TaxAct Backup Instructions

Modules Accepted for Conversion:

- *1040 - Individual*

Back up clients in TaxAct:

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

Calculate all clients, remove locks/passwords, **AND** remove **overrides** made on forms which create new input fields (i.e. input fields that do not exist on forms by default) 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. Browse to the installation directory for your TaxAct program. Hint: Default is **C:\TaxACT\TaxACT 20YY Preparer's Edition** (where YY is the program year)
3. Open the Client Data folder.
4. Highlight all files ending with **.taY** (where Y is the last digit of the tax year)
5. Right-click and choose Copy.
6. Browse to **C:\CONVERSIONDATA**
7. 5. Right-click and select Paste.