

Data Conversion Instructions for ProWeb

For desktop TaxSlayer Pro product conversions, see the instructions in the knowledgebase.

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, dependents, and W-2.

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.

All passwords and security restrictions should be removed prior to attempting to convert returns, as returns with passwords or other security restrictions cannot be read and thus cannot be converted. Once the conversion is complete, you can restore these security features in the package. (Crosslink users: If you use secondary encryption, be sure to remove it before commencing the conversion process. Click “Reset Encryption Key” under System Utilities and clear it out.)

Below is a list of popular tax software packages indicating whether individual returns can be converted for use in TaxSlayer ProWeb.

STEP 1: Ensure that all returns needing to be converted have been consolidated into a version of your current software on a single computer.

Software Package	Individual	Business
ATX	Y	N
CrossLink	Y	N
Drake	Y	N
Lacerte	N	N
OLT	Y	N
ProSeries	Y	N
TaxAct	Y	N
TaxWise	Y	N

STEP 2: In a web browser on the PC where the returns to be converted are stored, log in to **Account Hub** to download the conversion utility.

Log in to Account Hub

Enter your username and password below to access Account Hub so you can update your company info, apply for bank products, manage your business and more all from your account.

Username

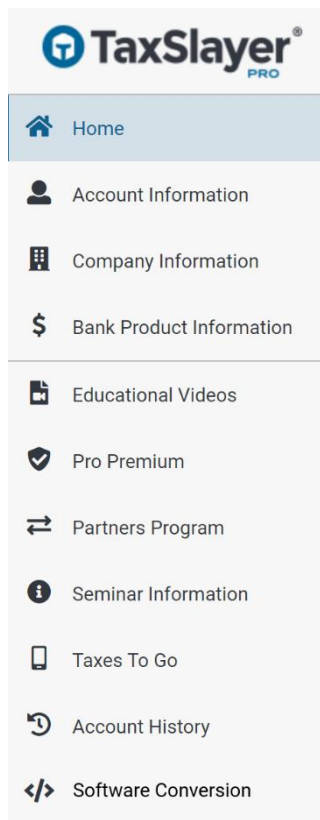
Password

LOG IN

[Forgot username](#)

[Forgot password](#)

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



The screenshot shows the left side menu of the TaxSlayer PRO Account Hub. The menu items are: Home, Account Information, Company Information, Bank Product Information, Educational Videos, Pro Premium, Partners Program, Seminar Information, Taxes To Go, Account History, and Software Conversion. A red arrow points to the Software Conversion option.

- Home
- Account Information
- Company Information
- Bank Product Information
- Educational Videos
- Pro Premium
- Partners Program
- Seminar Information
- Taxes To Go
- Account History
- Software Conversion

STEP 4: This set of documentation will be displayed. Scroll to the bottom and click the word **Conversion** on the line that reads **Click to Download the Conversion**. At any point in the installation process, if you're told you need to update .NET framework, click **Yes** to doing so.

