

TaxWorks Integration

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ArkWorks is designed to integrate directly with TaxWorks. In this way, accessing client *Documents* that have been archived in ArkWorks is quick and easy. You can open ArkWorks from within TaxWorks through the TaxWorks [button bar](#), [File menu](#), or [Client Selection screen](#).

However, you must upgrade TaxWorks before this integration can take place. Upgrade System Operations and Management & Letters from the Internet. When complete, close the *Upgrade Systems* screen to restart TaxWorks.

To ensure that TaxWorks has properly integrated with ArkWorks, open TaxWorks and access the *Client Selection* screen. Highlight and then right click on a client. This activates a popup menu. If TaxWorks is able to communicate with ArkWorks, *Open in ArkWorks* will be the first option listed.

Export Documents from TaxWorks

To export your tax returns from TaxWorks to ArkWorks, select one of the following:

For Multiple Clients

1. Select Batch Process from the Client Selection screen.
2. Tag the clients you wish to export to ArkWorks.
3. Select Print/Save/Email (select sets) from the *Process Options* drop down box.
4. Click Process.
5. The *Advanced Form Delivery* screen will appear. Select a set to export in the *Save* section.
6. Click the ArkWorks button.
7. Click Start Job.

For a Single Client

1. Open and Review the return in TaxWorks.
2. From the *Review* screen click the Adv. button.
3. Continue with steps 5 through 7 above.

Prior Year Import

In addition to exporting returns from the current year TaxWorks program, you can import prior year returns into ArkWorks as well. To add tax returns from prior year TaxWorks, click the Tools menu and select TaxWorks Prior Year Import. You can also access this utility by clicking the Start button, then selecting All Programs, ArkWorks, and TaxWorks Prior Year Import.

*Note: In order to import prior year tax returns, you must have the corresponding prior year TaxWorks program(s) installed.

Once the program launches, select the Tax Year for the tax returns you would like to import to ArkWorks. Then verify the *TaxWorks Database Path*. Make changes if needed from the *Change Path* and *Archive Drive* drop down boxes. Click Import. When the process is complete, you will see the results of your import.

Import to ArkWorks

Tax Year: 2001

TaxWorks Database Path: Access (c:\tw01\tpm\tpm01.mdb)

Change Path: C:\

Archive Drive: C:\

If the total archived files does not match your TaxWorks clients you may need to batch archive your TaxWorks clients.

Totals	
TaxWorks Clients	1
Archived Files	0
Results	
Converted	0
Skipped	0

Import Exit

What to Do Next

Once you have a tax return in ArkWorks that was exported from TaxWorks.

A *Drawer* was automatically created with the client's name. Click the client's name in the *Search Pane*. The documents associated with the client's return will be listed in the *Drawer Contents Pane*.

Refer to the [ArkWorks Overview](#) section for more information about using the *Documents* you have acquired.