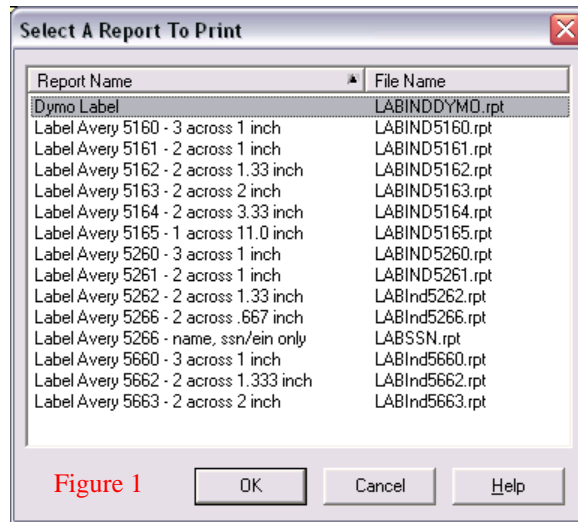


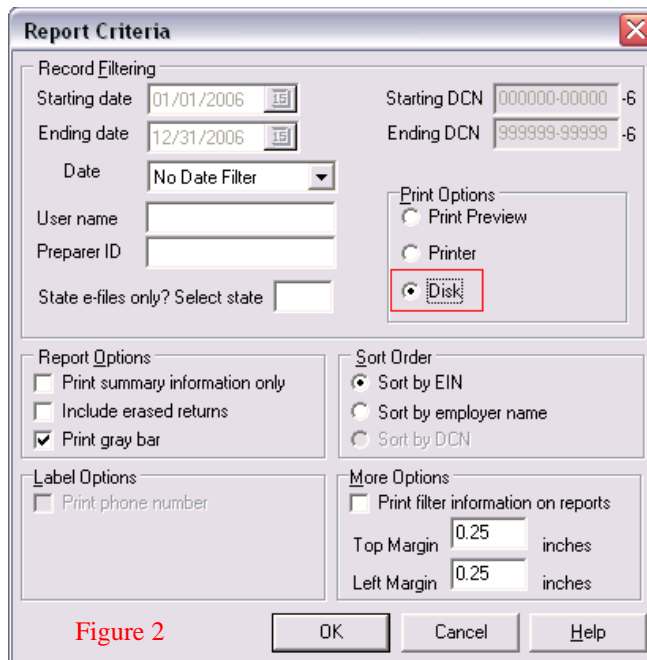
# TaxWise

Save a client listing report into a CSV or TXT file that can be imported into an ArkWorks drawer. Using this option in TaxWise does not allow the client data field's to be customized.

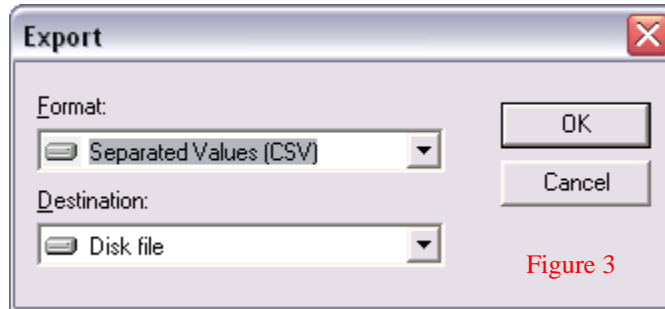
1. Open the TaxWise program.
2. On the Reports menu, click Mailing Labels.
3. Highlight Dymo Label and click OK. (Figure 1)



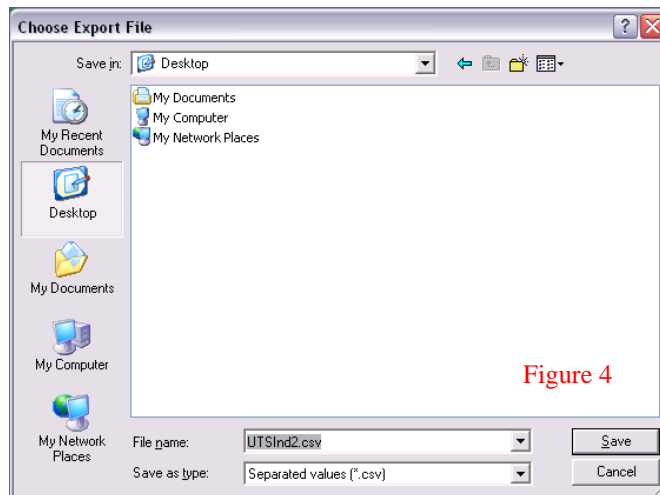
4. A dialog box called Report Criteria will be displayed. Under Print Options select Disk.
5. Change any other relevant data under Report Criteria and then click OK. (Figure 2)



- A dialog box will appear called Export. Click on the Format drop-down, change to Separated Values (CSV) and click OK. (Figure 3)



- A dialog box will appear Character-Separated Values. Leave the separator character as a comma and remove the contents of "out of the Delimiter Box and click OK.
- On the Number and Date Format Settings, click OK.
- Browse to the location of where you wanted your exported file saved. For example: C:\DOCUMENTS AND SETTINGS\ADMIN\DESKTOP and click SAVE. (Figure 4)



- The TaxWise program creates the CSV file with the following client information if you chose Mailing Labels:

Taxpayer and Spouse Name	Address	City	State and Zip Code
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- The TaxWise program will also generate a CSV file with the following client information if you chose Client Listing:

Client name	EFIN	Return Type	Evening Telephone number
Daytime Telephone number	SSN or EIN	Return Stage	Date and Version