easiTax for W2's and 1099's   *Quick Start Guide*

Basic Operations

EASITax allows you to enter your data on the data entry template on the top of the screen or directly into the spreadsheet on the lower portion of the screen. As data is entered, you will notice the values are synchronized to match in each view.

When the "New" record option is clicked to enter the second record, you will notice that the Payer information is already filled in and the data entry position begins in the Recipient information area of the form.

Although clicking on the Save button on the left will write the record to your hard disk, however, if you are planning to enter an additional record, just click the "New" button and the record will be written automatically to the hard disk.

"Open" a form for fill-in

Click the "Open" button to display a list of the following forms that can be used with EASITax.

W2 Wage and Tax Statement
1099Misc - Miscellaneous Income
1099R - Retirement Distributions
1099Div – Dividends and Distributions
1099 Interest Income
1098 - Mortgage Interest Statement
1099C - Cancellation of Debt
1099S – Proceeds from Real Estate Transaction
1099K – Payment Card and Third Party Network Transactions
1096 Transmittal Summary
W3 Transmittal Summary

"New" recipient record creation

Click on the "New" button. An empty row will highlight in the top of the spreadsheet and the cursor will be positioned at the Recipient Name field on the screen. Press the enter key or tab key once a field is filled in and it will automatically move to the next field for entry. You can use your mouse to jump directly to any field. Continue filling in the form including the payer information. When all fields are filled in, click the Save button.

Clicking the New button once one or more rows have been saved will fill in the payer information automatically from which ever row is highlighted in the spreadsheet.

Adding an additional company

EASITax automatically detects that a new company when you type a new value into the "Payers Name" field on a form. To start entering forms for a different company, just click on the "New" button and then fill in the new company name, address, and ID information along with the data for the first form and then click "Save". As you fill in subsequent forms, the "Payer Name" field will find a match and fill in the other information for the Payer automatically.

"Save" changes to disk

Click on the "Save" button or just move to another row on the spreadsheet. EASITax automatically saves your changes.

"Remove" recipient records from a form

Click on the "Remove" button to delete one or more selected rows in the spreadsheet. To delete more than one form at a time, hold down the Ctrl button while clicking on the row header of each row that you wish to remove. Then click the "Remove" button to remove all records that are selected.
If there is a need to remove ALL of the records from a particular form, select the "Delete ALL Forms" option from the "Advanced" option under the "Tools" menu.

"Print" recipient records

Click on the "Print" button to display a dialog box that allows you to select from a list of templates that print either on plain paper or directly onto the blanks of preprinted forms.

Top and left margins can be adjusted if necessary to align preprinted forms with your specific printer. Most laser or ink jet printers will not require any adjustments to the margins. Margin changes are saved with the template so additional printing requests will not require any changes to the margins.

Options to print only the current form, all forms, forms for one company, or just selected forms are provided.

"W3/1096" Transmittal Summary creation

Selecting this option displays a screen containing the information needed by EASITax so the 1096 or W3 Transmittal Summary. The Type of form being totaled (i.e. 1099-Misc, 1099-R, W2, etc...) and the Payers to include are specified from a list of choices.
Once the Type of Form is supplied, the Payer list will fill with choices that only include Payers that are used in the selected type of form. Options are provided to select a single payer or to indicate that All Payers for the selected type of forms will be generated.

For example, if the 1099-MISC forms has recipient records with 10 different Payer Names used on the

forms, selecting All Payers would generate 10 records in the form named "1096 Transmittal Summary". Likewise, "W3 Transmittal Summary" records would be created if W2 records were being processed.

Required contact information includes the Contact Name, Email, Phone Number, and Fax Number. This information will be copied onto each transmittal summary when it is generated.

"E-File" creation and submission

You will need to have the following things done before you generate your e-file.

- Obtain a PIN number for electronic filing
- Make sure all of the recipient forms are in the database and the amounts are correct
- Generate your Transmittal Summary records and check the totals to ensure they match your records

When you are ready, click the "E-File" button to display the following screen;

Follow these steps to fill out the information needed to generate the submission file.

- Choose the form being filed and the Payer(s) to include in the output file
- Name your output file to correctly describe its contents (i.e. 1099Misc-2014-Acme)

- Choose to either "Add a new Transmitter Profile" manually or have EASITax automatically create the Transmitter Profile from first Transmittal Summary processed. Automatic creation is used in most cases where the Transmitter and the Payer are the same company.
- Enter the PIN number you were assigned by the IRS or SSA.

NOTE: Only Payers and forms that have Transmittal Summary records are included in the selections shown.

