Installing ProSeries 2005

The following instructions will walk you through Installing and Launching ProSeries 2005. 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 2005 ProSeries as the Administrator. When running installation or launching
 ProSeries, right click on the installation file (w_pro_cd_core_2005.04.exe), or the ProSeries shortcut, and then
 select Run as Administrator.
- Email alerts for 2005 products are no longer supported. (Step 9, Page 5)
- 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 14, Page 8, or Step 3, Page 13)
- ProSeries will generate an error when it attempts to license following installation Step 15, page 8 or 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 2005 ProSeries software:

 After downloading the 2005 ProSeries software, double click on w_pro_cd_core_2005.04.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 2005		×
License Agreement Please read the following license agreement ca	arefully.	ProSeries. The Tax Professional's Choice
Software License and Tax Year 2005 ProSe	Services Agreement ries® Tax Products	
IMPORTANT INFORMATION Please R	ead	
1. Agreement Acceptance; Licensing		
This Software License and Services A you (as defined below) and Intuit Inc. (" that this Agreement applies to the Soft	greement ("Agreemen 'Intuit"). You understa ware (as defined belo	nt") is between nd and agree w) regardless ↓
I accept the terms of the license agreemen	t	
C I do not accept the terms of the license agr	eement	
InstallShield		
Print	< Back Next	> Cancel

3) Choose Stand Alone or Network

Choose **Stand Alone** and click **Next**. (If choosing **Network**, go to S**tep 5** to resume the Network Install instructions):



4) Click the "Browse..." button to install to a different location. Otherwise, click Next to install to the default destination folder C:\ProWin05. Then, click Next and skip to Step 8 to resume the stand alone installation.

ProSeries 2005		×
Select Destination Directory	ProSerie The Tax Professional's C	S,
Please enter the destination path.		
To accept the default, press Next.		
Destination Folder	1	
C:\ProWin05	Browse	
InstallShield		_
	< Back Next > Cancel	

5) Network Only: ProSeries 2005 Network Installation Steps - Click Next to continue.



6) **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 2005	×
Computer Name Identify this computer (workstation) for ProSeries	ProSeries. The Tax Professional's Choice
Name This Computer (ADMIN Workstation) <u>Tell Me More</u>	
Name of this Workstation: Examples: Carolyn, Carolyn's Computer, The computer in Caro	olyn's office
How do you want to refer to this computer?	
InstallShield	
Help < Back Next >	Cancel

7) Network Only: Click on the Change buttons to specify an installation folder other than the ProSeries default locations. You will need to specify a local installation folder, as well as a network installation folder. On the network, we recommend creating a shared folder called "ProSeries" and a ProNet05 sub-folder that all users can access when running ProSeries. "ProSeries\ProNet05" folder will be the destination of the2005 ProSeries install on the network. Click Next after identifying the installation locations:

ProSeries 2005	×
Choose Destination Location Select folders where setup will install files.	ProSeries, The Tax Professional's Choice
For best results, install to the recommended locations.	
Local Folder: (this computer) <u>Tell Me More</u> C:\ProWin05	Change
Network Folder: (shared data) <u>Tell Me More</u> S\ProSeries\ProNet05	Change
InstallShield Kext >	Cancel

 Choose the products you want to install. You can always choose additional products to install later using Select and Download New Products in the Update menu in ProSeries. Click Next to continue:

Tax Year 2005 Product Sel	ections	×
Instructions	State Products	
Select the products that you plan to use this year in order to see if they are available for download.	1040 1120 1120S 1065 1041 1040 1120 1120S	
Products not available now will be downloaded when available during future server connections or from future CDs.		
Federal Products Federal Products 1040 1120 1120S 1065		
☐ 1041 ☐ 706 ☐ 709 ☐ 990/990EZ ☐ 1040 NR	MA MA MD Pass-Through MI MI MI	
Help	Back Next >	Cancel

9) If prompted with an Email Alert Registration dialog, select **Decline.** Then click **Next**. (Note: 2005 Email Alerts are no longer supported.)

Email Alert Registrati	ion
You can recei * w/he	ve personal E-mail Alerts about your ProSeries products. These e-mails inform you:
*Abo	ut 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.
Oecline	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 a To change your To update your If you do not har	about ProSeries privacy practices, visit www.proseries.com/privacy. E-mail Alerts selection go to the Tools menu in ProSeries and select Options. e-mail address, visit www.proseries.com/email. ve an Internet connection, Intuit will not be able to receive your E-mail Alerts registration.
	Next > Help

10) Click Close when you see this dialog

E-mail Aleı	t Selection on Multiple Computers		
Please read this message if your firm has ProSeries installed on multiple computers.			
	The E-mail Alerts registration choice is based on customer number, so there is only one choice per firm. The most recent choice updates our records for the entire firm.		
	Close Help		

11) The ProSeries installation will now confirm your installation location, products, and confirm you have enough hard drive space for the installation. Click **Next** to start the install:

ProSeries 2005	×
Installation Details	ProSeries. The Tax Professional's Choice
When you are ready to continue select Next. If you want to make changes to you made on previous screens, select Back. We recommend that you print thi records.	any of the selections s screen for your
Selected folders: Local folder: C:\ProWin05 You selected the following products for installation: 1040 (will be installed) Missouri Individual (will be installed) Disk Space on Drive C: Required Space: 141 Megabytes Available Space: 2499 Megabytes	
InstallShield Help Print < Back Next >	Cancel

** If you are installing ProSeries as a Stand Alone, skip to "Launching ProSeries 2005 (Stand Alone Only)" on page 12, otherwise continue below with Step 12.

