



2008 ATX Conversion Instructions

The conversion process does not, in any way, change or remove data in your original 2007 ATX data files. During the conversion process, select data is extracted from the ATX data file and used to create a Drake data file, leaving the ATX file in its original state. The conversion also creates the necessary folders for the Drake data files, making it unnecessary to install the Drake 2007 software in order to convert your client files. It is our intent to convert as much information as possible that will remain unchanged for 2008.

***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 that you are running the latest conversion program, double-click the conversion program icon on your desktop and compare the version number at the bottom of the screen to the version number listed on our support web-site (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, states website, online EF database and many more useful tools created with you, the tax professional, in mind.*

If you have clients already in the Drake Software 2007 Program be sure to back them up PRIOR to running the conversion. You will go to Tools/File Maintenance/Back up. If you need assistance please contact our support team at 828-524-8020.

Installation

1. Insert the ATX Conversion CD into your CD drive.
2. The Installation program should automatically run. If it does not, from your desktop, click the Windows **Start** button and then click **Run**. Type **d:\setup.exe** (substitute the correct drive letter if not D). Click the **OK** button.
3. The **Conversion Setup Wizard Welcome** screen will display. Click the **Next** button.
The **Drake License Agreement** window will appear. If in agreement, click **I agree**, and click the **Next** button.
4. The **Destination Folder** screen will appear. This screen will allow you to choose where you want the conversion program installed. The default (recommended) location will be preset.

Click the **Next** button to use the default location or click the **Browse** button to choose a different location and then click the **Next** button.

5. The **Menu Folder** will appear click the **Install** button.
6. The installation begins when a **Green** installation bar is shown on your screen. When the process is complete Click the **Finish** button.

Installation of the Conversion utility is complete

Converting Files

You will see two icons on your desktop. ATX Conversion Package icon and the Instructions icon. *The steps listed will be identical for each ATX program.* Double click on the Conversion Package icon.

2. The ATX **Conversion** window will display.
 - Select the return type you want to convert 1040, 1065, 1120, 1120S. Verify the data path for your client files. If the drive letter is incorrect insert the proper drive letter by typing the correct path. (**Note:** *The default path for your 2007 Client Files is C: \Program Files\Saber or MAX2007\Database*) Click the **Convert** button.
 - The **SSN Option** window will display. On this screen you have the option to convert one file at a time by keying in the SSN or you can leave the field blank to convert all data at once. Once you have chosen your option, click the **Convert** button.
3. Save Drake Files to window will display. Default is Drive Letter "C". If your Drake program is installed on a different drive, please indicate the drive here. Click the **Convert** button.
4. The conversion process begins. When the process is complete. Click the **Exit** button.
5. Repeats steps 1 thru 6 for all other return types.
 - After Converting to Drake 2007, you must Repair the Index Files. To do this you will:
 1. Select the Tools menu
 2. Select Repair Index Files
 3. Select Repair All
 4. Select Scan Client files and add names to Index.

This will allow you to see all your files under the File menu.

Important Notes

- These steps will convert data from ATX 2007 into Drake 2007 format. To update the information to Drake 2008 program please refer to page 7 of your Drake Software Manual.
- After updating to Drake 2008, you must Repair the Index Files. To do this you will:
 1. Select the Tools menu
 2. Select Repair Index Files

3. Select Repair All

4. Select Scan Client files and add names to Index.

This will allow you to see all your files under the File menu.

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