

Creating an Accountant's Copy

Description

An Accountant's Copy is a version of your company file that your accountant can use to make changes while you continue to work. When your accountant is done, he or she will send you a file that you import into your company file.

Solution Description

To Save an Accountant's Copy File:

1. From the **File** menu, **Accountant's Copy**, and then select **Save File...**

Note: In QuickBooks Premier Accountant Edition and QuickBooks Enterprise Solutions Accountant Edition, select the **File** menu and then **Client Activities** to save the file.

2. Select **Accountant's Copy** and click **Next**.
3. Set the dividing date (Be sure to coordinate with your accountant before choosing this date) and click **Next**.
4. Select a location to save the file and click **Save**.
5. Give the Accountant's copy transfer file (.qbx) to you accountant and continue working.

To send an Accountants Copy File:

1. From the **File** menu, **Accountant's Copy**, and then select **Send to Accountant...**

Note: In QuickBooks Premier Accountant Edition and QuickBooks Enterprise Solutions Accountant Edition, select the **File** menu and then **Client Activities** to send to the accountant.

2. Click **Next** to confirm the accountant's copy.
3. Set the dividing date (Be sure to coordinate with your accountant before choosing this date) and click **Next**
4. Enter in the Accountant's E-mail address.
5. Reenter the accountant's e-mail address
6. Enter your name.
7. Enter you e-mail address.
8. Click **Next**.
9. Create the file transfer password to encrypt file for security
10. Reenter the password.
11. Enter any notes to your accountant.
12. Click **Send**.

If this solution does not resolve the issue, please review other available [QuickBooks support options](#) for additional guidance. You can also read and post messages relating to your issue on the [QuickBooks Community](#) forums.