

Importing Clients & Invoices from ProSeries

Creating Reports in ProSeries to Export:

- a. Open the ProSeries program
- b. Select the HomeBase view for the import type (1040, 1120, etc)
- c. Choose HomeBase from the menu bar
- d. Select Column Headings
- e. Add the required and optional headings to the HomeBase view

ProSeries Export Fields	Required
Client Name	Yes
Client Number	No
Home Telephone	No
Taxpayer E-mail Address	No
City	Yes
State	Yes
Zip Code	Yes
Client Street and Apt Address	Yes
Client Fax Number	No
Total Fees	No
Date Billed	No
Date Paid	No
Spouse Birthdate	No
Spouse First Name	No
Spouse last Name	No

The required fields must be in the export while the non-required fields are optional.

- f. When finished, click OK
- g. From HomeBase view, Save the view and name
- h. From HomeBase menu bar, choose “Export View”