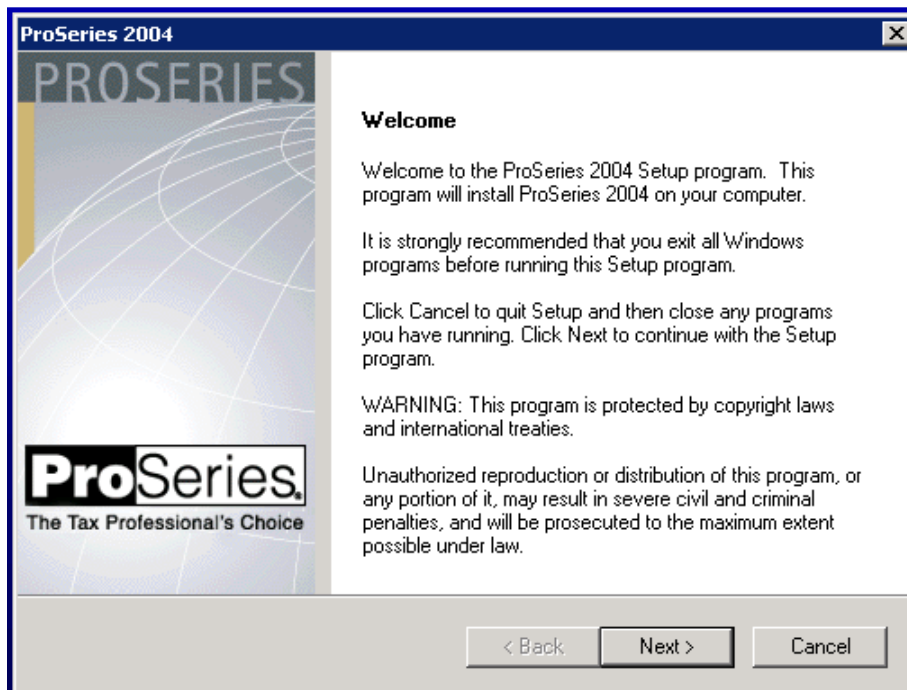# Installing ProSeries 2004

The following instructions will walk you through Installing and Launching ProSeries 2004. Before you begin your installation, it is very important to make note of the following key points to ensure your installation goes smoothly:

- You **must** install and launch 2004 ProSeries as the **Administrator**. When running installation or launching ProSeries, right click on the installation file (w_pro_cd_core_2004.04a.exe), or the ProSeries shortcut, and then select **Run as Administrator**.
- If installing ProSeries as a Network version, a special "customer number" and "code" will be required. Please do not attempt to use your personal customer number. (Step 3(c)ii, Page 4)
- Email Alerts for 2004 products are no longer supported. Please select "**Decline**" on Step 6, page 10.
- At the end of the installation, when the **Setup Complete!** message is presented, you **must** uncheck the **Launch ProSeries** check box. This ensures you have the option to launch ProSeries as the **Administrator** which will ensure the successful installation of the update that unlocks ProSeries. (Step 9, Page 11)
- On the **Customer Information** screen presented when first launching ProSeries after the installation, you may enter any value for the customer number and zip code. (Step 3, Page 13)
- ProSeries will generate a error when it attempts to license following installation – Step 4, Page 13. This error is expected as we are retiring the 2003-2005 licensing servers. Once the update is successfully retrieved, ProSeries will be unlocked for unlimited use.

Please carefully follow the steps below to install your 2004 ProSeries software:

