

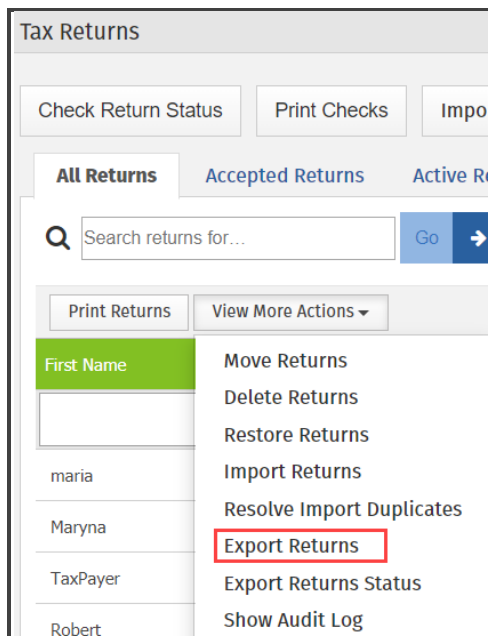
# TaxWise® Online 2020

## Export Returns

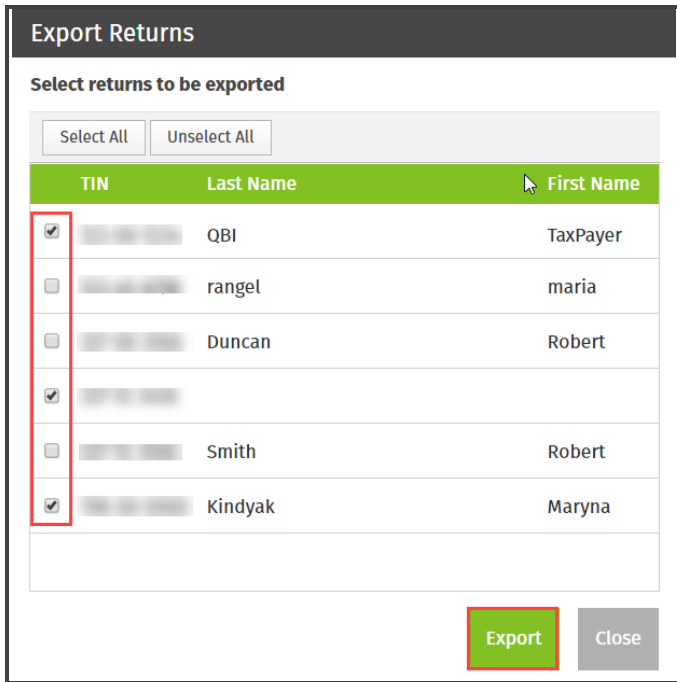
TaxWise online gives you the ability to export your return data and those files can be used in TaxWise Desktop. The export file will be password protected and encrypted. An email containing the password will be sent to the email address on file for the Admin user.

To export returns:

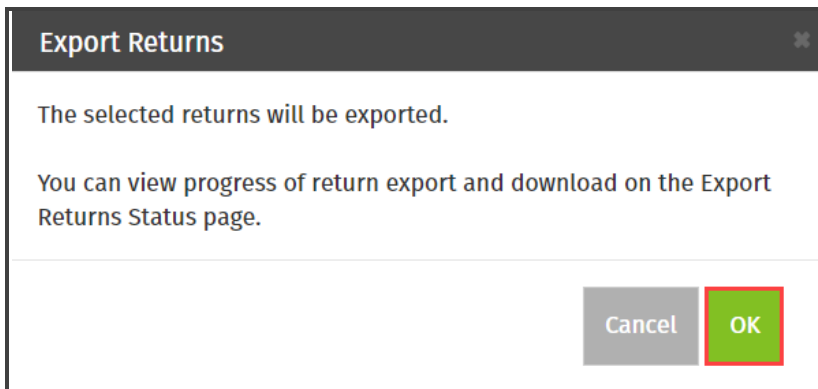
1. Log in as the admin user or a user with the administrator role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Export Returns**.



