



Quickbooks Backup/Restore Reference Guide

This guide is to assist clients through the process of backing up their Quickbooks file and Restoring a Quickbooks file.

As always, please contact our office if you have any questions or would like someone to walk you through these steps.



Backing-Up Quickbooks

1. Open the Quickbooks file you would like to backup.
2. Go to File > Back Up Company > Create Local Backup
3. Make sure "Local Backup" is selected and click Next
4. On the window that pops up select "Browse"
5. Scroll to the top of the list and select "Desktop", click OK
6. Leave all options on the default and click OK
7. Select "Save it now" and click Next
8. *If a pop box appears saying the company file is stored on a drive in a remote computer, just select OK*
9. Click "Save"
10. Quickbooks will now start the verification & backup process. Wait for this to complete.
11. Once the backup is complete, a box that says "Quickbooks has saved a backup" will appear. Click OK.

You have successfully backed up Quickbooks!



Restoring Quickbooks

To restore a Quickbooks file, you will need a Backup File downloaded to your computer. If you received a Backup File via ShareFile, follow the instructions in the ShareFile Documentation to save the Backup File to your Desktop.

1. Once you have a Backup File on your desktop
2. Open Quickbooks by going to Start > All Programs > Quickbooks
3. *If Quickbooks opens a company file automatically you will need to go to File > Close Company / Logoff. You need to be at the "No Company Open" screen.*
4. Select the middle box that says "Open or restore an existing company"
5. Select the second option "Restore a backup copy" > Next
6. Choose Local Backup > Next
7. Browse to your Desktop and select the Backup File
8. Click Open
9. Click Next
10. *Now you need to find the location where your Quickbooks File permanently lives. If you have a server environment, this is usually on a Q: or D: drive. If this is a home environment it is usually under Documents > Intuit > Quickbooks > Company Files.*
11. *If you already have an older Quickbooks file in this location, you must change the "file name" to something different. You can add the date at the end or add a "2".*
12. Click Save when you have found the correct location and changed the file name.
13. Quickbooks will now go through the restore process.
14. Enter your Admin password if prompted.
15. Once Quickbooks has successfully restored the file, a box will appear that says "Your data has been restored successfully". Click OK.
16. Your company file will now open like normal.

NOTE: Once your Quickbooks file has been successfully restored, we highly recommend deleting your old Quickbooks file to ensure you do not accidentally use it. To do this click Start > Computer > Navigate to the folder where your Quickbooks file lives > select the OLD file that ends in ".qbw" > Right-click and choose Delete.