

ProSeries[®] Tax Software

Basic

Getting Started Guide

Tax Year 2013

ProSeries® Tax Software

New for Tax Year 2013

Improved Security!

- Benefit from increased data encryption

E-file Enhancements!

- E-file late Individual returns year-round and for prior years¹
- E-file New York City returns

Faster Filing!

- Receive faster e-file status updates on delayed returns
- Attach PDFs for federal 1040, and now State e-filed returns

Training

ProSeries Training Center: Whether you are new to ProSeries and need to learn the basics, or you are a more experienced user who wants to get more out of your software, the ProSeries Training Center is your one-stop for accessing the training resources you need. Visit the Training Center to take advantage of CPE Courses, Live and Self-paced training, videos on top time savers, and much more. my.proseries.intuit.com/training

Reminders regarding operating systems in ProSeries System Requirements

- Windows Vista requires Service Pack 1 for recommended and minimum system requirements.
- Windows 7 Professional or Ultimate requires Service Pack 1 for recommended operating system requirements.
- Windows XP requires Service Pack 3 for minimum system requirements.
- Windows 8 operating systems are supported.
- 64-bit operating systems are supported.
- Internet Explorer 7.0 or later must be present in windows, but does not need to be the default browser.

Internet Connection Requirements

Dial-up Internet connections are not supported. High-speed Internet connection is required for both recommended and minimum Internet connection requirements.

Note: We cannot guarantee that ProSeries products/solutions will function properly on operating systems, software, and hardware we do not support. ProSeries Technical Support will not be able to help customers solve problems on unsupported environments.

1. Current customers will be able to continue to e-File Individual and Business returns after the final due date (September 15 for most Business returns and October 15 for Individuals) for all open years, and for up to three years, in accordance with the IRS guidelines. For Tax Year 2013, Individual return filing for Tax Year 2012 will continue to be open for filing; Business returns for Tax Years 2010, 2011 and 2012 will continue to be open for filing. To take advantage of the extended e-File period, customers need to be licensed for the 2013 program.

Welcome to ProSeries Basic tax software

Please follow steps 1 through 3 in this guide:

For this step...	Look here...
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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 7
Keeping your tax products up-to-date	Page 8

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.
- Note: ProSeries Basic 50 Return Bundle includes a license for (50) 1040 returns and (50) individual state returns for 2 states, for Tax Year 2013 only. Returns can be filed on extension for Tax Year 2013, but all 1040 and individual state returns must be used by December 31, 2014 or they will expire.
- Reminders regarding operating systems in ProSeries System Requirements:
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- 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 my.proseries.intuit.com/system_req.

Note: ProSeries Basic 50 Return Bundle includes a license for (50) 1040 returns and (50) individual state returns for 2 states, for Tax Year 2013 only. Returns can be filed on extension for Tax Year 2013, but all 1040 and individual state returns must be used by December 31, 2014 or they will expire.

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.

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 8.

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.

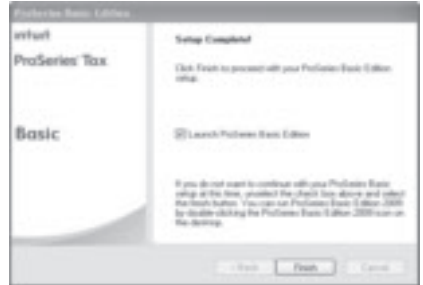


11 Restart Windows message. If you are prompted to restart your computer, do so. If the installation program doesn't resume, double-click the **ProSeries Basic** shortcut icon on your Windows desktop to start the ProSeries Basic program.

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 my.proseries.intuit.com/support to see additional troubleshooting solutions.
- If you have an issue requiring ProSeries Technical Support, go to my.proseries.intuit.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

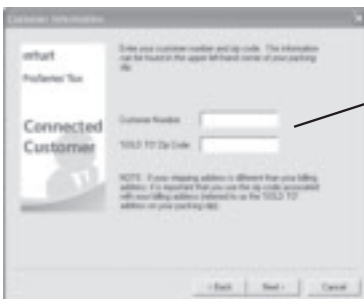
The first time that you start the ProSeries Basic program, the Connected Customer Wizard helps you set up the program if there's a valid Internet connection.

- **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:

- Go to <http://accountants.intuit.com/tax/proseries/resources/efile-resource-center.jsp>, or
- Use the Search Help feature on the Help toolbar or in the Help Center.



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.

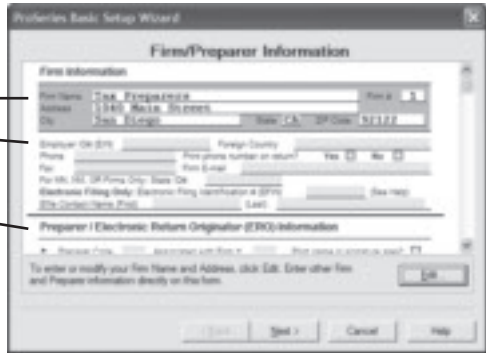
Enter other information about your firm in the fields below the gray area. If the firm will be e-filing returns using the firm's Electronic Filing Identification Number (EFIN) instead of a preparer's EFIN, enter the firm's EFIN and an Efile contact name.

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.

