ProSeries Backup Instructions

Modules Accepted for Conversion:

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

Back up clients in ProSeries:

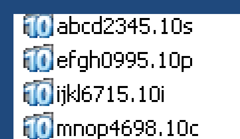
Please follow these instructions to back up your data in order to prevent any delays in the conversion process.

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. 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
3. 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
4. On the **File** menu, click **Client File Maintenance**, then click **Copy / Backup**
5. In the **Copy/Backup Client Files** dialog box, click **Set Target Directory**
6. Set the appropriate target directory for your backup media to **C:\CONVERSIONDATA**
7. Click **Backup Client(s)**

IMPORTANT NOTE:

A valid ProSeries backup will have one file for each client you are submitting, with extensions of 10s, 10p, 10i, or 10c (where 10 is the tax year).



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.