

**THOMSON REUTERS®**

## **DIF IMPORT/EXPORT GUIDE**

**FOR TAX YEAR 2019**

Last Updated: December 15, 2020

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# CHAPTER 1: CHANGES TO DIF IMPORT/EXPORT FOR 2020

As we continue to modernize our compliance solutions and advance our technology strategy, we are excited to announce the following updates.

**Creation and editing of DIF/KAT files will no longer be available for tax year 2020 forward.** The following options will continue to be available and supported to allow for a more user-friendly experience.

- **1065 Partner Bridge**  
(<https://tax.thomsonreuters.com/support/onesource/gosystem/?search=000102302>) will be supported.
- **Current DIF/KAT templates**  
(<https://tax.thomsonreuters.com/support/onesource/gosystem/?search=000101533>) supplied by Thomson Reuters will be supported, as long as no changes to the template are required.
- **Recently created Data Import templates**  
(<https://tax.thomsonreuters.com/support/onesource/gosystem/?search=000102011>) by Thomson Reuters will be supported.
- Data Connection provides import/export methods that allow users to transfer data into and out of a locator without manual data entry.
  - Complimentary training will be made available for new adopters.
  - Assistance with new file creation is available through our professional services team.
  - Data Connection requires a separate license.



Importing existing DIF/KAT files can continue to be utilized if no changes are required to the files.

# CHAPTER 2: COMPONENTS OF ORGANIZER IMPORTING

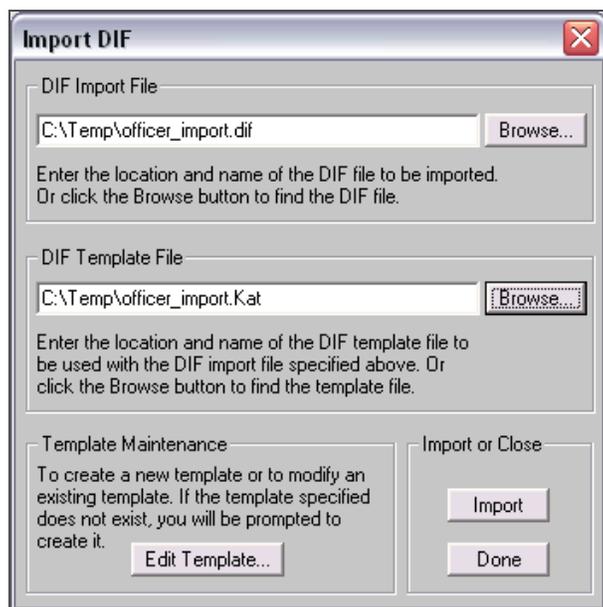
The DIF import feature can populate virtually every field within Organizer. DIF import can be used to populate Forms 4562, 8825, and areas such as contributions and distributions. Most commonly, DIF Import is used to populate State Allocation and Apportionment information.

The three components of Organizer importing are:

- **Import DIF** dialog box
- DIF Import File
- DIF Template File.

## IMPORT DIF DIALOG BOX

You can import from anywhere in the Organizer using the **Import DIF** dialog box. You can open the dialog box by selecting **File > Import > From DIF file**.



**Figure 2:1**

The **Import DIF** dialog box shown above enables you to:

- Specify the DIF import file and DIF template file to be used in the import.
- Start the import process.
- Create or modify an import template file.

The functions of the two text boxes on the dialog are:

FUNCTION	DESCRIPTION
DIF Import File	location and filename of the DIF import file
DIF Template File	location and filename of the Organizer import template (KAT file)

The functions of the command buttons on the dialog are:

FUNCTION	DESCRIPTION
Import	Execute the import specified by the <b>Import DIF</b> dialog box.
Browse	Specify the disk drive, directory location, and filename of the DIF import file and DIF import template file.
Done	Close the <b>Import DIF</b> dialog box.
Edit Template	Access the template dialog to create or modify the specified DIF template file.

## DIF IMPORT FILE

The DIF Import File contains the data to be imported into the Organizer. Import source files for Organizer must be in the Data Interchange Format. These files are created by spreadsheet programs such as Microsoft Excel. Import source files are usually referred to as “DIF files.”

## 4 Chapter 2: Components of Organizer Importing

### DIF Import File

To make an import file, you use a spreadsheet such as the one below.



