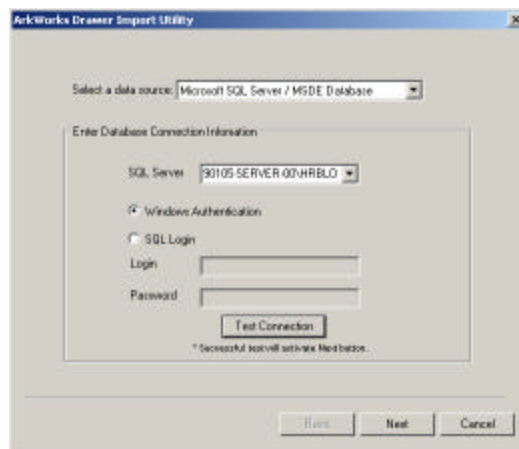


## Create Drawers in ArkWorks based on your TPS '06 Clients:

1. Open **ArkWorks**.
2. If you have not set up a Tax Clients cabinet, follow steps a through e below. If you have set up a Tax Clients cabinet, proceed to step 3.
  - a. Select **New Cabinet** from the *File* menu.
  - b. Type a cabinet name, e.g., **Tax Clients**.
  - c. Make sure the *Cabinet Type* is set to **Tax Preparation**.
  - d. Add any additional years or subfolders that you would like to include by default in each of your drawers (refer to the *Help Links* in the top right corner of the *Add New Cabinet* window for instructions on working with folders and subfolders).
  - e. Click **Save**.

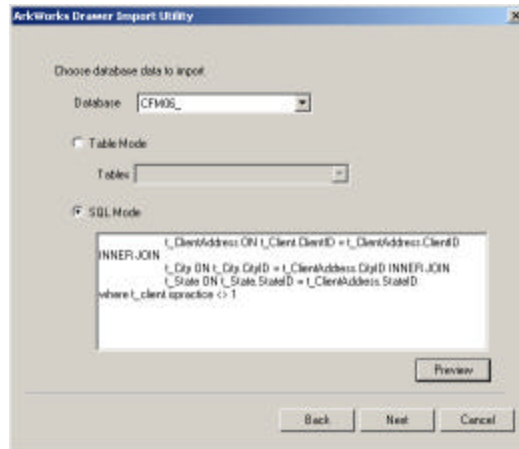


3. Select **Import External Drawers** from the *Tools* menu.
4. Select **Microsoft SQL Server / MSDE Database** from the *Select a data source* dropdown box.
5. Select the **HRBLOCK** database on your office server from the *SQL Server* drop down box.
6. Click **Test Connection**.



7. If the test connection is successful, click **Next**. If the test connection is not successful, obtain the SQL login information from your system administrator.
8. Select **CFM06\_** in the *Database* drop down box.

- Select **SQL Mode** and enter the following SQL command into the data box exactly as it appears. (To ensure accurate entry of the command, copy and paste directly from this document):

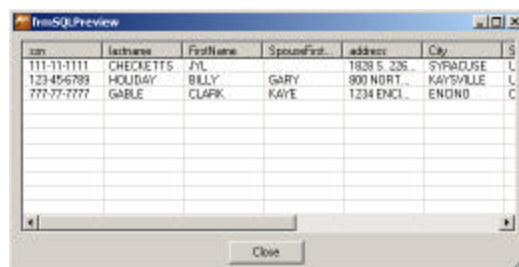


```

SELECT      left(convert(char,t_Person.SSN),3) + '-' + substring(convert(char,t_person.ssn),4,2) +
'- ' + right(rtrim(convert(char,t_person.ssn)),4) as ssn, t_Person.LastName AS lastname,
t_Person.FirstName,
isnull((
SELECT      tp.FirstName
FROM        t_Client tc INNER JOIN
            t_Person tp ON tc.spousePersonID = tp.PersonID
WHERE      (tc.ClientID = t_Client.clientid )
), '') as SpouseFirstName
, rtrim(rtrim(t_ClientAddress.Address1) + ' ' + rtrim(isnull('APT ' +
convert(char,t_clientaddress.aptno),''))) as address, t_City.City, t_State.State,
t_ClientAddress.PostalCode
,
isnull((
select top 1 contactnumber from t_contactNumber tcn where tcn.clientid = t_client.clientid
order by contactnumbertimeid ),'') as Phone, '' as cellphone, '' as email
FROM        t_Client INNER JOIN
            t_Person ON t_Client.PersonID = t_Person.PersonID INNER JOIN
            t_ClientAddress ON t_Client.ClientID = t_ClientAddress.ClientID INNER JOIN
            t_City ON t_City.CityID = t_ClientAddress.CityID INNER JOIN
            t_State ON t_State.StateID = t_ClientAddress.StateID
where t_client.ispractice <> 1

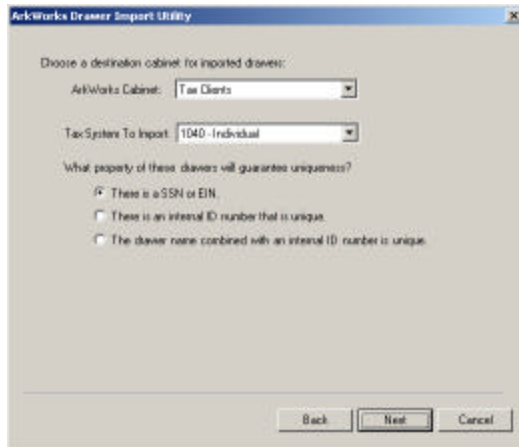
```