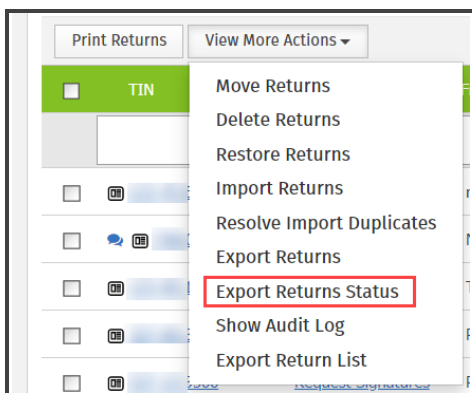
4. Select the return(s) to be exported, and click **Export**.



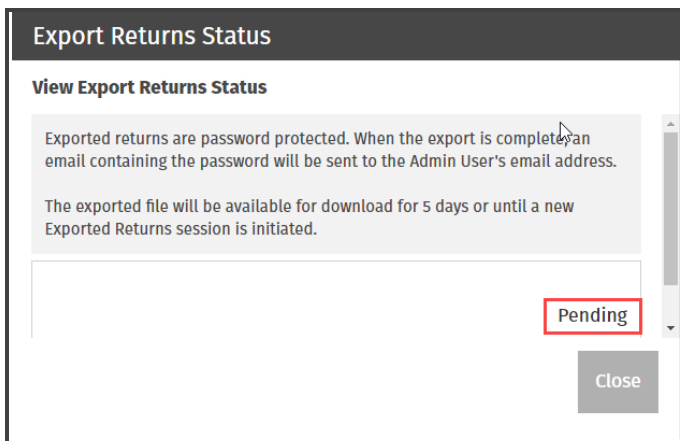
5. TaxWise Online displays confirmation message stating that the selected returns will be exported, and that you can view the progress of the return export, on the Export Returns Status page. To proceed to the Export Returns Status page, click **OK**.



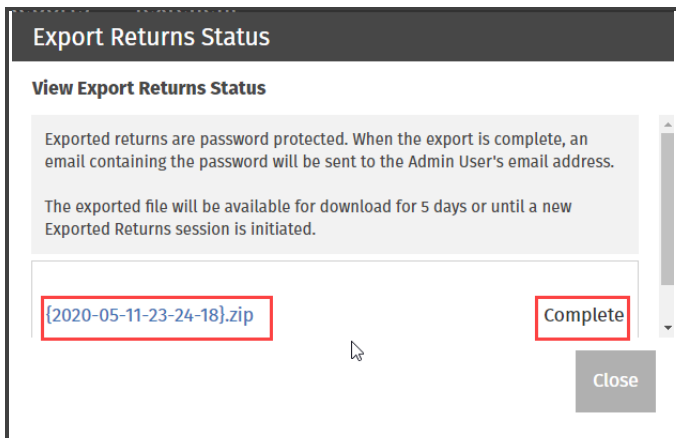
- i** You can access the Export Return Status page from the View More Actions menu.



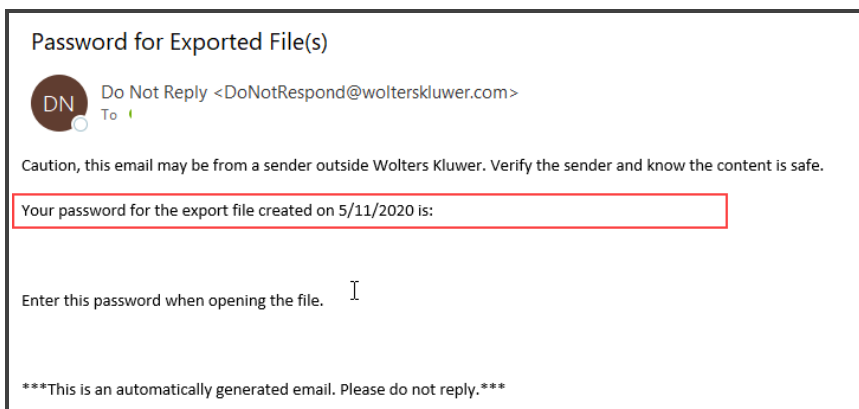
6. TaxWise Online displays the Export Returns Status page, where we see that the progress on the Export is still Pending.