The screenshot shows a Microsoft Excel spreadsheet titled "officer\_import.dif". The spreadsheet contains a table with the following data:

	Name	Address	City	State	Zip	SSN	Title	Pet Time	Common	Preferred	Comp	Expense	
1	1	Lawrence Barnes	7429 Sherwood Ct.	West Bloomfield	MI	48322	480-78-9852	President	100	35	40	3100000	10000
2	2	Donald Barnes	2691 Potter Rd	Wixom	MI	48324	786-54-1592	SRVP	100	20	15	2025000	4000
3	3	David Sutton	16590 Salem Ct.	Detroit	MI	48326	445-87-9981	V.P.	80	20	15	2020000	5000
4	4	Jim Bryant	37717 Northfield Dr.	Livonia	MI	48328	852-16-4452	Treasurer	90	15	10	1088242	2000
5	5	Debra Hunt	2727 Hampshire Ave.	Ann Arbor	MI	48330	446-75-8821	Secretary	100	10	20	1000870	500

Figure 2:2

## DIF TEMPLATE FILE

Import templates act as a “road-map” for data from the DIF import file to specific fields within Organizer. Import template files have the extension KAT and cannot be opened or edited using Microsoft Excel. Import template files are usually referred to as “KAT files.” Click **Edit Template** to access the **DIF Coordinates** dialog box.

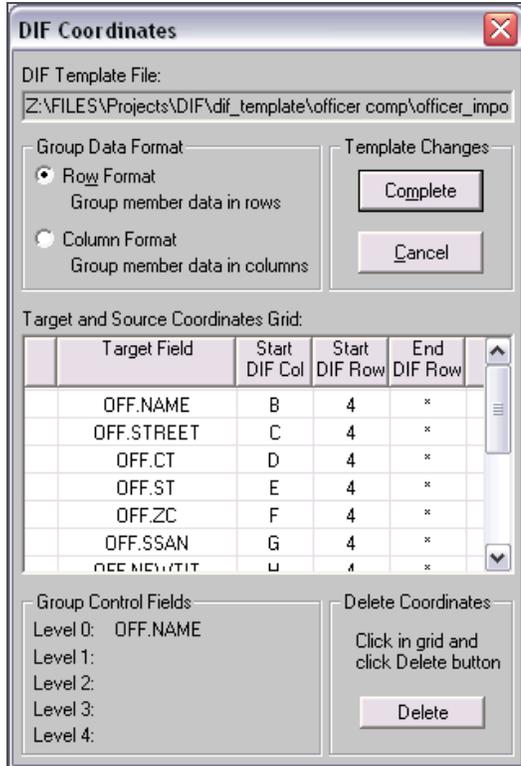


Figure 2:3

## Helpful Rules and Tips regarding Organizer Import Templates

- A single import template can be used to import data for multiple Organizer pages; there is no limit on the number of data elements selected for import or the number of Organizer pages with import targets.
- You can modify import templates by adding or deleting references to Organizer data fields.
- The position of a selected data element in a DIF import file cannot change after the row and column coordinates of the data element have been recorded in an import template.
- Multiple import templates can be used with a single DIF import file; each template specifies different data file elements to be imported.
- To avoid confusion later, name source files and import template files in a way that defines their use.

# CHAPTER 3: CREATING DIF AND KAT FILES



DIF/KAT creation and editing is available only in Tax Year 2019 and prior years. It is no longer available starting with Tax Year 2020.

Creating a DIF and corresponding KAT file takes some preparation. The effort and planning pays off when the same type of data will be imported repeatedly into the same Organizer or Organizers of different entities. The repetitive data entry process is then quick and accurate.



*DIF Template file (KAT) creation requires using Classic Organizer. This will not work with the New Organizer.*

- [Creating the DIF Import File \(page 7\)](#)
- [Defining a Group DIF Template \(page 7\)](#)
- [Rows/Columns with Blank Cells \(page 11\)](#)

## CREATING THE DIF IMPORT FILE

You create the DIF import file by placing the data in an Excel spreadsheet in the desired format with fields labeled appropriately.

1. In Excel, select **File > Save As**.
2. Browse to the location where the file will be saved.
3. In the **File name** field, enter the desired file name.
4. In the **Save as type** field, use the drop-down menu to select *DIF (Data Interchange Format)(\*.dif)*
5. Click **Save**.

## DEFINING A GROUP DIF TEMPLATE

Defining a group DIF template involves extra steps. The first step in creating a group data import template is to create the initial group member for the target group. To access a group member page in the Organizer for Officers' Compensation, a group member must exist.

Create a new entry by selecting **\*Add New...** Create the initial officer. Then access the Organizer page for the individual officer to create the import template.

Figure 3:1



The temporary officer's name created during template setup will disappear during the import of officers' compensation data after the import template is finished. So using a name like "officer" is appropriate.