12) Network Only: Click "Next" to continue. 2005 ProSeries will open.

ProSeries 20	005	×
Step 2: C Select N	omplete Licensing (Connected Customer) ext to launch ProSeries and complete licensing.	ProSeries. The Tax Professional's Choice
√ 1	Install to this computer (ADMIN Workstation) COMPLETED	
©2	Complete Licensing (Connected Customer) <u>Tell Me More</u> Click "Next" to complete licensing. This will launch ProSer Customer Number and ZIP code for this step. You no longe Without a network license you cannot print or E-file.	ies. You will need your er need a network code.
3	Install to other network computers (USER Workstations)	Fell Me More
InstallShield	c Kack N	ext > Exit

13) Network Only: When the Connected Customer dialog box appears, click Next to have ProSeries download updated components.

Important! If 2005 ProSeries opens and the Connected Customer dialog (below) does not appear, it will be necessary to manually launch the 2005 ProSeries updates by selecting **Update Installed Products** from the ProSeries **Update** menu. Then, skip to page 17.



14) **Network Only:** 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		×
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 > Cance	1

15) Network Only: 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:

Progress		x
ProSeries - 2	Connected Customer is performing the following tasks:	
	ОК	
	< Back Next > Car	ncel

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



17) Network Only: You can leave the email field empty or blank and click Next:



18) **Network Only:** When the following screen is displayed, click **Next** to continue:



19) Network Only: ProSeries will now check for and download the required updates:



20) **Network Only:** Once the updates have been downloaded, the ProSeries Update screen below will display the components that have been updated. The components identified will be different depending on the products you have installed.

Click **Close** to continue:

ProSeries Update v2005.09.	00.09			
ProSeries has been updated with the following on Thu Mar 22 2012:				
	Item	Version	Status	
	1040 Individual	5-45	Updated	-
	Win 1040 Pro Read Me	5-40	Updated	
X	ProSeries Application	5-99	Updated	
	Pro Individual task dlls	5-29	Updated	
	ProSeries Win Program Help	5-69	Updated	
Pro Series.				
				-
Details Print				Close

21) Network Only: The Setup Complete screen will be displayed. Choose "Launch ProSeries" and click Finish to launch ProSeries:



Launching ProSeries 2005 (Stand Alone Install)

1) The **Setup Complete** screen will be displayed. Choose "**Launch ProSeries**" and click **Finish** to launch ProSeries:



2) The ProSeries **Connected Customer** screen will launch when opening ProSeries the first time. Click on **Next** to proceed through the Connected Customer screens:



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				×
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 : ZIP Code : NOTE: If your shipping address, it is important t with your billing address address on your packin	0000000009 9 address is diff that you use th s (referred to as ng slip).	erent than your bi e ZIP Code assoc s the ''SOLD TO''	lling siated
	[< 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) ProSeries will now check for and download the required updates:



9) Once the updates have been downloaded, the ProSeries Update screen below will display the components that have been updated. The components identified will be different depending on the products you have installed.

Click Close to continue and 2005 Pr	ProSeries will open.
-------------------------------------	----------------------

RoSeries Update v2005.09.00.09				_ 🗆 🗙
A	ProSeries has been updated with the following on Mon Mar 19 2012:			
	Item	Version	Status	
	1040 Individual	5-45	Updated	-
	Missouri Individual	5-19	Updated	
X	Win 1040 Pro Read Me	5-40	Updated	
	Missouri Read Me	5-19	Updated	
	ProSeries Application	5-99	Updated	
	Pro Individual task dlls	5-29	Updated	
	ProSeries Win Program Help	5-69	Updated	
ProSeries.				
				V
Details Print				Close

Congratulations!

Your 2005 ProSeries has now been successfully installed and successfully updated.

ProSeries Firm Information

After installing 2005 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. 2005 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 2005 ProSeries Shortcut to "Run As Administrator" every time

To ensure successful operation of 2005 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 2005 ProSeries icon on the desktop, or in the Windows program menu.
- 2. Right click on the 2005 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 2005 ProSeries:

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

- 1. On each workstation you wish to setup to run 2005 ProSeries, in Windows Explorer go to the network drive, and locate the **ProSeries** folder (or other location) where 2005 ProSeries was installed.
- 2. In the **ProSeries** folder, open the **ProNet05** 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	2005	×
Computer Na Identify this c	ne omputer (workstation) for ProSeries	ProSeries, The Tax Professional's Choice
Name This Com	puter (USER Workstation) <u>Tell Me More</u>	
Name of this Workstation:	Bob's Computer	olyn's office
	How do you want to refer to this computer?	
InstallShield — Help	Back Next >	Cancel

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

ProSeries 2005	X
Choose Destination Location Select folders where setup will install files.	ProSeries. The Tax Professional's Choice
For best results, install to the recommended locations.	
Local Folder: (this computer) <u>Tell Me More</u>	
C:\ProWin05	Change
InstallShield	
Help (Back Next)	Cancel

- 6. Continue though the setup and when complete, click **Finish**.
- 7. Follow the instructions in the section immediately above to setup the 2005 ProSeries shortcut to **Run as Administrator** each time you launch.
- 8. The workstation should now be setup to run 2005 ProSeries. Repeat these instructions on each workstation that will operate 2005 ProSeries.