7. Once the process is complete, you will see the ZIP file of the exported returns, and the status reflects Complete.

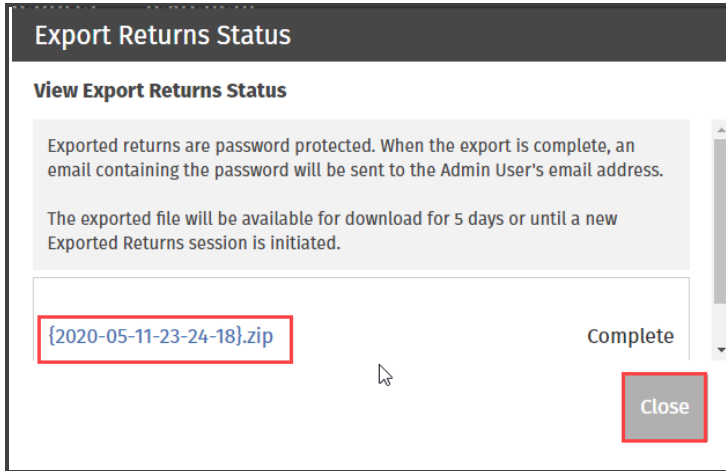


8. Remember that the exported returns are password protected. When the export is complete, an email containing the password will be sent to the Admin User's email.



9. From the Export Return Status page, do one of the following:

- Click the file name to download the file.
- Click **Close** to exit.



**i** The exported file will be available for download for 5 days or until a new Exported Returns session is initiated.

## Export Return List

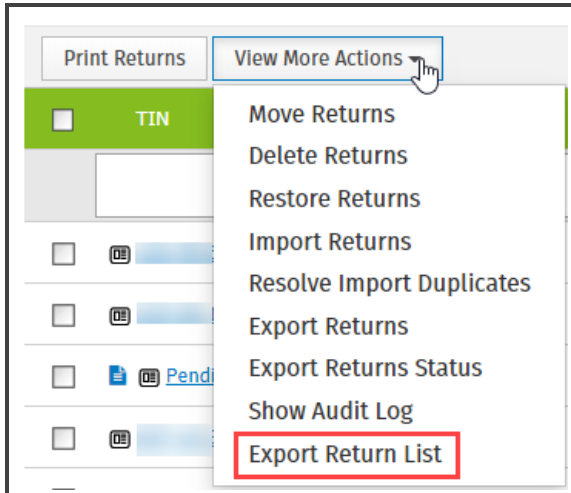
The return list on the Tax Returns tab can be exported as a .csv or .xls file.

To export the return list:

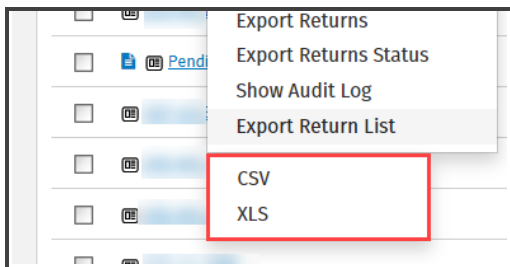
1. Log in as the Admin or a user with the Administrator role or ExportGrid role, and click on the **Tax Returns** tab.
2. Select the tab representing the view you want to export.



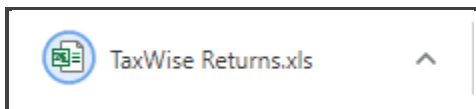
3. From the **View More Actions** list, click **Export Return List**.



4. Select if you want the return list exported in CSV or XLS format. For this lesson select XLS.



5. TaxWise Online displays in the lower left hand corner, the file that is being generated as part of this export.



The tax preparer can now open this return list in excel and review it.