2008 Lacerte Conversion Instructions

The conversion process does not, in any way, change or remove data in your original 2007 Lacerte data files. When you run a Drake conversion, the necessary data is read from the Lacerte data files and moved to a new Drake data file, leaving the Lacerte file exactly as it originally was. You will not need to have Drake 07 installed on your computer. 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.

Installation

1. Insert the Lacerte 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 window will display. Click the **Next** button.
4. The *Drake License Agreement* window will appear. If in agreement, click the **I agree** button and click the **Next** button.
5. 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.
6. The *Menu Folder* will appear click the **Install** button.
7. 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

1. To begin converting your client files click on the Lacerte Conversion Icon on your desktop.
2. Choose which package to convert, 1040, 1120, 1120-s, 1065.
3. Verify the path for your Lacerte location, if you are not sure use the browse button to browse for the correct path.
4. Verify location for converted files.
5. If you want to convert a single client file, click the box that says, single client, then type in the SSN or the EIN.
6. Click the convert button.

The conversion process begins. When the process is complete click the exit button, or Repeat steps 2-6 for each package. (1040, 1065, 1120, 1120S.)

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

Any current depreciation expense amounts that were overridden in Lacerte will be converted directly from your Lacerte data files. Current depreciation expense amounts that were not overridden are not stored in the Lacerte data files. We perform a depreciation calculation during the conversion process as an attempt to generate the current depreciation expense amounts. You must review and verify the current depreciation expense amounts in the Drake 2007 program or the prior depreciation expense amounts in the Drake 2008 program once you have updated your returns. There is no guarantee that the amounts converted will match what was calculated in Lacerte.

- These steps will convert data from Lacerte 2007 into Drake 2007 format. To update the information to Drake 2008 program please refer to 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.