



2008 ProSeries Conversion Instructions

The conversion process does not, in any way, change or remove data in your original 2007 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 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.

Please note: It is advised to verify that you are installing the latest Conversion program. The version number can be found on your CD. To access the latest updates and other conversion tools, please visit our website at <http://support.drakesoftware.com>. Our website also provides you with a searchable knowledge base, state website, online EF database and many more useful tools created with you, the tax professional, in mind.

Installation

1. Insert the ProSeries Conversion CD into your CD drive. The program should auto-run after several seconds (the delay time will depend on the speed of your CD drive). 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 the **OK** button.
2. The **ProSeries Conversion Package Welcome** screen will appear. Click the **Next** button.
3. The **Drake License Agreement** screen will appear. If in agreement, click the **I agree** box provided, and then 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** screen will appear. Click the **Next** 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 program is complete!

Converting Client Files

Please note that the conversion will need to decompress all client files before actually converting them. This will take some time depending on the amount of client files.

1. To begin converting your client files click on the ProSeries Conversion Icon on your desktop.
2. Verify the path for your ProSeries location, if you are not sure use the browse button to browse for the correct path.
3. Verify location for converted files.
4. **Convert 1 file at a time** – If you want to convert only 1 ProSeries file, enter the file name as it appears in the HomeBase view of your ProSeries program. To convert all files, leave this field blank.
5. **Convert all files at once**- Click the convert button.

The conversion process begins. When the process is complete click the exit button.

IMPORTANT:

- These steps will convert data from ProSeries 2007 to Drake 2007.
- After converting your files to the Drake 2007 file format, you must repair the index files in order to see a list of your clients in the Drake 2007 program. To do this you will need to:
 1. Open the Drake 2007 tax program
 2. Select the Tools menu
 3. Select Repair Index Files
 4. Select Repair All
 5. Select Scan Client files and add names to IndexThis will allow you to see a list of your clients on the File > Open/Create Returns screen.
- If you have any questions concerning the conversion or converted data, please feel free to call the Conversion Team at (828) 349-5546.