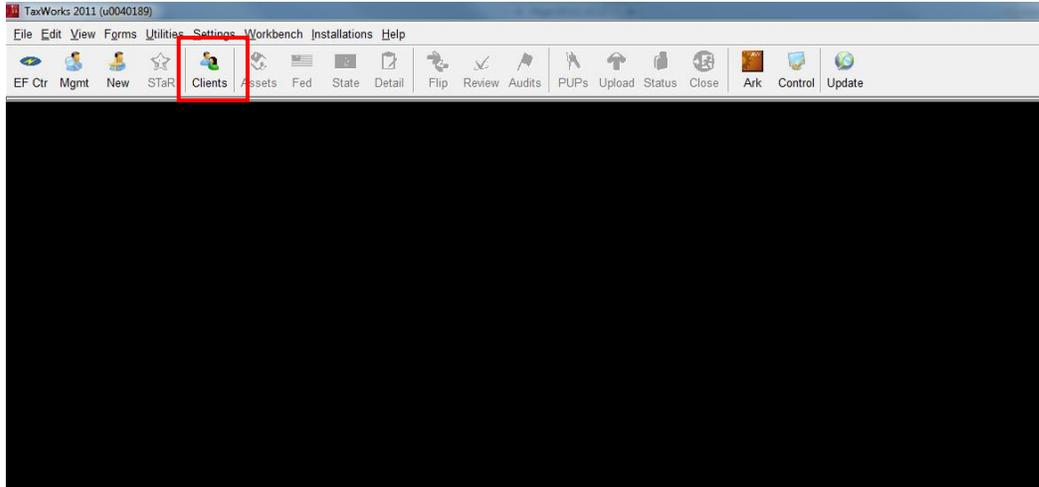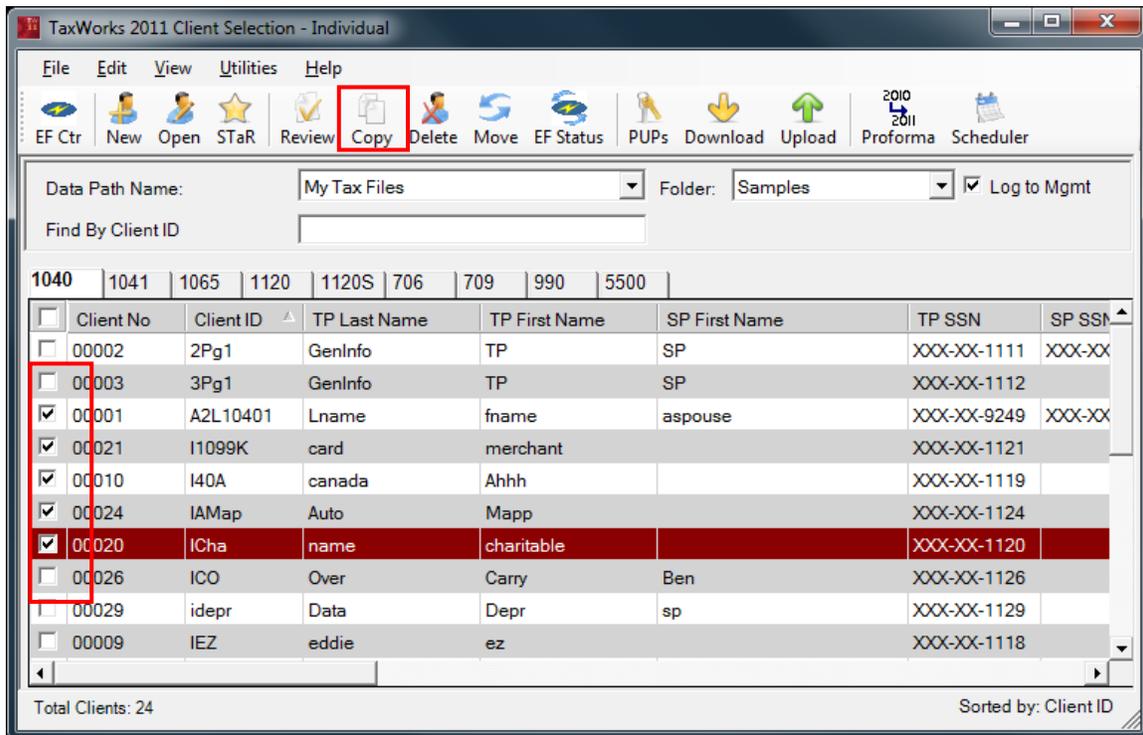# Preparing Select Clients in TaxWorks for Conversion

