ProSystem *fx* Backup Instructions

Modules Accepted for Conversion:

- *1040 Individual*
- *1065 Partnership*
- *1120 Corporation*
- *1120s SCorporation*
- *1041 Fiduciary*

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

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.