

Saving Prior Year Tax Returns in Document Manager

Introduction

This article sets out how to save a tax return from a prior year tax program into Practice Manager - Document Manager in a PDF format

Saving a tax return from a prior year tax program into Document Manager

Prior year tax programs utilise different data files to your current year HandiSoft programs. A tax return from a prior year tax program can be saved into Document Manager as follows:

1. Open the prior year HandiTax program and preview the Worksheet copy of the Income Tax Return.
2. From the **File** menu click **Export to PDF**.
3. In the **Export to PDF** window, clear the **Save** check box, select the **Open with PDF reader** check box, and click **Generate**.
4. In the **PDF reader** window, from the **File** menu click **Save a Copy**.
5. Save the copy into your **Watch** directory, from where it can be filed into the client folder.