1) Double click **on w_pro_cd_core_2004.04a.exe** and wait for the installer to launch. If your computer's operating system is Windows 7 or Windows Vista, a User Account Control window will appear and you must select **YES** or **Allow** to proceed with the installation.Click **Next** to start.
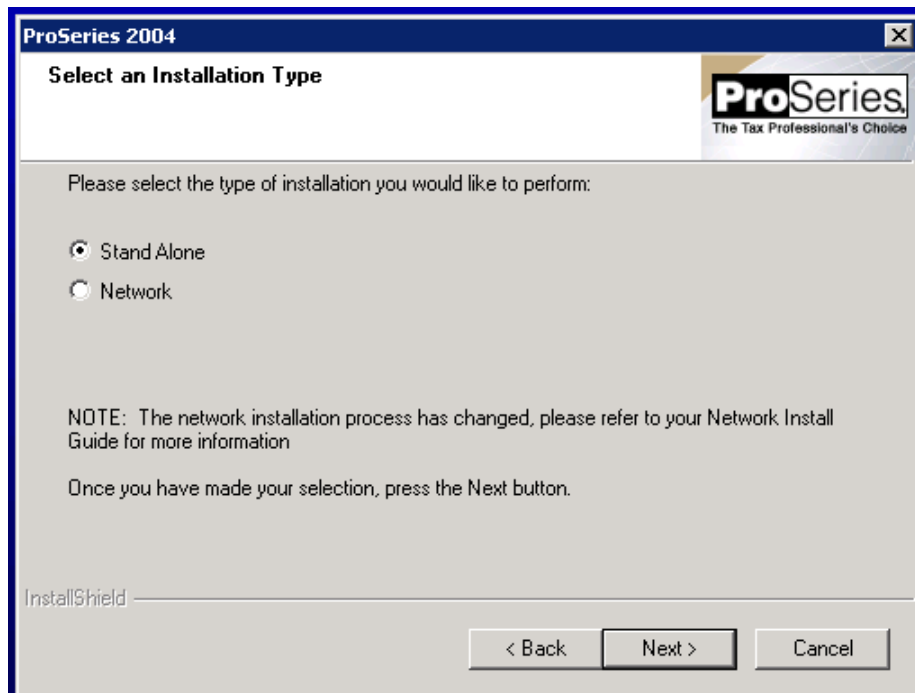
2) Read and accept the License Agreement to continue the install. Click **Next** :
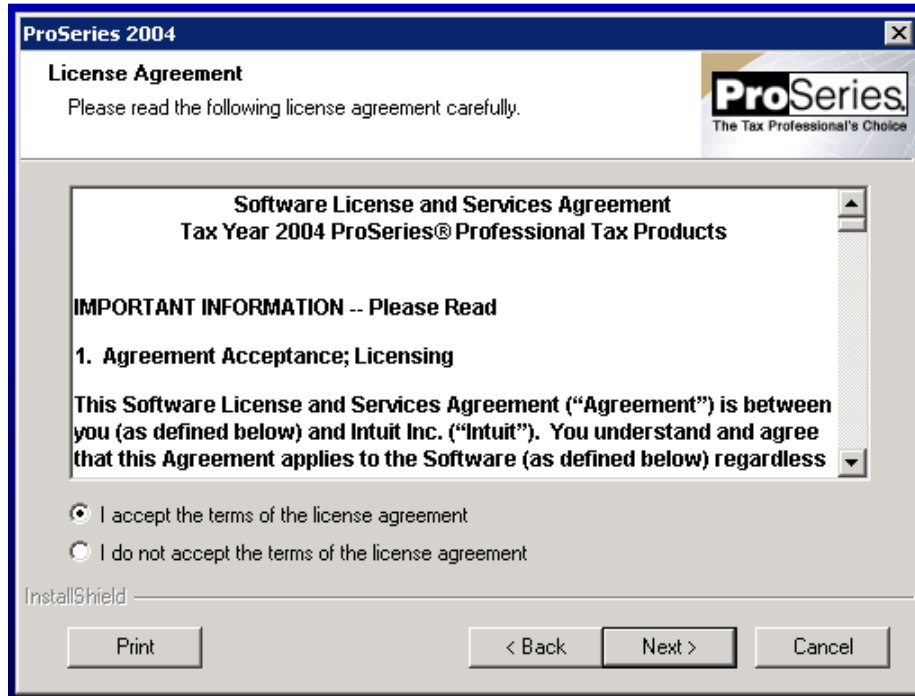

3) <u>**Choose Stand Alone or Network:**</u>
   a. Choose **Stand Alone** and click **Next**.   Then, skip to **Step 4**:

