Welcome to ProSeries Basic tax software

Please follow steps 1 through 3 in this guide:

For this step...	Look here...
Getting ready	Page 1
Step 1 - Install ProSeries Basic software	Page 1
Step 2 - Set up the ProSeries Basic program	Page 3
Step 3 - Transfer data from last year's ProSeries client files	Page 6
Product licensing	Page 6
Keeping your tax products up-to-date	Page 7

Getting ready

- For assistance and current information about all aspects of getting started with ProSeries Basic software, click the **Help** button on the ProSeries toolbar to open the Help Center or go to

    www.proseries.com/support.

- For information about What's New with ProSeries for the current tax year (such as form and calculation changes) refer to the **ReadMe** files located in the Help Center.
- Reminders regarding operating systems in ProSeries System Requirements:
    - Windows Vista requires Service Pack 2 for recommended and minimum system requirements.
    - Windows 7 Professional or Ultimate are supported under recommended operating system requirements.
    - Windows 7 Home Premium is supported under minimum operating requirements.
    - 64-bit operating systems are supported.
- Note about Internet Connection Requirements:
    - Dial-up Internet Connections are not supported. High-speed Internet connection is required for both recommended and minimum Internet connection requirements.
- For detailed information about current System Requirements, go to www.proseries.com/sysreq.

Step 1 - Install ProSeries Basic software

You install ProSeries Basic software from files you download from the My ProSeries area of ProSeries.com (via the Internet) or from a ProSeries Basic CD.

1 Close all programs.
2 **If you're installing from a ProSeries Basic CD**, insert the ProSeries Basic CD into the CD drive.

    If you're installing from an .EXE file that you downloaded from the ProSeries Web site, navigate to the location where the file was saved, and then double-click the .EXE file (or if using FireFox, double-click the .EXE file in the Downloads window).
3 In the **ProSeries Installation** dialog box, click **Install ProSeries**.

Tip: If you're installing from a ProSeries Basic CD and the **ProSeries Installation** dialog box doesn't appear automatically, go to the Windows taskbar, click **Start**, then select **Run**. In the **Run** dialog box, type x:\CDSETUP (where x represents the letter of the drive containing the ProSeries Basic CD), then click **OK**. In the **ProSeries Installation** dialog box, click **Install ProSeries**.

4 Follow the instructions on the screen. Specific dialog boxes are discussed next.

5 If a **System Warning** dialog box appears, click **Cancel**, correct the situation identified in the **System Warning** dialog box, then start the installation procedure again.

6 In the **Software License Agreement** dialog box, select **I accept the terms of the license agreement** if you agree to accept all the terms of the ProSeries Basic License Agreement, then click **Next**.

Important: If you find the terms of the License Agreement unacceptable, *do not install the software.* Select **I do not accept the terms of the license agreement**, then call ProSeries Basic Customer Service for a refund instead.

7 In the **Select Destination Directory** dialog box, click **Next** to install ProSeries Basic software in a \BASWINyy directory (where "yy" represents the last two digits of the tax year) on the drive that's shown in the dialog box.

Tip: If you want to install ProSeries Basic software to a different drive or directory, click **Browse**. In the **Select Folder** dialog box, select the drive you want, type the folder name BASWINyy in the **Folder name** field (where "yy" represents the last two digits of the tax year) after the drive you selected, then click **OK**.

8 In the **Product Selections** dialog box, select every ProSeries Basic state product that you expect to use during the tax year, then click **Next**. The ProSeries Basic 1040 product is installed automatically. The state products are not included on the CD. All state products you select will be available by download from the internet.

If you ordered specific state products when you placed your order, be sure to select those state products. If you select a state product that you didn't order, it will be installed for pay-per-return use. You can install additional products later, as described in "Keeping your ProSeries Basic products up-to-date" on page 7.

