

## Uploading QuickBooks File To Portal

In order to provide us with a copy of your QuickBooks file, please follow these instructions:

Open QuickBooks

Choose **File > Create Copy**

Select **Portable Company File** and then click **Next**.

Save the portable company file to your desktop.

The portable company file is saved with a .qbm extension.

When prompted to close your company file, click **OK**.

QuickBooks must close and reopen your company file before creating a portable company file.

**(Important:** When prompted to close your company file, click OK. If you click Cancel, QuickBooks exits the wizard and doesn't create the portable file.)

Upload (or drag and drop) file to portal.