b. **Network Only:** If you are installing ProSeries to a network, choose **Network. Important!** Before proceeding further, we recommend creating a shared network folder called "**ProSeries**" that all users can access on the network when running ProSeries. "ProSeries" folder will be the destination of the ProSeries install on the network. Click **Next**:
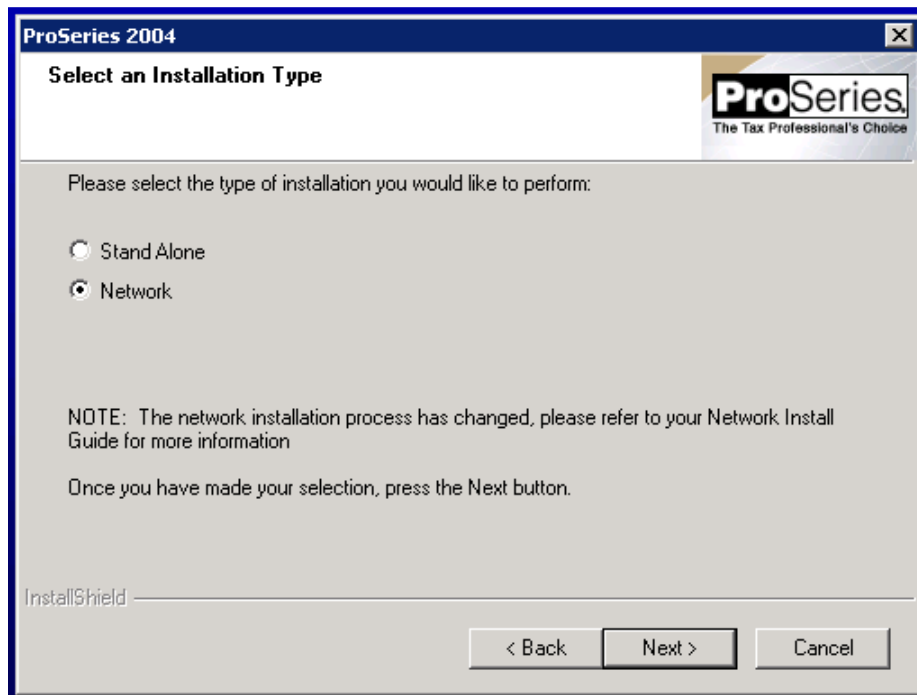
c. **Network Only:** Choose "**Admin Workstation**." For User Workstation instrucitons, skip to step 3d.
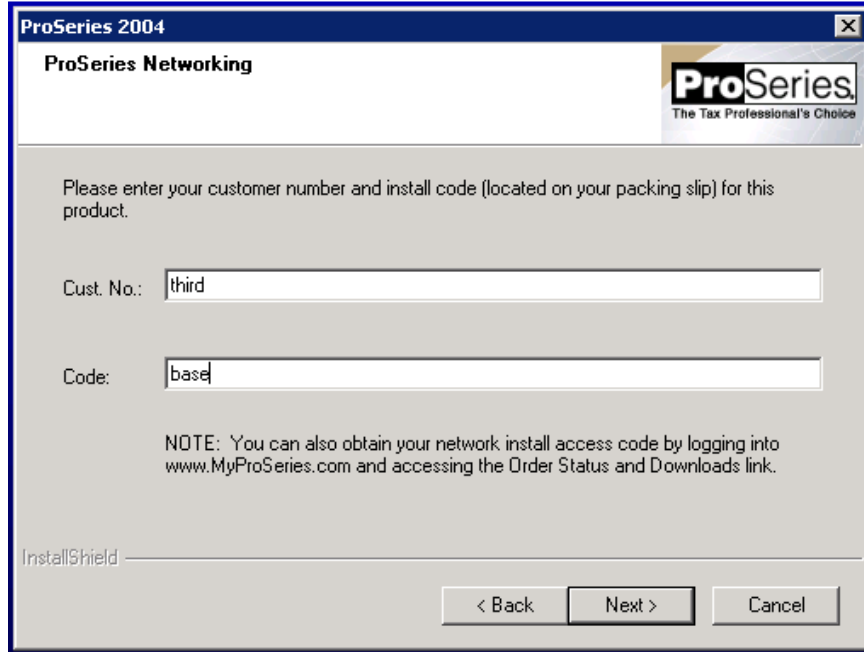   i. Choose **"Admin Workstation"** and click "Next":
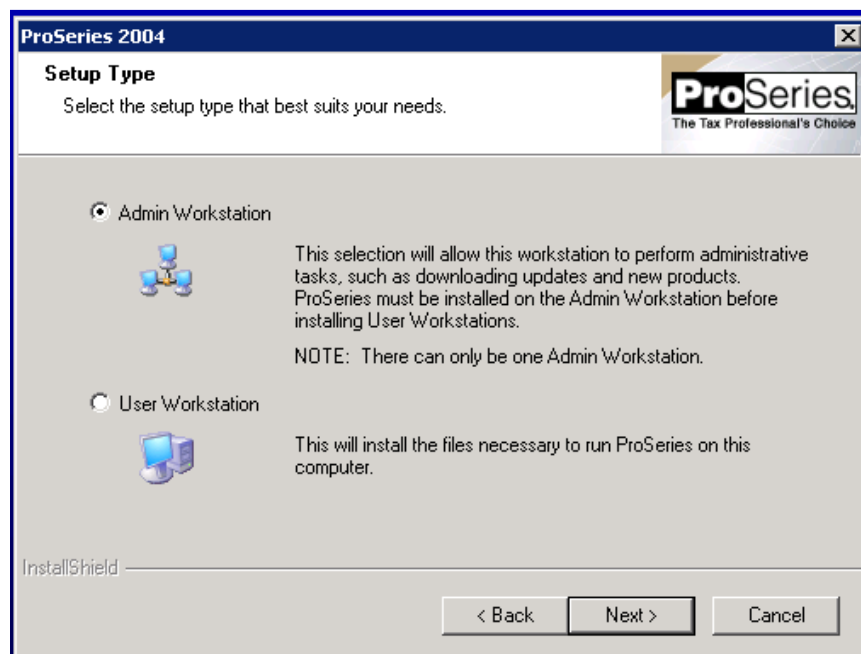
ii.   **Network Only:** ProSeries **Network install code:**
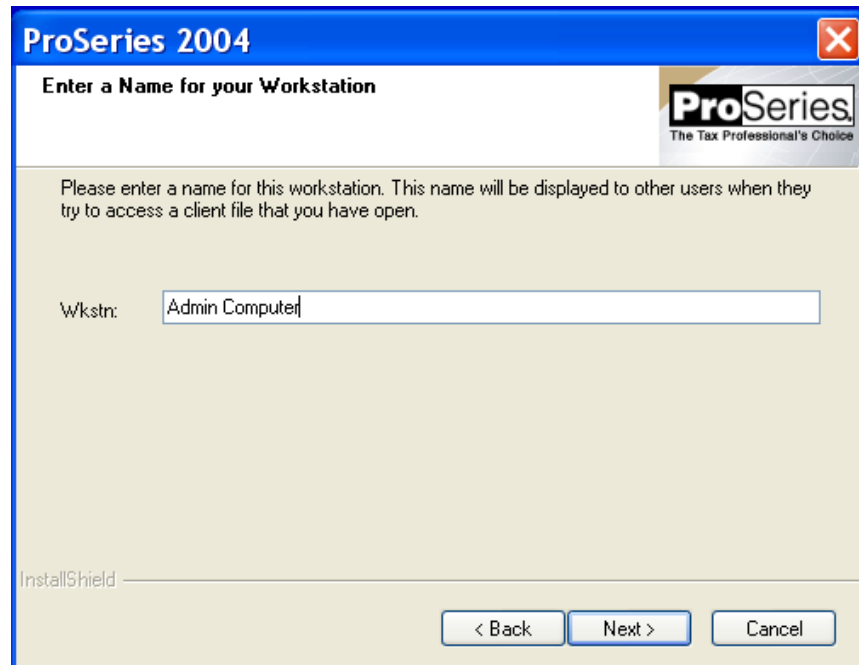
Enter **Cust. No.**:   **third**

