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.

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

ATX offers several conversions from other tax software, including:

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.
- Vou 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.



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



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



5. 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.

il A	TX Conversion Utility - Ta	ixWise					— D	×
File	Help							
	ATX					Read Mel	<u>User Guide</u>	
	Add Files to Convert				Search:	Search for specific added files		Q
	File Name	SSN/EIN	Туре	Path				

7. Click Convert Selected Returns to complete the process.

File	Help									
	ATX						Read Me!	<u>User G</u>	<u>uide</u>	
	Add Files to Con	vert			Search:	Search for specific added files				Q
	File Name	SSN/EIN	Туре	Path						^
	7C043593.202		1120C	C:\UTS17\Users\Guest\7C043593.202						
\checkmark	7C123456.789		1120C	C:\UTS17\Users\Guest\7C123456.789						
~	7C711003.566		1120C	C:\UTS17\Users\Guest\7C711003.566						
\checkmark	7C712003.566		1120C	C:\UTS17\Users\Guest\7C712003.566						
\checkmark	7C713003.566		1120C	C:\UTS17\Users\Guest\7C713003.566						
\checkmark	71042824.379		1040	C:\UTS17\Users\Guest\7I042824.379						
\checkmark	71101003.566		1040	C:\UTS17\Users\Guest\7I101003.566						
	71102003.566		1040	C:\UTS17\Users\Guest\7I102003.566						~

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**.

Return Manager Rollover Mana	iger	E-file N	lanag	ger Bank N	lanager	
Returns Options Tools View Forms Re	eports	CCH iFirm	Supp	ort		
Open Selected Return New Return Close All Open Returns	Ctri Ctri	+0 +N	nces	CCH iFirm Clien	t Portal ePa	
Duplicate Selected Return	Ctrl+D		Tax Warehouse			
Delete Selected Return	Ctri	+Delete		Client #	Туре	
Delete Marked Returns			Irn		1040	
Print Packets			4		1040	
Process Selected Returns with ePayment			im		Info Sheet	
Import		•		Returns		
Export Marked Returns				Converted Return	15	

- 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.