TaxWise Backup Instructions

Modules Accepted for Conversion:

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

Back up clients in TaxWise:

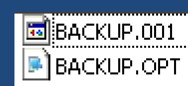
Please follow these instructions to back up your data in order to prevent any delays in the conversion process.

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. On the **Tools** menu, click **Backup to Disk**
3. In the **Backup Options** dialog box, click **Start a new backup**, then click **OK**.
4. In the **Select User** dialog box, click the folder containing the clients you want, then click **OK**
   OR
   To select multiple folders, press and hold **[Ctrl]**, click each folder containing the clients you want
   OR
   If you want to backup all files, click **Select All**
5. Click **OK**

IMPORTANT NOTE:

A valid TaxWise backup will 2 files with the name BACKUP. One file will have a *.001 extension and the other will have *.OPT extension. Both files are required for a valid submission.



Note: If multiple folders are selected, a separate **Backing Up From** dialog box appears for each folder selected. You will need to repeat steps 3 and 4 for each folder selected.

6. In the **Backing Up From** dialog box, click the **Select All** button
7. Click **OK**
8. In the following dialog, set the drive and directory to **C:\CONVERSIONDATA**
9. Click **OK**