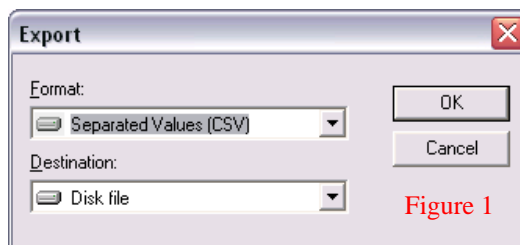


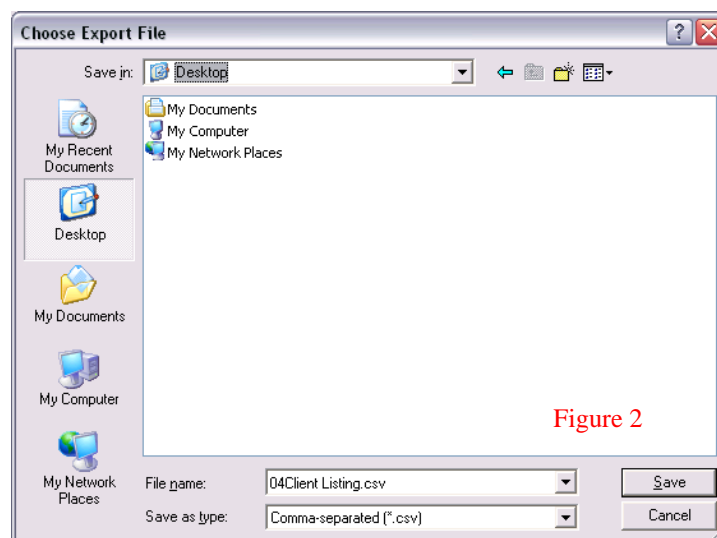
## Intellitax (Windows)

Save a client listing report into a CSV or TXT file that can be imported into an ArkWorks drawer. The Client Listing Report will display all client files in the identified database.

1. Open the Intellitax program.
2. On the homepage click on Report Center.
3. Open the Practice Management Reports folder in Report Tree.
4. Select the Client Listing.
5. If the Generate Report on Selection menu option is not selected, click Run Report button. The report will display in the display window.
6. Click the Export button located on the button bar.
7. A dialog box will appear called Export. Click on the Format drop-down, change to Comma-separated Values (CSV).
8. Click on the Destination drop-down, change to Disk File and click OK. (Figure 1)



9. On the Number and Date Format Settings, click OK.
10. Browse to the location of where you wanted your exported file saved. For example: C:\DOCUMENTS AND SETTINGS\ADMIN\DESKTOP and click SAVE. (Figure 2)



11. Once the data has been saved in CSV or TXT format it can be imported into ArkWorks.

