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## *Working Remotely – What Is It and What Does it Mean to You? Wrapping it Up*

We started our series of articles back in August, and we asked: *Working Remotely – What Is It and What Does it Mean to You?*

For some of our readers, it meant sending back-ups and restoring them using e-mail; this was the process they were used to, and it is certainly still one of the most common ways we work with our clients to this day. However, over the next few months we visited many other options that are available, and discovered the difference between basic file transferring and true remote access.

Each month we went up a 'step', looking at the 'next level' of services available that we could offer our clients:

- Secure Data Transfer
- Remote Support with services such as WebEx
- QuickBooks being hosted in a virtual environment

Be sure to check out the newsletter archives for any articles you may have missed, you will find detailed descriptions, how to use the various services, and resource links to reputable sites:

<http://www.idnac.org/news-archive.html>

We wanted to conclude the series by covering the new feature in QuickBooks 2006, the **Portable File**. It has created some confusion as to what it is and what it does, so we thought we would take a few minutes to review this new feature.

The New **Portable File**, available in QuickBooks 2006, is a compact version of your actual company data file (.QBW). It is small enough to be sent via most e-mail\* clients or saved to portable media. You will also notice it has a new file extension **.QBM**. **\*NOTE:** E-mailing is typically not a secure method of sending sensitive data; consider using a service that will encrypt the file, several services were mentioned in the August newsletter <http://www.idnac.org/news-81505.html>

The new QuickBooks 2006 database will cause your QuickBooks data files to increase in size compared to prior year company files. However, according to Intuit, by using the portable file the size can be reduced down to as little as 15% of their original QB2005 file size.

Only the QuickBooks Administrator can e-mail a portable file, and you must be in single-user mode to create the portable file. Use this new feature to exchange files with your client, accountant, bookkeeper, and moving your data file from one computer to another easily.

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### ***To Create the Portable file -- Log in as the Administrator, in Single-User Mode:***

- 1) Go to the *File Menu*, Choose *Portable Company File*, and click *Create File*
- 2) QuickBooks will prompt you to close all open windows, click *OK*
- 3) Save the portable file to a location of your choice, you may have to 'browse' to change the location if you do not want to use the default location. Be sure to note the location where you save the file, it will have the .QBM extension.
- 4) Send or copy the portable file to another location

### ***To Open the Portable Company File on the Destination Computer:***

First, as a precaution, ***make a back-up of the original file*** on the destination computer, before opening the new file.

When you open the portable file, it will automatically be converted to a *regular company file* (.QBW extension). Be careful when opening the new portable file, you can either overwrite an existing company file or create a new data file (by renaming it). TIP: While getting used to this new feature, it may be wise to create a new company file, rather than overwriting your existing file. The downside to this, you will end up with multiple data files and it's easy to work in the wrong one; so be sure to delete or rename your test data files. Again, we cannot stress the importance of always having current back-ups!

- 1) To Open the portable file, go to *File>Portable Company File>Open*
- 2) Select the Portable Company File that you want to open
  - a. You may need to browse to the location of the data file, remember, it has a .QMB file extension.
- 3) Select the COMPANY file that should be created from the Portable file
  - a. When you open the portable company file, the .QBW file that is created ***may be smaller*** than your original .QBW file; this is normal, do not panic ☺

Now you are probably saying, 'this doesn't sound much different than using the back-up and restore process.' The new feature is **not** meant to replace normal back-ups or the Accountant Review copy; it is best used for exchanging data files in a smaller format.

To give you an idea on the size difference, the normal back-up ratio is approximately 4-1. Using the Portable File, the ratio is approximately 10-1; reducing an 8 Meg file to approximately ½ Meg for transferring. It is imperative that everyone has a good back-up routine in place: automatic, daily, and preferably off-site. Also, it is important to note that a portable file does **not** create a recovery log, whereas a back-up will.

### ***In Conclusion***

The upcoming year will no doubt provide many opportunities to work remotely with your clients, we hope the information provided the last few months will help you decide which type of service(s) will be **'the best choice'** for any particular client. Consider becoming familiar with at least one service in each category so you can be flexible and offer a variety of services.

There is no one 'right' or 'perfect' solution, as the needs of each client will vary. By tapping into the technology now available, we can serve our clients quicker and more efficiently than ever before; opening a whole new world of QuickBooks training and support you can offer.

Next month we will be discussing when and why you may need to start a new data file for your client; and looking at various tools to help you do so effectively. Of course now you will be able to start a new file or perform a conversion easily from a remote location, the comfort of your own office!

Rox ☺

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