

Data Conversion Instructions for ProWeb



For Desktop TaxSlayer Pro Product Conversions, see instructions in your software

Please note, you do not need to use this utility to load returns from one year of TaxSlayer Pro cloud-based software into the current version of cloud-based software.

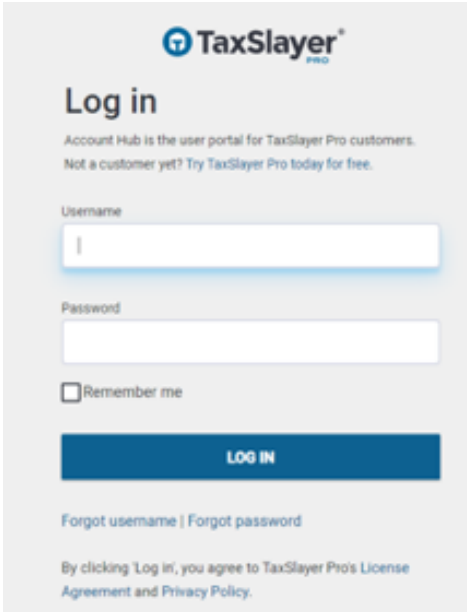
The ProWeb data conversion converts basic biographical information for the taxpayer, spouse and dependents and W-2 information.

The table below indicates what software packages can be converted. Please note, this utility can only convert data completed in the desktop version of a software package. It cannot convert returns completed in a cloud-based product.

STEP 1: Ensure that all returns needing to be converted have been consolidated into a version of your current software on the computer that will be used as the file server by TaxSlayer Pro.

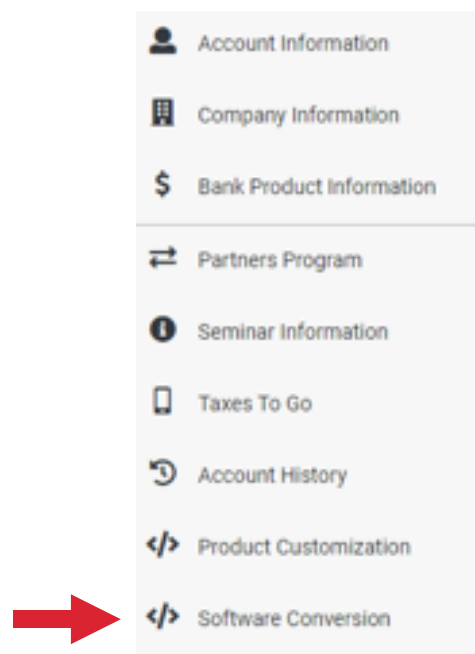
Software Package	Individual	Business
ATX	Y	N
TaxWise	Y	N
Drake	Y	N
ProSeries	Y	N
Crosslink	Y	N
LaCerte	N	N
OLT	Y	N
TaxAct	Y	N

STEP 2: Log in to **Account Hub** to download the conversion utility.

