

QuickBooks Portable File Instructions

Uploading a portable file:

1. Open Quickbooks.
2. Choose Open or Restore an existing company.
3. Choose the third option, restore a portable file, and click next.
4. Find the portable file that you are looking to restore, choose it and click open.
5. Choose where you would like to save the restored company file and click save.
6. Quickbooks will open and restore the portable file.

Sending a Portable File:

1. Open the Quickbooks Company that you would like to save as a portable file.
2. Go to File – Create copy
3. A new window will open asking what type of file you would like to save, the second choice down is a portable file. Choose this and press next.
4. Choose the location where you would like the portable file to be saved.
5. Quickbooks will tell you that they must close and reopen your company to create the portable file. Click okay.
6. Once Quickbooks has closed and reopened your company file, the portable company will be saved in the location that you previously chose.
7. This file can then be attached to an email or moved onto a flash drive.

Note: When a portable file has been created the original file can continue to be worked in and updated. If the portable file is updated, sent back and opened in the place of the original file it will overwrite any changes made to the original file since the portable file was created.