

TaxWorks Conversions 2009



Welcome to TaxWorks

Thank you for choosing TaxWorks Professional Tax Software. We are excited to have you on our team and look forward to building a lasting relationship together.

As you make the transition to TaxWorks, we want to ensure that everything runs as smoothly as possible. The first step of this transition will be converting your clients from TaxSlayer to TaxWorks. This document contains step-by-step instructions on converting your clients. Please read through it carefully.

There is a link in the conversion utility that will link you to the specific fields for each form that is converted to each TaxWorks system. The form information is lengthy and is intended for reference purposes only. You needn't read it in its entirety. Information is documented for system 1040.

If you require assistance during the conversion process, please don't hesitate to contact our support team at 1-800-843-1139. Again, welcome! We look forward to working with you.

Sincerely,

TaxWorks Professional Tax Software

Disclaimer Statement

1. The data conversion process is provided “as is” without warranty of any kind.
2. The entire risk as to the results and performance of the data conversion process is assumed by you.
3. TaxWorks does not warrant, guarantee, or make any representations regarding the use of, or the results of the use of, the data conversion process in terms of completeness, accuracy, and reliability, and you rely on the data conversion process and results solely at your own risk.
4. PLEASE analyze the converted data and make changes as needed.
5. The data conversion is NOT intended to do the following:
 1. It is NOT intended to convert all of your data.
 2. It is NOT intended to allow you to generate a complete and accurate 2009 tax return.

NOTE: Do not process/prepare 2009 tax returns using only the converted information, as tax calculations may not be accurate. Some manual data entry may be required.

The goals of the TaxWorks data conversion are as follows:

1. To convert the TaxSlayer data to the TaxWorks format you will need to run Update Clients which transfers your 2009 TaxWorks data to 2009 TaxWorks.
2. To update the 2009 TaxSlayer data to 2009 TaxWorks format that will allow you to generate TaxWorks Tax Organizers.

