



Import Accountant's Changes

QuickBooks Accountant's Copy file: a version of your company file that allows your accountant to make changes to the file while you continue to work in the books.

If you sent us an Accountant's Copy of your QuickBooks file, we will send the changes back to you, which can then be automatically imported into your company file.

1. You will receive an email from someone at Shaw & Associates with a QuickBooks Accountant's Changes file (.QB) attached. Please save this file to a location on your computer such as your desktop.
2. Open your QuickBooks software.
3. Click on the File menu at the top left, click on Send Company File, Accountant's Copy, Import Accountant's Changes From File.
4. We recommend that you either print or click Save As PDF so that you have a record of the changes.
5. After printing or saving the changes, click Incorporate Accountant's Changes.
6. Click OK to close the QuickBooks windows. Then click OK to back up your company file. In the Save Backup Copy window, choose a location for your backup file and click OK. Click OK again when the backup is complete.
7. You should get a message that the import was successful. If, instead, you get an error message, print or save the error message and contact us.