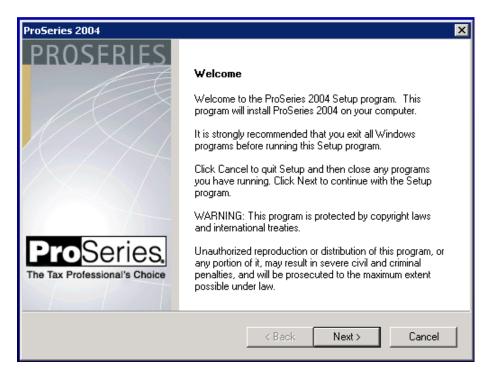
Installing ProSeries 2004

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 <u>must</u> 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 <u>must</u> 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:

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.

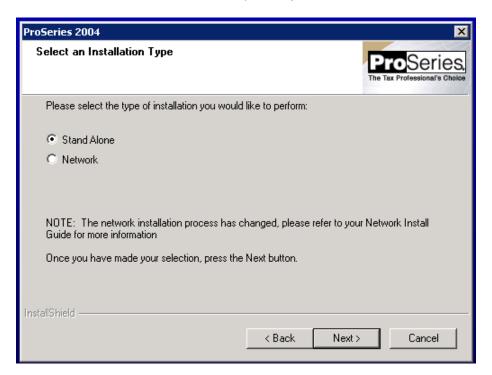


2) Read and accept the License Agreement to continue the install. Click Next :

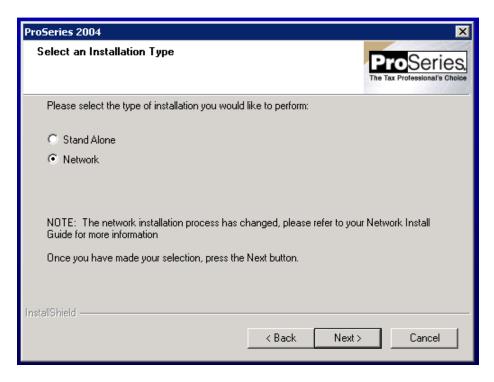
ProSeries 2004	×
License Agreement Please read the following license agreement carefully. The Tax Profession	ries, al's Choice
Software License and Services Agreement Tax Year 2004 ProSeries® Professional Tax Products	-
IMPORTANT INFORMATION Please Read	
1. Agreement Acceptance; Licensing	
This Software License and Services Agreement ("Agreement") is between you (as defined below) and Intuit Inc. ("Intuit"). You understand and agree that this Agreement applies to the Software (as defined below) regardless	-
 I accept the terms of the license agreement 	
C I do not accept the terms of the license agreement	
InstallShield	
Print <back next=""> Cano</back>	el

3) Choose Stand Alone or Network:

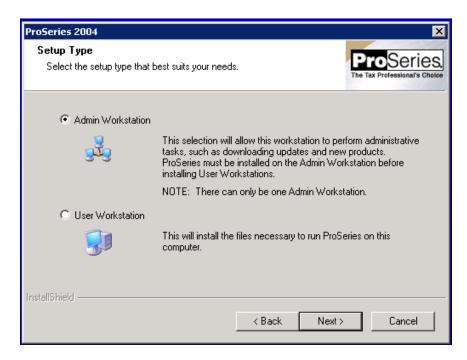
a. Choose Stand Alone and click Next. Then, skip to Step 4:



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 instructions, 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:

ProSeries 200	4	×
ProSeries N	etworking	ProSeries. The Tax Professional's Choice
Please ente product.	r your customer number and install code (located on your pac	king slip) for this
Cust. No.:	third	
Code:	base	
	NOTE: You can also obtain your network install access cod www.MyProSeries.com and accessing the Order Status and	
InstallShield —	< Back Next	> Cancel

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**:

ProSeries	s 2004 🔀
Enter a Nam	he for your Workstation ProSeries The Tax Professional's Choice
	r a name for this workstation. This name will be displayed to other users when they s a client file that you have open.
Wkstn:	Admin Computer
InstallShield ——	<pre></pre>

 Network Only, <u>Local</u> Installation folder: Click the "Browse..." button to specify a different Local installation location. Otherwise, click Next to install to the default destination folder C:\ProWin04. Then, click Next:

ProSeries 2004	×
Select Local Installation Folder	ProSeries, The Tax Professional's Choice
Please select the local folder where you wish to We recommend that you install to the default lo install to another location, please select the bro	ocation listed below. If you would like to
Destination Folder C:\ProWin04	Browse
InstallShield	< Back Next > Cancel

Network Only, <u>Network</u> Installation folder: Click the "Browse..." button to specify 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:

