Working with QuickBooks Portable Files

A portable company file provides a compact, efficient copy of only your financial data. It is often used to send your financial data by email or portable media such as a flash drive.

Create a portable company file

1. Choose File > Create Copy.
2. Select Portable company file and click Next.
3. Click the Save in drop-down arrow and select Desktop.
4. Click Save and OK twice.

Restore a portable file - Replacing original data with new data

1. Save the portable file you received via email on your desktop
2. Open QB, Go to the File menu and click Open or Restore Company.
3. Click Restore a portable file and then click Next.
4. Browse to the location where you saved the portable file, (desktop)which will have a .qbm file extension (for example, mycompanyname.qbm).
5. Select the portable file and click Open.
6. Click Next. The Save Company File as window opens.
7. Browse to the location where your data file is located, and double click it (If you are not sure where your data file is located, you can see the path by clicking on: File, Open Previous Company: The path will be the top one.)
8. You will be asked Do you want to replace it, click YES.
9. ***Critical***You are asked again, "Caution, you are about to permanently delete the data file, Type YES to confirm.
10. Click OK.
11. You now have the latest data.
12. Delete the portable file from the desktop, click and drag it to the trash.