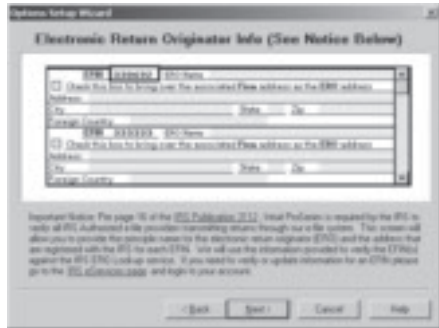
To move to new fields, press ENTER or TAB, or use your mouse.



Enter information about each of the firm's preparers in the **Preparer / Electronic Return Originator (ERO) Information** section of the dialog box. If preparers will be filing returns electronically, also enter the ERO Practitioner PIN in this section.

Important: When an Electronic Filing Identification Number (EFIN) is entered for either the firm or a preparer, you will also be required to verify the Electronic Return Originator name and address that are registered with the IRS. Intuit uses this information to verify IRS Authorized e-file providers so the information provided must match the IRS ERO records.

Tip: If the ProSeries program transferred preparer information from last year's program, just edit the information as necessary.



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.

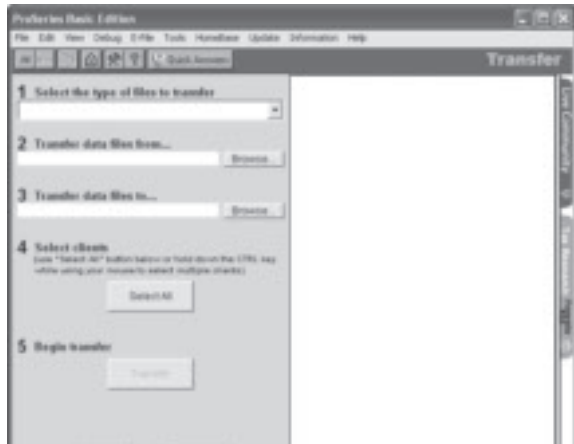


Step 3 - Transfer data from last year's ProSeries client files

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:\BasWinXX\XXData** (for last year's ProSeries Basic client files) or **C:\ProWinXX\XXData** (for last year's ProSeries client files), where "XX" 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.

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".

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**.

The screenshot shows a dialog box titled "License Products" with a close button in the top right corner. It contains four numbered sections:
1. **Verify Customer Number and Zip Code**: Includes a "Customer Name" field with the value "00000000" and a "Zip Code" field with the value "0000".
2. **Enter Your Firm Information**: Includes a "Firm Name" field, an "Address" field, and a "City" field with "State" and "Zip Code" dropdown menus.
3. **Retrieve Activation Code**: Includes the instruction "To obtain your activation code, you must connect that using one of the methods below." and a list of three options: "Automated Touch Tone 1-800-723-0692", "Online: www.proseries.com/licensing", and "Toll-Free Service: 1-800-374-7279". The "Automated Touch Tone" option is circled in red, and an arrow points from it to the text in step 3 of the instructions.
4. **Enter Activation Code**: Includes a large text input field for the activation code.
At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

Be sure to read "Keeping your ProSeries Basic products up-to-date" on page 8.

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**.

Save Time using Keyboard Shortcuts

You can even refer to this same list of top keyboard shortcuts while working in ProSeries by selecting **Alt S**.

These are the top 20 shortcuts

Ctrl A	Calculator	Ctrl M	Go to QuickEntry Mode	F1	Program Help	F8	Mark as Estimated
Ctrl D	Override	Ctrl Q	QuickZoom	F4	Tax Help	F9	Calculate return
Ctrl E	Return Errors	Ctrl U	Forms in Use	F5	Final Review	F10	Save Tax Return
Ctrl G	Go to State/City	Ctrl →	Next Form in Use	F6	Select Form	F11	Add/Edit Missing Client Info
Ctrl J	Find	Ctrl ←	Previous Form in Use	F7	Find Next Error	Tab	Go to Next Field

These are the remaining shortcuts that work inside a return

Ctrl B	Billing Clock	Ctrl S	Save Client	Ctrl F2	Go to Parted Window	Shift Tab	Go to Previous Field
Ctrl C	Copy	Ctrl T	Tax Summary	Ctrl F3	Sort Data in Table	Shift F1	Help
Ctrl F	Select Form	Ctrl V	Paste	Ctrl F6	Select/Create Multiple Copy	Alt F4	Exit
Ctrl K	K-1 Summary	Ctrl W	Remove Form	Ctrl Shift F	Find/List Notes	Ctrl Home	Top of Form
Ctrl L	Trial Balance Import	Ctrl X	Cut	Ctrl Shift J	Find Again	Ctrl End	Bottom of Form
Ctrl N	New Client	Ctrl Y	Print Options	Ctrl Shift L	Select Line	PgUp	Page Up
Ctrl O	Open Client	Ctrl Z	Undo	Ctrl Shift N	Add/Edit Note	PgDn	Page Down
Ctrl P	Print Client			Ctrl Shift R	Trial Balance Reverse Sign	Home	Front of Field
				Ctrl Shift S	Supporting Statements	End	End of Field

These are the shortcuts that work from HomeBase

Ctrl N	New Client	Ctrl P	Print Client	F11	Add/Edit Missing Client Info
Ctrl O	Open Client	Ctrl Y	Print Options	F12	EF Reports (EF View Only)
Alt F11	Client Snapshot	Ctrl A	Calculator	F5	Refresh View
Alt J	Find	F1	Program Help	Alt F5	Resync Database (Network Only)



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