"Convert Prior Year" recipients

When EASITax is initially started, this option will be activated automatically to ask if prior year data needs to be converted. This option may also be activated from the Tools menu. A "Do not ask again" checkbox can be selected to remove this prompt from being activated during startup.

Refer to the table in this document labeled "EASITax Directory and File Locations" for the default location where previous year data file (EASITax2013.mdb) should be located.

A "Browse" button will display so you can search in other folder locations such as your network path or a backup location. Double click on the EASITax2013.mdb data file and then click the "Next" button to start converting your data. EASITax will search for and convert ALL of the EASITax forms detected in the prior year data file.

"Import" data into EASITax

The Import ASCII File option appears on both the Tools menu and on the File menu. Once activated, a screen will display that allows you to "Browse" to your ASCII import file. Once a file has been selected, click on the "Next" button to begin importing.

Compatible import files can be generated from MsExcel, Open Office, and most Payroll / Accounting packages. Import files must be formatted in an industry standard comma-delimited ASCII format . Spreadsheets create this format by using the "Save As" option under their File menu. The Type of File dropdown box allows you to select the comma-delimited ASCII format for output.

5 quick steps to prepare your file import file

- First, [Download the EASITax Import Template](#)
- Remove any columns that are not to be imported into EASITax
- Change the column names to match the EASITax column names
- Format dollar values to remove dollar signs and commas
- Select "Save As" under the File menu to create the "Comma-delimited ASCII format

A properly formatted import file will have column names on the first row followed by an unlimited number of rows containing the data to be imported.

RecipientName, RecipientID, OtherIncome, FederalIncomeTaxWH
John Doe, 444-55-6666, 23496.74, 32469.88
Ann Page, 222-11-3333, 14200, 2344.88

The partial import example above imports 2 records into the EASITax columns that match the names in the first row. (i.e. "OtherIncome" in column 3 matches the 23496.74 in the 3rd column of the first row of data to be imported.) In an actual import file, additional columns such payer and recipient addresses would also be defined in the import file. Column names for row one of the import file for each form are shown as the headers of the columns on the EASITax data entry screen for each of the different forms. Just select the form name by clicking on the Open button to see the column header names at the top of each spreadsheet. A sample MsExcel spreadsheet that contains all of the possible column names for each type of form can be downloaded here.

Data is audited to ensure that the field names in row 1 of the import file match the names in the EASITax database for the form being imported. If fields are encountered that do not match, the unidentified field names will be displayed so they can be corrected before the import is ran again.

Once all field names match, the import file will be checked to ensure that the field lengths of imported fields are too long for the field lengths that are allowed by the IRS specifications. All fields that exceed the maximum field lengths (normally just company names and street addresses). If data is encountered that is too long, the truncated field values are displayed so you can decide to accept the truncations and continue the import or cancel the import so corrections can be made in the spreadsheet before running import again.

Local Area Network Setup

EASITax is a workstation product that is able to access files on a shared drive. Each workstation that will be accessing the shared data must have EASITax installed on its local hard drive in the default location as shown in the table in this document labeled "EASITax Directory and File Locations".

The files needed for relocating data to the LAN drive are located in the Solutions\EASITax2018 directory from the installation folder. The directory named EASITax2018 must be copied from any properly installed workstation along with all of its subdirectories and files.

The Network Setup option is located under the Tools menu. A multiuser license is required in order to access this function. Once activated, the following screen will display which allows you to browse to the location of the data file named EASITax2018.mdb.

Click on the "Browse" button and navigate to the relocated EASITax2018.mdb on the network. The Network Setup option must be activated on each workstation in order for it to point at the network location instead of its default local file location.

EASITax Directory and File Locations

EASITax 2018 Tax Year Directory Structure

Installation Directory

C:\Users\[your Windows user login]\AppData\Roaming\EASTax

The path shown above should preceed the paths shown below;

Database Path and Filename

Solutions\EASITax2018\Forms\EASITax2018.mdb

Schema Path and Filename

Solutions\EASITax2018\Forms\EASITax2018Schema.mdb

Previous Year Database Path and Filename

Solutions\EASITax2017\Forms\EASITax2017.mdb

Previous Year Directory Structure (2017 tax year)

Installation Directory

C:\Users\[your Windows user login]\AppData\Roaming\EASTax

The path shown above should preceed the paths shown below;

Database Path and Filename (preceeded

Solutions\EASITax2017\Forms\EASITax2017.mdb

Schema Path and Filename

Solutions\EASITax2017\Forms\EASITax2017Schema.mdb