



2008 TaxWorks – GreatTax Conversion Instructions

The conversion process does not, in any way, change or remove data in your original 2007 TaxWorks-GreatTax data files. During the conversion process, select data is extracted from the TaxWorks-GreatTax data file and used to create a Drake data file, leaving the TaxWorks-GreatTax 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.*

Installation

1. Insert the TaxWorks-GreatTax 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.
4. The **Drake License Agreement** window will appear. If in agreement, click **I agree** and then 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** screen 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

You will see two icons on the desktop. TaxWorks-GreatTax Conversion and TaxWorks Conversion Instructions.

To begin converting your client files click on the TaxWorks-GreatTax Conversion Icon on your desktop.

1. Choose which package to convert: 1040, 1120, 1120-S, 1065.
2. Verify the path for your TaxWorks-GreatTax location. If you are not sure, use the **Browse** button to browse for the correct path.
3. Verify the destination location for converted files.
4. If you want to convert a single client file, click the box that says 'Single Client', then type in the SSN or the EIN.
5. 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, 1120, 1120-S, 1065)**

- 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 Notice

If you notice a certain tax return was not converted, it is possible the return was updated from 2006 to 2007 in TaxWorks but never opened. To convert the tax return, open the return in TaxWorks. Save the return, close the return, and then reconvert it using the single client option in the Conversion program.

These steps will convert data from TaxWorks-GreatTax 2007 into Drake 2007 format. To update the information to the Drake 2008 program please refer to your Drake Software 2008 Manual.

- ❖ After updating to Drake 2008, you must Repair the Index Files. To do this you will:
 - Select the Tools menu
 - Select Repair Index Files
 - Select Repair All
 - 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.