

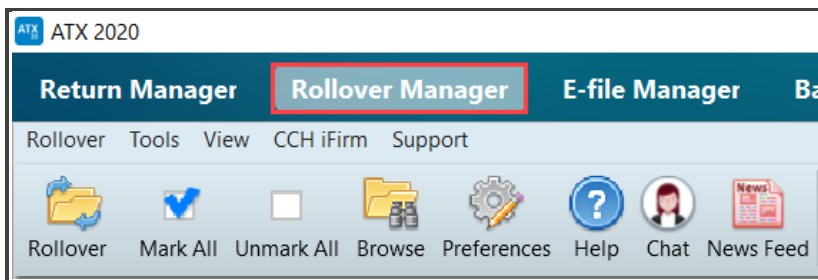
CCH iFirm Learning Portal

Export Contacts in Bulk from ATX™

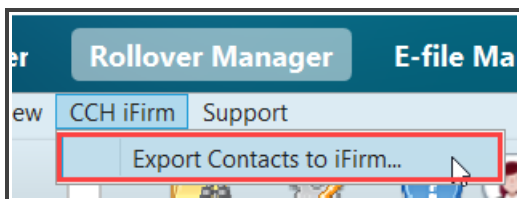
After syncing your CCH iFirm account with ATX, you can export contact information from your prior year tax returns to create contacts in CCH iFirm.

To export your clients from ATX:

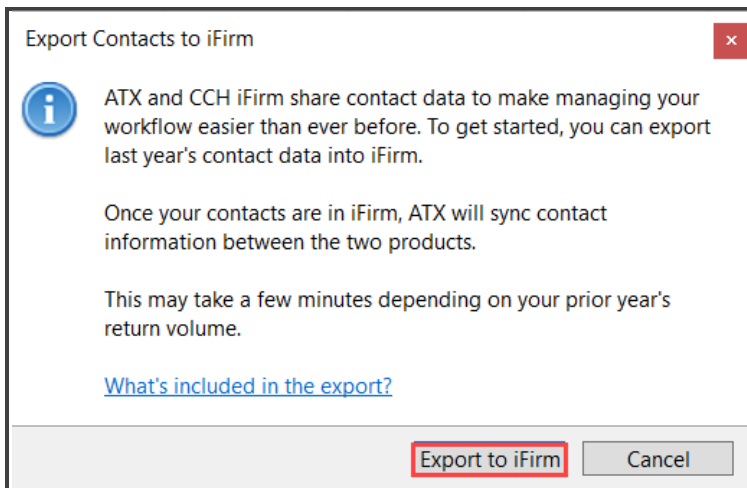
1. Click **Rollover Manager**.



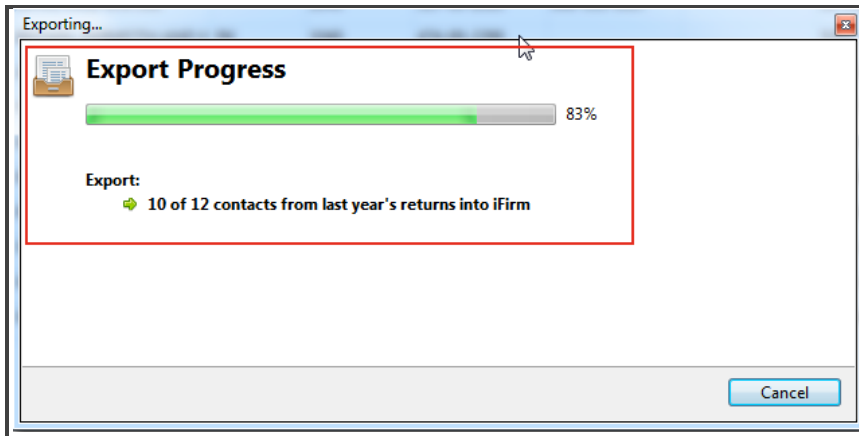
2. From the CCH iFirm menu, click **Export Contacts to iFirm**.



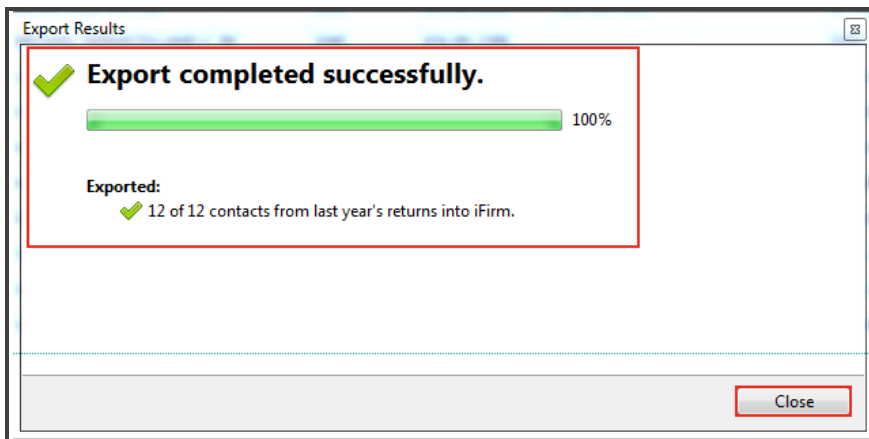
3. ATX displays the **Export Contacts to iFirm** dialog box. Click **Export to iFirm**.



4. ATX displays the **Exporting** dialog box.



5. When the process is complete ATX displays the **Export Results** dialog box. Click **Close**. You can now view these contacts in CCH iFirm.



- i** To view the contacts you have just imported, make sure to log in as the general user, not the default admin user.