**How to Send your QuickBooks File over the Internet Securely and Easily**

Please use this link to send your company file to us via the internet. This is a quick, secure and easy way to provide us with a backup of your file.

[**https://quickbooks.intuit.com/ca/resources/updates/sending-your-company-file-accountant/**](https://quickbooks.intuit.com/ca/resources/updates/sending-your-company-file-accountant/)

**How to send your QuickBooks File using our Portal**

**How to back up your QuickBooks File**

Log in to QuickBooks

1. Select the “Back Up Data” company option under the File Menu
2. Select Create Local Backup and choose Local Backup
3. Click Options and select your desktop as to where you would like to store your backup
	1. You should name your backup with your company name followed by the date
4. Click Next
5. Click Save it now
6. Close QuickBooks

Once your back up has been created on your desktop, log into the client portal. If you are unsure of your username or password, please call our office at 802-223-6261. Once logged into the portal, make sure you are on the correct portal (if you have multiple entities) by using the upper right arrow to move between personal and businesses.

1. Highlight the *To Firm* folder under File Transfer
2. Look for an arrow pointing up icon in the middle of your screen and click it
3. A box will appear and you can either drag and drop your backup file or you can use “select file” to browse to the file
4. Click the blue button with “send emails” and select the correct FSV staff to send the file to. If you omit this step, the file will still be routed to the correct staff member although it may not be instant
5. Click the green upload button and do not close your browser until the upload has finished
6. Close the browser by signing out in the upper right hand corner

Please note that you should alert us to the password. You may call the office at 802-233-6261 and provide it to us over the phone or upload a word document or text file to the portal similar steps above.