Follow the steps below to prepare a copy of select clients in TaxWorks to send for conversion.
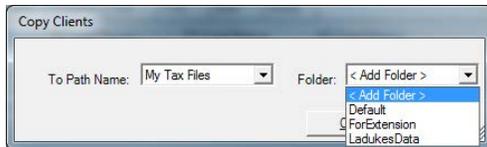
1. Open 2011 TaxWorks and click the "clients" button on top

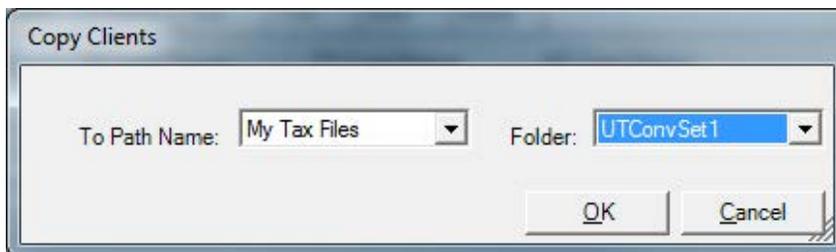2. Select the desired clients and click the "Copy" button on top
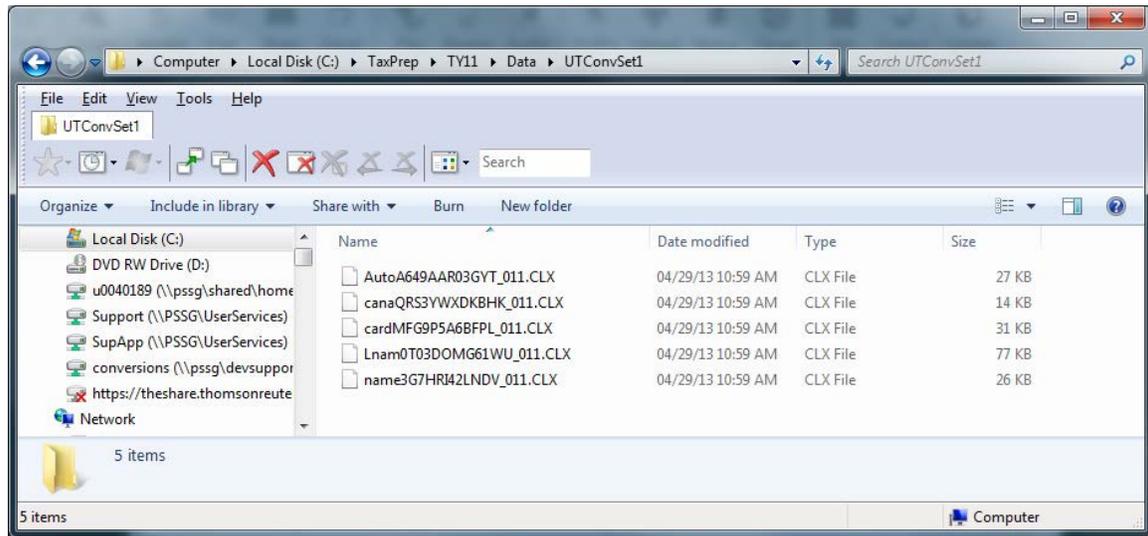

3. Choose "<Add Folder>"

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

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

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

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.