ProSeries 2004	×
Select Network Installation Folder	ProSeries, The Tax Professional's Choice
Please select the network folder where you wish to contain files which will be shared by all workstation data flies and client views. NOTE: Please be sure to select a location that is a	ns. Examples of shared files are client
workstations.	·
For general information on how to setup a shared on Install Guide or contact your network technician	INVE OF FOIDER, TETER TO YOUR INFORMUTE
Destination Folder	
S:\ProSeries\ProNet04\	Browse
InstallShield	
	< Back Next > Cancel

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 Sel	ections										×
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 Federal Products Federal Products 1120 1120 1120 1065 1041 706 709	AR C AR C AR C AR C AR C AR C AR C AR C				e Proc						
990/990EZ 1040 NR 0rganizer	MI T SBT MN T					Mu Mu WV	lti-Stal	te 🗖			
		< Ba	ck	1	√lext>		Car	ncel	-	Help	

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

Email Alert Registra	tion
× Wł	eive personal E-mail Alerts about your ProSeries products. These e-mails inform you: tien the products you've selected for installation become available or are updated but support issues and information relevant to your ProSeries products
C Accept	I want to receive E-mail Alerts about my ProSeries products. I understand that each time I connect to the Internet using ProSeries, the list of ProSeries tax products I have selected for installation will be transmitted to Intuit. Intuit will use this information to ensure that I only receive E-mail Alerts about the products I'm interested in.
O Decline	I don't want to receive E-mail Alerts about ProSeries product releases. I understand that I may still receive E-mail Alerts that are critical in nature such as issues that may impact my ability to use ProSeries accurately.
Notes:	
For information To change you To update your	about ProSeries privacy practices, visit www.proseries.com/privacy. r E-mail Alerts selection go to the Tools menu in ProSeries and select Options. e-mail address, visit www.proseries.com/email. ave an Internet connection, Intuit will not be able to receive your E-mail Alerts registration. Next > Help

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:

ProSeries 2004	×
Disk Space Confirmation	ProSeries, The Tax Professional's Choice
Setup has determined the following information	
Target Drive: C: Required Space: 120 Megabytes Available Space: 2650 Megabytes	
InstallShield	< Back Next > Cancel

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

 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:

Customer Information		X
ProSeries The Tax Professional's Choice Connected Customer	Enter your customer number and ZIP Code. This information can be found in the upper left-hand corner of your packing slip.	
	Customer Number : 0000000009 ZIP Code : 9	
	NOTE: If your shipping address is different than your billing address, it is important that you use the ZIP Code associated with your billing address (referred to as the "SOLD TO" address on your packing slip).	
	< Back Next > Cancel	

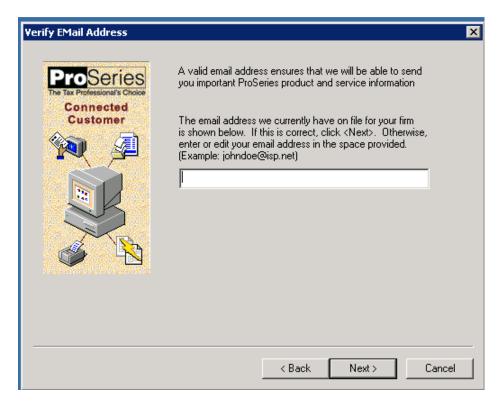
4) The program will attempt to license but will fail and an error will be presented. **This is expected. Ignore the error message** and click **OK** to continue:



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



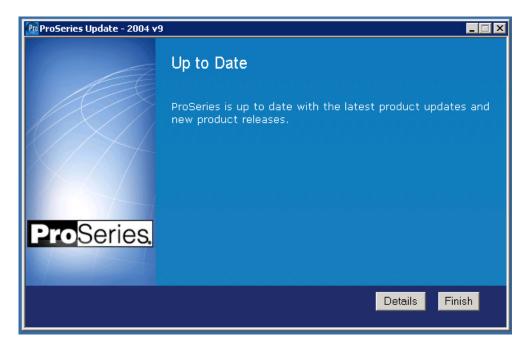
6) You can leave the email field **empty or blank** and click **Next**:



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**.

ProSeries	s 2004 🗙
Enter a Nan	ne for your Workstation ProSeries The Tax Protessional's Choice
	r a name for this workstation. This name will be displayed to other users when they s a client file that you have open.
Wkstn:	Bob's Workstation
InstallShield —	
	< Back Next > Cancel

5. You will be prompted for the destination of the local workstation install. We recommend accepting the default location.

ProSeries 2004	X
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	
	< <u>B</u> ack <u>N</u> ext > Cancel

- 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.