



Are You Backing Up Your QuickBooks File?

It's critical information. Losing it could shutter your business.

We've all lost computer files. A Word document here, part of a presentation there – maybe even a spreadsheet. It's maddening. But we can usually reconstruct our work. Lose a QuickBooks company file, though, and you're in a world of hurt. There's no way you could rebuild your customer and vendor and product/service lists and your countless invoices and sales receipts and other transaction forms.

Even if you live in a geographical area where a crippling natural disaster isn't likely to hit, you could still experience a fire or burst pipes. You might, for example:

- Be the victim of a hacker.
- Have your QuickBooks file become corrupt.
- Lose access to everything on your computer when it just stops working.

If you don't have a backup, you risk losing more than data. You could lose your company. Your accounting data is the backbone of your business, and you have to protect it. Here's how it's done.

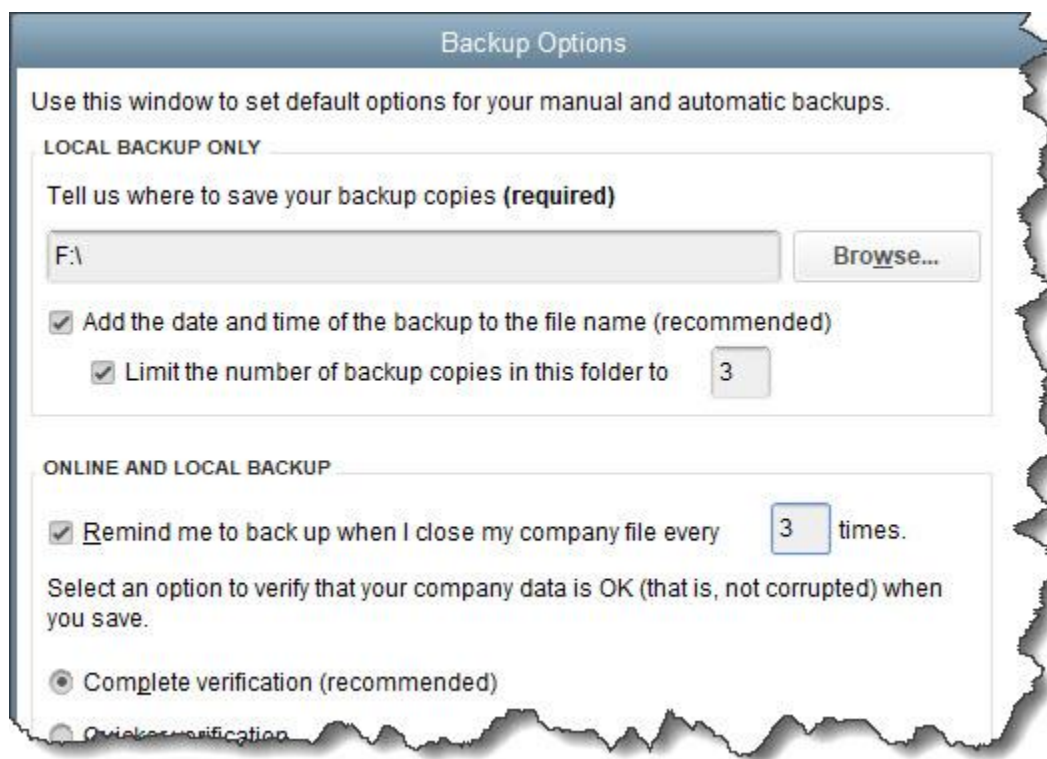
Two Decisions, and Some Preparation

Before you start backing up your QuickBooks file (your accounting data, templates, letters, logos, images, and related files, but not payroll), you'll need to answer two questions. First, where do you want your backup to be located? On a CD or DVD? USB drive? Second, do you want to automate the

process or rely on yourself to remember to do it every day or so? Whatever you choose, you can set up your backups from within QuickBooks.

You'll have to be in single-user mode to back up your file. If you're not sure, open the **File** menu and look about halfway down the list. If it says **Switch to Multi-User Mode**, you're good. Click **Switch to Single-User Mode** if that option is active. Also, make sure your copy of QuickBooks is up to date. If you have automatic updates turned on, you should be OK. Just to be sure—and especially if you're updating manually—open the **Help** menu and select **Update QuickBooks Desktop**.

Setting Up Local Backups



Backup Options

Use this window to set default options for your manual and automatic backups.

LOCAL BACKUP ONLY

Tell us where to save your backup copies (required)

F:\ [Browse...](#)

☒ Add the date and time of the backup to the file name (recommended)

☒ Limit the number of backup copies in this folder to

ONLINE AND LOCAL BACKUP

☒ Remind me to back up when I close my company file every times.

Select an option to verify that your company data is OK (that is, not corrupted) when you save.

☒ Complete verification (recommended)

☐ Quick verification

*You'll fill out this window to create a **Local Backup**.*

There are two ways to create backups of your company file. The one we're covering in this column is a **Local Backup**. These can be either manual or automatic.