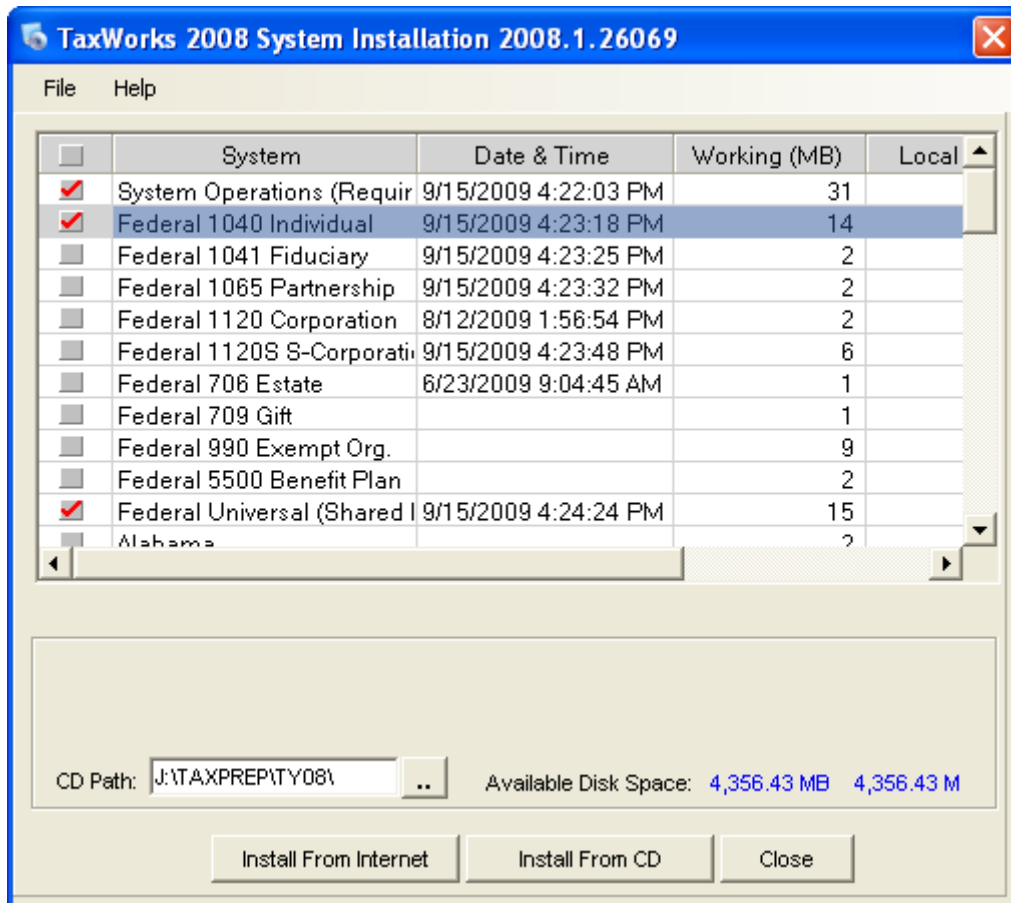
Individual Conversions

Note: TaxWorks only converts information necessary to prepare a Proforma and Taxpayer Organizer.

- ✘ Preparer Information will not convert.
- ✘ State information will not convert.
- ✘ Items selected for deletion for next year may not be taken into account. You may have to manually remove some items after updating to TaxWorks 2009.
- ✘ Detail statements – All amounts and descriptions may not convert.
- ✘ Non-calculated forms will not convert.
- ✘ TaxWorks 2009 Taxpayer Organizer is available.