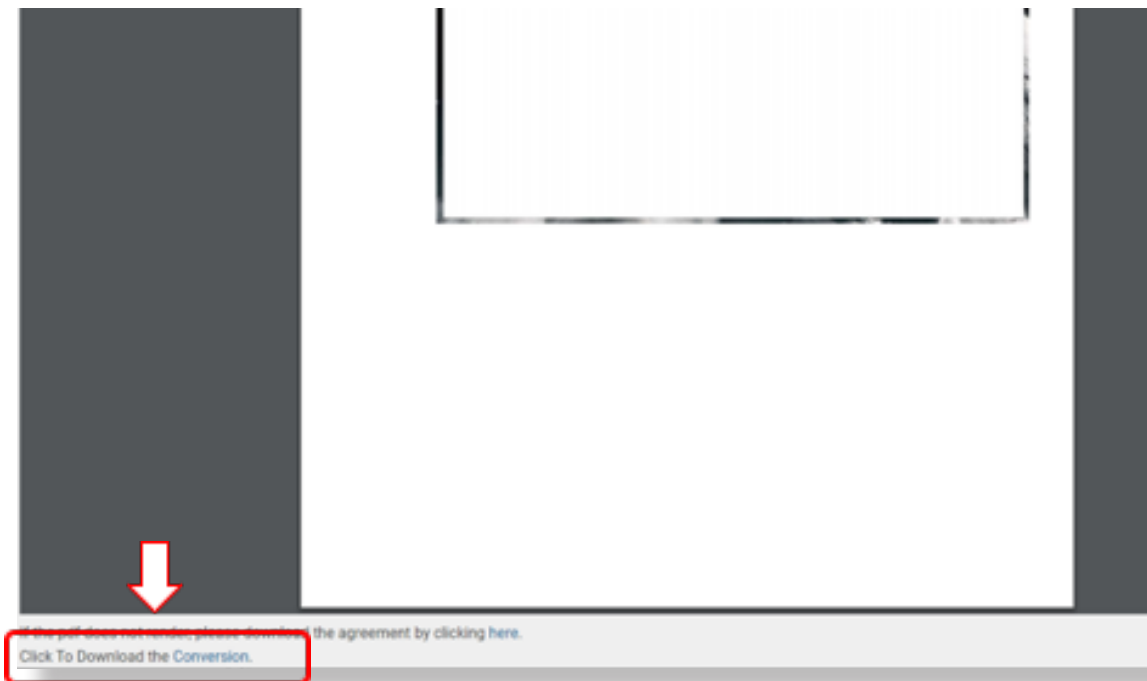


The image shows the TaxSlayer PRO login page. At the top is the TaxSlayer PRO logo. Below it is the heading "Log in". A sub-heading reads: "Account Hub is the user portal for TaxSlayer Pro customers. Not a customer yet? Try TaxSlayer Pro today for free." There are two input fields: "Username" and "Password". Below the password field is a checkbox labeled "Remember me". A blue "LOG IN" button is centered below the form. At the bottom of the form, there are links for "Forgot username" and "Forgot password". A disclaimer at the very bottom states: "By clicking 'Log in', you agree to TaxSlayer Pro's License Agreement and Privacy Policy."

STEP 3: Once logged into **Account Hub**, choose **Software Conversion** on the left side of your **Account Hub** menu.

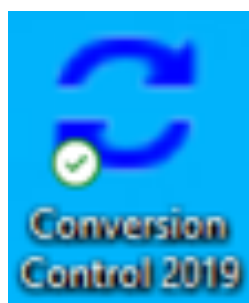


STEP 4: This set of documentation will be displayed. Scroll to the bottom and click on the word **Conversion** on the line that reads **Click to Download the Conversion.**