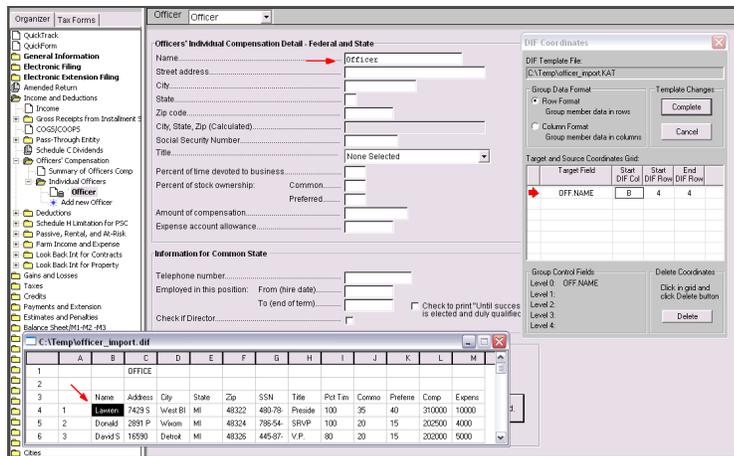
## Defining a DIF Template

1. In Organizer, select **File > Import > From DIF**.
2. Select **Browse** beside the **DIF Import File** field. Browse to and open the saved DIF file.
3. Enter a name for the template file (including path) in the **DIF Template File** field.

Figure 3:2

## Defining a Group DIF Template

4. Select **Edit Template** to open the **DIF file** dialog box and **DIF Coordinates (Template)** dialog box.



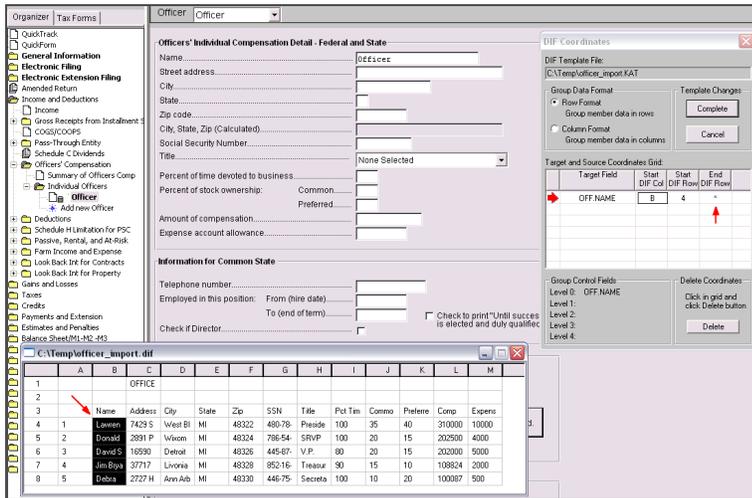
**Figure 3:3**

5. If you are creating a new template (KAT file), the application confirms that a new template is being created.
6. Place the cursor in the appropriate Organizer field, and the **DIF Coordinates** dialog box should display its name in the **Target Field** column. If the name does not appear, click a different field in the Organizer, and click the previous field again.

- Click the matching cell from within the open **DIF** dialog box.



If you are importing a group, select the first data cell containing data to be imported so the entire column is highlighted.



**Figure 3:4**



The **DIF** dialog box now shows the cells to be imported. If there is one cell matched to one field (non-Group import) the **Coordinates** box will show Column, Row, and ending point: for example B, 4, 4. If a group is being imported, the **Coordinates** box will show for example C, 4, \* meaning the group starts in cell C4 and continues as long as there is data in the group.

- Repeat steps 6 and 7 for every Organizer field that is to be defined.
- Once all desired fields have been defined, select **Complete** to return to the **Import DIF** dialog box.
- In the **DIF Import** dialog box, click **Import**.
- Click **Done** to return to Organizer and view the imported data.

## ROWS/COLUMNS WITH BLANK CELLS

Importing files that contain columns (for row processing mode) with blank cells, such as shown in the figure below, may result in data not importing into the correct data set.

	A	B	C	D	E	F	G	H	I
1	Description	Mandatory	Disp Type	Date Acq	Date Disp	Prop Type	4797 Sales	Cost	6252 Sales
2	4797-1		1	1/1/	7/1/	C	100000	10000	
3	6252-1		2	1/6/	7/6/	D		15000	150000
4	4684-1		3	1/11/	7/11/	E		20000	
5	4797-2		1	1/2/	7/2/	L	110000	11000	110000
6	6252-2		2	1/7/	7/7/	G		16000	
7	4684-2		3	1/12/	7/12/	K	210000	21000	210000
8									

**Figure 3:5**

To resolve this problem, cells that are blank should be filled with spaces. In Excel, do the following:

1. Highlight columns G and I.
2. Click **Edit > Replace**.
3. Leave the **Find what** field blank.
4. Place the mouse in the **Replace with** field.
5. Press the space bar once.
6. Click **Replace All**.
7. Save the file.

