

Creating a QuickBooks Desktop Portable Copy

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The Gold Standard of... Creating a QuickBooks Desktop Portable Copy

1 - Create a portable copy of the QB file. Instructions here:

Create a portable company file.

- Open QuickBooks and log in as an admin.
- Go to the File menu and select Create Copy.
- Select the Portable company file and then Next.
- Give your portable company file a unique name. This makes it easy to tell apart from your regular company file.
- Select a location to save your portable company file. Pick somewhere that's easy to find, like your Windows desktop.
- When you're ready, select Save and then OK.

You now have a portable company file.

2 - We should have sent you a secure link to our Dropbox. Please drop the files there

3 - Send an email to care@precisionf.com with the following information:

- a) What year and version of QuickBooks are you using
- b) The admin password. We'll need that to reopen the file on our side

Please note: This does not transfer the live file to us. You are still in possession of the live file unless we tell you

otherwise.
