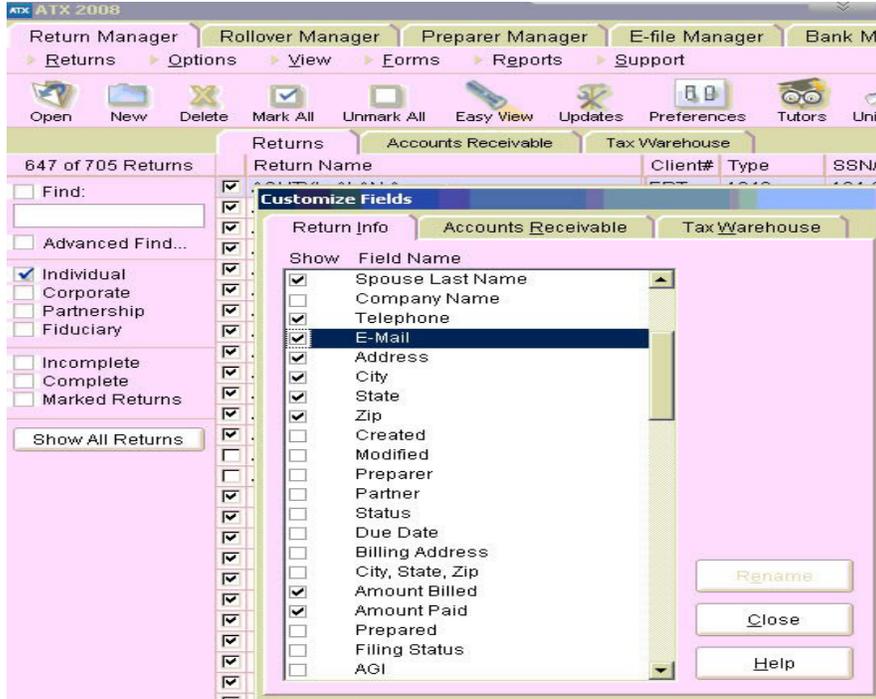


Importing Clients & Invoices from ATX

Creating Reports in ATX to Export:

From ATX,

- Select Option menu
- Select Customize Fields. You should see a dialog similar to image below. (Note: You may want to take a screenshot or write-down your current options, so you can restore these settings later)

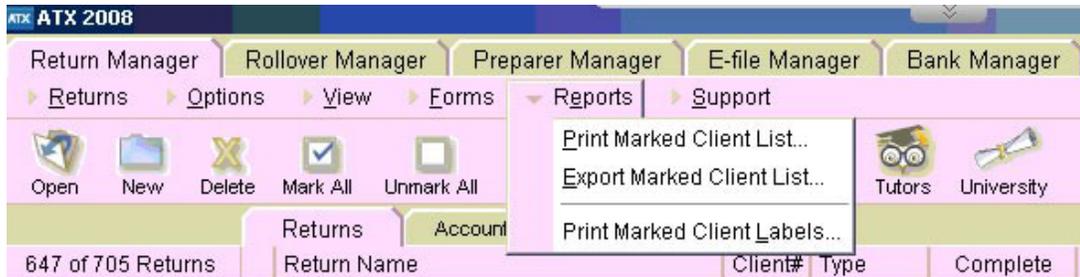


- Select the following fields, which are also listed on the ATX Mapping in Mango.

ATX Export Fields	Required
Company Name	Yes
Client Number	No
Telephone	No
E-Mail	No
City	Yes
State	Yes
Zip	Yes
Address	Yes
Amount Billed	No
Amount Paid	No
Date Billed	No
First Name	Yes
Last Name	Yes
Filer DOB	No
Spouse First Name	No
Spouse Last Name	No
Spouse DOB	No

The required fields must be in the export while the non-required fields are optional.

- d. Mark all the returns with a check mark
- e. Unmark any returns you do not wish to import, including any duplicates that you do not wish to import into Mango.
- f. Ensure that no social security or ID numbers are duplicated or missing
- g. On the Reports menu, select Export Marked Client List. This will produce an Excel spreadsheet that can be imported into Mango.



- h. When complete, you can select the Options menu and click Customize to restore your previous settings
- i. You are now ready to import your data into Mango.