# CHAPTER 4: TYPES OF ORGANIZER IMPORTING

Based on the type of data being imported, you can use any of four types of importing into Organizer:

- [Group Importing \(page 12\)](#)
- [Non-Group Importing \(page 16\)](#)
- [Mixed Group and Non Group Importing \(page 16\)](#)
- [Multi-Level Group Importing \(page 16\)](#)

## GROUP IMPORTING

Group importing imports lists or groups of data. One type of group in the Organizer navigation tree shows **\*Add new...** This designates group data for which you can add new group members. The target screen for group importing is called a “group screen” because it contains multiple sets of the same data. The example in the following figure is **Officers’ Compensation** in the 1120 Organizer.

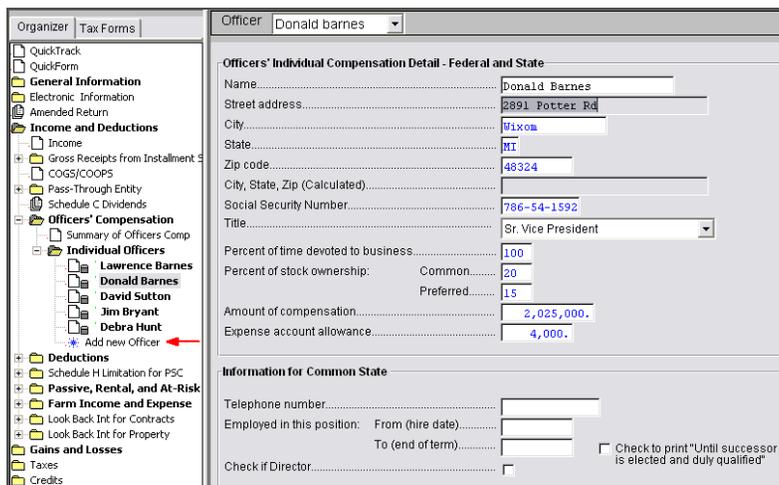


Figure 4:1

A second group screen is one in which target fields have multiple lines. The example in the following figure is on the **Schedule N Questions** page of the 1120 Organizer.

Partnership Name	FEIN (if any)	Partnership Returns Filed (1042, 1085, etc.)	Name of Tax Matters Partner	Foreign Partnership's Tax Year Beginning	Foreign Partnership's Tax Year Ending
Woodworth Partnership	77-78965412	1065	Lawrence Baxner	01/01/	12/31/
Swartzland Venturess	88-30745621	1065	Lawrence Baxner	03/01/	02/28/
Alliance Capital	99-32145698	1120		04/01/	03/31/

**Figure 4:2**

Examples of group data in the federal section of the 1120 Organizer

- **General Information > Corporation Owns 50% of Stock**
- **General Information > Owners of 50% or More of Stock**
- **Income and Deductions > Officers' Compensation**
- **Income and Deductions > Passive, Rental and At-Risk**
- **Gains and Losses > 4797 Asset Sales**
- **Gains and Losses > Contracts Section 1256 contract**
- **Information Returns > Form 851 Part II Subsidiary corporations**
- **Foreign Information > Form 5471 Foreign corporations.**

For importing into Organizer, there are two formats for group data: *row* and *column* formats. The two formats differ by the arrangement of the group data in the import file.

## Group Data in Row Format

The sample worksheet below shows officers' compensation data in row format:

	Name	Address	City	State	Zip	SSN	Title	Pct Time	Common	Preferred	Comp	Expense
1	Lawrence Barnes	7429 Sherwood Ct.	West Bloomfield	MI	48322	480-78-9852	President	100	35	40	3100000	10000
2	Donald Barnes	2891 Potter Rd	Wixom	MI	48324	786-54-1592	SRVP	100	20	15	2025000	4000
3	David Sutton	16590 Salem Ct.	Detroit	MI	48326	445-87-9981	V.P.	90	20	15	2020000	5000
4	Jim Bryant	37717 Northfield Dr.	Livonia	MI	48328	852-16-4452	Treasurer	90	15	10	1088242	2000
5	Debra Hunt	2727 Hampshire Ave.	Ann Arbor	MI	48330	446-75-8821	Secretary	100	10	20	1000870	500

Figure 4:3

This format results in the various group member data elements being in columns. In this example, all officer names are in the first column, street addresses are in the second column, and so on.

## Group Data in Column Format

The sample worksheet below shows the same officers' compensation data in the column format. Column formatting means that the group member data is arranged in columns with various group member data elements.

