

Backing up your QuickBooks data file

A regular backup regime is essential to minimise disruption to the business should there be an unexpected computer or network failure. A well prepared back up regime allows you to backup your data and have it available should such a disaster arise.

There are three backup options available

1. Have QuickBooks automatically back up your company file, each time (or a specified number of times) that you close it.
2. Schedule automated daily backups either locally, or to a remote site by using Reckon Tools Online Backup.
3. Manually back up your company file.

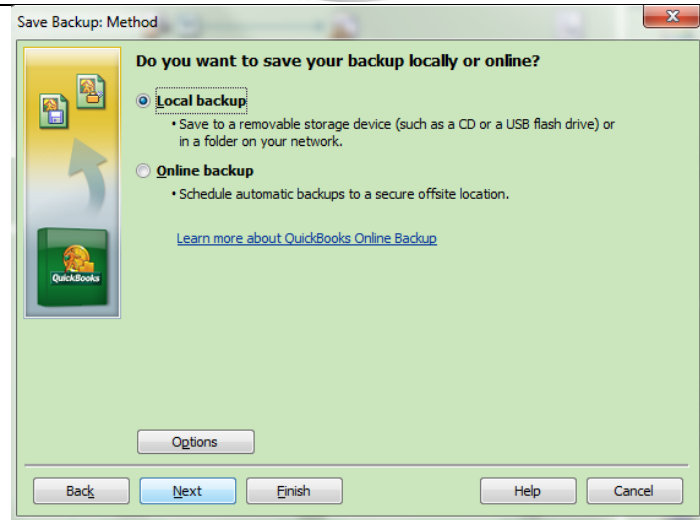
Note – you must be in single user mode to back up manually and if you have selected an automatic backup, then the company file that is being back up must be closed and the computer switched on. (You can be working have another QuickBooks company file open)

Commencing the backup

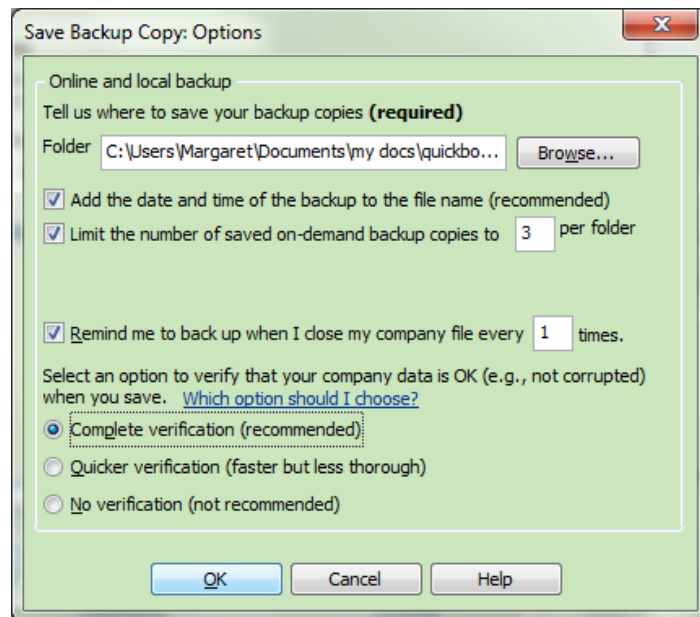
1. From the **File** menu, click **Save Copy or Backup** to open the backup wizard. The following screen is displayed



2. Click **Backup Copy**, then click **Next**,

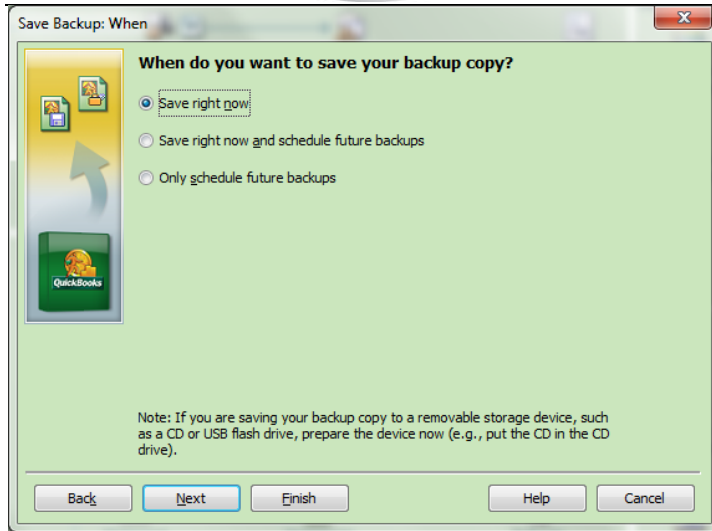


3. then click **Local Backup**.
4. If you have not already done so, click **Options** to set your backup defaults (such as where you want to save your local backup)