Enter **Code**:   **base**

Click **Next** to continue:

iii.   **Network Only:** Enter a name for for the workstation (Wkstn). This can be any name you desire, as long as each workstation is assigned a unique name. Click **Next**:
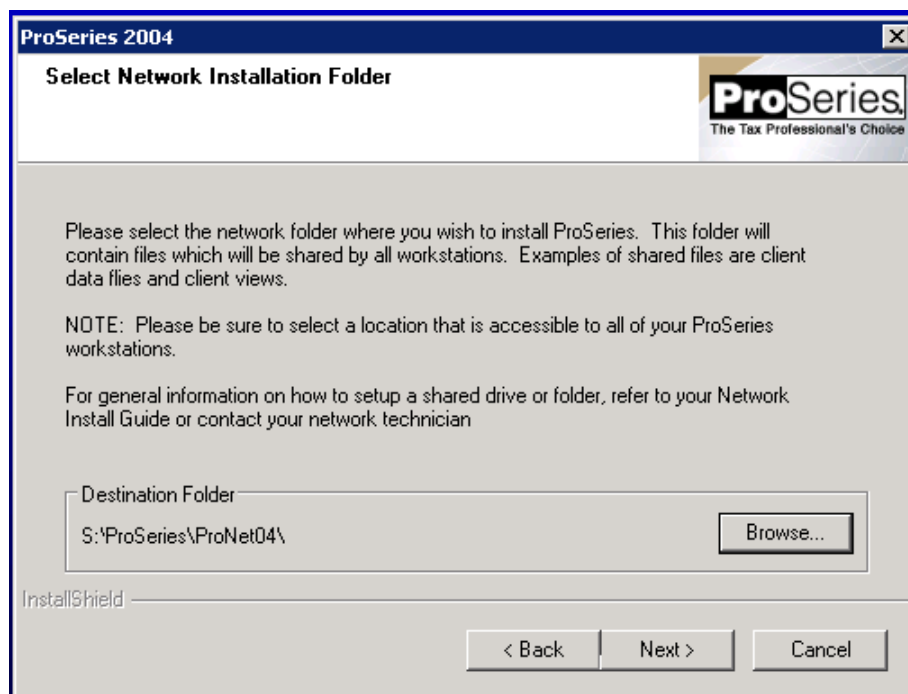
iv.   **Network Only, <u>Local</u> Installation folder:** Click the "**Browse…**" button to specifiy a different *Local installation* location. Otherwise, click **Next** to install to the default destination folder **C:\ProWin04.** Then, click **Next**:
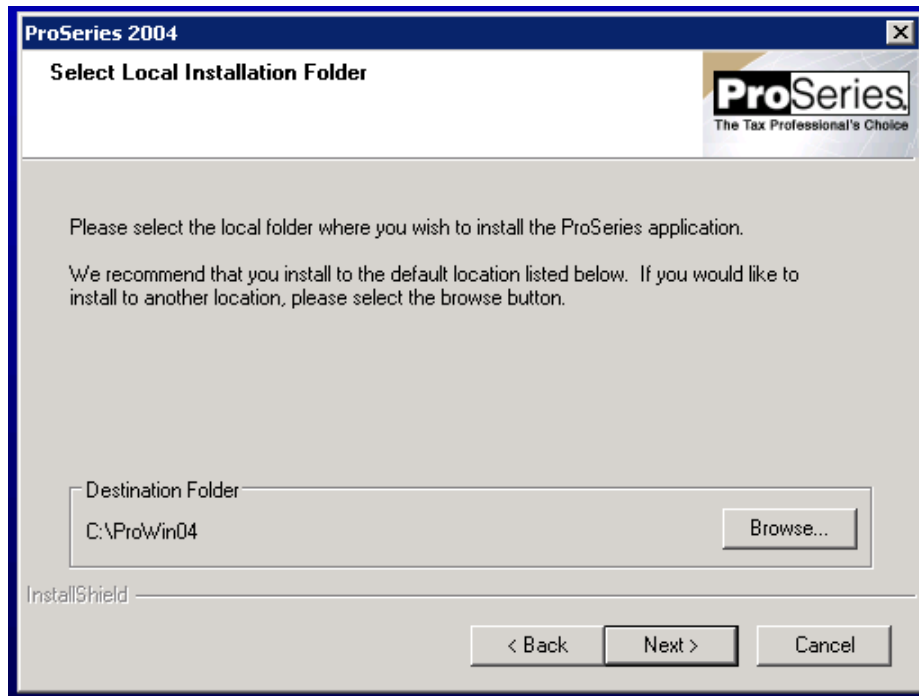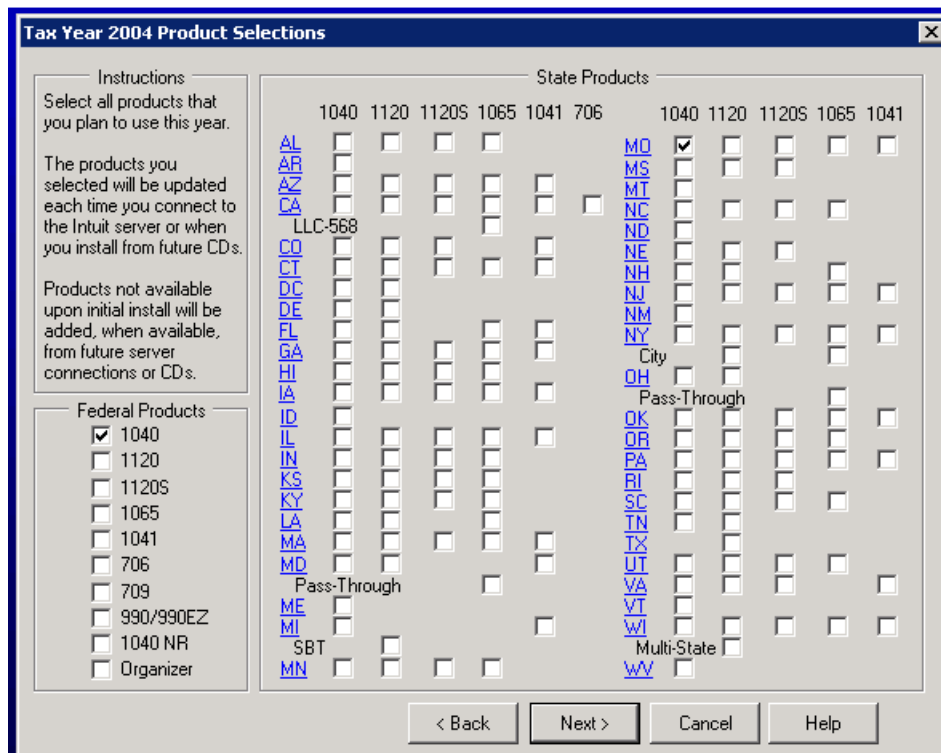

