

How to restore Proseries client data files?

Meta Title: How to Restore ProSeries Client Data Files?

Meta Description: Learn how to easily restore ProSeries client data files with step-by-step instructions. Get started now!

For tax professionals who utilize the ProSeries tax software, restoring ProSeries customer data files is an essential task. You can quickly restore client data files in ProSeries by going through this article and regaining access to crucial tax data.

Learn how to restore ProSeries client data files by following the below steps:

Step 1: Firstly, launch ProSeries on the Ace Cloud server.

Step 2: After launching ProSeries, click on **Restore** after choosing **Client File Maintenance** from the File menu.

Step 3: To access the location of your backed-up files, select the option **Set source directory**.

Step 4: Choose the **Type of return** to be restored.

Step 5: Select the client files to be restored. Use the **Select All** button to restore all files.

Step 6: Next check the path entered for the Set target directory. The ProSeries data folder should be listed as the default location. Use the **Set target directory** button to change the destination folder if you wish to restore clients to a different place.

Step 7: Click **Cancel** to know where your current data is saved. After that, select **File** and then choose the option **Change Directory**. For customer files from the current year, check the suggested location.

Step 8: To start restoring the chosen files, click **Restore client(s)**.

Benefits:

Here're the 3 benefits of restoring ProSeries client data files:

- **Data Integrity:** You guarantee the accuracy of the data included in client data files by restoring them. This aids in keeping precise records of your clients' financial information, especially information pertaining to taxes.
- **Historical Comparisons:** The restoration of client data files enables you to compare current and historical financial data. This might be helpful for estimating and budgeting taxes by analyzing changes in income, deductions, or other pertinent financial variables over time.
- **Compliance and Audit Trail:** Having a thorough audit trail of financial transactions is crucial for complying with tax laws and regulations, and restoring client data files makes sure of this.

During audits or inquiries by tax authorities, it helps you prove the correctness and dependability of your clients' tax returns.

Conclusion:

Restoring ProSeries client data files enables you to better serve your clients and manage their tax-related information while bringing you peace of mind, efficiency, accuracy, and compliance.

If you're still having trouble restoring ProSeries client data files and need more help, feel free to contact us at +1-855-223-4887.