# How to create a Transfer file

This is an alternative method to save your data externally.

You can create a Transfer file easily on to your computer desktop or to a selected location, you can also email a copy to yourself or anyone you choose

The Transfer file process will create a data file for the currently open company. The file name will be "[company name] (created 'todays date' in dd-mmm-yyyy format).tfr. You can rename the file but leave the extension as .tfr
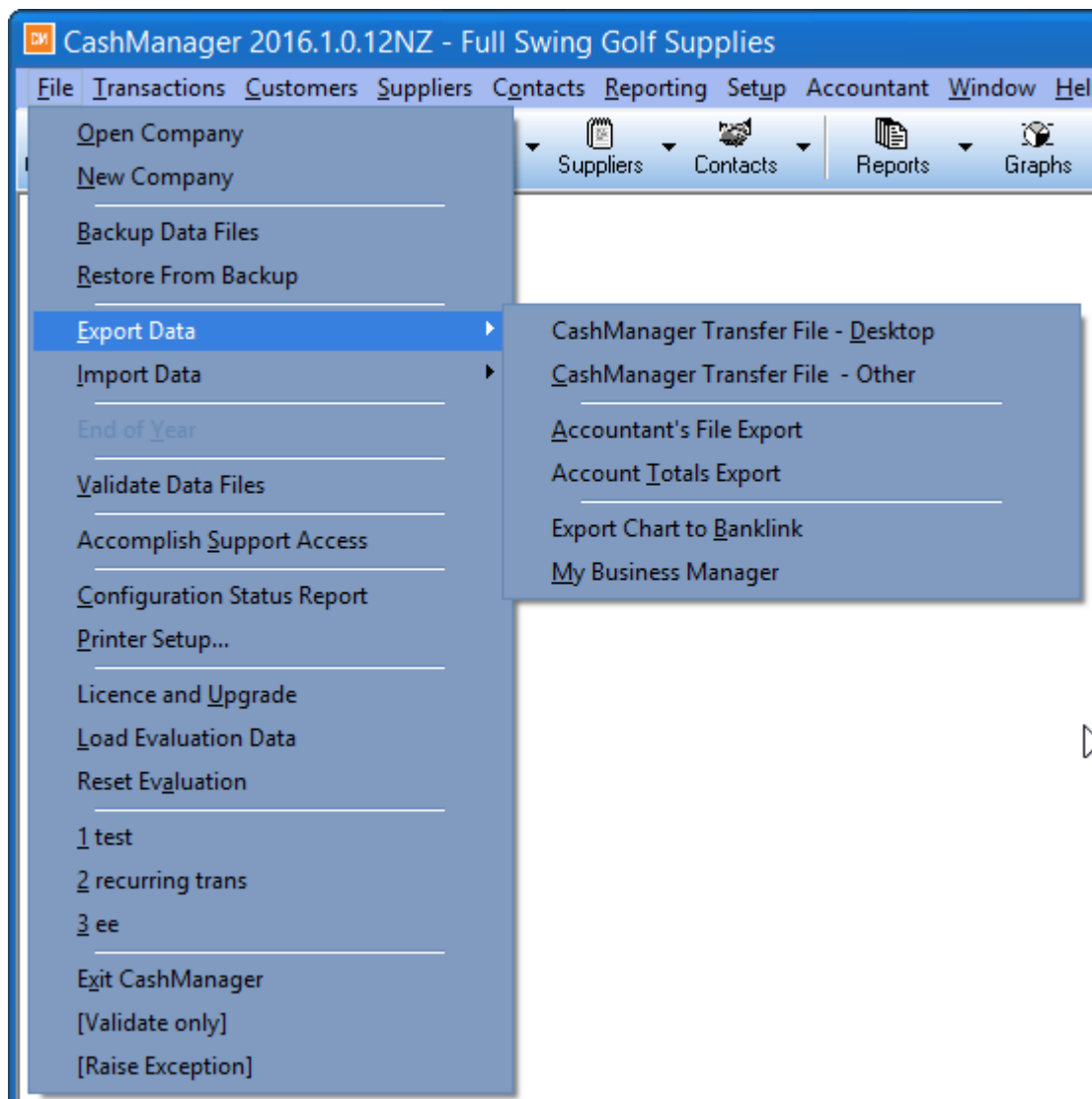
As shown in the above image, if you would like to make the transfer file on to your PC desktop, then go to **File menu**, **Export data**, and then select the option the arrow is pointing to- **'CashManager Transfer file- Desktop'.**
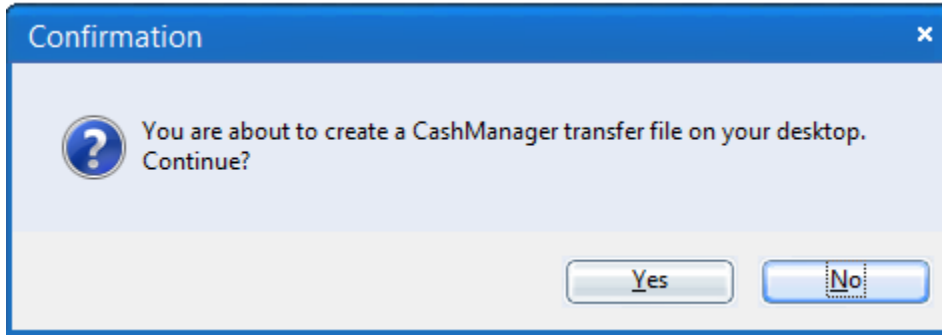
If you would like to save the file to a different location, a folder on your PC, USB drive, External Hard drive or even to email it to yourself or to your accountant for that matter, then select the option **'CashManager Transfer file- Other'** and you will directed to the screen as below
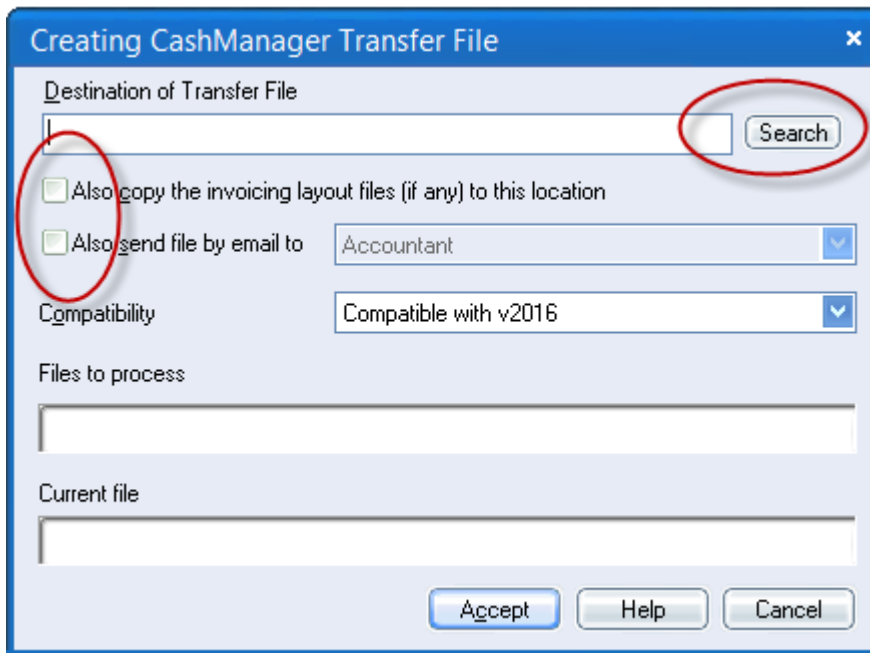
Should you need to select the destination of the file, select the button **Search** (circled in Red) this will open the screen to select the destination of the file to be saved