v.   **Network Only, <u>Network</u> Installation folder:** Click the "**Browse…**" button to specifiy a different *Network installation* location. **Important!** Network users should install to S:**\ProSeries\ProWin04** where "S" represents your network drive containing the **ProSeries** folder. Then, click **Next** and **skip to step 5** to continue with the install:

4) Click the "**Browse…**" button to install to a different location. Otherwise, click **Next** to install to the default destination folder **C:\ProWin04.** Then, click **Next**:

ProSeries 2004

Select Destination Directory

ProSeries.
The Tax Professional's Choice

Please enter the destination path.

To accept the default, press Next.

Destination Folder

C:\ProWin04

Browse...

InstallShield

< Back   Next >   Cancel
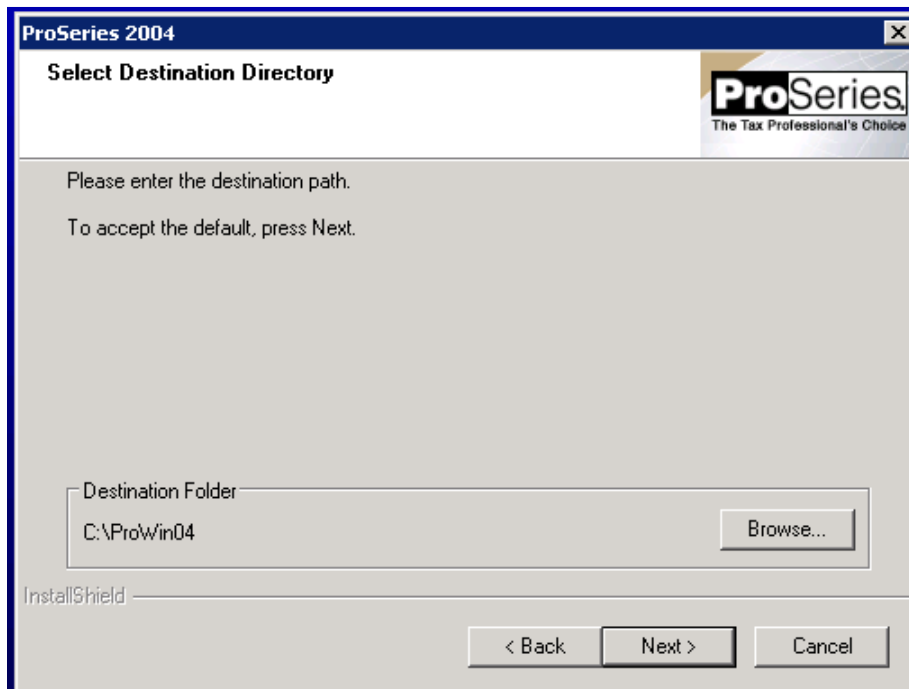
5) **Choose the products** you want to install. You can always choose additional products to install later using the **Update Installed Products/Download New Products** menu item under the **Help** menu in ProSeries. Click **Next** to continue:

Tax Year 2004 Product Selections

Instructions

Select all products that you plan to use this year.

The products you selected will be updated each time you connect to the Intuit server or when you install from future CDs.

Products not available upon initial install will be added, when available, from future server connections or CDs.