9 If any of the products you selected aren't available, you'll see the **Installation Note** dialog box. Review the list of products that will be installed later, then click **OK**. Any products that are not available can be downloaded later (when they become available) by using the updates feature as described in "Keeping your ProSeries Basic products up-to-date" on page 7.
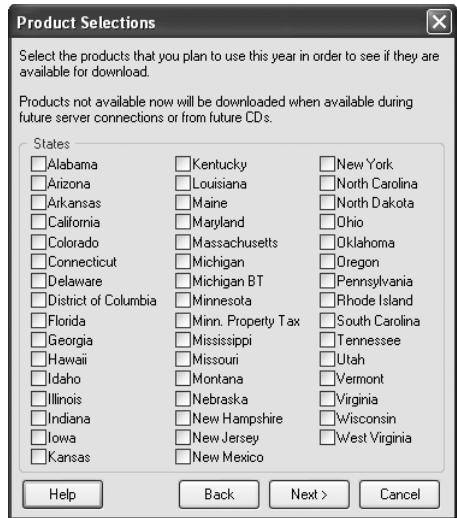
10 Review the information in the **Installation Details** dialog box, then click **Next** to install the ProSeries Basic tax products that you selected and that are available.

Important: If you see the **Installation Failed** dialog box, click **Help** to find a possible solution, then click **Exit** to exit the installation program.

11 **Restart Windows message**. If you are prompted to restart your computer, do so. If the installation program doesn't resume, double-click the **ProSeries Basic** shortcut icon on your Windows desktop to start the ProSeries Basic program.

Proceed to "Step 2 - Set up the ProSeries Basic program".

12 **Setup Complete.** If you leave the check mark in the **Launch ProSeries Basic** option in the **Setup Complete** dialog box, the Connected Customer Wizard begins when you click **Finish**.

Tip: If you see the **ProSeries Basic Installation** dialog box, click **Exit** to return to the Windows desktop, then double-click the **ProSeries Basic** shortcut icon to start the ProSeries Basic program. The Connected Customer Wizard will begin.

If you have difficulty installing or starting the ProSeries Basic program:

- Start your browser, then go to http://www.proseries.com/support to see additional troubleshooting solutions.
- If you have an issue requiring ProSeries Technical Support, go to http://www.proseries.com/contact_us to review all available support options. To save time, gather as much information as possible, including any error messages, before contacting chat or phone support.

# Step 2 - Set up the ProSeries Basic program

The first time that you start the ProSeries Basic program, the Connected Customer Wizard helps you set up the program if there's a valid Internet connection.

- **Firm information**. Retrieves the name and address of your firm.
- **Product licensing**. Licenses your ProSeries Basic tax software to your firm.
- **Product updates**. Downloads and applies updates for installed products, if any.
- **New products**. Downloads and installs not-yet-installed products, if any.

Tip: If the computer doesn't have a valid Internet connection, a dialog box asks whether you want to start the Internet Connection Setup Wizard. Select **Yes** to establish a valid Internet connection, or select **No** to establish a valid Internet connection at a later time.

Using the Connected Customer Wizard

1 In the first **Connected Customer** dialog box, click **Next**.

2 In the **Customer Information** dialog, enter or verify your Customer Number and ZIP code, then click **Next**.
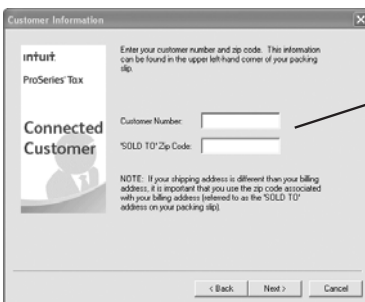
The numbers you enter in these fields should match the Customer Number and ZIP code that are printed in the **Sold To**: area of your packing slip.

A different Customer Number and ZIP code might appear in the **Ship To**: area of your packing slip.

3 Click **Next** after the Connected Customer Wizard finishes the setup tasks.

4 In the **Verify Firm Information** dialog box, review the information carefully. This is the information that we have on file for your firm (based on the Customer Number and ZIP code entered). The program prints this information on all returns prepared by your firm.

Click **Yes** if your firm information is correct.

Click **No** if you want to enter or edit your firm information.

5 Select **Yes** or **No**, then click **Next**. If you selected **Yes**, skip to Step 9 . If you selected **No**, continue with Step 6 .

6 Enter or edit your firm's name and address in the **Enter Firm Information** dialog box, then click **Next**.

7 The wizard transmits the updated information to an Intuit server via the Internet, or a dialog box instructs you to call Customer Service. Click **OK** to continue.