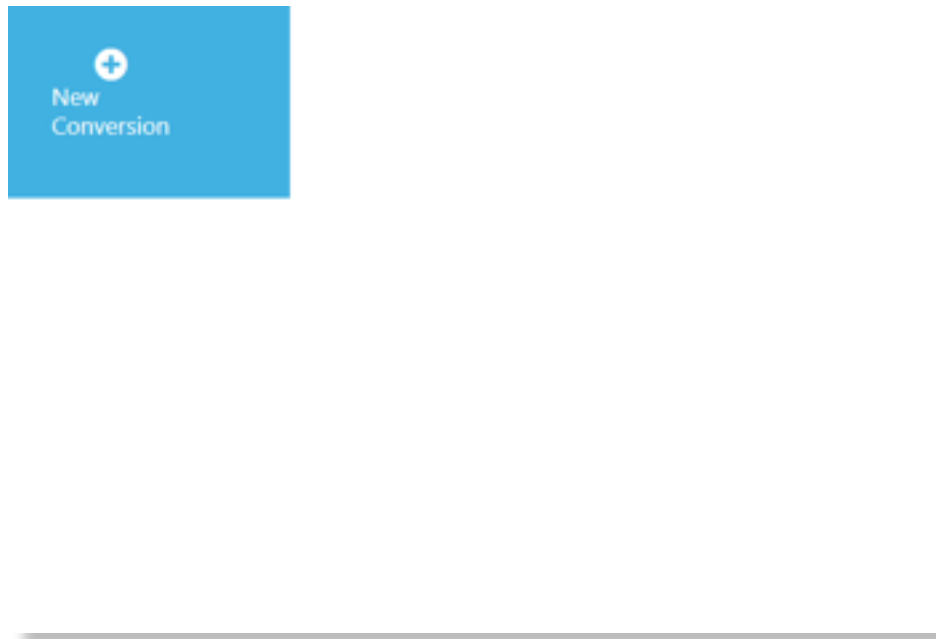


STEP 5: Download and install the conversion utility.

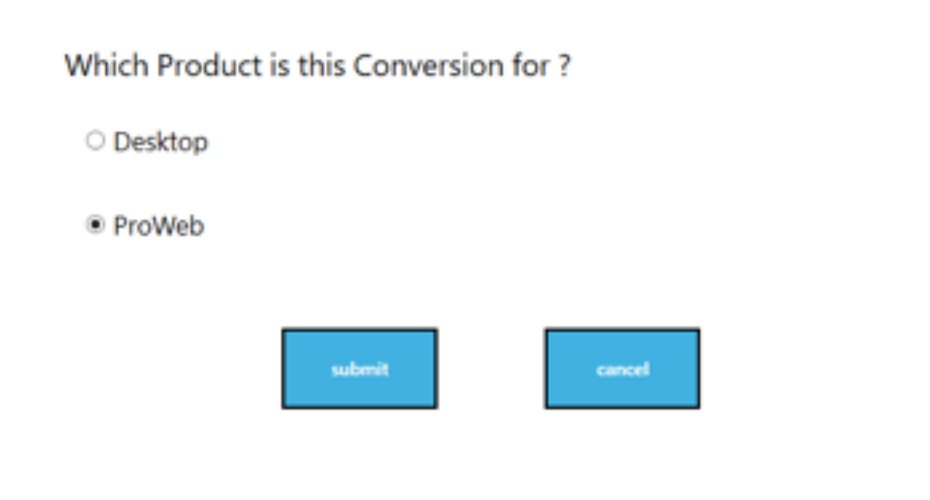
STEP 6: Click on the shortcut (pictured below) on the desktop to run the conversion utility.



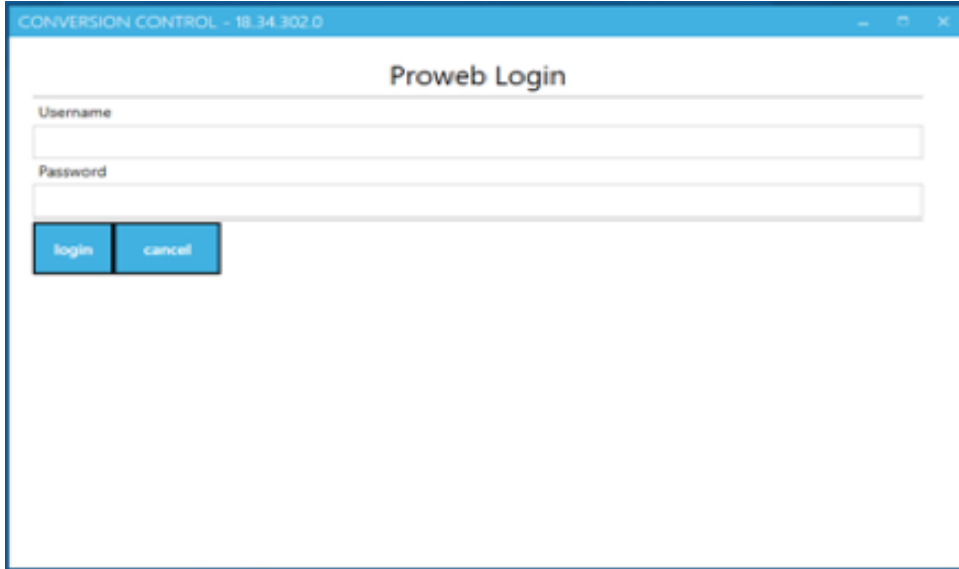
STEP 7: Click New Conversion.



