Data Conversion Instructions for TaxSlayer Pro desktop

For TaxSlayer ProWeb Product Conversions, see instructions in your Account Hub

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

The table below indicates what software packages can be converted. Please note, this utility can only convert data completed in a 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 and business returns can be converted for use in TaxSlayer Pro.

STEP 1: Ensure that all returns needing to be converted have been consolidated into an operational 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	Y
CrossLink	Y	N
Drake	Y	Y
Lacerte	N	N
OLT	Y	N
ProSeries	Y	Y
TaxAct	Y	N
TaxWise	Y	Y

STEP 2: Open the TaxSlayer Pro desktop program. You can log in with the Admin username, or you can log in with your own username as long as your security role is either Superuser or Unlimited.

Once logged in to either the Admin Menu or the Quick Menu, select **Utilities.**
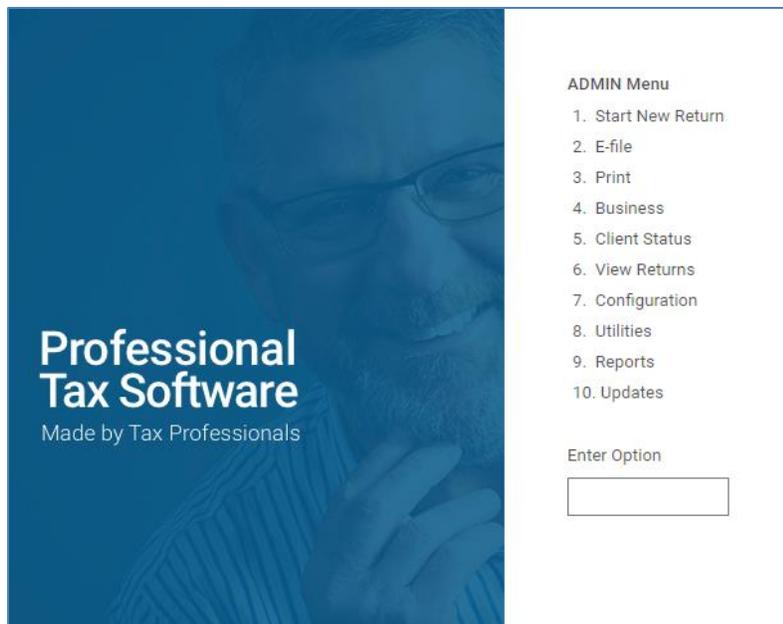
STEP 3: Select **Run Conversion Program**. At any point in the installation process, if you're told you need to update .NET framework, click **Yes** to doing so.

![TaxSlayer Pro logo]