Federal Products
☑ 1040
☐ 1120
☐ 1120S
☐ 1065
☐ 1041
☐ 706
☐ 709
☐ 990/990EZ
☐ 1040 NR
☐ Organizer

State Products

1040 1120 1120S 1065 1041 706   1040 1120 1120S 1065 1041

AL   MO ☑
AR   MS
AZ   MT
CA   NC
LLC-568   ND
CO   NE
CT   NH
DC   NJ
DE   NM
FL   NY
GA   City
HI   OH
IA   Pass-Through
ID   OK
IL   OR
IN   PA
KS   RI
KY   SC
LA   TN
MA   TX
MD   UT
Pass-Through   VA
ME   VT
MI   WI
SBT   Multi-State ☐
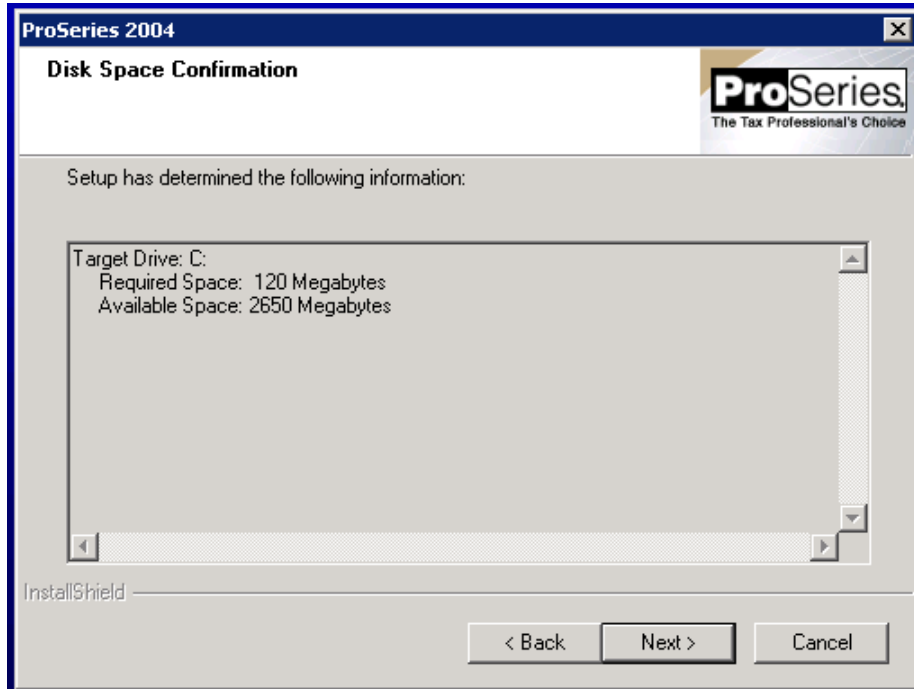MN   WV

< Back   Next >   Cancel   Help

6

6) If prompted with an Email Alert Registration dialog, select **Decline.** Then click **Next**. (Note: 2004 Email Alerts are no longer supported.)
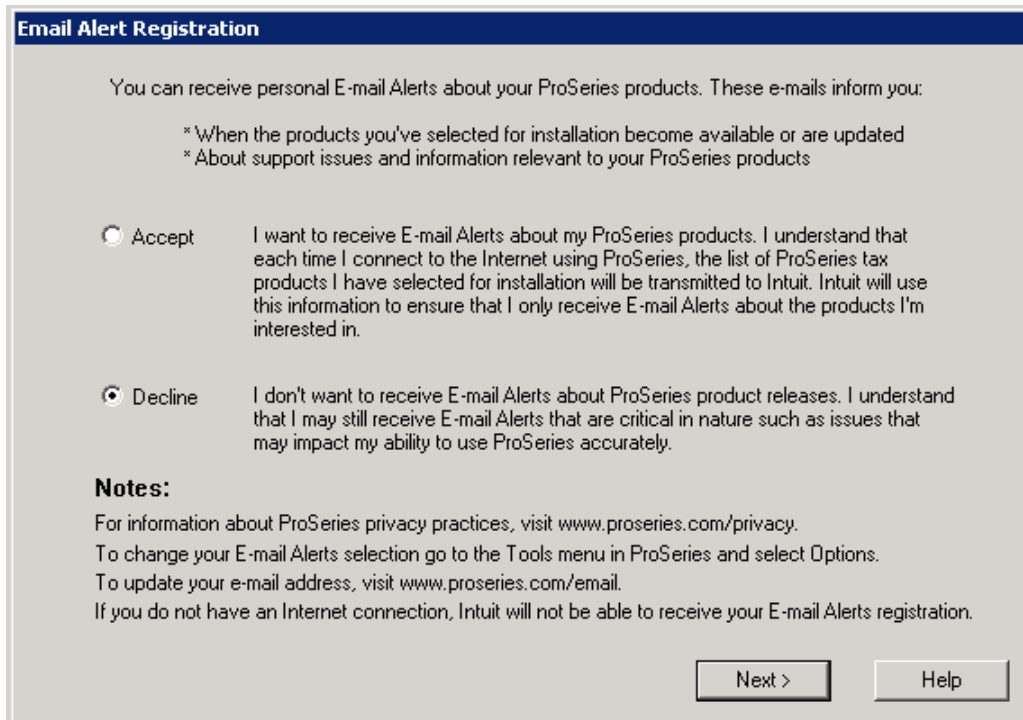