	Name	Address	City	State	Zip	SSN	Title	Pct Time	Common	Preferred	Comp	Expense
1	1	2	3	4	5							
4	Lawrence Barnes	Donald Barnes	David Sutton	Jim Bryant	Debra Hunt							
5	7429 Sherwood Ct.	2891 Potter Rd	16590 Salem Ct.	37717 Northfield Dr.	2727 Hampshire Ave.							
6	West Bloomfield	Wixom	Detroit	Livonia	Ann Arbor							
7	MI	MI	MI	MI	MI							
8	48322	48324	48326	48328	48330							
9	480-78-9852	786-54-1592	445-87-9981	852-16-4452	446-75-8821							
10	President	SRVP	V.P.	Treasurer	Secretary							
11	100	100	80	90	100							
12	35	20	20	15	10							
13	40	15	15	10	20							
14	3100000	2025000	2020000	1088242	1000870							
15	10000	4000	5000	2000	500							

Figure 4:4

DIF only processes data contained within the Excel 2003 boundary: 65,536 rows by 256 columns. In a single-tier group data, row processing will allow 65,536 items with 256 details to be imported, but column processing will limit it to 256 items with 65,536 details. Multi-tiered group data transfer quickly reduces the number of items and details that can be processed since sub-tier information requires additional rows and columns. Therefore, Excel row and column limitation should be considered when setting up a DIF transfer file.

## Group Control Field

When you create a KAT file for group data that includes a navigational item, the field for the navigational item must be mapped first. With depreciation detail associated with an activity (i.e., rental activity), you must map the activity name of the rental property first. It must be the first field in the KAT file (Cell A1). DIF directs you to do this with the dialog below when you begin the template setup.



**Figure 4:5**



The import process will only work (group align all data) if the navigational field is in Cell A1. As long as you properly map the navigational field first in Cell A1, the depreciation assets related to the property as well as other imported data for this property will be group aligned. If you do not do this, you will have trapped data. The data is imported into the locator files, but without the navigational field being displayed in the navigation tree, you will never see it.

## NON-GROUP IMPORTING

Non-group importing is importing into individual, non-repeating fields. The illustration below (from the **General Information** folder in the 1120 Organizer) contains only non-group data.

Organizer	Tax Forms	Company Information	Return/Entity Type	Insurance C-Corps
<b>Company Name, Address and EIN</b>				
Corporation name..... Larson, Inc.				
Name (cont'd) .....				
Number and street..... 155 Central Blvd.				
City..... Dallas				
State..... TX				
ZIP..... 75201				
Federal EIN..... 75-12345678 -Or- <input type="checkbox"/> Federal EIN is "Applied For"				
<input type="checkbox"/> Change in address from previous year <input type="checkbox"/> Name Change				
Corporation Company Number.....				

Figure 4:6

## MIXED GROUP AND NON GROUP IMPORTING

Mixed group and non-group importing means having group and non-group data in the same import file.



Row and column formats for group data cannot be used in the same import template.

## MULTI-LEVEL GROUP IMPORTING

- [Multi-Level Group Screen \(page 16\)](#)
- [Multi-Level Group Screen Importing \(page 18\)](#)

### Multi-Level Group Screen

Multi-level group screen is an area in the Organizer where there is a group screen nesting inside another group screen. The screens are identified by the presence of:

Multi-row fields inside a group screen (first screen below) or

Nested blue snowflake inside a group screen (second screen below).

## Two-Level Group Screen

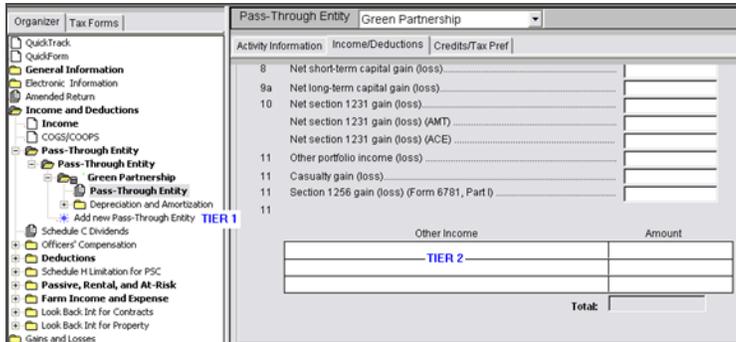


Figure 4:7

## Three-Level Group Screen

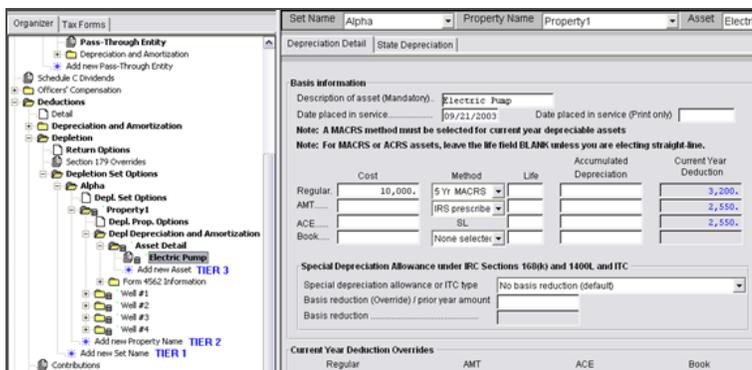


Figure 4:8

## Multi-Level Group Screen Importing

Multi-level group screen requires the DIF template to include mapping of the mandatory (interesting) fields of each level. These fields are the factors that determine which group screens the sub-group detail should belong to. A good example of multi-level group screen is the depreciation asset detail under passive activity (see the following screen), where depreciation detail can be added for multiple passive activities.