8 Review the firm and product information in the **Product Licenses** dialog box.

9 If the ProSeries Basic Update program downloads and installs new products and product updates, review the status of each product in the **ProSeries Basic Update** dialog box, then click **Close**.

When the Connected Customer Wizard or ProSeries Basic Update program finishes, the ProSeries Basic program starts. The first time the program starts, the **Prior Year Settings Transferred** dialog box appears if the program was able to transfer the preferences and settings you used with last year's program.

Using the Options Setup Wizard

The Options Setup Wizard usually runs automatically the first time the program starts. If it does not automatically start, click the **Help** button on the ProSeries toolbar then click **Options Setup Wizard**. The Options Setup Wizard helps you set ProSeries Basic options. Most Options Setup Wizard dialog boxes are self-explanatory. Note the following:

You can set up E-File options and Bank Products Enrollment/Registration Information using the Options Setup Wizard.

For more information about offering bank products through Santa Barbara Bank & Trust or Refund Advantage:

● Use the **Search Help** feature on the toolbar or in the Help Center.

The **Firm/Preparer Information** dialog box involves more information than the other dialog boxes and is discussed in the next section.

Filing returns electronically

ProSeries/Electronic Filing is installed with ProSeries tax products that support e-filing. To e-file returns in ProSeries, you must be an Authorized IRS e-file Provider with a valid IRS issued EFIN. We only accept and transmit returns from Authorized IRS e-file Providers, set forth in IRS Publications 3112 and 1345. For more details about e-filing:

- On www.proseries.com, select **Products**, select **ProSeries Workflow Solutions**, then open the **e-filing** link, or
- Use the Search Help feature on the Help toolbar or in the Help Center.

Search

Entering firm and preparer information

If you completed the Connected Customer Wizard described on page 4, you'll see your firm's name and address in the gray area of the **Firm Information** section of the **Firm/Preparer Information** dialog box.

Enter other information about your firm in the fields below the gray area. If the firm will be e-filing returns using the firm's Electronic Filing Identification Number (EFIN) instead of a preparer's EFIN, enter the firm's EFIN and an Efile contact name.

During the product licensing procedure, your firm's name and address are retrieved from an Intuit Internet server, then entered here.

Enter other information about your firm here, including the firm's EFIN and ERO contact information, which are required for e-filing.

Enter preparer information in this section.

To move to new fields, press ENTER or TAB, or use your mouse.

Enter information about the firm's preparers in the **Preparer/Electronic Return Originator (ERO) Information** section of the dialog box. There's room to enter information for many preparers. If preparers will be e-filing returns, also enter the ERO Practitioner PIN. If the ProSeries Basic program transferred preparer information from last year's program, edit that information as necessary.

Important: A valid EFIN issued by the IRS is required to e-file returns using the ProSeries Basic software.

Selecting the state products you want to license

In the **Choose State Licenses** dialog box, select the state products that you want to license for unlimited use, then click **OK**. The number of state products you can select depends on which ProSeries Basic suite you purchased.

If you prefer to wait, you can license state products later. State products that aren't licensed for unlimited use can be used on a pay-per-return basis.

Step 3 - Transfer data from last year's ProSeries client files

The first time that you start the ProSeries Basic program, you are asked if you want to transfer last year's client files. If you have last year's ProSeries client files, click **Yes**, then complete the five steps listed on the left side of the **Transfer** window. Note the following:

● The choices for Step 1, "Select the type of files to transfer" are **<**last year**> Form 1040 to <**this year**> Form 1040** and **<**this year**> TurboTax 1040 to <**this year**> ProSeries 1040**.

● The most likely entry for Step 2, "Transfer data files from" is **C:\BasWinly\lyData** (for last year's ProSeries Basic client files) or **C:\ProWinly\lyData** (for last year's ProSeries client files), where "ly" represents the last two digits of last tax years.