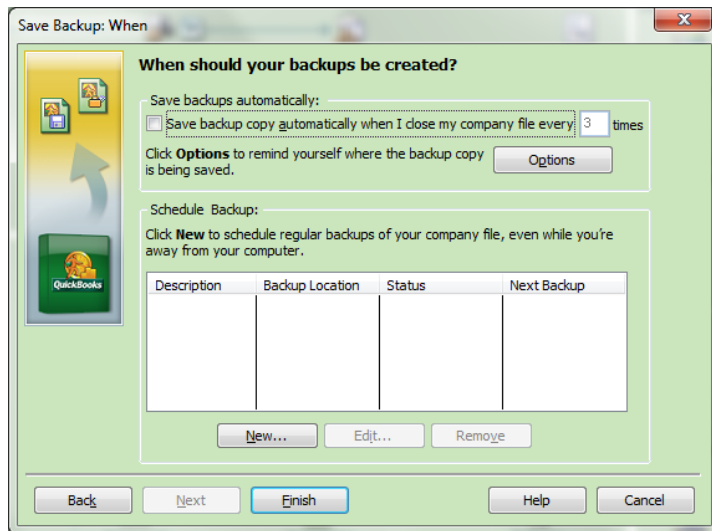
(It is strongly recommended at this stage that you select the Complete Verification option to ensure there is no data corruption)

5. Close this and then click **Next**.



Option 3 - Manual Back up

6. Select the first option here – save Right now and the backup will proceed immediately
7. Otherwise for either option 1 or 2, click **Only schedule future backups** (to create a schedule without running a backup) and click **Next**



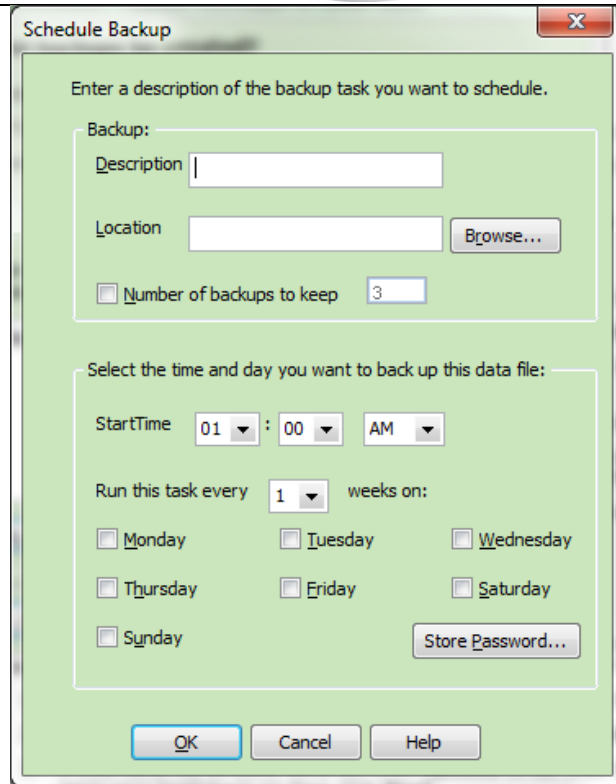
From here you have the other two options noted above

Option 1 – Automatically back up on the company file when closing

8. Select the first check box and enter a number to specify how often you want your company file to be backed up. For example, to back up your data file every second time you close it, type 2 in the field provided.

Option 2 – Schedule a backup

9. Click New



- Enter a **Description** for your scheduled backup.
- Click **Browse** to select the folder where you want to store your backup copies. This can be on a network drive, or on local media.
- Optionally, click the check box to **Limit the number of backup copies in this folder** and enter a number in the field provided. If you do not specify a number, QuickBooks saves all of your scheduled backups.
- Click **Set Password** to open the **Enter Windows Password** window and enter the requested information. This provides permission to run the scheduled backup.
- Select the time, frequency, and day for the backup to take place.
- Click **OK** to return to the **Save Backup Copy: Schedule** window. The backup appears in the list in the **Schedule backups:** section

Click **Finish** to complete the process

If you are backing up locally

If you back up locally and your hard disk has more than one drive, back up onto a different drive from the one where you keep your working data, or back up to a network drive. If you have only one hard disk drive, back up onto a removable storage device such as a USB flash drive, Zip disk or CD-ROM. Remember that an important purpose for backing up data is to protect against a hard disk failure.

1. Each day, back up onto removable media to keep in the office.
2. At least once a month, make a backup copy to keep off your premises.
3. At the end of your financial year, make a copy of your data to keep off-premises.

If you are using Reckon Tools Online Backup

If you are using Reckon Tools Online Backup, your QuickBooks company file (.QBW) is automatically preselected for backup when you open the Online Backup application from within QuickBooks. Backing up this file is sufficient.