

ProSeries Backup Instructions

Backing Up Your Data

Please follow these instructions closely to back up your data in order to prevent any delays in the conversion process.

Please use blank, formatted media to begin the backup process.

You must calculate all clients **and** remove all locks and passwords from clients before you begin the backup process.

To back up clients in ProSeries:

If you are backing up to CD, create a new folder on your **C:** drive named **CONVERSIONDATA** before you begin the backup process (e.g. **C:\CONVERSIONDATA**).

1. Set the **HomeBase View** to the module(s) you want to back up or to **All Tax Returns** if you wish to submit all tax types
2. At **HomeBase**, press and hold **[Ctrl]** while clicking the clients you want to select
OR
On the **HomeBase** menu, click **Select All** to select all clients
3. On the **File** menu, click **Client File Maintenance**, then click **Copy / Backup**
4. In the **Copy/Backup Client Files** dialog box, click **Set Target Directory**
5. Set the appropriate target directory for your backup media, then click **OK**
(if you are backing up to CD, set the drive path to **C:\CONVERSIONDATA**)
6. Click **Backup Client(s)**

Note for CD users: We strongly recommend using Windows XP CD Recording to burn the CD. If you want to use different CD burning software to burn the CD, we also have Nero and Roxio instructions on our website.