

ATX Backup Instructions

Backing Up Your Data

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

Please use blank, formatted media to begin the backup process.

You must calculate all clients and remove all locks and passwords from clients before you begin the backup process.

To back up clients in ATX:

If you are backing up to CD, create a new folder on your C: drive named CONVERSIONDATA before you begin the backup process (e.g. C:\CONVERSIONDATA).

To prevent inaccuracies in your converted files, please remove overrides made on forms which create new input fields (i.e. input fields that do not exist on forms by default).

1. 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
2. On the menu bar, click Returns, then Export Marked Returns
3. In the Export Marked Returns dialog box, select the Drive and/or Folder for your backup media (if you are backing up to CD, set the drive path to C:\CONVERSIONDATA)
4. Click OK

Note for CD users: We strongly recommend using Windows XP CD Recording to burn the CD. If you want to use different CD burning software to burn the CD, we also have Nero and Roxio instructions on our website.