

HOW WWW.12eFile.COM SYSTEM WORKS

1. Overview on how www.12eFile.com works.

2. Sign Up for An Account and Sign In

- 2.1 System Administrator Sign Up
- 2.2 Additional Users Sign Up
- 2.3 Sign In and Security issues

3. Downloading the Spreadsheets and Populating your Data

- 3.1 Where and how you download the required spreadsheets
- 3.2 How to populate your data into the spreadsheets
- 3.3 Important notes: leave the header intact
- 3.4 Do not save any blank rows or columns
- 3.5 Recommend you have an overall file naming convention

4. Uploading the Spreadsheets / CSV files

- 4.1 Accepts CSV files only
- 4.2 How to convert the spreadsheet into a CSV file
- 4.3 Where and how you upload the file
- 4.4 Where to check the status of the uploaded file
- 4.5 Approving the uploaded file (view / print PDF file)

5. Tackling Data Errors

- 5.1 Non-compliance data errors (error reports)
- 5.2 Values within the data contain errors (view / print PDF page)
- 5.3 Removing unwanted uploaded files
- 5.4 Important note: no corrections possible after data has been e-filed

6. E-filing the Files

- 6.1 Where and how you click to e-file
- 6.2 Declaration and password to confirm
- 6.3 Where to check the e-filing status

-- Quick Review and Q and A's--

7. Useful Features

- Reports - consolidated reports
- Reports - for individual subbies e-filing results
- Reports - for tax status - Additional Users
- Support Requests
- Working from anywhere
- Forgotten sign-in details - Certificates
- CIS 300 CSV file downloading after e-filing
- CIS Verification downloads for auto-tax code updates
- Free training at any time
- Other services e.g. EOY and DPS
- Other features