ATX Backup Instructions

Modules Accepted for Conversion:

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

Back up clients in ATX:

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..

Note: Be sure to roll over all client files from the prior year program. Failure to do so will result in those files returning with a "corrupt" status.

1. Create a new folder on your **C:** drive named **CONVERSIONDATA** before you begin the backup process (e.g. **C:\CONVERSIONDATA**).
2. Open ATX, and in **Return Manager**, check the box for each return you want to back up
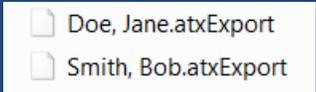
   OR

   To select *all* clients, on the menu bar, click **View**, then **Show All Returns**, then click **View**, and **Mark All Displayed Returns**
3. On the menu bar, click **Returns**, then **Export Marked Returns**
4. In the **Export Marked Returns** dialog box, select the **Drive** and/or **Folder** for your backup (set the drive path to **C:\CONVERSIONDATA**)
5. Click **OK**
6. **Follow this step only if you are submitting 2015 data**. Browse to C:\Programdata\CCH Small Firm Services\ATX 2015 Server\ATX 2015 Files. Right click on FormsetData folder and choose copy. Browse to C:\CONVERSIONDATA. Right click in the white space and choose paste.

> **IMPORTANT NOTE:**
>
> A valid ATX backup contains files with an extension of *.atx15Export. You will have one file for every client you are submitting.
>
> Doe, Jane.atxExport
> Smith, Bob.atxExport

Please note that C:\Programdata is a hidden folder. To access this folder, Click Start and type Run in Search Programs and Files search box and click Enter. Type C:\Programdata in Run window and Click OK. Navigate to the folder mentioned above with step 5.