7) Click **Close** when you see this dialog
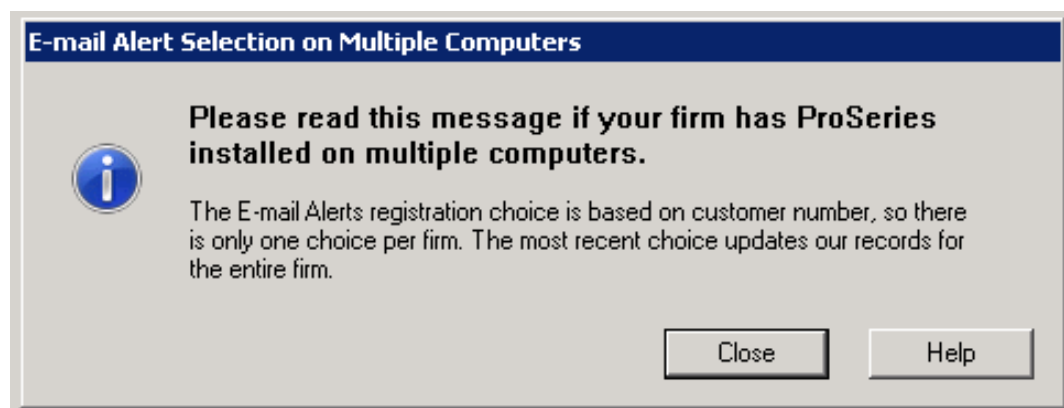
8) The ProSeries installation will now confirm you have enough hard drive space for the installation. Click **Next** to start the install:

9) Continue through the installation screens until the **Setup Complete** screen is displayed. *IMPORTANT!* Do not launch ProSeries from the "Setup Complete" screen. **Uncheck** the **Launch ProSeries** box and click **Finish** to exit the installation.
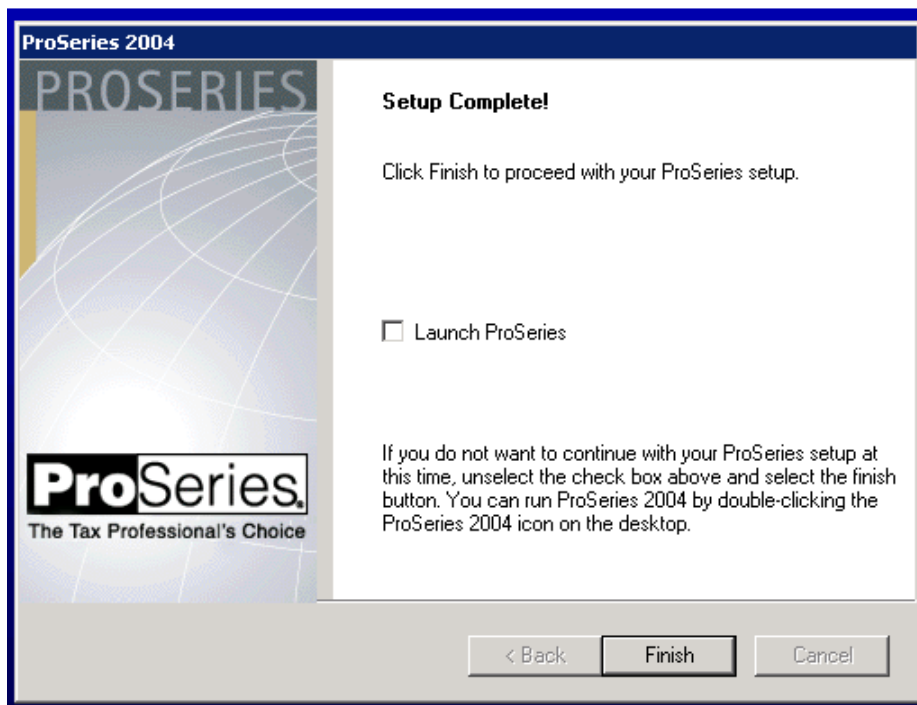
__Continue below for instructions on launching 2004 ProSeries__

Launching ProSeries 2004 the first time

1) To launch ProSeries double click on the "ProSeries 2004" desktop icon. **Important!** If your operating system is **Windows Vista** or **Windows 7**, **right click** the ProSeries shortcut icon and select **Run as Administrator to launch 2004 ProSeries**. At the end of these instructions, we will provide you with steps to configure ProSeries to launch as Administrator each time you open ProSeries.

2) The ProSeries Connected Customer screen will launch. Click **Next** to continue:

3) On the **Customer Information** window is displayed, enter any 10 digits greater than zero for a customer number, and a zip code. You actual customer number will no longer be required. Click **Next** to continue:

4) The program will attempt to license but will fail and an error will be presented. **This is expected. Ignore the error message** and click **OK** to continue:

5) You should now see this Progress screen. Ignore the two red X's. Click **Next** to continue:
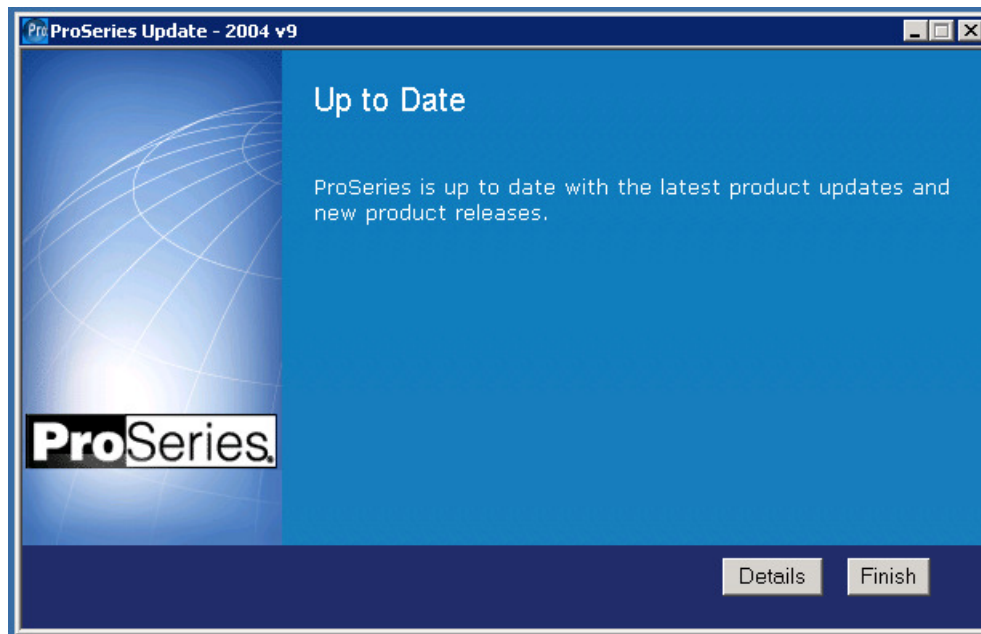

