

Lacerte

Using the Export feature on the Client menu, you can save information about clients to a text file that can be used with ArkWorks. You can choose which client data field's to export and the format in which to export the information.

1. Open the Lacerte program.
2. At the Clients screen, select the client(s) to export by holding down CTRL or SHIFT and click on each of the clients. Or you can select all clients by pressing the F3 key, All Clients.
3. On the Client menu, highlight Export, and then click Export to File. (Figure 1)

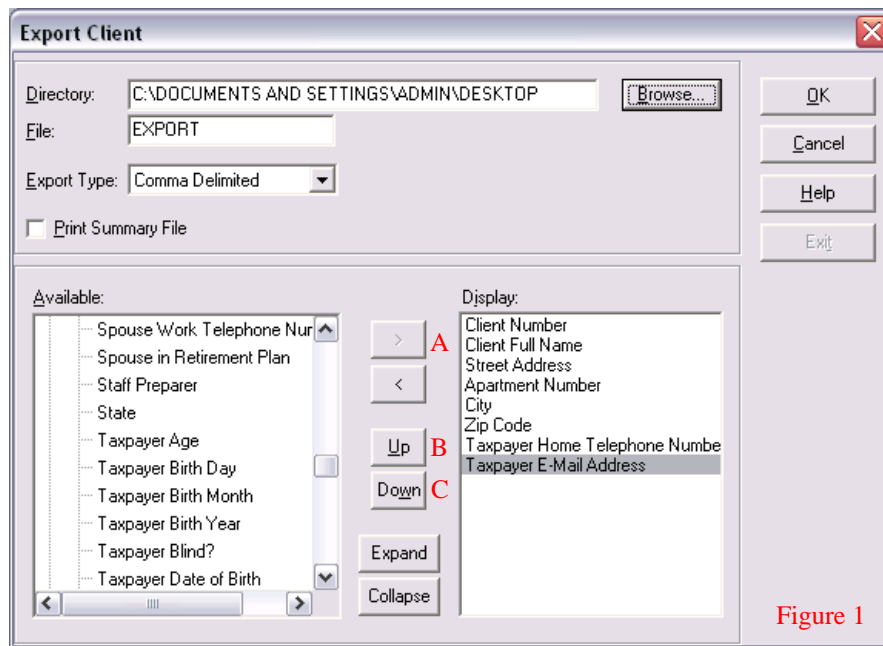





Figure 1

4. In the Directory box, type the location where you want to export the file.
5. Click Browse to select the location from the directory tree.
6. In the File box, type a name for the file.
7. In the Export Type list, do the following:
8. Select Comma Delimited to separate each field with commas.
9. In the Available list, click the information you want to export, and then click (Figure 1a- Move)  to move the item to the Display box. (Repeat step 9 for each item to include in the file)
 - a. Note: ArkWorks common drawer values that can be imported are: SSN or other unique identifier, Taxpayers Last Name, Taxpayers First Name, Spouse Name, Address, City, State, Zip Code, Phone Number, Cell Phone Number and E-Mail Address.
10. Click the plus sign (+) next to the category to search for an item.
11. To change the order in which the program writes the items to the file, select an item in the Display list, and click (Figure 1b – Up)  or (Figure 1c – Down)  to arrange it in the list.

- 12 Click OK to export the information.
- 13 Once the data has been exported it can be imported into ArkWorks by using the Select Data Source as Custom and browsing to the file.