

UltraTax 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 UltraTax:

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).

1. On the File menu, click Backup...
2. In the Backup window, clear the box for Exclude clients unchanged since their last backup in the bottom left corner
3. Press and hold [Ctrl], click each client you want, then click Select->
OR
Click Select All >> to select all clients
4. Click Modify Backup Location
5. In the Modify Location dialog box, set your target directory to the appropriate backup media (if you are backing up to CD, set the backup location to C:\CONVERSIONDATA)
6. Click OK
7. Click Backup to begin the backup process

Important: Please include all files generated by the backup process in order to prevent any delays in the conversion process.

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.