STEP 8: Choose ProWeb and click submit.




STEP 9: Enter the **username** and **password** of the ProWeb office that will be using the converted data. You will be required to use Multi-Factor Authentication (MFA) to complete the login.



A screenshot of a software window titled "CONVERSION CONTROL - 18.34.302.0". The window contains a "Proweb Login" form. The form has two input fields: "Username" and "Password". Below the input fields are two buttons: "login" and "cancel".

STEP 10: Choose the **Program** you would like to convert. Once the **Program** is selected, the standard data path for the program will appear next to **Path to Program Data**. You may select another data folder for this program if needed.

Click **Start** to begin the conversion.



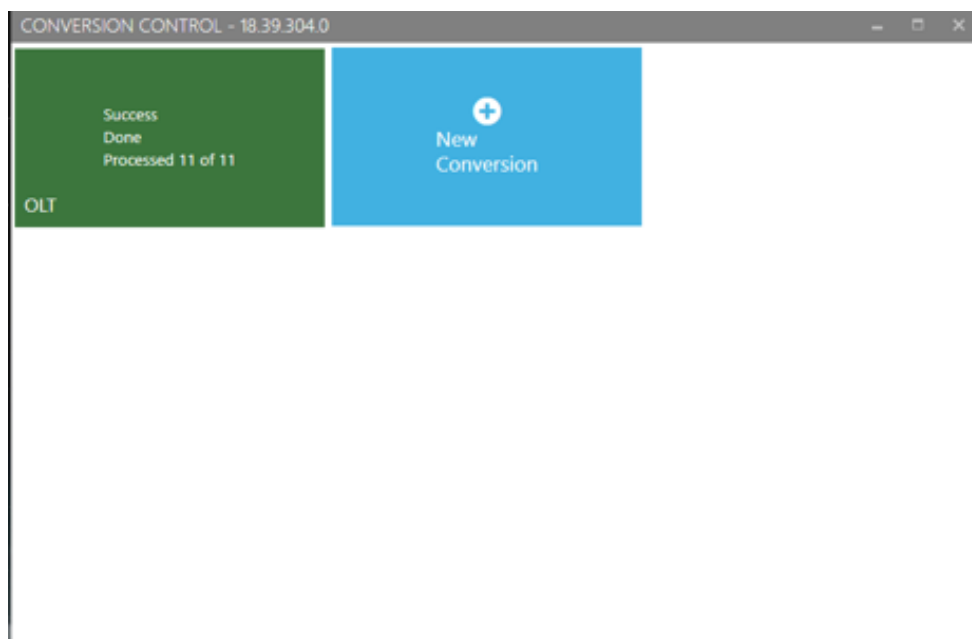
A screenshot of a software window titled "CONVERSION CONTROL - 18.34.302.0". The window contains a "Back" button at the top left. Below it is a "Program" dropdown menu. To the right of the dropdown menu is a "Path To Program Data" input field. To the right of the input field is an "Open path" button. At the bottom of the window is a "Start" button.

The conversion utility will begin processing returns.



The green box shown below and **Done** indicate your conversion is complete and your data is ready to be pulled forward. When you enter an SSN or EIN to start a return that has already been converted, you will be asked if you would like to start the return using prior year data. Select **Yes**.

When the data conversion is complete, click on the **X** in the upper righthand corner of the utility to close the program.



Please Note:

- Returns with passwords or other security restrictions cannot be read and will not be converted. All passwords and security restrictions should be removed prior to attempting to convert returns. Restore these security features in your current package after the conversion is complete.
- Some returns or portions of some returns may not be convertible. In those situations, you will need to manually reenter the data in the 2019 return within TaxSlayer Pro.

Revised: 12/04/2019