

To send a QuickBooks Accountant's copy through Intuit web servers (most secure method), if you assign a transfer password or have an administrative password, please send that to the accountant you are working with in a separate email, and follow the directions below for your QuickBooks version below:

QuickBooks 2013

Open your company in QuickBooks, then select:

File

Accountant's Copy

Client Activities

Send to Accountant

Create Accountant's Copy

Next

Dividing Date: custom MM/DD/YYYY

Next

Enter your email address and the email address to whom you are sending the file.

QuickBooks 2014

Open your company in QuickBooks, then select:

File

Accountant's Copy

Client Activities

Send to Accountant

Create Accountant's Copy (Blue Button)

Next

Dividing Date – click on drop down arrow and choose: custom

Enter date: MM/DD/YYYY

Next

Enter your email address and the email address to whom you are sending the file.

QuickBooks 2015 & 2016

Open your company in QuickBooks, then select:

File

Send Company File

Accountant's Copy

Client Activities

Send to Accountant

Create Accountant's Copy (Blue Button)

Next

Dividing Date: custom MM/DD/YYYY

Next

Enter your email address and the email address to whom you are sending the file.

QuickBooks 2017

Open your company in QuickBooks, then select:

File

Send Company File

Accountant's Copy

Client Activities

Send to Accountant

Next

Dividing Date: custom MM/DD/YYYY

Next

Enter the accountant's email address and your email address

To send a QuickBooks Accountant's copy as an attachment to an email, please send your administrative password to the accountant you are working with in a separate email, then follow the directions below:

QB2015

Open your company in QuickBooks, then select:

File

Create Copy

Accountant's copy

Next

Follow the prompts

pick the dividing custom, then date of MM/DD/YYYY

then save the file to your desktop

QuickBooks 2016

Open your company in QuickBooks, then select:

File

Create Copy

Accountant's copy

Next

Create Accountant's Copy (Blue Button)

Accountant's Copy

Next

Dividing date, click on dropdown arrow and select custom, date of MM/DD/YYYY

Next

QuickBooks must close all windows – OK

Follow any other prompts

Save the file to your desktop

Attach the file you saved to your desktop to an email and send it to the accountant you are working with

QuickBooks 2017

Open your company in QuickBooks, then select:

File

Create Copy

Accountant's copy

Next

Accountant's copy

Next

Dividing date, click on dropdown arrow and select custom, date of MM/DD/YYYY

Next

QuickBooks must close all windows – OK

Follow any other prompts

Save the file to your desktop

Attach the file you saved to your desktop to an email and send it to the accountant you are working with