6) You can leave the email field **empty or blank** and click **Next**:

7) Click **Continue** and ProSeries will download required updates:

8) When ProSeries reports **Up to Date**, click **Finish** to complete the update:

Congratulations!

Your 2004 ProSeries has now been successfully installed and successfully updated.

ProSeries Firm Information

After installing 2004 ProSeries, if you wish to have ProSeries display your **Firm Information** it will be necessary to manually enter your firm and address information in the ProSeries "Options" window. 2004 ProSeries will no longer download your firm information from the licensing server.

1. Go to **Tools**
2. Select **Options**
3. On the left navigation bar, select **Firm/Preparer Info**
4. On the right side of your screen, select the **Edit** button.
5. The "**Edit Existing Firm Information**" will be displayed where you may enter your firm and address.
6. Select **OK** to save your firm information.

## Adjusting the 2004 ProSeries Shortcut to "Run As Administrator" every time

To ensure successful operation of 2004 ProSeries, we recommend that Windows 7 and Windows Vista users make a simple change to the ProSeries shortcut properties to allow ProSeries to launch as administrator each time it is opened.

1. Locate the 2004 ProSeries icon on the desktop, or in the Windows program menu.
2. **Right click** on the 2004 ProSeries icon, then select **Properties**
3. In the Properties window, click the **Compatibility** tab.
4. Check the box to "**Run this Program as an Administrator**"
5. Click **OK** to save the change and close the property window.
6. ProSeries will now be launched using the **Run as Administrator** each time it is opened through the shortcut.

Network Installations Only- Set up of Additional Workstations to Run 2004 ProSeries:

To setup additional ProSeries workstations on the network, please follow the instructions below:

1. On each workstation you wish to setup to run 2004 ProSeries, in Windows Explorer go to the network drive, and locate the **ProSeries** folder (or other location) where 2004 ProSeries was installed.
2. In the **ProSeries** folder, open the **ProNet04** folder, and then open the **Wkstn** folder.
3. Double click the **Setup.exe** file to begin the workstation installation.
4. When prompted to enter the Name of the Workstation, please ensure you assign a unique name to each computer / workstation. Click **Next**.
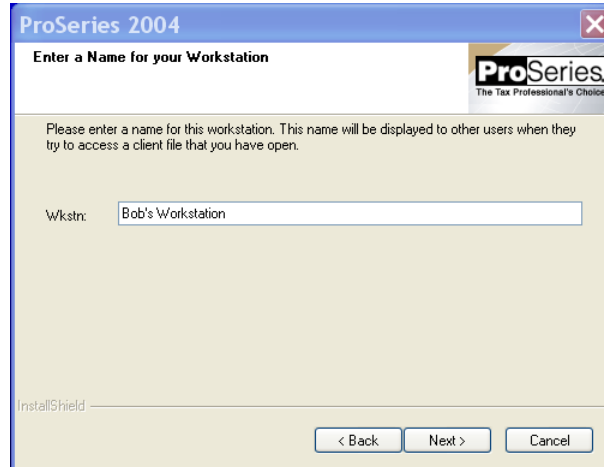
5. You will be prompted for the destination of the local workstation install. We recommend accepting the default location.
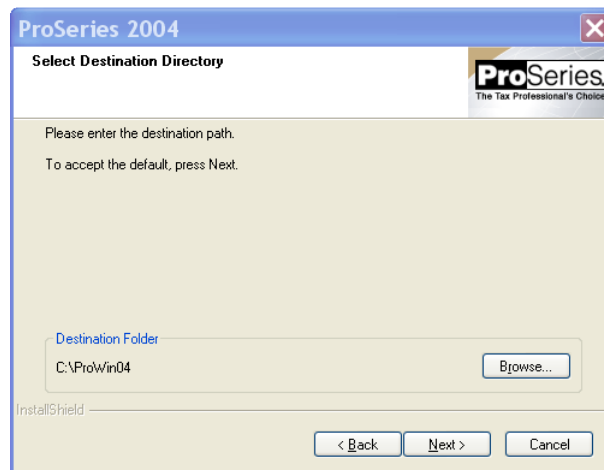
6. Continue though the setup and when complete, click **Finish**.
7. Follow the instructions in the section immediately above to setup the 2004 ProSeries shortcut to **Run as Administrator** each time you launch.
8. The workstation should now be setup to run 2004 ProSeries. Repeat these instructions on each workstation that will operate 2004 ProSeries.