

Lacerte 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 Lacerte:

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).

Note: Please repeat the steps below for each tax type you wish to submit for conversion.

1. On the menu bar, click Tax Type, and select the tax type you wish to backup
2. On the Client Selection screen, press and hold [Ctrl], then click each client you want to back up.
OR
Press F3, select All Clients, then click OK
3. On the Client menu, click Backup
4. In the Backup Clients dialog box, select the location of your backup media
(if you are backing up to CD, set the drive path to C:\CONVERSIONDATA)
5. Click OK to begin the backup process
6. If the directory does not exist, click Yes to create it

If the client already exists in the destination directory, the Confirm Client Replace dialog appears. You have the following options:

- To replace the client and continue with your backup, click Yes or Yes to All
- If you do not want to replace the client but you want to continue with the backup, click No
- To terminate the backup completely, click Cancel

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.