

ProSystem fx Backup Instructions

Modules Accepted for Conversion:

• 1040 Individual	• 1065 Partnership	• 1120 Corporation	• 1120s SCorporation	• 1041 Fiduciary
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Back up clients in ProSystem fx:

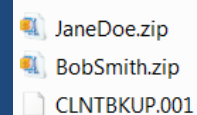
Please follow these instructions on backing up your data for the Intuit conversion process.

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. Open the **Office Manager** program
3. Click **Backup Client Data**
4. In the **Create Client List** dialog box, select **All Clients**, then click **OK**
5. In the **Select Clients for Backup** window, click the clients you want, then click **Add**
OR
Click **Add All** to select all clients
6. Click **Select Drive**
7. In the **Select Destination Drive/Directory for Backup** dialog box, set the destination to **C:\CONVERSIONDATA**
8. Click **OK** (**NOTE:** depending upon how many clients you are backing up, this may take awhile)

IMPORTANT NOTE:

A valid ProSystem FX backup contains 2 file types: files with *.ZIP extensions (these are client files, there should be one for each client you are submitting), and a CLNTBKUP.001 file, which is a database backup file.



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.

Important: Do **not** remove the **CLNTBKUP.001** file from your backup submission. **Include all files** created by the backup process in your submission to prevent any delays in the conversion process.

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.