With a Transfer file you can elect to copy the invoicing layout files (.RAV). This is great for people who have special layouts and logos on their Invoices. Tick the box that says **'Also copy the invoicing layout files (if any) to this location'** (Circled in blue)

If you need to email a copy of the data to your accountant or to yourself or even the CashManager Support team you could tick the second box in the Blue circle that says **'Also send file by email to'.** And select one of the options

- **Accountant** (if you need to email to your accountant)
- **Accomplish Support team** (if you are sending the files to the CashManager support team)
- **Other**, use this if you want to send a copy to anyone else, even if it's to yourself

After the file is created you will be asked if you want to mark this file as Locked. This is to make sure no one will alter the data till your files are opened again from a repair file from CashManager team or a file from your Accountant or simply you need to keep it locked until you reimport your data
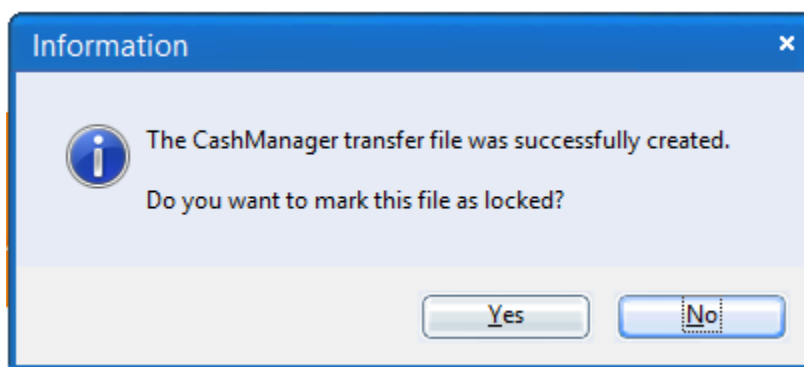
You can unlock the Company files by going to **Setup** menu and selecting **unlock** option. If you never want to lock your files you can turn this off by going to **Setup Menu**, **Options** and **Preferences** and untick **"prompt to lock company data after creating a transfer file"**