

How to back up the Lacerte data?

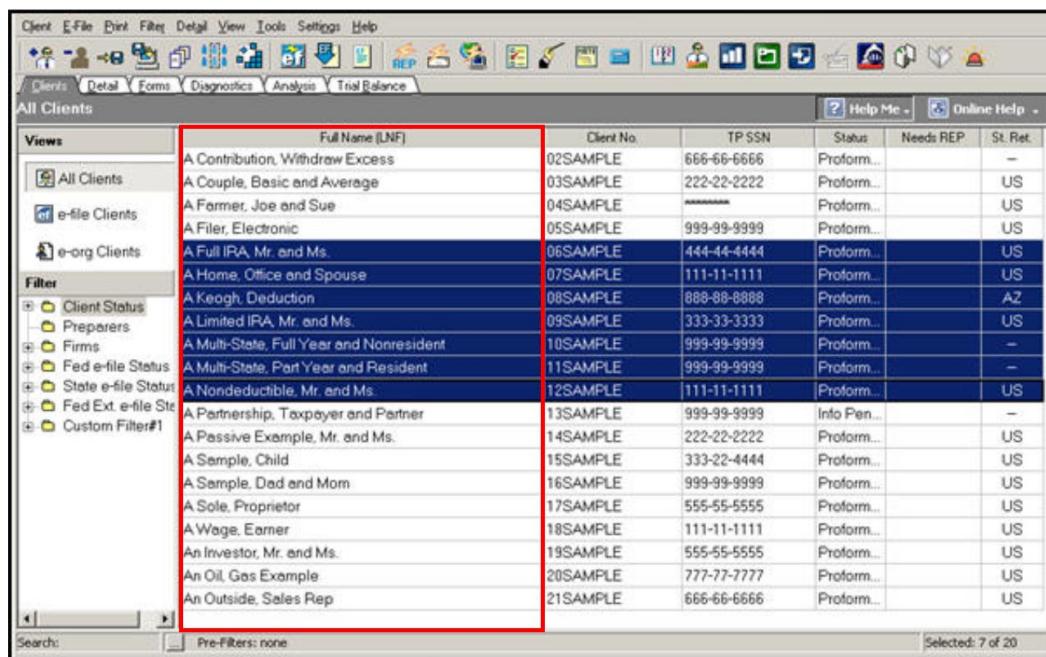
Meta Title: How to Back Up the Lacerte Data?

Meta Description: Safeguard your Lacerte data effectively by mastering the process of data backup. Protect your valuable information with secure backup techniques today!

Safeguarding your Lacerte data through frequent backups is vital to preserving your precious tax information from loss or corruption. In this KB article, we will offer a clear summary of how to back up your Lacerte data properly.

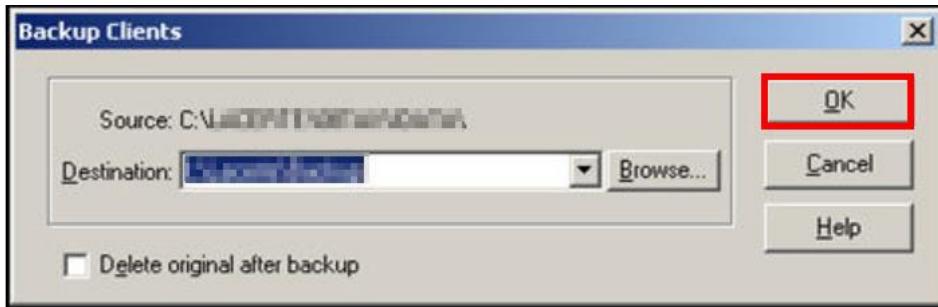
Learn how to back up the Lacerte data by following the below steps:

1. Select the **Clients** tab to view the list of your clients.
2. Pick the clients you want to back up.



Views	Full Name [LNF]	Client No.	TP SSN	Status	Needs REP	St. Ret.
All Clients	A Contribution, Withdraw Excess	02SAMPLE	666-66-6666	Proform...		-
e-file Clients	A Couple, Basic and Average	03SAMPLE	222-22-2222	Proform...	US	
e-org Clients	A Farmer, Joe and Sue	04SAMPLE	XXXXXXXXXX	Proform...	US	
	A Filer, Electronic	05SAMPLE	999-99-9999	Proform...	US	
	A Full IRA, Mr. and Ms.	06SAMPLE	444-44-4444	Proform...	US	
	A Home, Office and Spouse	07SAMPLE	111-11-1111	Proform...	US	
	A Keogh, Deduction	08SAMPLE	888-88-8888	Proform...	AZ	
	A Limited IRA, Mr. and Ms.	09SAMPLE	333-33-3333	Proform...	US	
	A Multi-State, Full Year and Nonresident	10SAMPLE	999-99-9999	Proform...	-	
	A Multi-State, Part Year and Resident	11SAMPLE	999-99-9999	Proform...	-	
	A Nondeductible, Mr. and Ms.	12SAMPLE	111-11-1111	Proform...	US	
	A Partnership, Taxpayer and Partner	13SAMPLE	999-99-9999	Info Pen...	-	
	A Passive Example, Mr. and Ms.	14SAMPLE	222-22-2222	Proform...	US	
	A Sample, Child	15SAMPLE	333-22-4444	Proform...	US	
	A Sample, Dad and Mom	16SAMPLE	999-99-9999	Proform...	US	
	A Sole, Proprietor	17SAMPLE	555-55-5555	Proform...	US	
	A Wage, Earner	18SAMPLE	111-11-1111	Proform...	US	
	An Investor, Mr. and Ms.	19SAMPLE	555-55-5555	Proform...	US	
	An Oil, Gas Example	20SAMPLE	777-77-7777	Proform...	US	
	An Outside, Sales Rep	21SAMPLE	666-66-6666	Proform...	US	

3. Click on **Client**.
4. Click on **Backup**.
5. Enter the path or click **Browse** to find an existing directory.



6. To initiate the backup, click **OK**.

NOTE: If the client already exists in the destination directory, the application prompts you to decide whether you wish to replace it with the one that is being backed up.

- Click **Yes** or **Yes to All** to replace the client or group of clients.
- Click **No** or **Cancel** to keep the original client and terminate the backup.

Benefits:

Here're the 2 benefits of backing up the Lacerte data:

- **Data Protection and Disaster Recovery:** By backing up your Lacerte data, you safeguard it from potential data loss due to hardware failures, system breakdowns, natural disasters, or other unanticipated events. Regular backups guarantee that you have a safe copy of your tax data, allowing for speedy recovery and minimal downtime in the case of data loss.
- **Business Continuity:** With dependable backups in place, you can sustain business continuity even in the face of data-related events. If your primary Lacerte data becomes inaccessible or damaged, you can restore the backup and restart your tax preparation and filing activities without severe delays.

Conclusion:

By frequently backing up your Lacerte data, you assure data protection, business continuity, compliance, and increased client service. It is a proactive step that mitigates the risks associated with data loss, develops trust with clients, and allows you to conduct your tax practice or business with confidence.

If you're still having trouble backing up the Lacerte data and need more help, feel free to contact us at +1-(888)415-5240

