



## *The QuickBooks™ Client Newsletter*

Helping You Grow a Profitable Business with QuickBooks™ Software  
From the office of:

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### **How to Back Up and Move a Company File in QuickBooks**

*Your QuickBooks company file is gold. Make sure you know how to back it up and restore it properly.*

You may not think of your QuickBooks company file as being portable. It lives safely on the hard drive of your desktop and/or laptop computer. You wouldn't want it to be anywhere else, right?

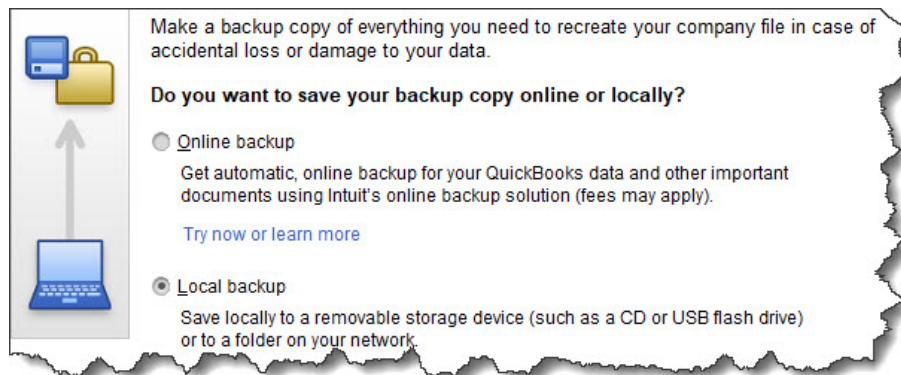
However, the most common reason businesses move these critical files; is they have purchased a new computer or they may also want to share their data. QuickBooks allows you to create a backup file that you can save to a USB drive or CD, or to another folder on your company's network. Once it is available at its destination computer (where a copy of QuickBooks is installed), you (or another recipient) will be able to restore it.

#### **Making a Backup**

You should not wait until you have to move a QuickBooks company file before backing it up. This is something you should be doing regularly.

Before you start, make sure your copy of QuickBooks has the most recent update, which should not be a problem if your set up is on automatic updates. If you are not, and you have ignored those messages about updates that appear when you open QuickBooks, we can help you launch a manual update and configure QuickBooks to update automatically.

With QuickBooks in **Single-User Mode**, open the **File** menu and hover over **Back Up Company**. Select **Create Local Backup**. You will see this window:



*You can save your QuickBooks backup copy locally or online.*

Click the button next to **Local backup**, then the **Options** button. In the window that opens, you'll select your destination location and answer a few questions about your backup. One of these gives you the option to get a reminder to back up your file every x times you close QuickBooks, should you choose to do manual backups.

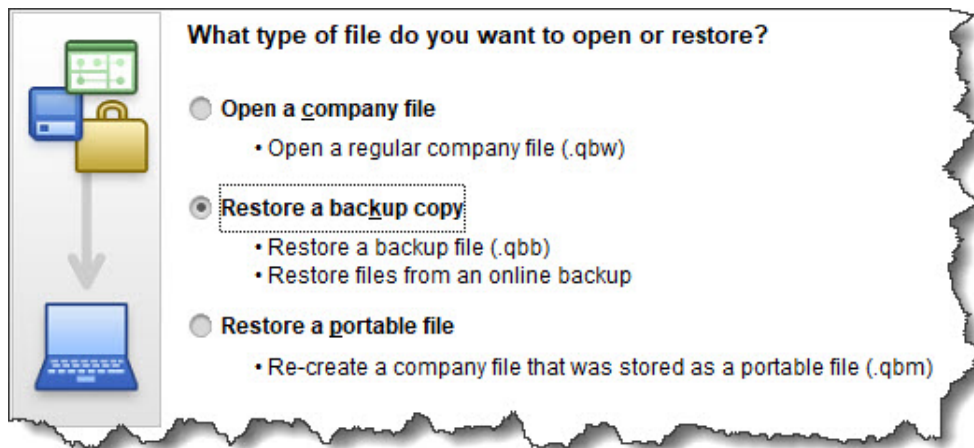
Click **OK** to return to the **Create Backup** window, then click **Next**. The following screen gives you the option to save your file and/or schedule future (automatic) backups. If you choose to simply save it now, check that button and click **Next** to verify the destination location and file name.

*Note: Before you save your backup file, give it a name that is different from your regular company file. Write down the exact file name and its location.*

Click **Save**. A small window will open displaying your progress, and you will get a confirmation message when the file has been saved with a **.qbb** extension. You can now take the removable storage device to the destination computer, where QuickBooks should already be installed.

## Restoring a Backup File

Once that is done, open the **File** menu and select **Open or Restore Company** on the destination computer. This window will appear:



*QuickBooks displays this window when you select **File | Open or Restore Company**.*

Click the button in front of **Restore a backup copy**. Click **Next** and select **Local backup**. Then click **Next** again. Click the down arrow next to the **Look in** field and click on the location of your backup file to display its contents. Browse until you find the file (it should end in **.qbb**), then highlight it by clicking on it. Click **Open**.

QuickBooks displays a window that asks where you want to restore your file. You will click **Next** to find it in the **Save Company File as** window. The **Save in** field should point to your main QuickBooks directory (like **QuickBooks 2018**) and the **File name** field should show the **correct** file name (YourCompanyName).

When everything looks correct, click **Save**. QuickBooks will convert your **.qbb** file to the standard QuickBooks file type, **.qbw**, and open it.

### Care Needed

Losing your QuickBooks data, as you know, would be absolutely disastrous and there may be occasions when you will need to open a backup copy of your company file on a different computer. We would be happy to walk you through this the first time you do it; in fact, we highly recommend it. As always, we are available to work with you on any QuickBooks issues you are experiencing – or to get you up and running for the first time.

We hope you find these QuickBooks tips helpful. Please visit our company website often at <http://www.accountingconnections.org> for we update it constantly. Our website offers a wealth of tax and accounting tips, along with links that will better serve your business needs. We archive our QuickBooks Tips newsletters on our website as well. They are printable PDFs for easy reference, as are our tax tips PDFs.

Accounting and Taxation is **our** business; making us a part of your team allows **you** to concentrate on **your** core business.



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