Preparing Select Clients in TaxWorks for Conversion

Follow the steps below to prepare a copy of select clients in TaxWorks to send for conversion.

1. Open 2011 TaxWorks and click the "clients" button on top



2. Select the desired clients and click the "Copy" button on top

🌃 Ta	TaxWorks 2011 Client Selection - Individual							
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EF (Ctr New (🏂 👷 🛛	view Copy Delete	Move EF Status PUF	Ps Download Upload Profo	rma Scheduler		
Da	Data Path Name: My Tax Files Folder: Samples Log to Mgmt							
Fir	Find By Client ID							
104	0 1041	1065 1120	1120S 706	709 990 5500	1			
	Client No	Client ID 🗠	TP Last Name	TP First Name	SP First Name	TP SSN SP SSN		
	00002	2Pg1	GenInfo	TP	SP	XXX-XX-1111 XXX-XX		
	00003	3Pg1	GenInfo	TP	SP	XXX-XX-1112		
	00001	A2L10401	Lname	fname	aspouse	XXX-XX-9249 XXX-XX		
	00021	I1099K	card	merchant		XXX-XX-1121		
	00010	140A	canada	Ahhh		XXX-XX-1119		
	00024	IAMap	Auto	Марр		XXX-XX-1124		
	00020	lCha	name	charitable		XXX-XX-1120		
	00026	ICO	Over	Carry	Ben	XXX-XX-1126		
	00029	idepr	Data	Depr	sp	XXX-XX-1129		
	00009	IEZ	eddie	ez		XXX-XX-1118		
				1		Þ		
Tota	Total Clients: 24 Sorted by: Client ID							

3. Choose "<Add Folder>"

To Path Name:	My Tax Files	•	Folder:	< Add Folder >
				< Add Folder >
			,	Default

4. Type in a description for the new folder. This folder is where the clients will be copied to and will appear at C:\TaxPrep\TY11\Data

lew Folder Name:	UT Conv Set 1
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to Mana	gement Database
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to Mana	Igement Database
clude clients in this fo	older when logging
to Mana	gement Database

5. After clicking "OK" the dialogue displays the folder. Click "OK" again to begin the copy process.

Copy Clients	-					
To Path Name:	My Tax Files	•	Folder: UTConvSet1			
			<u></u> K		Cancel	

6. Navigate to C:\TaxPrep\TY11\Data\ and the UTConvSet1. This is the folder that contains the copy your clients.

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File Edit View Iools Help	Share with The Burn New folder			8= • 6	0
Local Disk (C:) DVD RW Drive (D:) U040189 (\pssg\shared\home Support (\PSSG\UserServices) SupApp (\PSSG\UserServices) conversions (\pssg\devsuppor https://theshare.thomsonreute Network	Name AutoA649AAR03GYT_011.CLX canaQRS3YWXDKBHK_011.CLX card/MFG9P5A6BFPL_011.CLX Lnam0T03DOM/G61WU_011.CLX name3G7HRI42LNDV_011.CLX	Date modified 04/29/13 10:59 AM 04/29/13 10:59 AM 04/29/13 10:59 AM 04/29/13 10:59 AM 04/29/13 10:59 AM	Type CLX File CLX File CLX File CLX File CLX File	Size 27 KB 14 KB 31 KB 77 KB 26 KB	
5 items 5 items				🐙 Computer	al

7. Zip up the UTConvSet1 folder with the copy of your client data and note the location of the ZIP file.

Important! When you zip up folders, do not assign a password to the ZIP file or encrypt the ZIP file. Secure Data Exchange automatically encrypts all data. If you add a password to the ZIP file, there will be a delay in processing your data. For information about how to ZIP files and folders, refer to the Microsoft KB article 306531 at http://support.microsoft.com/kb/306531.