



Export, Backup & Restore - Quick Start Guide



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Check the top-right corner for the **Server Connected** badge before performing any operation. Leave the fields below empty to use Bp Allied default settings, or fill them in to connect to a different server.

Click **Connection Details...** (top right) to review or update the full connection configuration.

- **SQL Database Server** – The name or IP address of your SQL Server. Leave blank to use the default server configured for Bp Allied.
- **SQL Server Username** – Your SQL Server login name. Leave blank to use the default.
- **SQL Server Password** – Your SQL Server password. Leave blank to use the default.

Backup

Choose a backup method, set a destination, then click **Backup Database**.

1. Select a backup method (radio button).
 - **Standard Backup** – creates a single .BAK file. Database stays online.
 - **Detach & Copy** – copies raw MDF/LDF files. Database briefly offline.
2. Click [...] to choose the **Backup location** folder.
3. Click **Backup Database** and confirm success in the Status bar.

Restore

Ensure all users are logged out of Bp Allied before restoring.

1. Select a restore method (radio button).
 - **Standard Restore** – restores from a .BAK file.
 - **Attach** – attaches existing MDF & LDF files.
2. Click [...] to locate the **Backup file location**.
3. Click **Restore Database** and confirm success in the Status bar.

Export to CSV

Exports the entire Bp Allied database to comma-delimited text files (.CSV) — one file per database table. Useful for reporting, analysis, or sharing data with third-party applications.

1. Click the **Export to CSV** tab.
2. Click [...] next to **Export all files to** and select a destination folder. Use an empty folder to avoid mixing exports.
3. Click **Export Database to CSV Files**.
4. Wait for the process to finish and verify the status message.

NOTE CSV files can be opened directly in Microsoft Excel. Existing files in the chosen folder with the same names will be overwritten.

Document Export

Copies all saved client documents to a target folder. Use when migrating servers or creating a file-level backup.

1. Click [...] next to **Export all files to** and choose a folder.
2. Click **Export Client Documents**.
3. Confirm completion in the status area.

Document Import

Restores client documents from a prior export back into Bp Allied.

1. Click [...] next to **Import files from** and select the backup folder.
2. Click **Import Client Documents**.
3. Confirm completion in the status area.

Settings Export

1. Saves all user settings, letter templates, and invoice templates to a folder. Use when setting up a new workstation or as a configuration backup.
2. Click [...] next to **Export Settings and Templates to** and choose a folder.
3. Click **Export Settings & Templates**.

Settings Import

Applies a previously exported settings package to the current installation. Restart Bp Allied after importing.

1. Click [...] next to **Import Settings and Templates from** and select the backup folder.
2. Click **Import Settings & Templates**.
3. Restart Bp Allied to apply the imported settings.

IMPORTANT Before Restoring Ensure all users are logged out of Bp Allied. A restore will overwrite the current database — always take a fresh backup first.

TIP Detach & Copy This backup method takes Bp Allied offline briefly. Use Standard Backup during business hours to keep the system available.

NOTE Best Practice Back up daily to a separate drive or network location. Periodically test your backups with a trial restore to confirm they are valid.