QuickBooks Desktop Upload Instructions

You will need to use the QuickBooks copy utility. Go into your QuickBooks program and make sure the company you want to backup is open and active on your desktop. Go to FILE (on the top edge of your screen). Go to the CREATE A COPY, select the PORTABLE option, click the NEXT button...the computer will ask you where you want the copy to be located, select DESKTOP and click the SAVE button on the lower right. QuickBooks might tell you it needs to close and reopen your file before creating a portable company file...click OK. Once complete, QuickBooks will tell you it is complete, click OK.

<u>If you received an email from us:</u> Go to the email you received and press the CLICK HERE to UPLOAD. The screen will prompt you to CHOOSE FILES...browse the list until you see the file you backed up above. The file will look like a small lime green suitcase, click on it and click OPEN. Your screen will take a few minutes to load depending on the size of the file. You should see your file with the extension .QBM. **If** not, you have loaded the WRONG file and you will need to click REMOVE and CHOOSE FILES to try again. Once it is loaded, you can load other files by following the steps above.

<u>If you did not receive an email from us:</u> Go to our website (<u>www.sykes-cpa.com</u>). In the Client Center section, (bottom left on Home page), select "Secure File Transfer" and click "Go". You will be instructed to type your email address, name, and company name. Then click "Browse" to select the file you backed up above. The file will look like a small lime green suitcase, click on it and click OPEN. Your screen will take a few minutes to load depending on the size of the file. You should see your file with the extension .QBM. If not, you have loaded the WRONG file and you will need to click REMOVE and CHOOSE FILES to try again. Once it is loaded, you can load other files by following the steps above.

You are ready to press UPLOAD FILES to send the file.