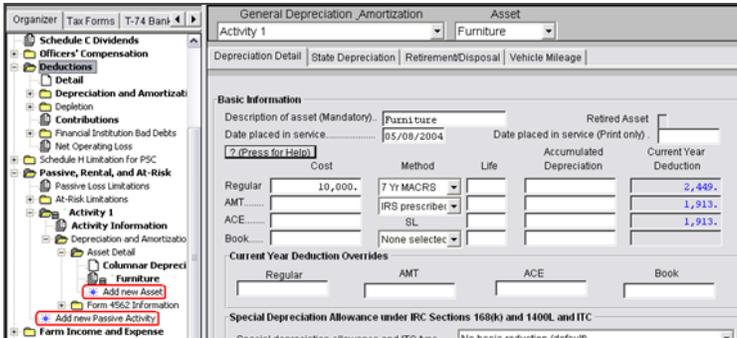


Figure 4:9

In this example, DIF transfer process requires mapping of the mandatory (interesting) fields for the passive activity (first level) (next screen), **Activity Number** and **Activity Name**, and **Asset Description** for depreciation (second level) (previous screen).

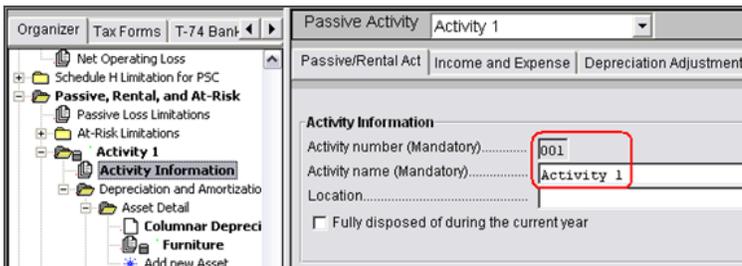


Figure 4:10

For row processing, the DIF file may be set up as in the next screen.

	A	B	C	D	E	F
1	Act number	Act name	Description	Date	Regcost	Regmethod
2						
3						
4						
5						

Figure 4:11

The DIF template can be set up using the point and click approach and for this example, the template will include two additional coordinates as shown below.

Target and Source Coordinates Grid:				
Target Field	Start DIF Col	Start DIF Row	End DIF Row	
RNT.NUMBER	A	1	*	
RNT.NAME	B	1	*	
DPR.DESC	C	1	*	
DPR.COMPUTED...	D	1	*	
DPR.REGCOST	E	1	*	
DPR.REGMETH	F	1	*	

Figure 4:12

Import file for the template in the previous figure has to be set up in a tiered format (next screen) for the asset details to import into their associated passive activities (following screen).

	A	B	C	D	E	F
1	10	Activity 10	Furniture 11	7/1/2004	10001	M7
2			Computer 12	7/2/2004	10002	M5
3			Furniture 13	7/3/2004	10003	M7
4			Computer 14	7/4/2004	10004	M5
5	20	Activity 20	Laptop 21	7/5/2004	10005	M5
6			Copier 22	7/6/2004	10006	M5
7			Laptop 23	7/7/2004	10007	M5
8			Copier 24	7/8/2004	10008	M5
9	30	Activity 30	Furniture 31	7/9/2004	10009	M7
10			Computer 32	7/10/2004	10010	M5

Figure 4:13

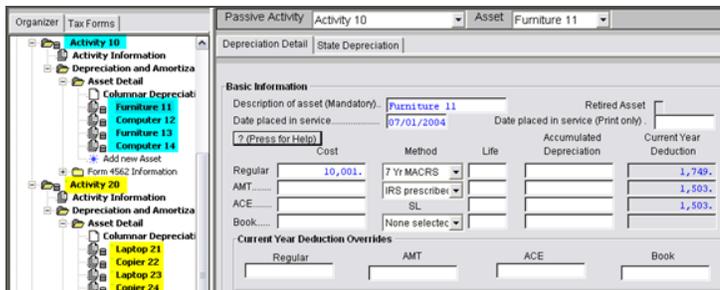


Figure 4:14

1040 has a four-level group screen to enter depletion depreciation detail for each business activity (Schedule C). Before DIF import is possible, the mandatory fields under Business Information, Set Options, Property Options, and the asset description have to be mapped properly.