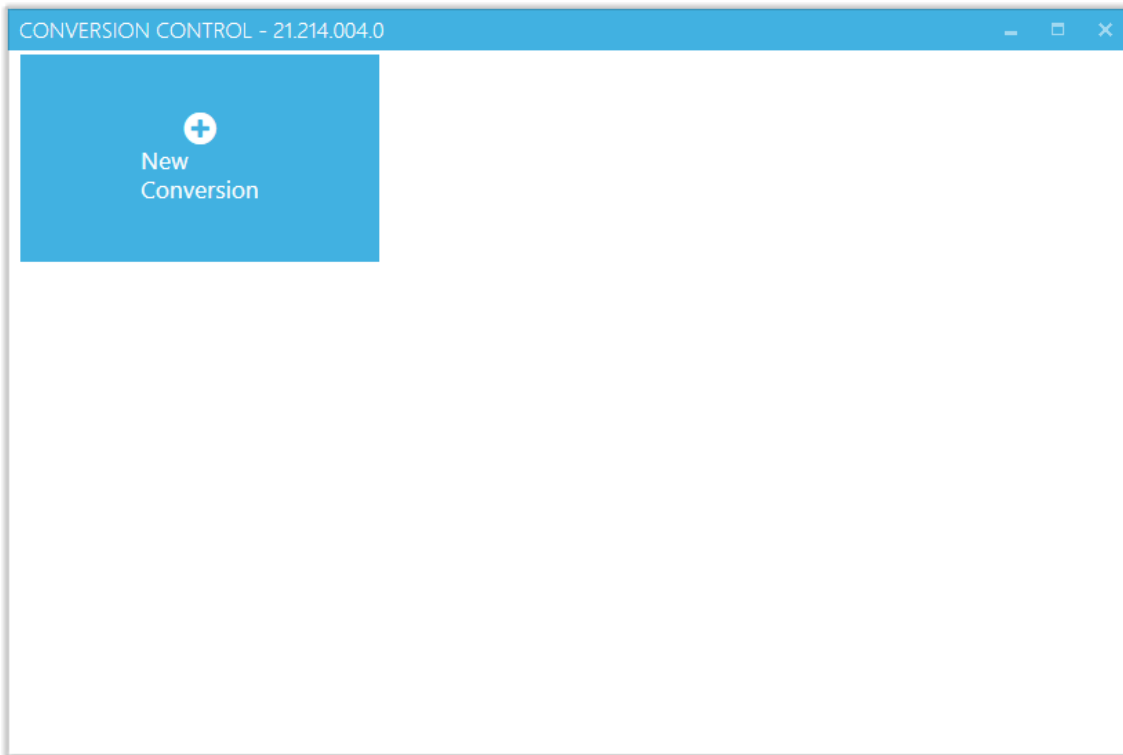


STEP 5: Download and install the conversion.

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



STEP 7: Click New Conversion



STEP 8: Choose ProWeb and click submit

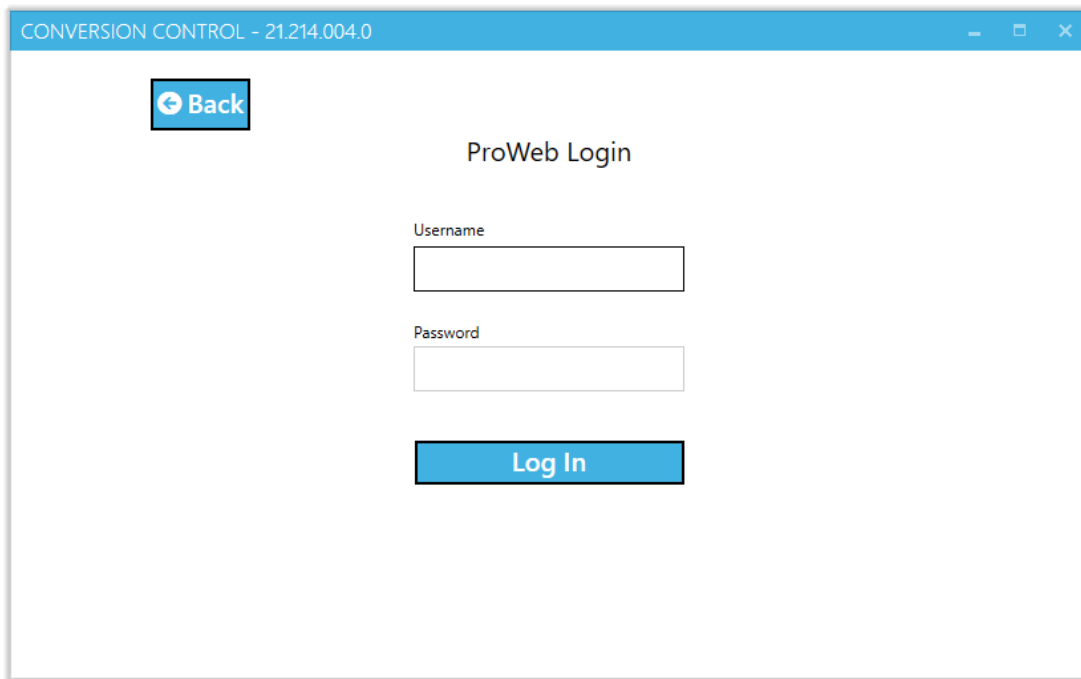
Which Product is this Conversion for ?

