

TaxWise Online 2015 – Return Export

- Feature allows for the export of all returns to a ZIP file
- ZIP file is downloaded to the user's local machine

1. Use this link to access TaxWise Online 2015 – [CLICK HERE](#).
2. Enter the Client ID and admin user credentials.

Universal Tax Systems, Inc. [US] | <https://twonline.taxwise.com/User/Login.aspx?ReturnUrl=%2f>

Client Login

Please login to your account by completing the form below

Client ID

Username

Password

Remember Me

Warning:
Three unsuccessful login attempts
will lock your account.

Forgot your password? Click [here](#)

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Must be unique to the Client ID
- Passwords expire every 90 days

[Need Help?](#)

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1. Click on the Export button.
2. When the dialog box is presented, click Ok
3. Do NOT close the browser tab or leave the page.

The screenshot displays a web application interface with a top navigation bar containing various icons and labels such as 'Open Return', 'Submit e-files', 'View Acks', 'Client Letters', 'Return Query', 'TWO Reports', 'Print Checks', 'Manage Users', 'Return Templates', 'Settings', 'Send Settings', 'Live Chat', 'Help', 'Blog', 'Hot Topics', and 'Log Out'. On the left side, there is a 'Return Tasks' sidebar with a 'Home' link, a 'View' section with links for 'Accepted Returns', 'Active Returns', 'Paper Returns', 'Rejected Returns', 'Send/Create Failed', 'All Returns', and 'Return Stages', a search box for returns, and a list of actions including 'Print Returns', 'Print Reject Details', 'Move Returns', 'Delete Returns', 'Restore Returns', 'Clear Sent E-Files', 'Retrieve Returns', 'Select to Import', and 'Resolve Conflicts'. The main content area features a heading: 'Click on Export button to export all returns. You can view progress of return export and download on this page.' Below this heading is an 'Export' button, which is highlighted with a blue arrow labeled '1'. A dialog box titled 'Message from webpage' is shown, containing a question mark icon and the text: 'All returns will be exported. You can view progress of return export and download on this page.' The dialog box has 'OK' and 'Cancel' buttons, with a blue arrow labeled '2' pointing to the 'OK' button.

1. **Wait for the message to change to “Pending”**
2. **Logout. We recommend returning after 24 hours.**
3. **When returning, use the same link to retrieve the ZIP file.**

Open Return Submit e-files View Acks Client Letters Return Query TWO Reports Print Checks Manage Users Return Templates Settings Send Settings Live Chat Help Blog Hot Topics Log Out

Return Tasks

[Home](#)

View

- [Accepted Returns](#)
- [Active Returns](#)
- [Paper Returns](#)
- [Rejected Returns](#)
- [Send/Create Failed](#)
- [All Returns](#)
- [Return Stages](#)

Search Returns:

- [Print Returns](#)
- [Print Reject Details](#)
- [Move Returns](#)
- [Delete Returns](#)
- [Restore Returns](#)
- [Clear Sent E-Files](#)

- [Retrieve Returns](#)
- [Select to Import](#)
- [Resolve Conflicts](#)

Return Export status

14753_TWO_Converted_0.zip Pending 

1. When the export file is ready, the message will change from “Pending” to “Complete”
2. Click on the link to download the file. Save it to your computer.
3. Remember where on your computer the downloaded ZIP file is placed.

The screenshot displays a web application interface with a top navigation bar and a main content area. The navigation bar includes icons and labels for various functions: Open Return, Submit e-files, View Acks, Client Letters, Return Query, TWO Reports, Print Checks, Manage Users, Return Templates, Settings, Send Settings, Live Chat, Help, Blog, Hot Topics, Login As, and Log Out. The main content area is divided into two sections. On the left, the 'Return Tasks' sidebar contains links for Home, View (Accepted Returns, Active Returns, Paper Returns, Rejected Returns, Send/Create Failed, All Returns, Return Stages), a search box, and various actions like Print Returns, Print Reject Details, Move Returns, Delete Returns, Restore Returns, Clear Sent E-Files, Retrieve Returns, Select to Import, and Resolve Conflicts. The right section, titled 'Return Export status', shows a link for '14217_TWO_Converted_0.zip' with a status of 'Complete'. A large blue arrow points to the word 'Complete'.

Return Tasks

[Home](#)

View

- [Accepted Returns](#)
- [Active Returns](#)
- [Paper Returns](#)
- [Rejected Returns](#)
- [Send/Create Failed](#)
- [All Returns](#)
- [Return Stages](#)

Search Returns:

- [Print Returns](#)
- [Print Reject Details](#)
- [Move Returns](#)
- [Delete Returns](#)
- [Restore Returns](#)
- [Clear Sent E-Files](#)

[Retrieve Returns](#)

[Select to Import](#)

[Resolve Conflicts](#)

Return Export status

[14217_TWO_Converted_0.zip](#) Complete

Import process – Available Nov 23rd 2016

1. Log in to the [TaxWise Support Site](#) with the admin login.
2. Click the "Download" link located at the top of the page.
3. Click on "Conversions" (Left-hand side).
4. Click on the "Choose File" button.
5. On your computer, select the zip file downloaded from the export process.
6. Click "Upload" – once upload is complete, the system will display "Upload Successful"

support.taxwise.com/download/download.aspx?cmd=conversions

TaxWise Wolters Kluwer

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Product Updates
Help File Updates
Other Downloads
Templates
Conversions
TaxWise Software
TaxWise Payroll
Quick Tax Estimator

Conversions

The TaxWise Desktop and the TaxWise Online conversion utilities are now combined into one utility, listed below in the TaxWise Conversions box. The release notes for the competitor utility will have both the Desktop and Online instructions included. If you are using TaxWise Online for 2015 then you can run the conversion utility but the upload procedure documented in the release notes is not available at this time. Once the upload procedure is available then this page will be updated to include how you should upload your converted returns so that TaxWise Online 2015 program will be able to access the data.

TaxWise Conversion Utilities

ATX Business (10/30/2015 12:00:00 AM)		
ATX Individual (10/30/2015 12:00:00 AM)		
CrossLink Individual (10/30/2015 12:00:00 AM)		
Drake Business (8/12/2015 4:59:14 PM)		
Drake Individual (8/4/2015 10:23:37 AM)		
Lacerte Business (8/4/2015 10:16:49 AM)		
Lacerte Individual (8/4/2015 9:20:14 AM)		
ProSeries Business (8/6/2015 9:20:48 AM)		
ProSeries Individual (8/3/2015 1:50:38 PM)		
TaxAct Individual (10/30/2015 12:00:00 AM)		

Legend

- Download File
- Release Notes

Upload Converted Files to TaxWise Online

Select CID: 1430487

Choose the .zip archive created by the conversion utility in the TaxWise conversion folder inside your documents library. Max file size 4 MB.

No file chosen

Upload History

Date	FileName	Message	Uploaded By
06/25/2015	vs_ultimate.exe	Filetype Mismatch	1430487-Admin
06/25/2015	Vs_Ultimate_Converted_0.Zip	File Received	1430487-Admin