Using the Export/Import Tool in IntelliForms™

The "Export/Import" feature in IntelliForms assists users in transferring forms from one computer to another computer or to an external memory drive. Specifically, the "Export/Import" tool is ideal for:
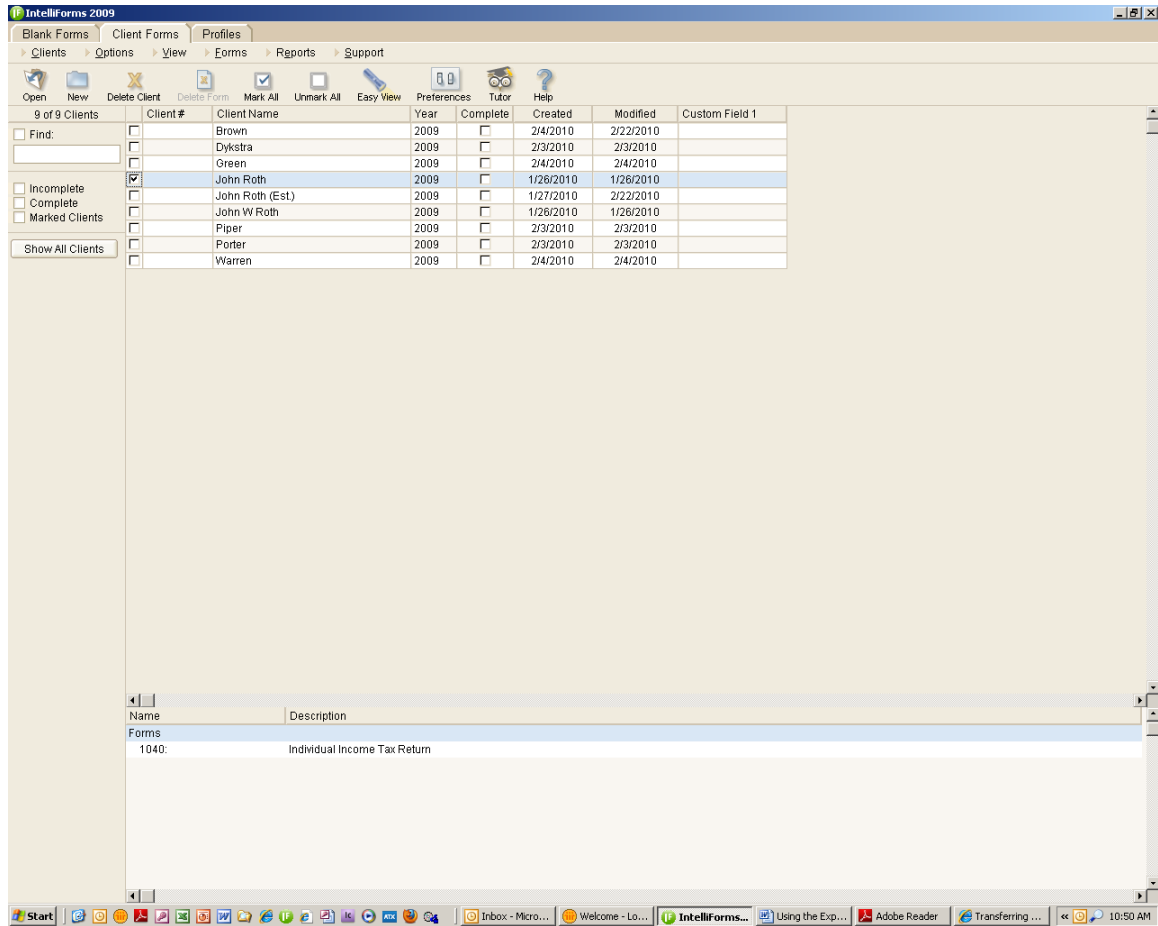