CONVERSION CONTROL - 21.214.004.0

➕
New
Conversion
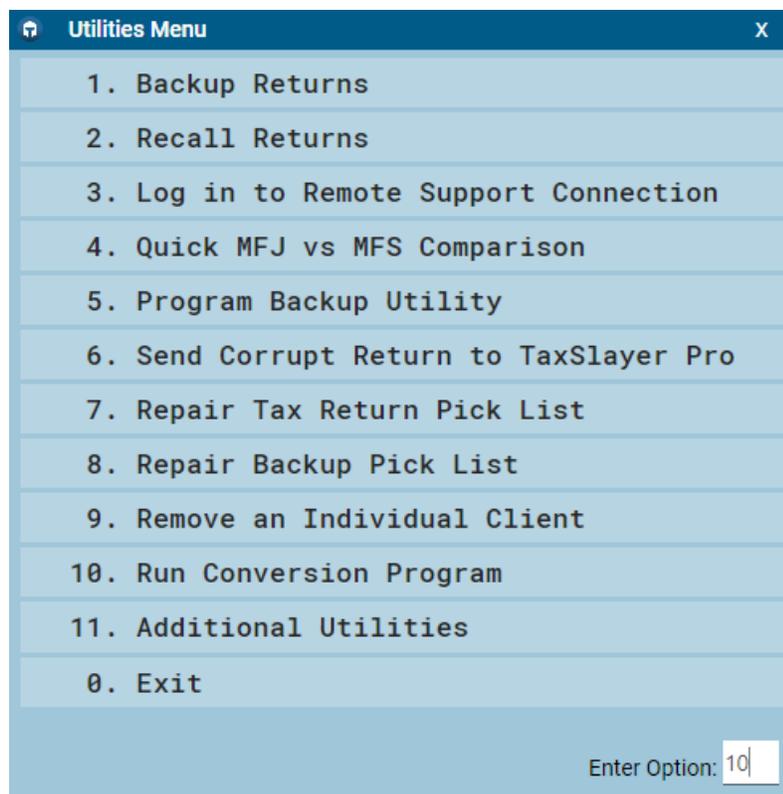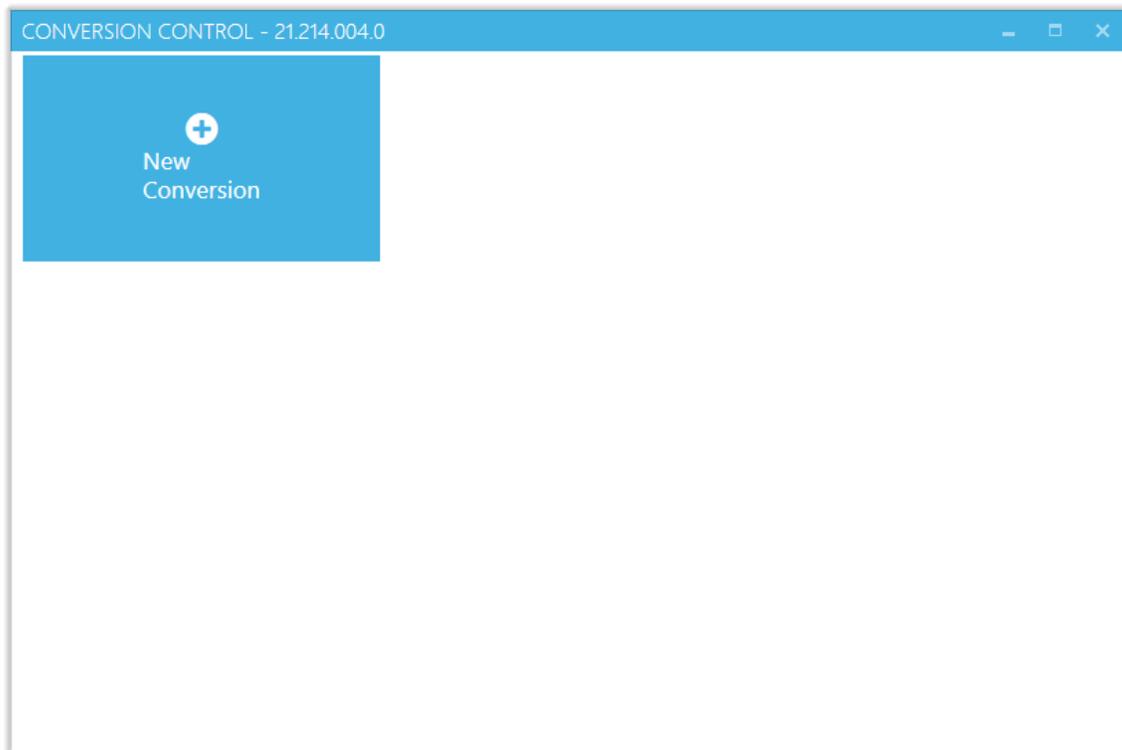
Which Product is this Conversion for ?

○ Desktop

○ ProWeb

submit   cancel

STEP 6: 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**. If the path is different on your PC, click **Open Path** and locate the path on your PC.

Click **Start** to begin the conversion.

