

ATX™ Learning Portal

Conversions

As a new customer with ATX, you can use a conversion to save time by transferring your data from your previous program to the ATX format. After converting, you can take advantage of the Rollover process, which brings data from the prior year into the current tax year, allowing you to be even more efficient.

ATX offers several conversions from other tax software, including:

Conversion Tools Are Available for Most Tax Software Products		
Product	Individual	Business
ProSeries	✓	✓
Lacerte	✓	✓
UltraTax	✓	✓
Drake	✓	✓
ProSystems fx	✓	✓
TaxAct	✓	
TaxWise	✓	✓

Things to keep in mind when converting:

- Not all data converts (no state data converts).
 - You cannot convert across a network.
 - You should verify that amounts are correct.
 - Verify calculations, assets and income amounts.
 - Review schedules and worksheets.
1. First, you must install ATX 2019, and update to the latest version. This ensures the returns you convert have the most up-to-date forms and calculations before you roll them over to ATX 2020.
- i** You must also have your prior year software and returns on your local computer, not on a network. Conversions cannot run correctly across a network installation.

- Next, download and install the conversion software from the ATX Solution Center. Each program has its own conversion and user guide you can review.
- Once located, click the download icon for the utility you need.



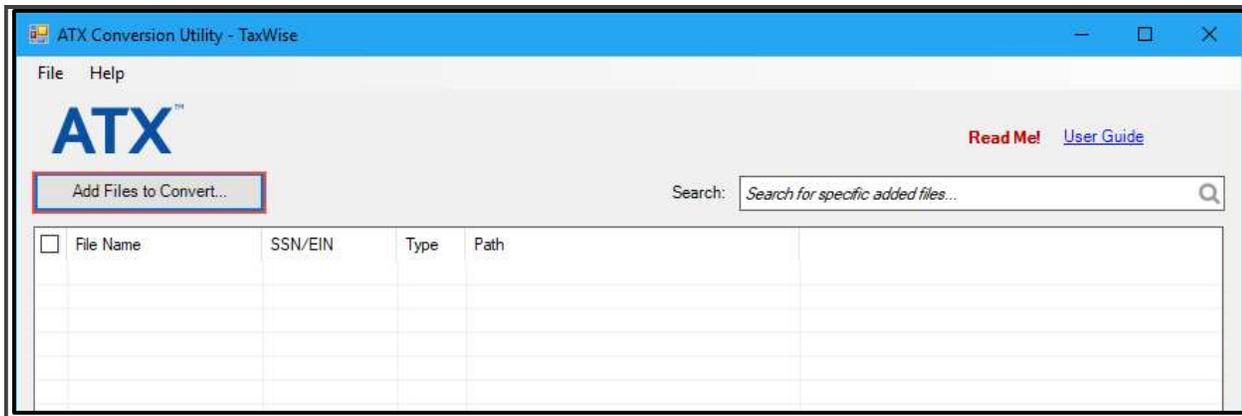
- Install the utility by clicking the download once it is complete.



