



How to Backup TaxPlanner Data

1. Navigate to your main list of taxpayers in TaxPlanner
2. Click the 'File' menu in the top left hand corner
3. Choose 'Backup TaxPlanner Advantage Database'
4. **If** you see a message that states: 'Do you want to create cfg.tps?' Click Yes
5. Click 'All' or 'Selected' based on your requirements. If you chose 'Selected' then tick the taxpayers you require for backup purposes and click the 'Backup Taxpayers' button in the bottom right hand corner
6. Click the 'Ok' button once you have read the info message
7. Click Other Drive C
8. Make sure that the path is blank
9. Click 'Ok' and then 'Ok' again
10. Double click My Computer
11. Double click your C Drive
12. Look for an unknown Windows file called 1.bkp. This is your backup file.

* Tip: To email this file Right click on the 1.bkp and choose Send To – Mail Recipient. The FinSolve email address is info@finsolve.co.za.

How to Restore TaxPlanner Data

1. Firstly save the 1.bkp file by right clicking on the file and by choosing 'SAVE AS'
2. Choose your C Drive as the location
3. Navigate to your main list of taxpayers in TaxPlanner
4. Click the 'File' menu in the top left hand corner
5. Choose 'Restore TaxPlanner Advantage Database'
6. **If** you see a message that states: 'Do you want to create cfg.tps?' Click 'Yes'
7. You now need to select whether to merge the data or to overwrite the previous set of data. Read the differences between choosing 'Merge' and 'Full Overwrite' located under the 'Merge' option. Make sure that the correct option is selected. If your data has been repaired then you need to select the 'Full overwrite' method (Unless otherwise instructed)
8. Click Other Drive C
9. Make sure that the path is blank
10. Click 'Ok'
11. If you selected the 'Merge' option you will now need to select the taxpayers you wish to restore
12. If you receive an error message that states: 'Invalid Record Declaration (47)' then you need to download the latest version from our website. This can be completed by clicking the 'Check Web for updates' feature located under your Windows program list (Click the Windows Start button/All programs/FinSolve/TaxPlanner 2006(5)/Check Web for Updates)

If you experience problems with this procedure you may contact the FinSolve support desk at 043-7401601. Please note that support will be charged at R 250.00 per hour in assisting with data issues.