- Click **Preview** to make sure your clients are visible.



- Close the *Preview* screen.
- Click **Next**.
- Select your cabinet, e.g., **Tax Clients**, from the *ArkWorks Cabinet* drop down box.
- Select **1040 – Individual** as the *Tax System To Import*.

15. Select **There is a SSN or EIN** option.



ArkWorks Drawer Import Utility

Choose a destination cabinet for imported drawers:

ArkWorks Cabinet: Tax Clients

Tax System To Import: 1040-Individual

What property of these drawers will guarantee uniqueness?

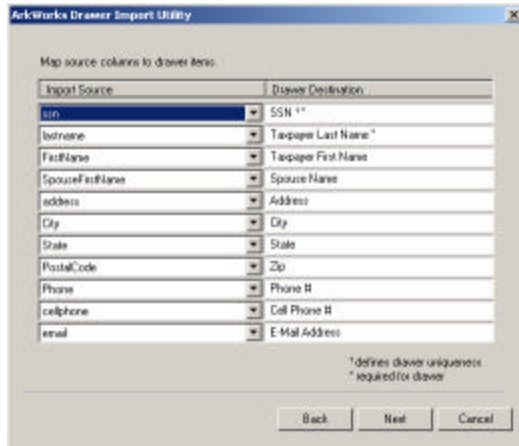
There is a SSN or EIN

There is an internal ID number that is unique.

The drawer name combined with an internal ID number is unique.

Back Next Cancel

16. Click **Next**.



ArkWorks Drawer Import Utility

Map source columns to drawer items.

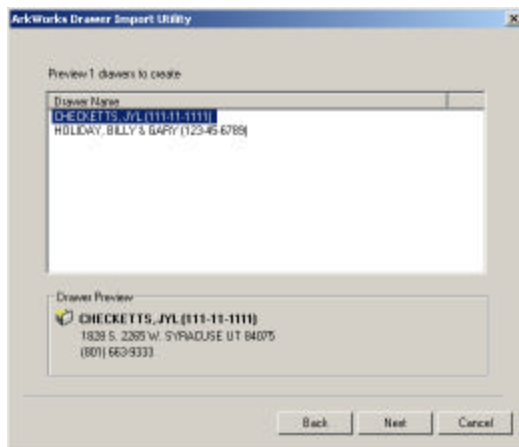
Import Source	Drawer Destination
ssn	SSN *
lastname	Taxpayer Last Name *
firstName	Taxpayer First Name
spouseLastName	Spouse Name
address	Address
City	City
State	State
PostalCode	Zip
Phone	Phone #
cellphone	Cell Phone #
email	E-Mail Address

\* defines drawer uniqueness  
\* required for drawer

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17. Click **Next** again.

18. Verify that the drawer(s) will be created properly and click **Next**.



ArkWorks Drawer Import Utility

Preview 1 drawers to create

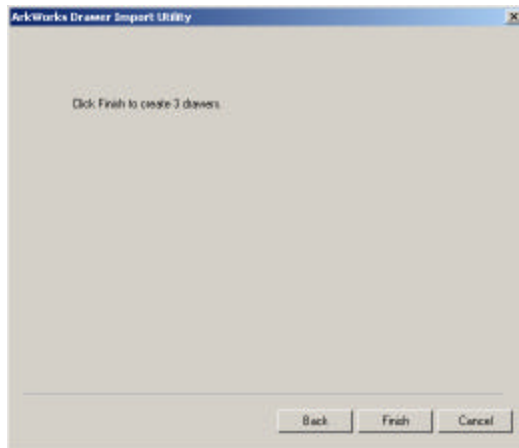
Drawer Name
CHECKETTS, JYL (111-11-1111) HOLLAY, BILLY S GARY (123-45 6789)