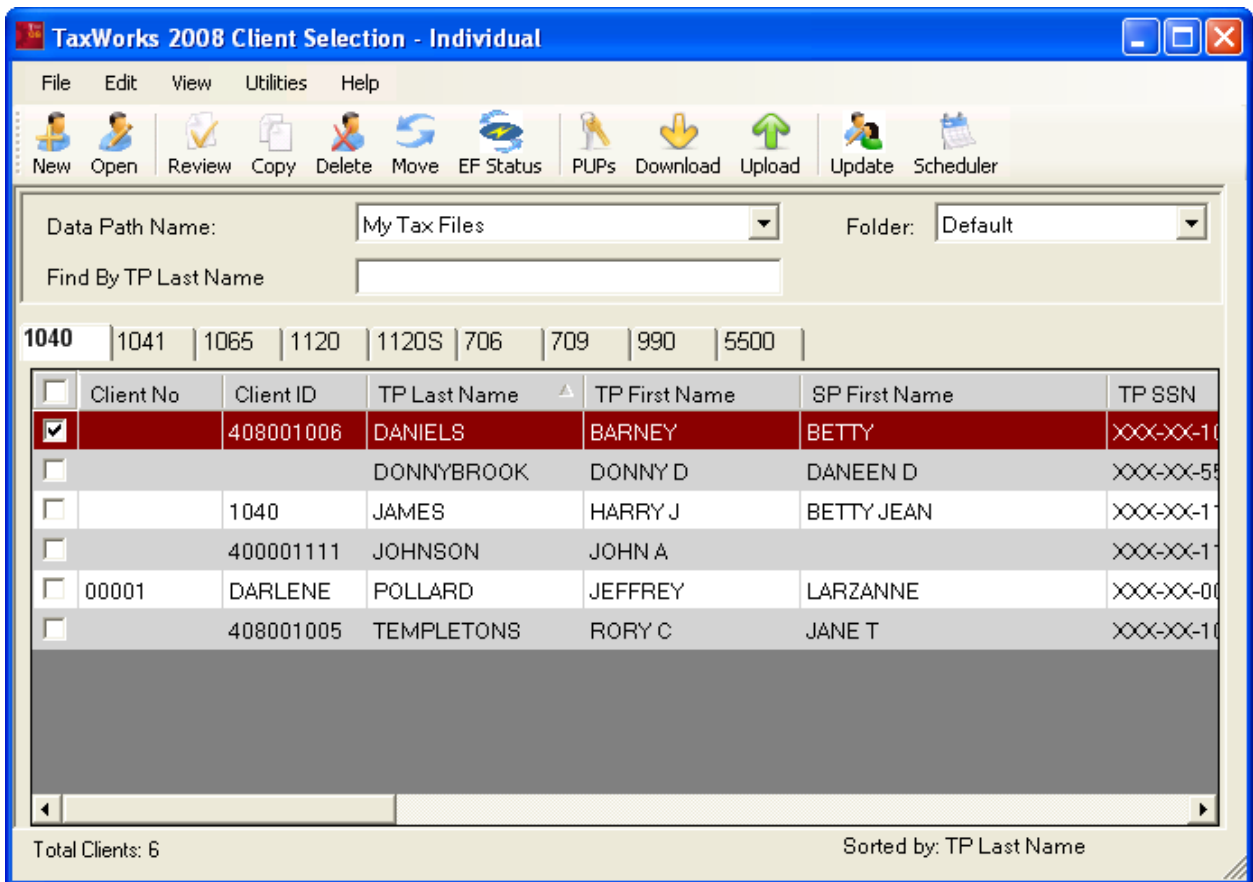
Conversion Process

1. As a precaution, backup your client data in your 2009 software package.
2. Install the TaxWorks 2009 Demo (follow the installation instructions provided with the demo).
 - a. If you do not have a copy of the demo call our Sales Team at (800) 230-2322.
3. After installation is complete, open the TaxWorks 2009 Demo by clicking the *TaxWorks* icon located on your desktop.
4. If the Client Selection screen appears, click *Close*.
5. On the menu bar click *Installations* and then *Upgrade Systems*.



