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).