Drake Backup Instructions

Modules Accepted for Conversion:

- 1040 - Individual
- 1065 - Partnership
- 1120 – Corporation
- 1120s – SCorporation

Back up clients in Drake:

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

Calculate all clients **and** remove locks and passwords from clients before beginning the backup process.

1. Create a new folder on your **C:** drive named **CONVERSIONDATA** before you begin the backup process (e.g. **C:\CONVERSIONDATA**).
2. On the menu bar, click **Tools**, select **File Maintenance**, then **Backup**
3. The **Drake 20yy - Backup** dialog box appears
4. Click the **Select a backup location** button, and select the **drive** and **folder** for your backup(set the location to **C:\CONVERSIONDATA**)
5. Check **only** the box for **Client Files**
6. Click **Backup**

IMPORTANT NOTE:

A valid Drake backup contains a folder named DT. Inside the DT folder are 10 additional folders named for each of the numbers 0 to 9.

Zip the folder for Upload:

1. Open My Computer
2. Navigate to **C:\CONVERSIONDATA**
3. Right-click on the **CONVERSIONDATA** folder
4. Select Send To > Compressed (zipped) Folder
5. If a Compressed (zipped) Folder dialog appears, click No to continue.
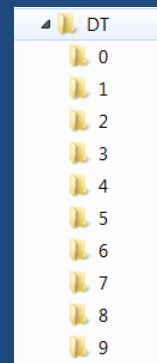
Note for Mail-In Submissions:
If submitting via mail, please use blank, formatted media to begin the backup process.
If you wish to submit a CD, we strongly recommend using Windows CD Recording to burn a CD.