



## 2016 ProSeries Conversion Instructions

The conversion process will convert as much information as possible that will remain unchanged for 2016. It is not intended to convert all of your tax data. The conversion process does not, in any way, modify your ProSeries data files. During the conversion process, select data is extracted from the ProSeries data file and used to create a Drake data file, leaving the ProSeries data file in its original state. It is not necessary to install the Drake 2015 software in order to convert your data files.

### Important things to do before running the conversion:

- If your client files are password protected it is recommended to remove the password prior to running the conversion.
- If you have already entered tax returns in the Drake Software 2015 Program, be sure to back them up before you run the conversion. Select **Tools > File Maintenance > Backup**. If you need assistance, please contact our support team at (828) 524-8020.

### Conversion Program Updates:

If you have an established internet connection, the conversion program, when launched, will automatically pick up and install any updates that have been released. To verify you are running the latest conversion program, double-click the conversion program icon on your desktop and compare the version number at the top of the screen to the version number listed on our support website ([support.drakesoftware.com](http://support.drakesoftware.com)). Once you are logged into the support site, click the Conversions link to see a list of all conversions offered and their latest version number. Our support website also provides you with a searchable knowledge base, state specific information, online EF database, and many more useful tools.

### Installation:

- 1) If you are installing from CD, insert the ProSeries Conversion CD into your CD drive. The program should start automatically. If the program does not start automatically, click the Windows **Start** button and then click **Run**. Type **D:\setup.exe** (substitute the correct drive letter if not D) and then click **OK**.
- 2) The **Conversion Setup Wizard Welcome** screen will appear. Click **Next**.
- 3) The **Drake License Agreement** screen will appear. To continue, click **I agree**, and then click **Next**.

- 4) The **Destination Folder** screen will appear, where you can choose where you want to install the conversion program. The default (recommended) location will be preset. Click **Next** to use the default location or click **Browse** to choose a different location, and then click **Next**.
- 5) The **Menu Folder** screen will appear. Click **Next**.
- 6) The installation will begin, showing a progress bar on your screen. Click **Finish** when the process is complete.

### Converting Client Files:

You will see two icons on your desktop, **2016 ProSeries Conversion** and **2016 ProSeries Conversion Instructions**. To begin converting your client files, double-click the **2016 ProSeries Conversion** icon.

- 1) Verify the path for your ProSeries data files. You may click **Browse** to find the correct location.
- 2) Verify the location for saving the converted files.
- 3) To convert only one ProSeries file, enter the file name as it appears in the HomeBase view of your ProSeries program. To convert all files, do not enter a file name.
  - a. NOTE: All client files have to be decompressed before they can be converted. The amount of time this takes depends on the number of client files being converted.
- 4) Click **Convert**.
- 5) The conversion process begins. When the process is complete click **Exit**.

If you receive a “parsing error” message during the conversion process, press the **ENTER** key on your keyboard three times to clear the message and continue converting your files. This error is due to an unexpected file format. You can contact Drake Support to receive assistance with that specific return.

### Accessing Converted Returns in Drake Software:

After converting your ProSeries data files to the Drake Software 2015 file format, you must repair the index files in order to see a list of your clients in Drake Software 2015 under the File menu. Start Drake Software 2015 and follow these steps:

- 1) Select **Tools>Repair Index Files**.
- 2) Select **Repair All**.
- 3) Select **Scan client files and add names to index**.
- 4) Click the **Exit** button.
- 5) Select **File>Open/Create Returns**.
- 6) Select **All Clients**.

### **Updating Converted Returns in Drake Software:**

To update your clients to the Drake 2016 program, please refer to your Drake Software Manual. After updating to Drake 2016, you must repair the index files in order to see a list of your clients under the File menu. Start Drake Software 2016 and follow the steps presented above to repair the index files.

### **Questions:**

If you have any questions concerning the conversion or converted data, please feel free to call the Conversion Team at (828) 349-5546.