CONVERSION CONTROL - 21.214.004.0   _ □ ✕

◀ **Back**

Program   [▼]

Path To Program Data   [   ]   📁 **Open path**

- ATX
- Crosslink
- Drake
- OLT
- ProSeries
- TaxWise
- TaxAct
- Taxprogram To Web

▶ **Start**
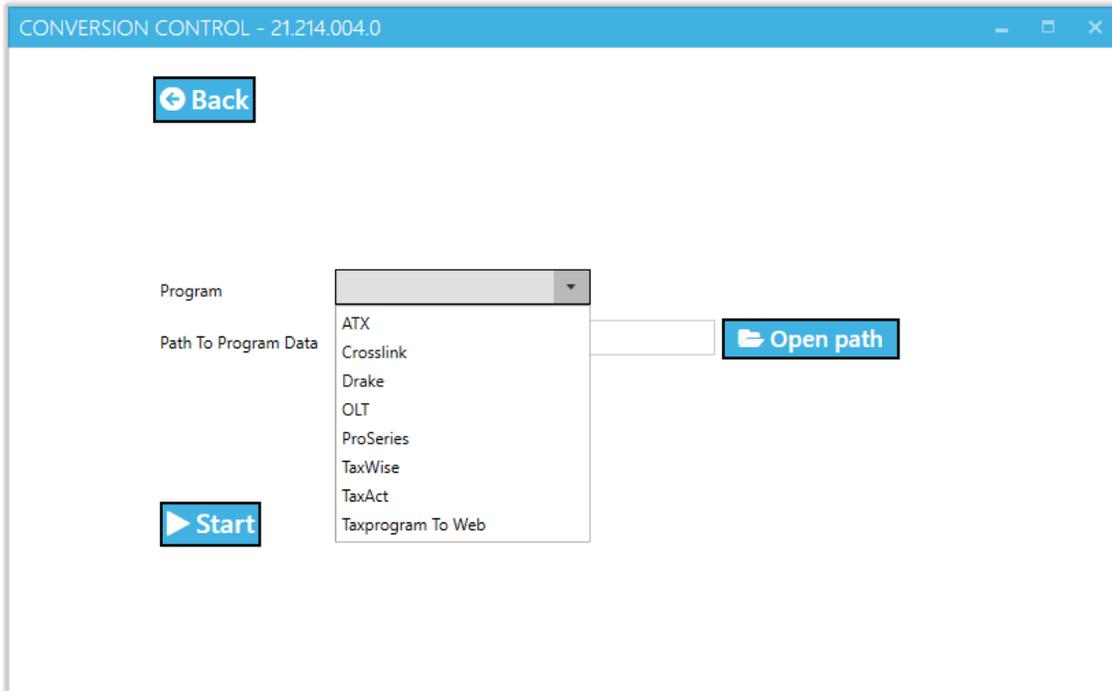
The conversion utility will begin processing returns.

CONVERSION CONTROL - 21.214.004.0   _ □ ✕

Running
Getting Tax Returns
Processed 11 of 11

OLT

⊕
New
Conversion

![TaxSlayer PRO logo]
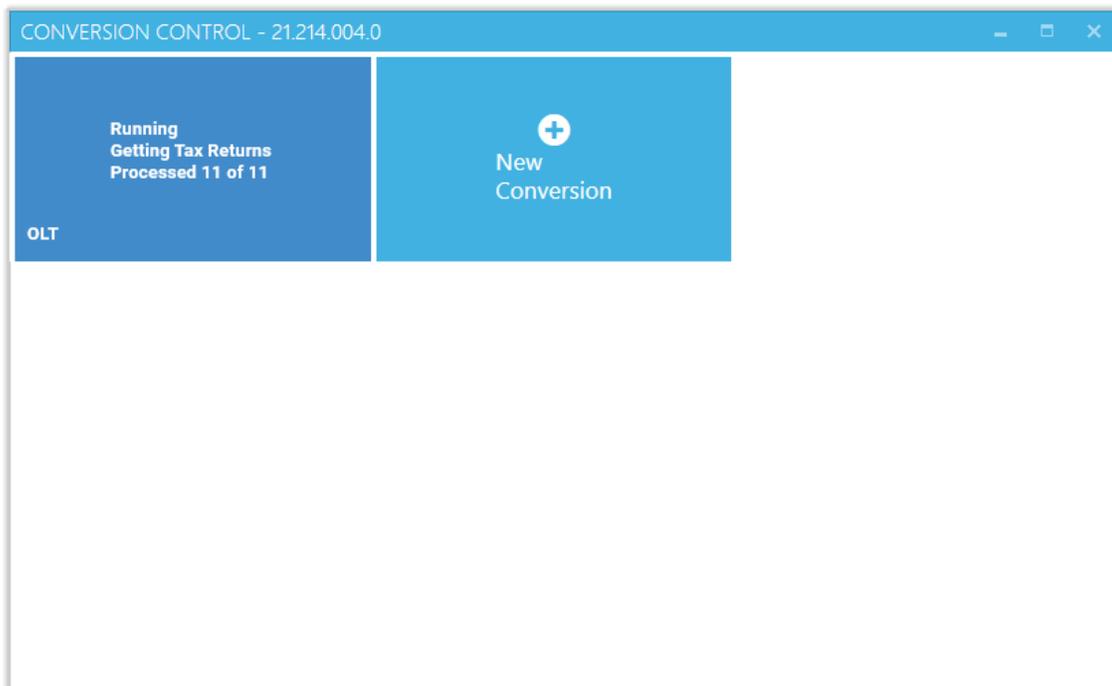
The length of time it takes to complete the conversion will vary depending on the speed of your computer, the number of returns to convert, and your current software package.