1
Select the type of transfer you want to perform from the list of alternatives.

2
Select the location of your existing client files.

3
Select a location for the new client files.

4
Select the client files that you want to transfer data from, or click the **Select All** button.

5
After you've selected one or more clients, click **Transfer**.
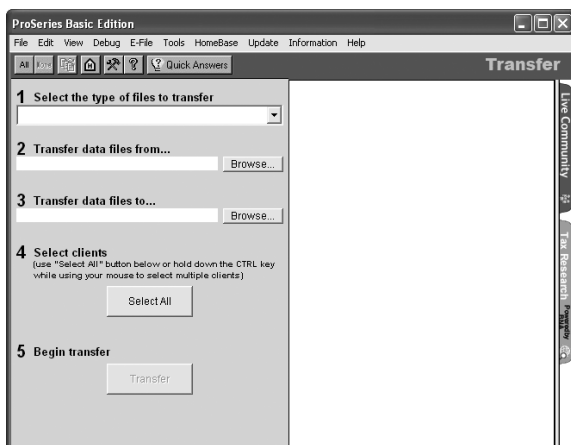
When you click **Transfer**, the program creates a new client file for each client whose data is being transferred. When the **Transfer Log** dialog box opens, review the information, then click **Close** to go to HomeBase.

Important: If your firm will be e-filing returns from more than one computer and each computer is using the same EFIN, change the starting number in the DCN counter on all but one computer before opening any returns. To change the DCN counter for a computer, go to the **Tools** menu, select **Options**, then select **Electronic Filing**.

Product licensing

Product licensing uses your Customer Number, ZIP code, and information in Intuit's records to license your ProSeries Basic tax software to your firm. Product licensing is required before you can print returns or file returns electronically.

ProSeries product licensing can be performed using the Online method or the Manual method. For most ProSeries users, product licensing occurs online automatically.

Automatic, Online product licensing

The Connected Customer Wizard performs product licensing automatically when you install ProSeries Basic tax software on a computer that has an Internet connection

Be sure to read "Updating your firm's product licensing information" on page 7 of this guide.

Product licensing using the Manual method

If automatic, Online product licensing hasn't been performed (as explained above), you'll see the message "Product Licensing Required" in the HomeBase Message Center. When you click that message, you see a **License Products** dialog box that includes two options: **Online (Recommended)** and **Manual**. Select **Manual**, then select **OK**. You'll see the **License Products** dialog box shown below.

Tip: Ways that you can contact Intuit for manual product licensing include:

- **Automated Touch Tone phone service** (call 1-800-723-0692)
- **Online service** (go to http://www.proseries.com/licensing, you will need to login to your MyProSeries account or create one if you don't have one yet. After logging in, select "Product Licensing").

1
Verify your Customer Number and ZIP code.

2
Enter your firm's name and address.
(This information must match the information contained in Intuit's records.)

3
Contact Intuit using one of three methods. You will receive a unique Activation Code from Intuit.

4
Enter the Activation Code, then click **OK**.

Be sure to read "Keeping your ProSeries Basic products up-to-date" on page 7.

Updating your firm's product licensing information

Update your firm's product licensing information when the software or an Intuit ProSeries representative instructs you to update your product license information

If either of these situations occur, go to the **Tools** menu, select **License Products**, select **Online**, select **OK**, then simply wait for the product licensing procedure to conclude.

For more information about product licensing:

- Use the Search Help feature on the Help toolbar or in the Help Center, or
- Click the **Help** button on the toolbar, select **User's Guide** in the Help Center, then go to chapter 4, "Setting Up ProSeries Features."

Keeping your ProSeries Basic products up-to-date

As soon as a ProSeries Basic product or product update becomes available, it is posted to a ProSeries Basic Internet server. Getting tax products and updates via the Internet helps you have the most up-to-date versions of the tax products you use.

  1 Use any of the following methods to start the ProSeries Basic Update program:
    • In HomeBase, go to the toolbar and click the **Update** button.

- Go to the **Update** menu and select **Update Installed Products**.
- Go to the **Update** menu and select **Select and Download New Products** if you want to review the selected state products or select additional state products.
- Go to the Windows taskbar, click **Start**, select **Programs**, then **ProSeries Basic**, then **ProSeries Update**.

2 When it finishes, the update program informs you that "No ProSeries updates found..." or "ProSeries has been updated with the following...".

3 See which products are "Current" and which are "Updated," then click **Close**.

4 If you see the **Ready to Install** dialog box (because some products are "Updated"), click **Install Now**.