**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)