- Moving one or more client returns from a workstation computer to a network computer for review;
- Allow users to work remotely but share client information with others in the firm; and
- Allow users to save data to external memory drives.
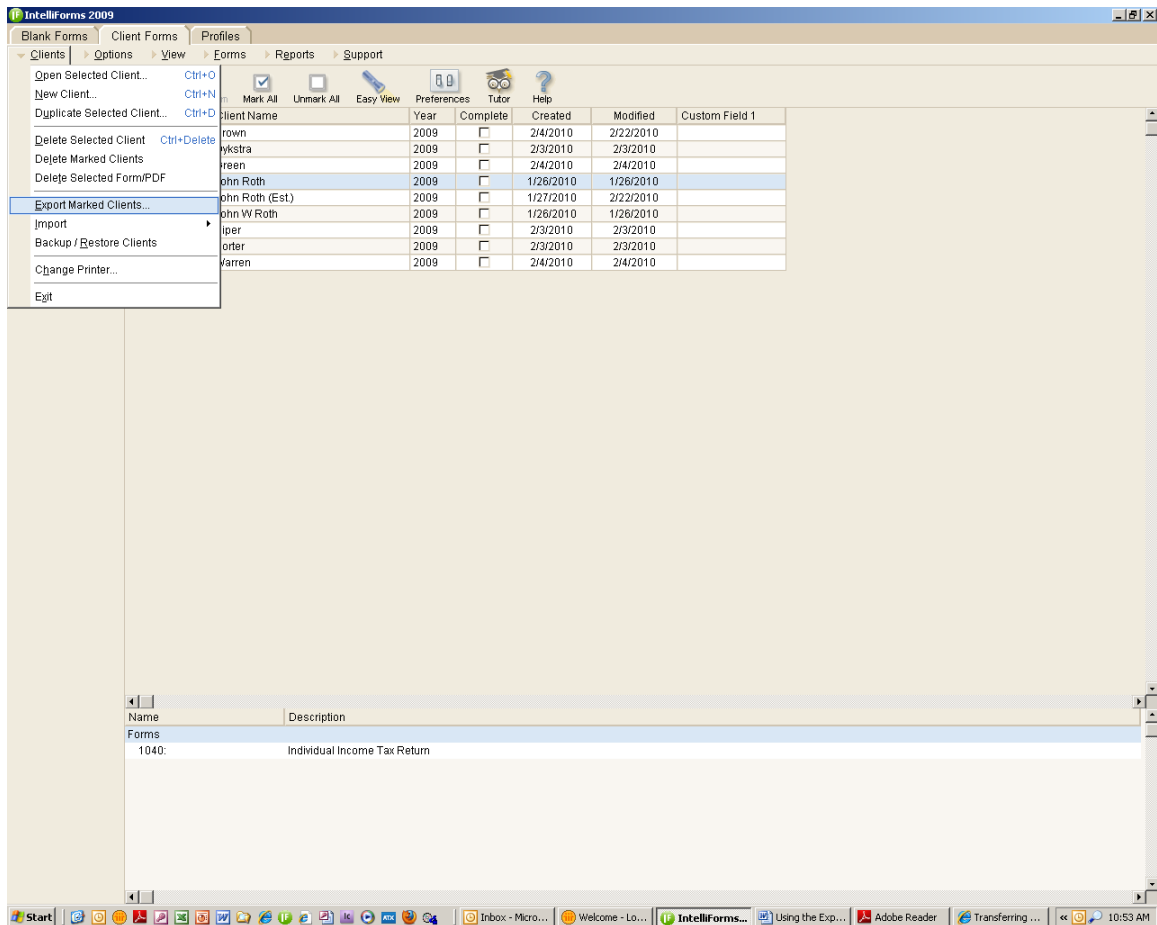
Exporting Client File(s)

