

TaxWise 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 TaxWise:

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. On the Tools menu, click Backup to Disk
2. In the Backup Options dialog box, click Regular Backup, then click OK.
3. In the Select User dialog box, click the folder containing the clients you want, then click OK
OR
To select multiple folders, press and hold [Ctrl], click each folder containing the clients you want
OR
If you want to backup all files, click Select All
4. Click OK

Note: If you selected multiple folders, a separate Backing Up From dialog box appears for each folder you selected. You will need to repeat steps 3 and 4 for each folder you selected.

5. In the Backing Up From dialog box, click the Select All button
6. Click OK
7. In the following dialog, set the drive and directory to the location of your backup media (if you are backing up to CD, set the location to C:\CONVERSIONDATA)
8. Click OK

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.