

ProSeries

Using the Export feature on the HomeBase menu, you can save information about clients to a CSV file (Comma Separated File) that can be used with ArkWorks. To export client information to a CSV file in ProSeries follow these steps:

1. Open the ProSeries program.
2. Go to HomeBase View
3. Go to the HomeBase menu and choose Export Contacts.
4. When you see a ProSeries dialog box indicating the location of the file, click the OK button.
(Figure 1)



Figure 1

The ProSeries program creates the CSV file in \Prowin06\Common\Exports\Contacts.CSV with the following client information:

Client file name and location	Client name	Type of return	Telephone number
Email address	SSN or EIN	Status of the return	Date last modified
Due date for the return	Preparer	City, state, and ZIP code	Extension - Yes or No

The CSV file doesn't include any tax return data.