



How to Backup & Restore Quickbooks Data

At Rebit, we receive many calls from Quicken (and QuickBooks) users trying to restore their system after a virus or hard drive crash, or trying to understand how to protect their data just-in-case. So we decided to write this guide describing many of backup and recovery options available to Quicken users in the hope to alleviate some common concerns and questions. We've published a few other guides (e.g. to help with migration to Windows 7) and you can learn more by subscribing to our Blog, or following us on Twitter and Facebook.

Where is My QuickBooks Data?

The default location for QuickBooks data files is not your normal Documents ("My Documents" on Windows XP) folder. QuickBooks configures the location of your data files to a location that is easily shared in the event that you are using a multi-user version of the application. The default location for these data files is shown below:

Windows 7

C:\Users\Public\Documents\Intuit\QuickBooks\Company Files

Windows Vista

C:\Users\Public\Documents\Intuit\QuickBooks\Company Files

Windows XP

C:\Documents and Settings\All Users\Documents\Intuit\QuickBooks\Company Files

What are My Backup Options?

Back Up to Local File

Users of QuickBooks are familiar with this option. Shutting down the QuickBooks application causes a question to appear asking whether to back up the QuickBooks data to file. With a USB flash memory drive connected, you can easily select this device and QuickBooks will copy an archive of your company file(s) to the device.

Advantages

Simple

With an external USB flash memory device connected, the QuickBooks software takes care of the rest

Quick

the process only takes a moment

Convenient

after QuickBooks exits, unplug the USB flash memory device and take it with you



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Disadvantages

- Incomplete** What are not included in this method are files such as invoice templates
- Untimely** Depending on usage, QuickBooks users may leave the application running for extended periods
- Active** Requires you to take an action step, such as connecting the external USB device, when you may not have time

Scheduled Backup Applications

Traditional backup applications are designed to back up files at a time when the computer is not in use. This is frequently referred to as nightly backup, and aside from ensuring the computer is left on at such a time, the user is responsible for identifying which files should be backed up. The term backup set is typically used to identify the set of files and folders that the application should copy to an alternate location, such as an external hard disk drive, tape drives, or network shared folder.

Advantages

- Familiar** the features of this type of backup application, along with shortcomings, are understood
- Inexpensive** some software applications are freely available and possibly incorporated into Windows itself

Disadvantages

- Configuration** requires you to become familiar with the location and types of files that need to be backed up
- Incomplete** while you may have selected the appropriate items, it is difficult to be certain
- Unreliable** many people find applications stop functioning when storage becomes full or issues arise with the quality of the storage media (tape drives in particular)

Automatic and Continuous Data Protection Backup

With automatic and continuous data protection, files that change are backed up almost immediately. This ensures that any and all work performed throughout the day is captured moments after data is saved. In addition, all your files are backed up, eliminating the need to assess which files and folders should be included. With automatic storage management, the external hard disk drive or network storage location is monitored and maintained in an ongoing fashion. Newer backup applications, including Rebit SaveMe, bring convenience and reliability to the backup process.

Advantages

- Reliability** with ongoing storage management, backups continue indefinitely



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Responsive without need for maintenance
Simple data is backed up almost immediately, preventing data loss
configuration and maintenance free, leaving you time for productive work

Disadvantages

Capacity requires more backup storage capacity than some applications

Online Backup

A relatively new trend is to back up data through the Internet to a third party facility for a monthly subscription. QuickBooks users have the option to purchase such a subscription from Intuit, the company behind QuickBooks. This type of service typically includes a software application that is installed on the computer and backs up according to a schedule. With some configuration, along with a user name and password, the QuickBooks data files can be backed up nightly or on a schedule you determine. Not only does this service back up your data files, it keeps those items stored off-site, facilitating disaster recovery in the case of fire or flood.

Advantages

Cost Low up-front costs are appealing, but the recurring fees add up
Security Encryption is good for transfer and storage of data

Disadvantages

Control Data stored at a third party facility is out of your control
Configuration requires you to become familiar with the location and types of files that need to be backed up
Incomplete Only the files you select are backed up, not the entire computer

Restoring QuickBooks Data Files

Occasionally, you may find that QuickBooks data files need to be recovered from backup to overcome data corruption, computer loss, or even data migration to a new computer. Restoring from a QuickBooks local backup file is straightforward. If you have the backup file created on your USB flash memory device, you may utilize the QuickBooks feature for restoring a company. These steps are listed below:

1. Open the QuickBooks application
2. Click "File" -> "Open or Restore a Company"
3. Click to select "Restore a Backup Copy" and click "Next"
4. Click to select "Local Backup" and click "Next"
5. Click the "Look In" drop-down list and select the location of your backup file (probably the drive letter for your USB flash memory device)



