

ProSeries Backup Instructions

Modules Accepted for Conversion:

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

Back up clients in ProSeries:

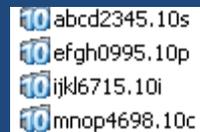
Please follow these instructions to back up your data in order to prevent any delays in the conversion process.

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).



abcd2345.10s
efgh0995.10p
ijkl6715.10i
mnop4698.10c