How to create a backup copy of QuickBooks

1. If you are saving the file to a flash drive, make sure it is plugged in to the computer.
2. With your QuickBooks company file open, click on “File” in the top left-hand corner.
3. Click on “Back Up Company”
4. Click on “Create Local Backup”
5. Click “Next”
6. On the “Backup Options” screen, there is a box under the words “Tell us where to save your backup copies (required)” - Click “Browse” next to that box.
7. If you are saving:
    a. to a flash drive, look for the drive associated with that – should be coded as something between a “F:” and “J:” drive depending on how your computer is set up and click on that letter.
    b. To send via the portal or email, click on “Desktop” – you may need to scroll up on the list to see this.
8. Click “Ok” once the letter or word “Desktop” appears in the box
9. This should take you back to the “Backup Options” screen with the drive you choose filled into the box next to Browse.
10. There should be several lines under this box that should all be check marked and should remain that way:
    a. “Add the date and time of the backup to the file name (recommended)” and the box in front of this line - this makes it easier to find the most current backup.
    b. “Limit the number of backup copies in this folder to 3” - this makes it so you don’t have too many files on the same drive
    c. “Remind me to back up when I close my company every 4 times” – reminders to back up your file are always a good idea!
11. There are also options to “verify that your company data is OK when you save”. You want to make sure that “Complete verification (recommended)” is checked. Checking this will increase the amount of time it takes to make a backup, but also increases the chances of finding errors in your data before your entire file is corrupted and breaks down.
12. Click “Ok”
13. On the “When do you want to save your backup copy”, the “Save it Now” option should already be checked, so you can just click “Finish”
14. You will see a “Verifying data integrity” box come up as it works through the verification process. If it comes back with no errors, another box will automatically appear showing the backup being created.
15. When it is all done (with no errors), you should see a screen come up that says “Back up created successfully”.

NOTES: It is always a good idea that if you are using a flash drive, that you use two different drives and alternate backups between them. That way if something happens to one drive the other should have the next oldest backup to restore from.

You should also test your backups from time to time to make sure that the flash drive is functioning correctly. To do this, restore the file to your system, but instead of the usual filename, use the word “test”. If it comes back successfully restored, then you know it is working correctly.

If you are sending the backup file via DBC's portal:

1. Open your web browser and go to DBC's website, dbccpa.com
2. Click on "Client Portal" (Listed in top menu bar of website). This will show you two options for the NetClient CS client portal system: Register or Sign In
    a. To register:
        1. Contact your DBC representative to request access
        2. After the access request has been submitted, you will receive an email from register@netclientcs.com with a link to complete the registration process.
        3. You will be required to create a username and password to use when you want to access the portal.

    b. To sign in, enter the login and password you created when the account was set up.
3. Once logged in, click the "File Exchange" button on the left-hand side of the screen. This will display a "File Uploads" folder in the main area of your screen
4. Click on the "File Uploads" folder
5. Click on "Upload"
6. You can drag and drop the file into the window that appears of click "Add files" to browse for a file on your computer. Do this by, clicking on the drive where you saved the file (Desktop or one of the flash drives).
7. You should see the file you created appear in the box that comes up. It should have a green Quickbooks icon in front of the filename and you should see the word "Backup" and the date and time you made it in parenthesis after the company name. Click on this file to highlight the name of the file then click "Start Upload"
8. The screen will show the progression of your file as it is uploaded and when it is finished.

If you are sending the backup file via email:

1. Open your email program
2. Enter email address of person you want to send the file to
3. Click on "Attach File"
4. To browse for a file on your computer, click on the drive where you saved the file (Desktop or one of the flash drives).
5. You should see the file you created appear in the box that comes up. It should have a green Quickbooks icon in front of the filename and you should see the word "Backup" and the date and time you made it in parenthesis after the company name. Click on this file to highlight the name of the file.
6. Click "Insert" or "Ok" to select the file (depends on your email program).
7. If you have a user name different than Admin or a password on the file, please include it in the body of the email or in a follow up email.
8. Send the email.