

To copy Sail Tax and existing data to a different computer:

Sail Tax and Data on local C: drive:

1) First check to see where your data is by starting Sail Tax up on your old computer and clicking on the Sail Tax Settings button (the light bulb at the top right) or the File pull-down menu then Setting/Defaults. At the bottom of the Settings screen, look at the Data Path. If it says "C:\My SailTaxIL Data\" then your data is on your local C: drive. (If it has F: or some other letter at the beginning, then your data is on that network drive. See "Sail Tax on C: drive and Data on a Server" below.) Make a note of where your data is. Also carefully write down or screen print to save the other information on the Sail Tax Settings screen. You will need to enter this information once you have Sail Tax installed on the new computer.

2) To copy your data to the different (new) computer:

On your old computer, copy the folder "C:\My SailTaxIL Data" (or wherever the data is on your old computer) and then paste it to your new computer's C: drive (the root of your C: drive.) Use whatever media you have available... floppy disk, zip disk, thumb drive, network, etc.

3) At your new computer, go to the current Sail Tax download at:
<http://www.instantsoftwaresolutions.com>
and install Sail Tax on the new computer.

4) If you don't see your clients when you go to Do-Return on the new computer, copy the individual file "sail_il.cdb" from your old computer to your new computer. The file is in the "C:\My SailTaxIL Data" folder.

5) In Sail Tax, go to Settings and set up your Preparer info (and efilng credentials if you are efilng.)

Sail Tax on C: drive and Data on a Server:

1) First check to see where your data is by starting Sail Tax up on your old computer or existing workstation and clicking on the Sail Tax Settings button (the light bulb at the top right) or the File pull-down menu then Setting/Defaults. At the bottom of the Settings screen, look at the Data Path. If it says "C:\My SailTaxIL Data\" then your data is on your local C: drive. (If your Data Path starts with C: use the instructions above for "Sail

Tax and Data on local C: drive" above.) Make a note of where your data is. Also write down or screen print to save the other information on the Sail Tax Settings screen. You will need to enter this information once you have Sail Tax installed on any new workstations.

If you are installing a new server, the Sail Tax Settings | Data Path on the workstations will show the network folder to copy to the new server.

2) At your new computer, go to the current Sail Tax download at:
<http://www.instantsoftwaresolutions.com>
and install Sail Tax on the new computer. Install the program and data to your C: drive (even if your data is on a network drive.)

3) On the new computer, start Sail Tax and click on the Sail Tax Settings button (the light bulb at the top right) or the File pull-down menu then Setting/Defaults. At the bottom of the Settings screen, change the Data Path to the path you noted in Step 1 above. Usually you will only need to change the first letter in the Data Path (C) to the drive letter of your server. When asked, choose "Change Path Only."

4) In Sail Tax, go to Settings and set up your Preparer info (and efilng credentials if you are efilng.)

If you need any further help please email or call.

Thanks,

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