**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 2016, 2017 & 2018**

Open your Company File in QuickBooks, then select:
File
Send Company File
Accountant’s Copy
Send to Accountant

Create Accountant’s Copy (next button)
Next
Dividing Date: custom MM/DD/YYYY
Next
Enter Accountant’s email address and your email address

**To send as an e-mail / Upload to Client Portal**

**QuickBooks 2018**

Open your Company File in QuickBooks, then select:
File
Create Copy…
Accountant’s Copy
Next
Dividing Date – Click on drop down box and select Custom
Enter Dividing Date MM/DD/YYYY
Next
QuickBooks Must Close All Windows – Click OK
Dividing Date
Follow any prompts
Save file to desktop
Attach saved file on desktop to an e-mail, and send the e-mail to the accountant with whom you are working

**Alternative:**
Log into Client Portal
Click on Documents to Preparer
Upload
Click on Saved File on Desktop
Click Upload

Send E-mail to Accountant to let them know you uploaded the file (If you uploaded it correctly, they will be notified, but you should alert them to expect the notification of the upload)