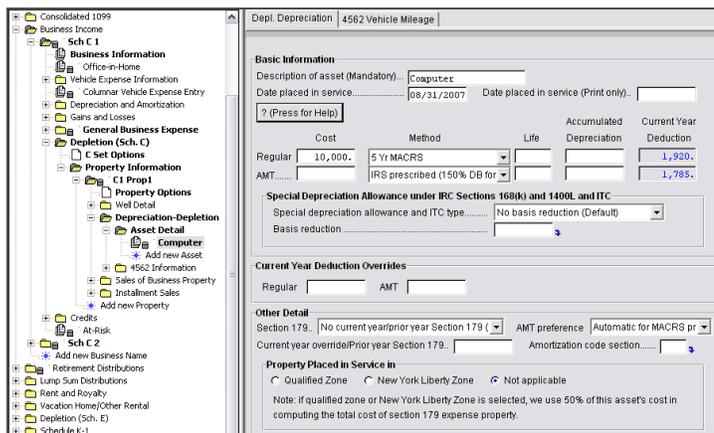


Figure 4:15

For row processing, the DIF import file may be set up as shown below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Firm													
2	Location			First asset must										
3	Client Name			be on row 8										
4	Client Code													
5														
6	Business #	Business Name	Set #	Set Name	Prop #	Prop Name	Asset Number	Asset Descr	Basis Date	Print Only Basis Date	Regular Cost	Regular Method	Regular Life	Regular Accm Dep
7							11	Asset 11	1/1/2003		11000	M7		0 26632
8	1	Schedule C1		11	Set 11	111	Property 111	12	Asset 12	1/2/2003	12000	M7		0 6801
9								13	Asset 13	1/3/2003	13000	M7		0 7367
10								14	Asset 14	1/4/2003	14000	M7		0 6753
11								15	Asset 15	1/5/2003	15000	M7		0 0
12							112	Property 112	1/6/2003		16000	M7		0 20021
13								17	Asset 17	1/7/2003	17000	M7		0 0
14								18	Asset 18	1/8/2003	18000	M7		0 55
15								19	Asset 19	1/9/2003	19000	M7		0 1537
16								20	Asset 20	1/10/2003	20000	M7		0 0
17								21	Asset 21	1/11/2003	21000	M7		0 0
18								201	Asset 201	2/1/2004	201000	M7		0 26632
19	2	Schedule C2		21	Set 21	211	Property 211	202	Asset 202	2/2/2004	202000	M7		0 6801
20								203	Asset 203	2/3/2004	203000	M7		0 7367
21								204	Asset 204	2/4/2004	204000	M7		0 6753
22								205	Asset 205	2/5/2004	205000	M7		0 0
23							212	Property 212	2/6/2004		206000	M7		0 20021
24								206	Asset 206	2/6/2004	206000	M7		0 0
25								207	Asset 207	2/7/2004	207000	M7		0 0
26								208	Asset 208	2/8/2004	208000	M7		0 55
27								209	Asset 209	2/9/2004	209000	M7		0 1537
28								210	Asset 210	2/10/2004	210000	M7		0 0
29								211	Asset 211	2/11/2004	211000	M7		0 0

Figure 4:16

## Importing Organizer DIF Information with Existing DIF and KAT Files

1. Organize data in Microsoft Excel.

	Name	Address	City	State	Zip	SSN	Title	Pct Time	Common	Preferred	Comp	Expense
1	Lawrence Barnes	7429 Sherwood Ct.	West Bloomfield	MI	48322	480-78-9852	President	100	35	40	3100000	10000
2	Donald Barnes	2891 Potter Rd	Wixom	MI	48324	786-54-1592	SRVP	100	20	15	2025000	4000
3	David Sutton	16590 Salem Ct.	Detroit	MI	48238	446-87-9981	V.P.	80	20	15	2020000	5000
4	Jim Bryant	37117 Northfield Dr.	Livonia	MI	48338	852-16-4462	Treasurer	90	15	10	1088342	2000
5	Debra Hunt	2727 Hampshire Ave.	Ann Arbor	MI	48330	446-75-8821	Secretary	100	10	20	1000870	500

Figure 4:17

2. Save the file in DIF format.
3. Navigate to the appropriate area of Organizer. The page into which the data will import and populate need not be open during the import. It is a good idea, however, to check to see if the data imports properly.
4. From the menu, select **File > Import > From DIF file**.

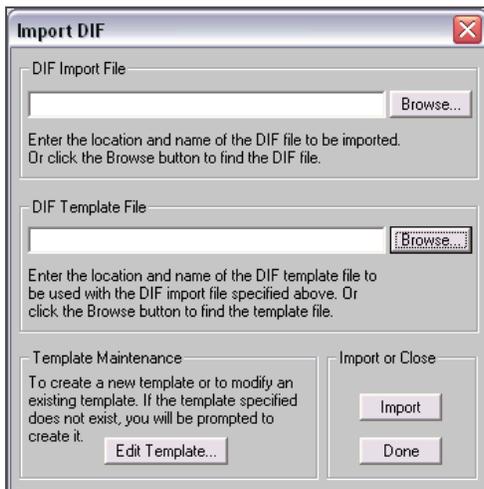


Figure 4:18

5. Browse to and open the DIF Template File.



Figure 4:19

6. Click **Import**.

# CHAPTER 5: EXPORTING FROM ORGANIZER

## COMPONENTS OF ORGANIZER EXPORTING

The three components of Organizer exporting are:

- **Export DIF** dialog box
- DIF Import File
- DIF Template File.