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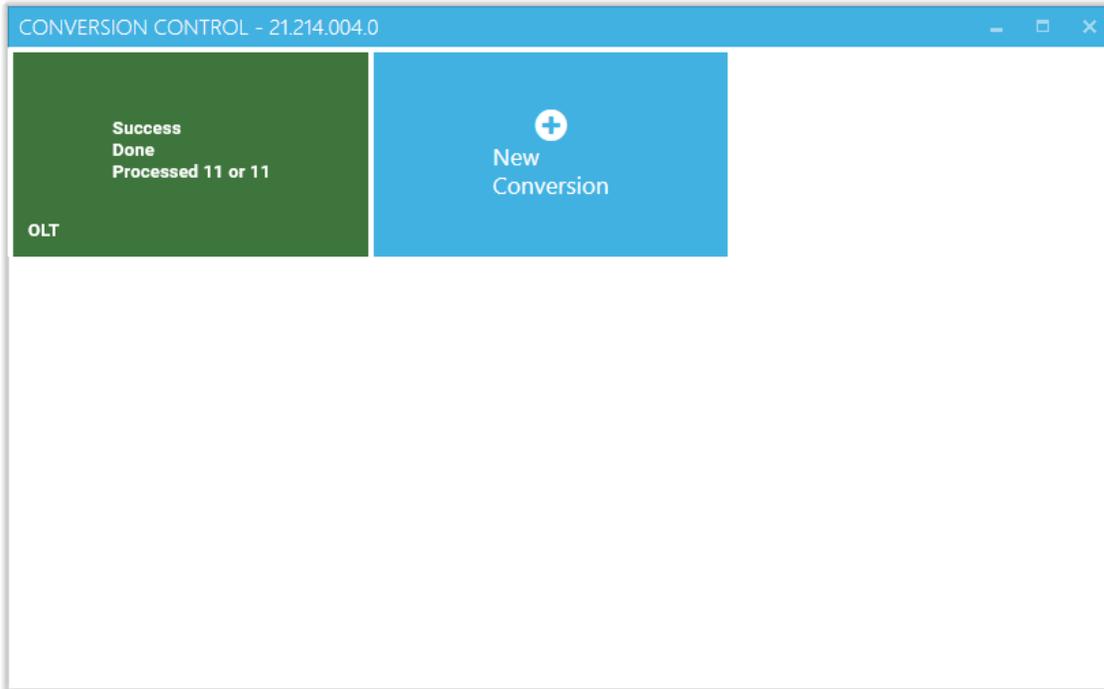
In TaxSlayer Pro, after entering an SSN/EIN to start a new return, if that SSN/EIN is included in the conversion data you will be asked if you would like to start the return using prior year data. Select **Yes**.

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 20, 2023