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6. Click to select the company file backup file ending in “.qbb” (e.g. “Acme Corporation.qbb”)
7. Click “Open”
8. Click “Next”
9. Click the “Save In” drop down list and select the appropriate location (the default location is recommended)
10. Enter a new company name, perhaps including a date to easily identify it in the future and prevent overwriting any existing files
11. Ensure the extension is set to “.qbw” and click “Save”

If the backup data file is not in the form of a local backup file created by QuickBooks application, then you will need to restore the company data file from the backup storage to the computer. Locating the data file may require browsing or searching for the item. The default location for QuickBooks data files is not your normal Documents (“My Documents” on Windows XP) folder. The default location for these data files is shown below:

Windows 7

C:\Users\Public\Documents\Intuit\QuickBooks\Company Files

Windows Vista

C:\Users\Public\Documents\Intuit\QuickBooks\Company Files

Windows XP

C:\Documents and Settings\All Users\Documents\Intuit\QuickBooks\Company Files

Regardless of the backup method used, it is necessary to locate and restore (copy) the appropriate files from the backup location to the computer and locate the copied file in the location specified above. For the purpose of illustration, assume the company name is “Acme Corporation” and the QuickBooks file name is “Acme Corporation.qbw” in the steps shown below:

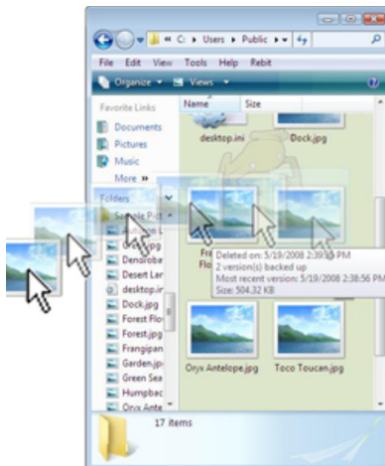
1. Utilizing your backup software method for restoring files, locate and restore (copy) the data file for your company (e.g. C:\Users\Public\Documents\Intuit\Quickbooks\Company Files\Acme Corporation.qbw) to your Desktop
2. If QuickBooks is not already installed, install the application from your CD or download
3. Open a “Computer” (“My Computer” in Windows XP) window
4. Browse to the location for QuickBooks data (e.g. C:\Users\Public\Documents\Intuit\QuickBooks\Company Files)
5. Create a new folder and name it “old”
6. Drag-and-drop the current company QuickBooks data file (e.g. Acme Corporation.qbw) onto the new folder icon “old”
7. Drag-and-drop the company QuickBooks data file from Step 1 into the “Company Files” folder
8. Launch the QuickBooks application and attempt to open the company



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In the event that you need to recover QuickBooks data files from backup to a computer that does not have the QuickBooks application already installed, there are additional files that represent data for other features of QuickBooks. For example, invoice templates and various correspondence files reside in different folders that typically reside within the “Company Files” folder. Restoring the complete set of files and folders into the “C:\Users\Public\Documents\Intuit\QuickBooks\Company Files” folder is all that is necessary in most cases to become productive again.

For more information on the various data files for QuickBooks, [visit this article](#).



How to Simplify Backup and Restore of QuickBooks

If you find the steps outlined above daunting, don't panic... there's another option. With QuickBooks (and Quicken), each and every entry for financial transactions is saved to disk, and Rebit SaveMe makes a backup copy of those changes the next time you stop typing and moving the mouse for about 30 seconds.

Not only does the Rebit SaveMe software remain idle during periods of user activity to ensure you have the full responsiveness of the computer, it protects you from data loss in an ongoing, continuous manner.

Recovering QuickBooks data files from your Rebit SaveMe backup is as easy as using Windows to copy files from one folder to another. If you have used Windows to Drag-and-Drop a file from one location to another, you already know how to recover files from the Rebit SaveMe backup.

Follow these simple steps below to restore QuickBooks data files:

1. Open a “Computer” window and browse to the default QuickBooks data folder: C:\Users\Public\Documents\Intuit\QuickBooks\Company Files
2. Double-click the SaveMe icon on the Desktop to open the Rebit backup file browser
3. Inside the SaveMe browser, browse to the default QuickBooks data folder C:\Users\Public\Documents\Intuit\QuickBooks\Company Files
4. Select and Copy the QuickBooks company data file to the Company Files folder on your computer. You may Click-and-Drag on a selected file icon and move the icon(s) to the other folder visible on your screen.

HOW TO BACKUP AND RESTORE QUICKBOOKS DATA

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