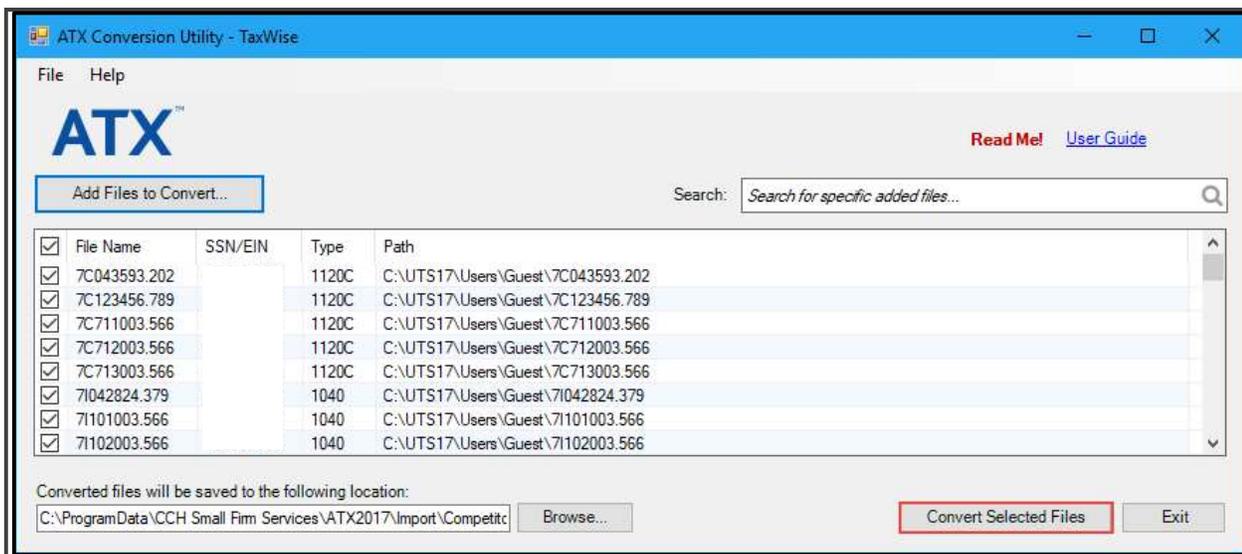
- Once the installation is complete, you can choose to automatically launch the utility and to open the instruction guide. Click **Finish**.



6. The ATX Conversion Utility opens. Click **Add Files to Convert** and choose your return data from your prior year software.



7. Click **Convert Selected Returns** to complete the process.



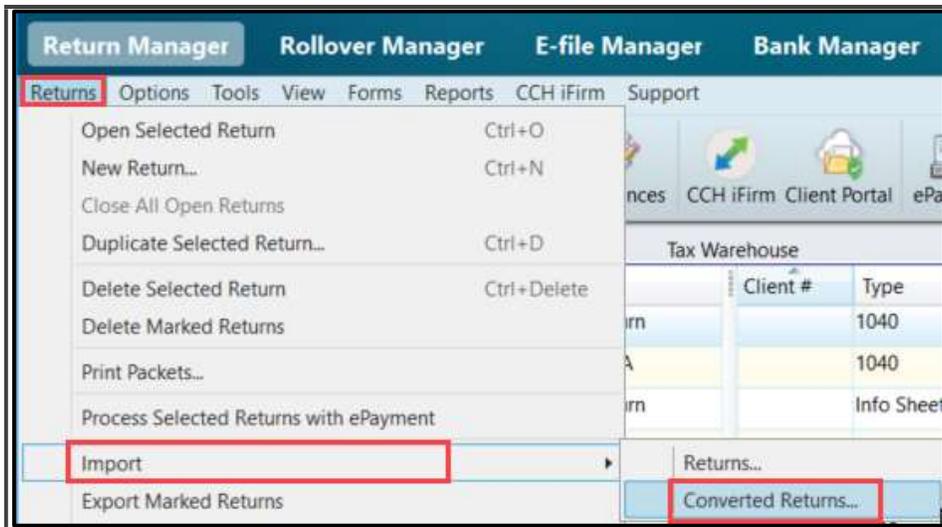
8. When the conversion finishes processing, you receive a *Conversion successfully completed* message.

Importing Converted Returns

Once you convert your returns, the next step is to import to ATX 2018. First, open ATX 2018.

To import your returns:

1. On the **Returns** menu, click **Import**, and then **Converted Returns**.



2. Click **Continue**. ATX displays the converted returns.
3. Select the returns you want to import or press **Ctrl+A** to select all the returns at once. Click **Open**. ATX defaults to import your 1040 returns only. If you also want to convert business returns, you can select to import all returns at once using the drop-down menu in the Import screen.
4. ATX imports the returns. Click **Done** and refresh ATX to display the returns in your Return List.