- Desktop
- ProWeb

submit

cancel

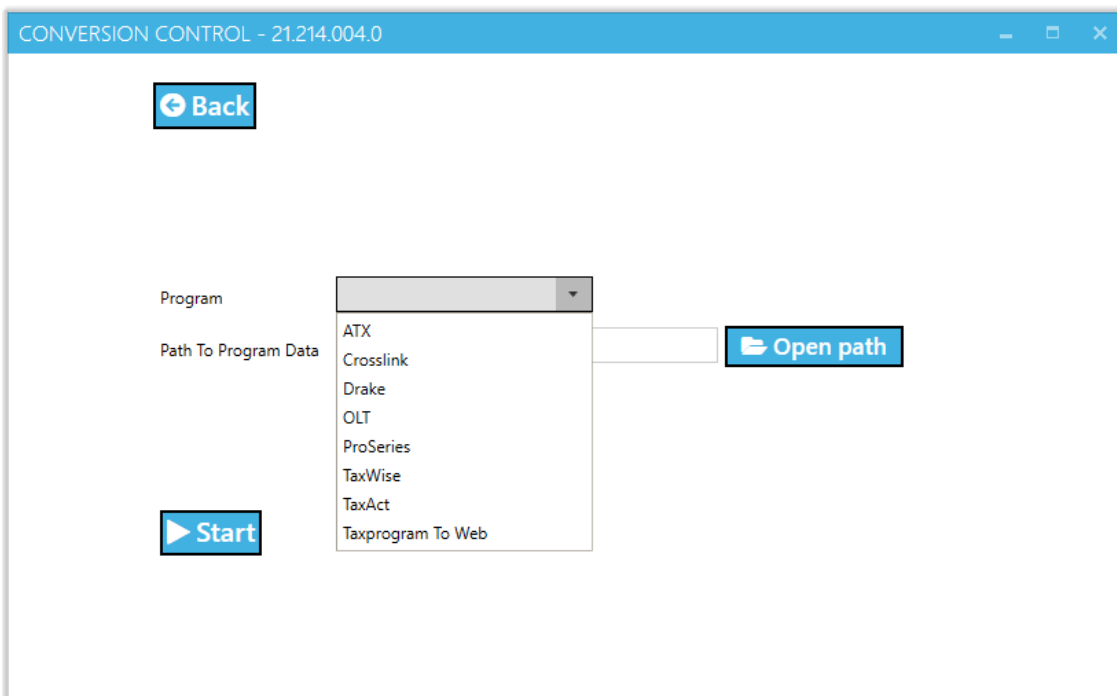
STEP 9: Enter the **Username** and **Password** of the ProWeb office that will be using the converted data. You will be required to use Multi-Factor Authentication (MFA) to complete the login.



The screenshot shows a window titled "CONVERSION CONTROL - 21.214.004.0". Inside the window, there is a "Back" button with a left-pointing arrow. Below it, the text "ProWeb Login" is centered. Underneath, there are two input fields: "Username" and "Password". At the bottom, there is a blue "Log In" button.

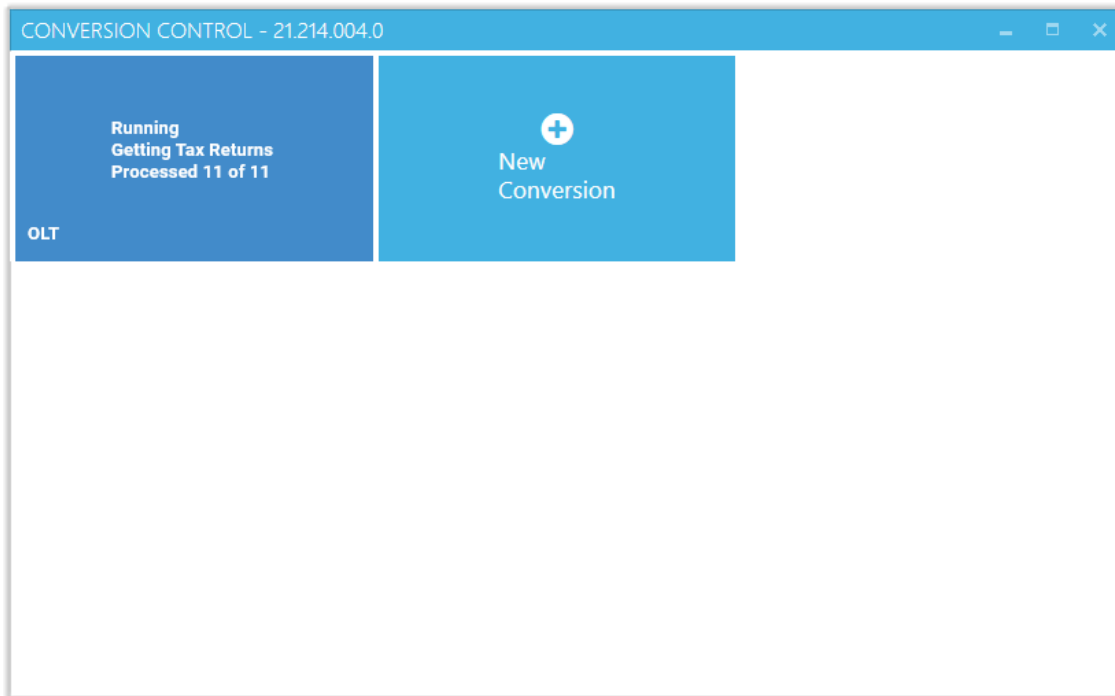
STEP 10: Choose the **Program** you would like to convert. Once the **Program** is selected, the standard data path for the program will be in the **Path to Program Data** field. If the path is different on your PC, click **Open Path** and locate the path on your PC.