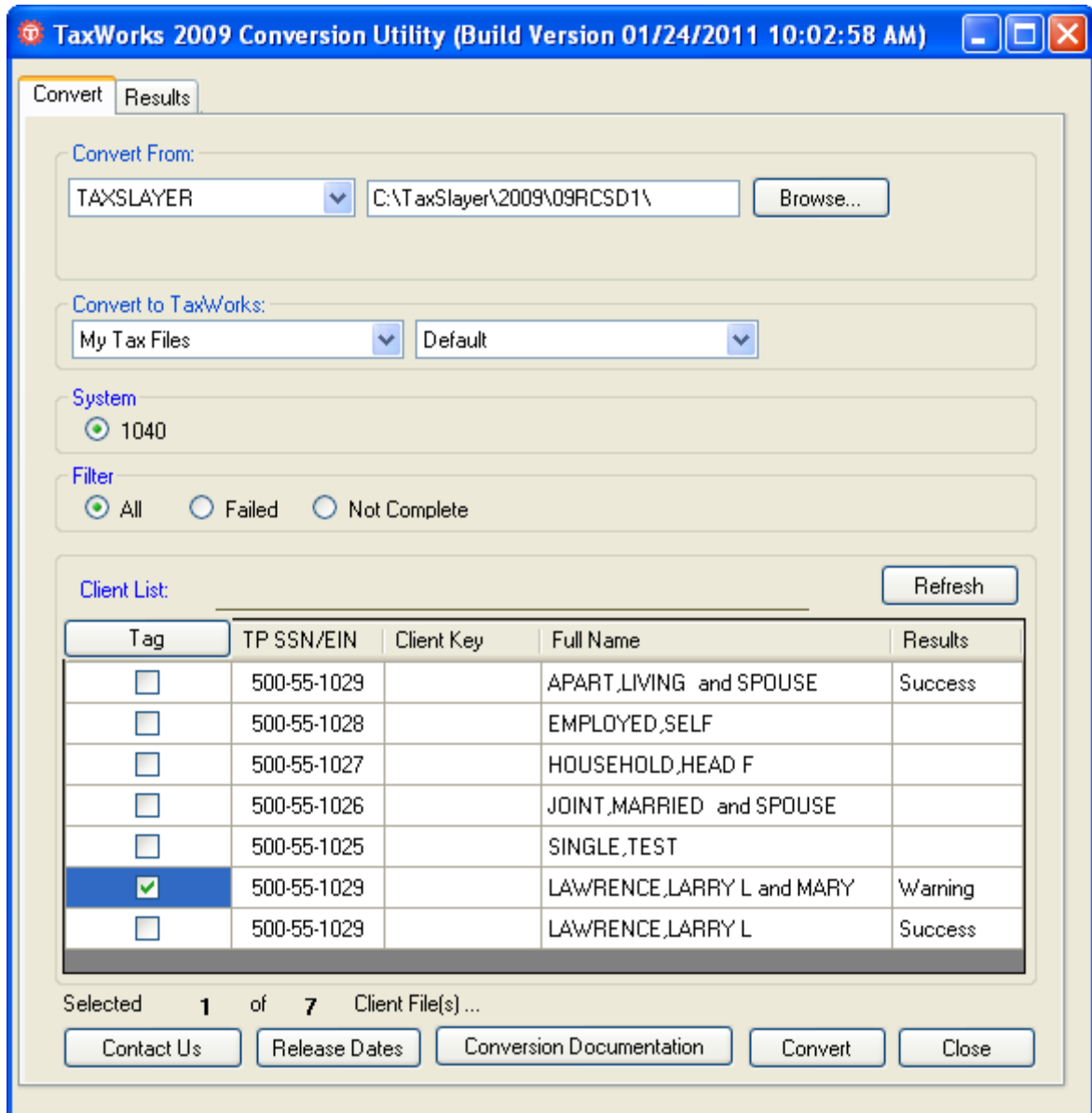
6. Tag the following items using your mouse. Do this by clicking on the gray box to the left of the item:
 - a. Required Files
 - b. Depreciation
 - c. Zip Codes

- d. Conversions & Acct Imports
 - e. Federal 1040 Individual
 - f. Federal Universal
7. Click *Upgrade From Internet* (Upgrades may take up to 1 hour).
 8. Once upgrade is complete, click *Close*.
 9. Files that were upgraded will automatically decompress.
 10. TaxWorks 2009 will automatically open.
 11. If the Client Selection screen appears, close it by clicking X in the upper right corner.



12. Click *File* tab and click *Convert Clients*.
13. TaxWorks will automatically close.
14. The TaxWorks 2009 Conversion Utility will open.
15. Verify TaxSlayer Data Path:
C:\TaxSlayer\2009\08RCSD1\
16. Select the TaxWorks Data Path (default is MY TAX FILES).

17. Select the TaxWorks Folder (default is DEFAULT).
18. Tag clients you want to convert. To Tag all clients click Tag.
19. Click Convert.



20. Once the conversion is complete, the status of each client will be displayed in the Refresh column.
21. To view a conversion report click the *Results* tab.
22. To review the Conversion Documentation click *Conversions Documentation*.
23. When finished click *Close*.
24. TaxWorks 2009 will automatically open.

25. If the Client Selection window does not open automatically click the *Clients* button located on the button bar.
26. Carefully review your converted data files to be sure your converted data is accurate. To open the return double click on the desired client file; or, highlight the desired client and click *Open*. If you have items that did not convert, manually enter them in the TaxWorks program.
27. If you have any questions or suggestions concerning the conversion process please contact us at support@taxworks.com or call (800) 843-1139.
28. Occasionally we will upgrade items in the conversion program. We will post upgrade changes on the web. You may reconvert clients affected by these changes.

CAUTION: *Entries made in TaxWorks to previously converted clients will be lost.*