

## ProSystem fx Engagement Import Grouping Utility (Version 6.x or higher)

### Description

The ProSystem fx Engagement Import Grouping Utility can be used to import new grouping lists, map to an existing Engagement grouping list, and import account assignments to the groupings. You may also import tax code subgroups and account assignments to the tax code groupings.

**Note:** ProSystem fx Engagement version 6.x or higher must be installed to use this utility. Please see the files below for instructions on how to use this utility as well as instructions to prepare your CaseWare data for use with the Import Grouping Utility.

**Note:** These files will also be installed to the Utilities folder in the Pfx Engagement\WM directory after downloading and installing the utility.

### [Import Grouping Utility Instructions](#)

### [Import Grouping Utility – Preparing CaseWare Data](#)

#### How to install:

1. Close ProSystem fx Engagement before running this update.
2. [Download](#) and save the Import Grouping Utility.zip file.
3. Double-click on the file Import Grouping Utility.zip to open the zip file.
4. Extract the Import Grouping Utility.xls and two .pdf files to the x:\Pfx Engagement\WM\Utilities directory (where x equals the drive letter the Engagement program is installed to).

Download Description: ProSystem fx Engagement Import Grouping Utility

Version: 6.x or higher

Release Date: September 2010

File size: 305 KB

Approx. Download Time: 1 minutes at 28.8kbps

License: Full Version

Platforms: Windows XP/Vista/7

If you have questions regarding this issue, please contact our Technical Support Group at **1-800-PFX-9998, option 4.**