Click **Start** to begin the conversion.

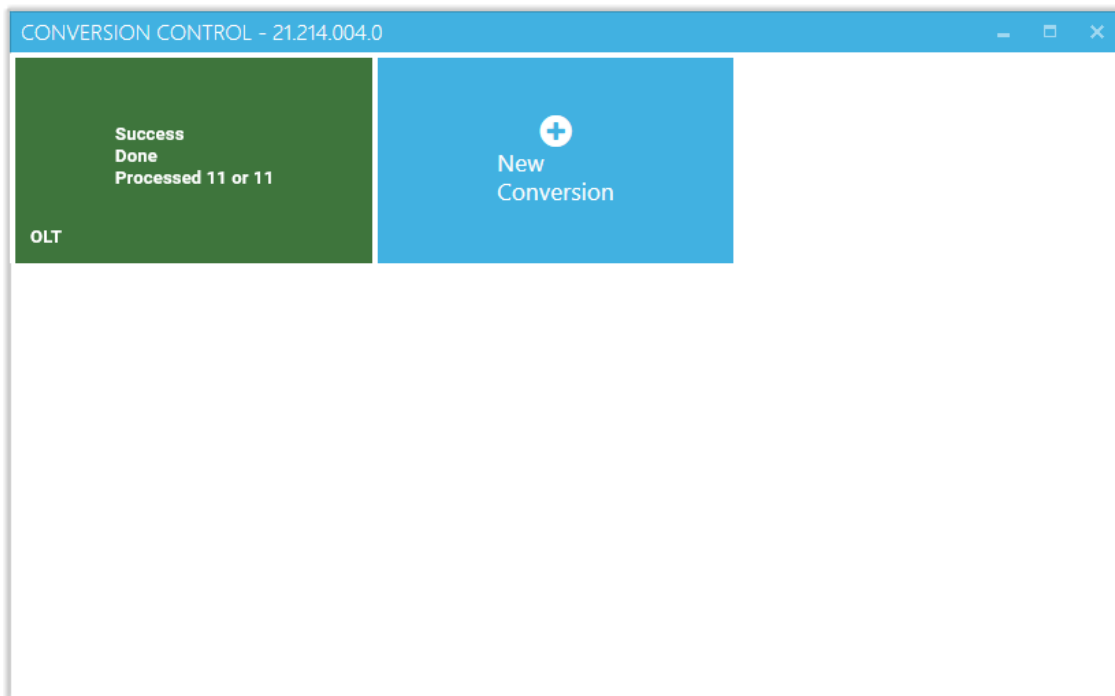


The screenshot shows the same window as in Step 9. The "Program" dropdown menu is open, showing a list of options: ATX, Crosslink, Drake, OLT, ProSeries, TaxWise, TaxAct, and Taxprogram To Web. The "Path To Program Data" field is empty. To the right of this field is an "Open path" button with a folder icon. At the bottom left, there is a blue "Start" button with a right-pointing arrow.

The conversion utility will begin processing returns.



“**Done**” in the green box shown below indicates the conversion is complete. Click the **X** in the upper righthand corner of the utility to close it.



In ProWeb, after entering an SSN to start a new return, if that SSN is included in the conversion data you will be asked if you would like to start the return using prior year data. Select **Yes**.

Some returns or portions of some returns may not be convertible. In those situations, you will need to manually enter the data in the current year return within TaxSlayer Pro.

Revised: November 14, 2023