Open the **File** menu and click **Back Up Company**, then **Create Local Backup**. In the window that opens, select **Create Local Backup**. **Browse** to the location where you want to store your file. This can be a removable storage device like a USB drive or a CD/DVD, something you can store away from your office. Then specify your preferences in the rest of the window by answering these questions:

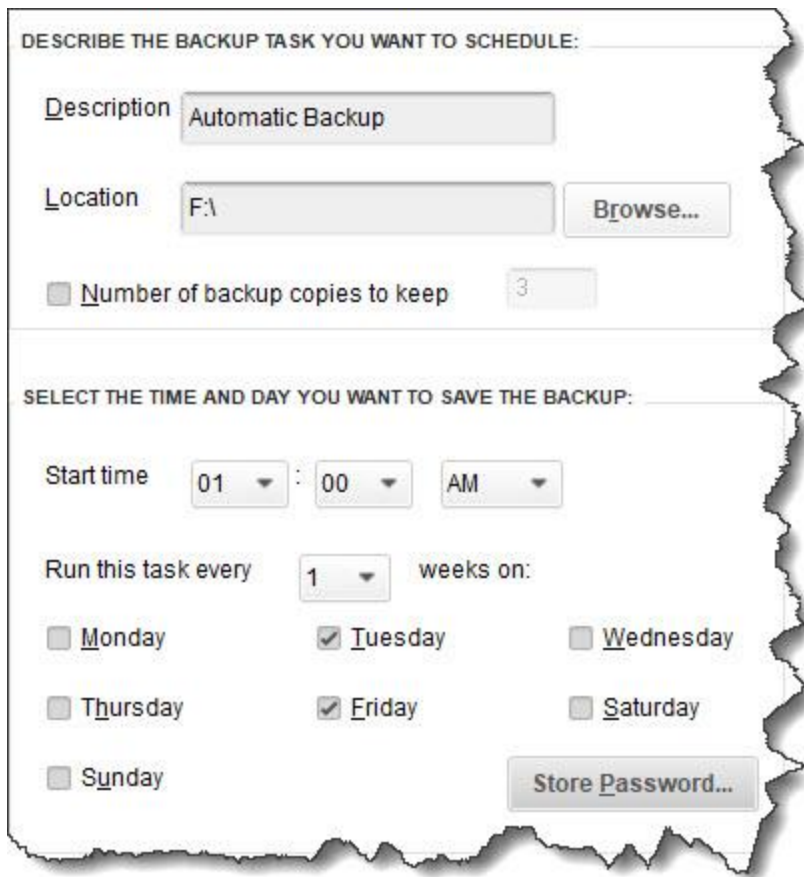
- Do you want a date/time stamp?
- What is the maximum number of backup copies you want in the location you selected?
- How often should QuickBooks remind you to back up (every X times you close your company file)? This is optional.

QuickBooks recommends that you select the **Complete verification** option. When you're done, click **OK**.

Scheduling Automatic Backups

We just described the manual method of creating backup copies, with or without reminders. You can also schedule automatic backups. In the window that opens after you've completed the **Backup Options** window, you can specify when you want your backups to occur. You can save your file immediately, save it immediately and schedule future backups, or just schedule future backups. Make your choice and click **Next**.

Do you want your file saved automatically when you close your company file every X times? Check that box. Otherwise, you can **Back Up on a Schedule** by clicking **New**.



DESCRIBE THE BACKUP TASK YOU WANT TO SCHEDULE:

Description: Automatic Backup

Location: F:\ Browse...

☐ Number of backup copies to keep: 3

SELECT THE TIME AND DAY YOU WANT TO SAVE THE BACKUP:

Start time: 01 : 00 AM

Run this task every 1 weeks on:

☐ Monday ☒ Tuesday ☐ Wednesday
☐ Thursday ☒ Friday ☐ Saturday
☐ Sunday

Store Password...

You can create a schedule for automatic company file backups in QuickBooks.

Specify your options in the window pictured in the above image. Click **Store Password** to enter your Windows password to give QuickBooks permission to run your scheduled backup when you're not at your computer. When you're done, click **OK**. You can go back in and change these options anytime.

Restoring Your Company File Backup

QuickBooks contains tools to restore your company file backup, of course. You might need to do this to undo recent changes, for example. Restoring your backup will return you to the point where you created the backup file.

Open the **File** menu and select **Open or Restore Company**. In the window that opens, click **Restore a backup copy**, then **Next**. Select **Local backup** in the next window and **Next**. The file directory of your PC that opens will only contain .qbb (QuickBooks backup) files. Browse to where you saved the file and locate it. Highlight it so the name shows in the **File name** window. Click **Open**.

The next window tells you that you're about to select a location for the backup file (which will be converted to a .qbw file). If you save it to the same directory with the same name, you will overwrite your existing file, which may or may not be what you want to do. If you just want to move the backup file to your hard drive for now, rename one of the files or save it to another folder. When you're ready, click **Next**. QuickBooks will warn you if you're about to delete an existing file and overwrite it (you'll have to enter YES in a box to do so).

Be Careful And/or Contact Us

Restoring a QuickBooks company backup file can be risky. We strongly urge you to contact us unless you have a lot of experience working with this process. Let us know if we can help in any other way. QuickBooks is usually pretty forgiving, but you can get into trouble working with your company file. Call us if you need us.

SOCIAL MEDIA POSTS

- Do you wish you could go back a few days in your QuickBooks file? If you create backups, you can do that. Ask us.
- Looking for your QuickBooks company files? Open your OS(C:) folder and enter *.qbw In the search box in the upper right.
- It's easy to create a local backup of your QuickBooks company file, which you should be doing regularly. We can help.
- If you're trying to restore a QuickBooks company file backup, we strongly urge you to let us help you.