Example: A new associate at a firm's satellite office has just completed a complex return for the office director's parents. The associate asks an experienced colleague at the firm's main office if he would review the return.

Solution: The "Export/Import" tool will allow our new associate to place her completed return on a network drive which her colleague can easily access to review her work.

1. Navigate to the Client Forms tab in IntelliForms. Mark the client return you wish to export to a different location. To mark a client, click the check box at the far left of the client grid. You can export a single client or export a number of clients by using the batch capability.

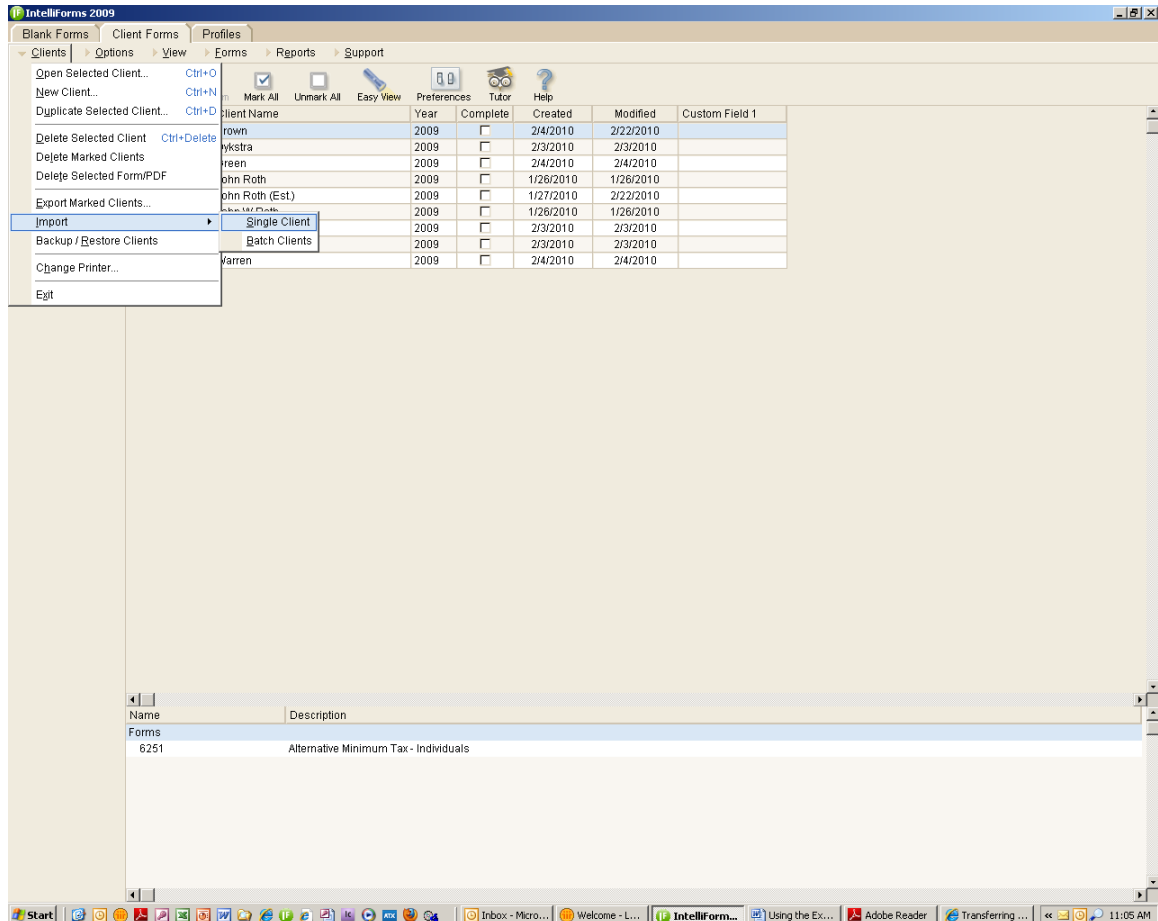2. Click on the Clients menu and choose Export Marked Clients.

3. Once you click the Export Marked Clients, a dialogue box will open to allow you to choose the destination drive and folder of the exported file(s). Our associate will use the firm's network drive but a portable external memory drive could also be used.

4. Once the destination is chosen, the file(s) is exported. Now the return is available for review.

Importing Client File(s)

Navigate to the Client Forms tab in IntelliForms and click on the Clients drop down menu.

1. Chooses Import from the Client menu. You can import either an individual file or a batch of files at one time.

2. A dialogue box will open which allows you to navigate to the drive and folder that contains the client file to be imported.

3. After choosing the file(s), click the Open button.

4. The files will be imported into your Client Forms tab in IntelliForms.

5. Once the client has been imported in to IntelliForms, you can immediately begin to either perform additional work by adding new forms or review the client file.