Back – up Client’s File

NOTE: Make sure to put client return File Name on the site copy.

1. Close the return. You must be in the main menu (pg 1-4) to make a back-up copy.
2. Select Tools, then Back-up to disk.
3. Select VITA User
4. Select Clients File Name by clicking on the box next to the clients file name.
5. Select the drive to put the back-up on. This could be a 3 ½ disk, flash drive or a CD-RW.
6. Click on OK.
7. Double Check that the back up was made by:
   1. Select “My Computer”
   2. Select the folder that has the two files: Backup.001 and Backup.opt

Restore from Back-up

1. From Main Menu select Tools
2. Select “Restore from Disk”
3. Select Drive and DIRECTORY where backup files are located.
4. Select User Name: VITA
5. Select Clients File Name, OK
6. => Restore Summary, OK
7. => Restore Complete
8. => Main Menu
9. Open an existing return
10. Select Clients return from Return List