UltraTax Backup Instructions

Modules Accepted for Conversion:

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

Back up clients in UltraTax:

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 **File** menu, click **Backup…**
3. In the **Backup** window, clear the box for **Exclude clients unchanged since their last backup** in the bottom left corner
4. Press and hold **[Ctrl]**, click each client you want, then click **Select->**
   OR
   Click **Select All >>** to select all clients
5. Click **Modify Backup Location**
6. In the **Modify Location** dialog box, set your target directory to to **C:\CONVERSIONDATA**
7. Click **OK**
8. Click **Backup** to begin the backup process
9. **Follow this step only if you are submitting 2015 data**. Go to Ultra Tax Install Directory (e.g C:\WinCSI) and then navigate to UT15DATA folder. Copy CltList.WT5 to C:\CONVERSIONDATA

IMPORTANT NOTE:

A valid CSI backup contains one file folder for each client you are submitting and a file named CltBKLst.W10 (where the 10 is the tax year)


```
3695
4567
CltBKLst.W10
```
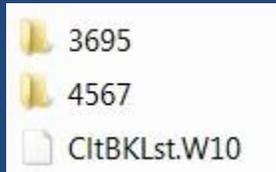
Important: Please **include all files** generated by the backup process in order to prevent any delays in the conversion process.