

# TaxWorks Backup Instructions

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## 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 TaxWorks:

1. On the menu bar, click **File**, then **Backup**
2. In the **Backup** dialog box, type **C:\CONVERSIONDATA** in the **Backup To** field
3. In **Client Files From Data Path Name** field, select the source data path which contains the files you want to submit for conversion  
OR  
Select **< All Path Names >** to back up client files from all data paths
4. Check **only** the **Clients** option in the **Select Files to be included in the Backup Set** list
5. Click **OK** to begin the backup process
6. Click **No** in the **2008 Backup** dialog that appears, unless you wish to see the generated backup log
7. Click **No** again to continue to the main window
8. Close the **TaxWorks** program
9. Copy the **C:\CONVERSIONDATA** folder to your backup media

**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.