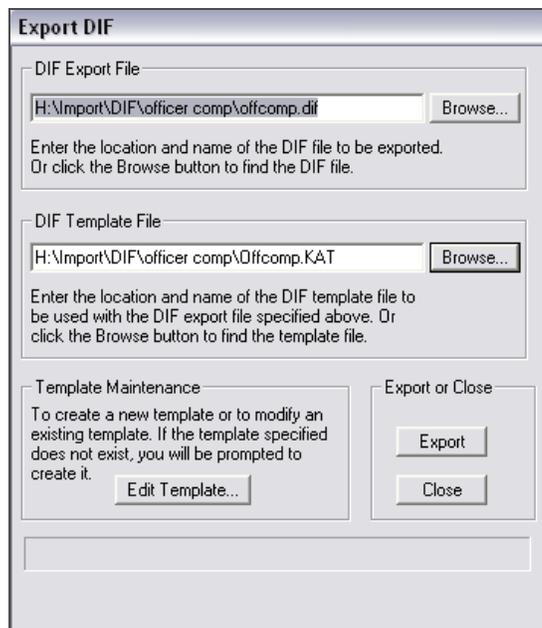


Figure 5:1

## EXPORTING DIF FILES FROM ORGANIZER

To export from Organizer, the steps of the DIF import process are reversed. A new DIF file is created automatically during export. An existing KAT template must be used to direct data to the appropriate cells in the spreadsheet.

Exporting from Organizer may be appropriate when the data was input manually and needs to be reviewed in a different format, stored separate from the 1120 application, or imported into another return. Another circumstance might be if data was imported from a DIF file and some data was manually changed. In this case, you might want to update the original DIF import file with the modified data.

## Exporting Data from the Organizer

1. To display the **Export DIF** dialog box, select **File > Export > To DIF file**.
2. Specify the target **DIF Export File**.
3. Specify the **DIF Template File**.



**Figure 5:2**

4. Click **Export**.

# CHAPTER 6: FAQs

## Can KAT Templates be re-used in different returns?

Yes. Once templates are created, they can be used for similar imports into the same return type.

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## Can I use multiple DIF Imports within one return?

Using two or more different imports will not accumulate or sum data in the same field(s) within Organizer. Each import will overwrite the previous import. However, if each import populates a different area of Organizer (for example, A&A property, A&A payroll), then multiple imports can be used.

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## Can I export using the same DIF import templates?

Yes. Create a blank file in Microsoft Excel and save it as DIF. From within the appropriate screen in Organizer select **File > Export > To DIF file** and follow the same procedures as importing.



KAT Export templates can be created the same way that import templates are created to export Organizer data.

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## Why does my template not import into certain Organizer fields when they are already mapped?

You may have a corrupt mapping coordinates. Try deleting and adding back the coordinates. If this step does not resolve the issue, the template is corrupted. A new template has to be created.

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## Can I use DIF import to append information?

No, DIF import only overwrites existing information. If you need to append data, export the information to a DIF file, add the information to the export file, and then import back into the Organizer.

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## Does DIF import delete the excess information if the data i am importing is less than what is in the Organizer?

No, DIF import does not delete the excess in the Organizer. You will need to delete the unwanted information manually.

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**In Organizer under Depletion Set Options, if an asset is deleted from the depletion depreciation and amortization area of a depletion property, or, if a property is deleted from a depletion set, can i export the remaining property sets and their assets from depletion set options with DIF?**

No. Once any asset has been deleted from a Depletion Property, or any Depletion Property has been deleted from a Depletion Set, DIF cannot export the Depletion Set anymore. To continue to use DIF to import or export the Depletions Set, users will need to delete all the Depletion Properties and their assets in Organizer using the appropriate delete options on the **Federal Deactivation** tab under **General Information > Return and Print Options**.

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**Are there any pre-defined DIF and KAT Files that I may use?**

Yes. Pre-defined DIF and KAT files are available for download on the Customer Center site. Once downloaded, populate the files with information and perform the import. There is no KAT template to define!

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**Is there a way to delete information from a previous DIF import?**

Yes, but you will need to delete the information individually and manually. There is no way to delete multiple instances at one time.

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**Is there a way to delete amounts from a previous import?**

Yes, edit your existing DIF file and replace the amounts with 0 (Blank does not work) and reimport the DIF file.