![Jones & Associates LLC - Certified Public Accountants]

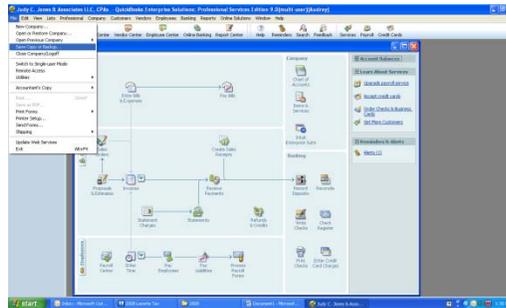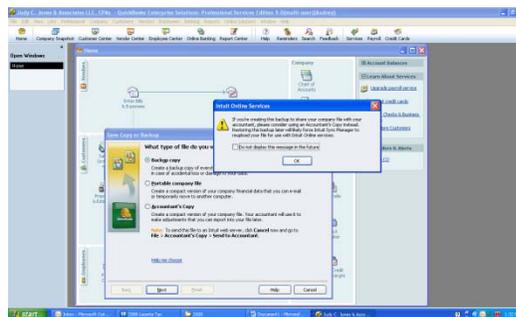# *Instructions for sending us your QuickBooks back-up file:*

1. In QuickBooks, in single user mode:
    a. Select "Save Copy or Backup" in the FILE menu.

    b. Select "Back<u>u</u>p copy". *Do not select Portable company file or Accountants copy.* Click "<u>N</u>ext"
    c. Click "OK" to disregard any alerts (see example below)

    d. Click "<u>N</u>ext" to save as a "<u>L</u>ocal backup"
    e. Browse and select a place to store the backup file (*any backup option settings will work*)
    f. When asked if you want to save now or later, choose "Save <u>i</u>t now"
    g. Follow the additional prompts to save the backup (*.qbb*) file

2. Next, go to the website link we provided with these instructions.

3. At the prompt, enter your username and password (see the email we sent with this document, or call us for these).

4. Once you've logged onto our SharePoint site, click the "upload" link on the navigation bar. The "Upload Document" page will appear.

5. Click the "Browse" button and the "Choose file" dialog box will appear.

6. Browse your computer for the .qbb backup file you saved in Step 1.

7. IMPORTANT NOTE FOR STEP 9: Depending on the size of your file and the speed of your Internet connection, the file upload may take as long as a few minutes or as long as 20-30 minutes. Make sure you do not close the browser tab/window once the upload begins.

8. You will be returned to the "Upload Document" page. Click the "OK" button to begin your upload. This upload process will begin and the blue progress bar will fill up at the bottom of your browser window. Your upload is finished when you are returned to your SharePoint site and you see your file listed with a "new" label on the end of it.

9. Once you see your file in the list, then you can simply close the browser window to end this session.