Drawer Preview

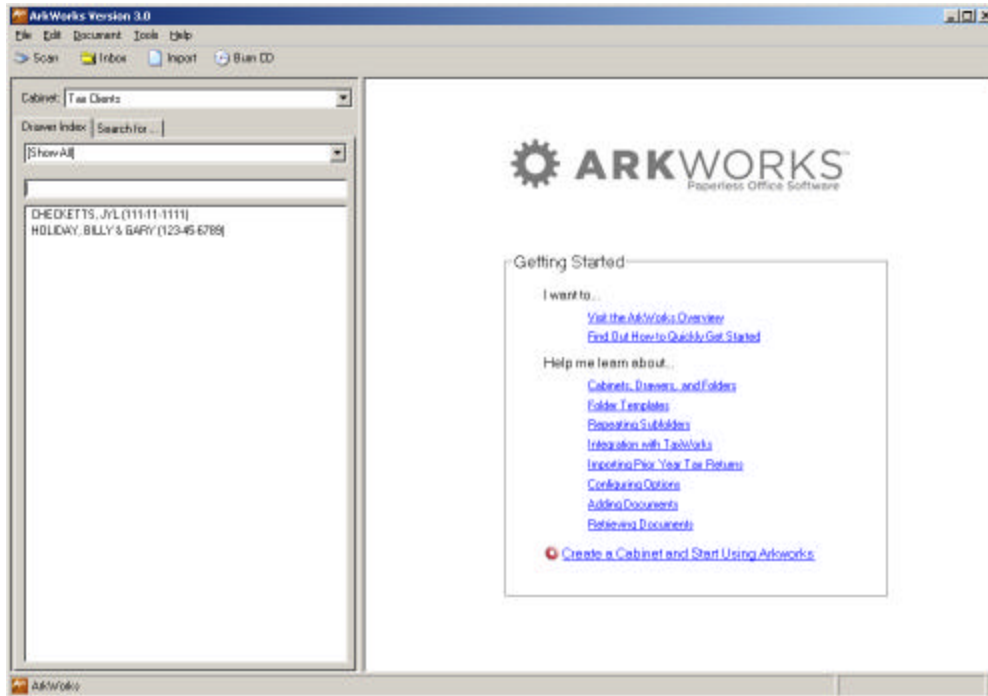
CHECKETTS, JYL (111-11-1111)  
1828 S. 2305 W. SYPADUSE UT 84075  
(801) 663-9333

Back Next Cancel

19. Click **Finish** to create the number of drawers reported.

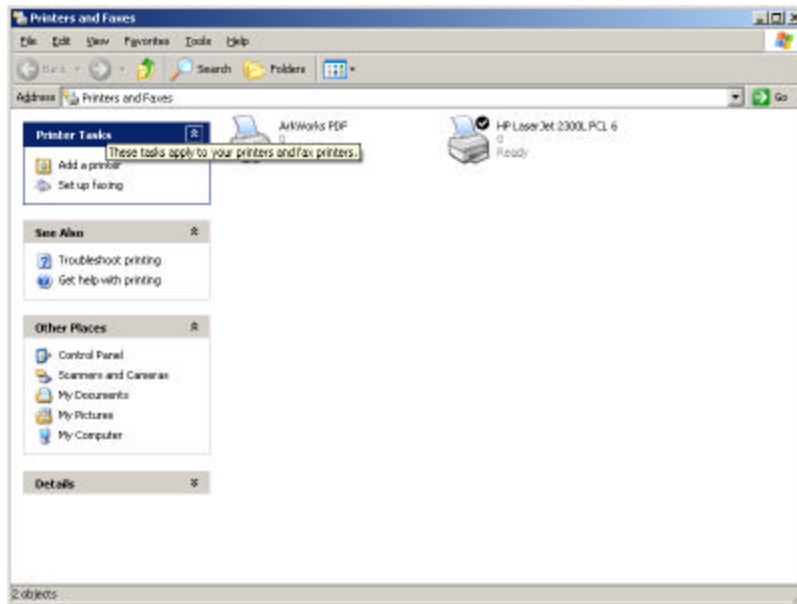


20. When the drawers have been created, the ArkWorks startup page will appear. The drawers are now available to add data to by scanning, importing files or printing using the ArkWorks Printer.



## To print from TPS '06 to ArkWorks:

1. If *TPS '06* is open, close it.
2. Click the **Start** Button in Microsoft Windows.
3. Select **Printers and Faxes**.
4. Note which printer has the check mark next to it to indicate the default printer.



5. Right click the **ArkWorksPDF** printer icon and select **Set as Default Printer**.
6. Launch **TPS '06**.
7. Print the return(s) that you wish to archive in ArkWorks.
8. When all returns have been archived, close **TPS '06** and reset the default printer to the printer noted in step 4.
9. Click the **Close** icon in the top right corner on the *Printer and Faxes* window.