

Directions to backup QuickBooks file for 1099 processing

Based on the recent December 2020 update to QuickBooks, a file backup is required before processing 1099s. This process will need to be repeated if any changes (which includes entering any type of transaction) are made to the file before printing the 1099s, so keep in mind that this process may need to be completed more than once.

*****Also, please note – the backup process should only be completed from QuickBooks when processing the 1099s. Please do not backup your QuickBooks file any other time, if prompted, and NEVER use the backup to restore the QuickBooks file*****

Before you begin

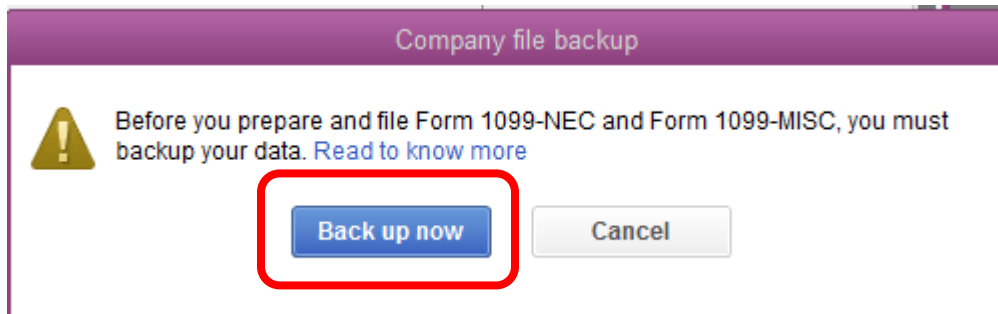
You **MUST** save the backup file to your local PC's hard drive. **Failure to do so will result QB shutting down for all users.** Before you start the process of backing up your QuickBooks file, please make sure you have a folder created on your local C: drive where you can save the file. We typically recommend calling the folder "Citrix Exports", and you may already have this folder created for exporting reports from QuickBooks to your local PC. If you already have an exporting folder created with that name, or another, please skip to the next section, "Preparing your 1099s". If you need to create a folder, follow these easy steps.

1. Open the C: drive on your local PC
2. Once you have the C: drive open, right click on the C: drive, and choose New, and then Folder, and left click on it.
3. You will be asked to name the new folder. Again, we recommend "Citrix Exports", but any name will work, as long as you know which folder to save the backup in when prompted.

You are now ready to backup your QuickBooks file.

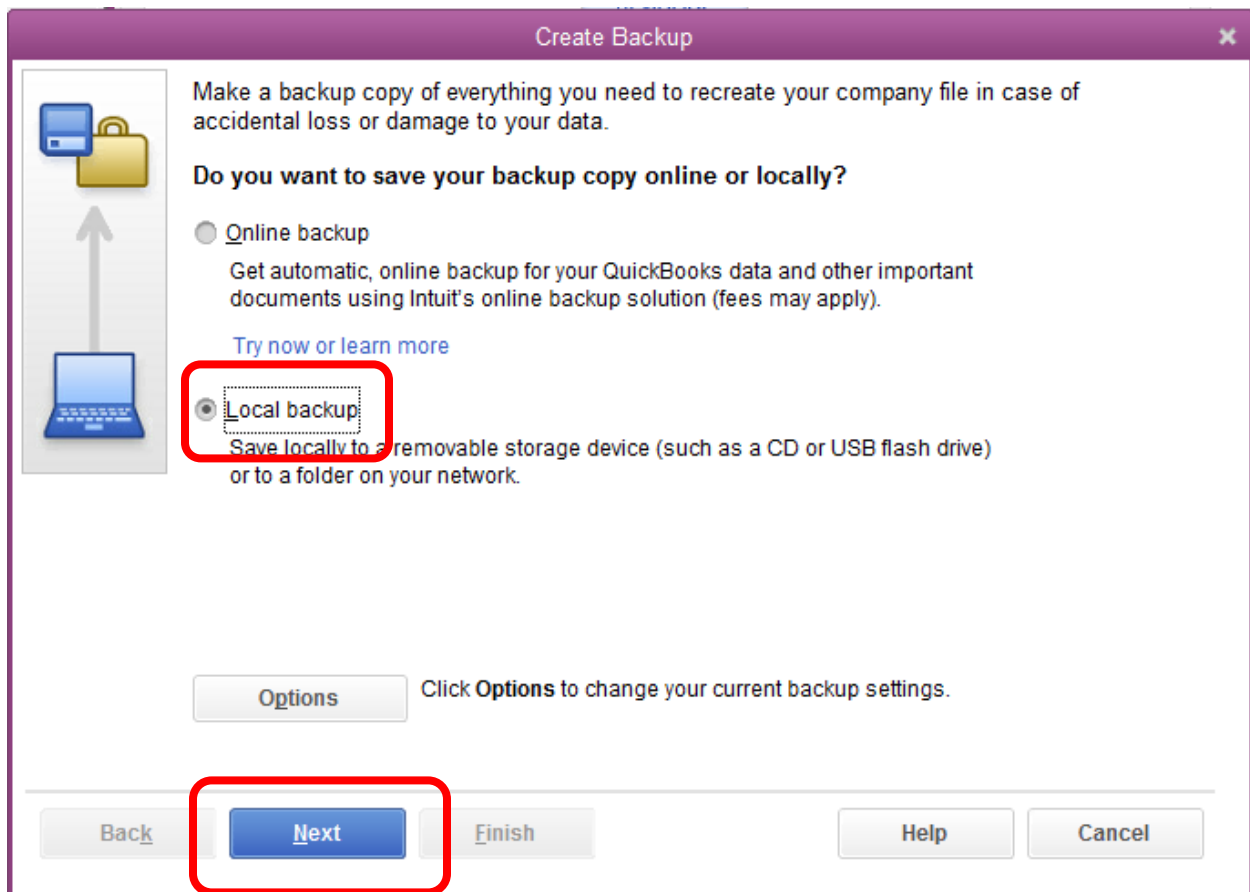
Preparing your 1099s

As you prepare your 1099s in QuickBooks, you will be prompted to backup the file first. The message will appear like this –



Click the "Back up now" button.

The Create Backup window will appear. Leave the default selection of Local backup, and click Next.



The Backup Options window appears, and you will click the Browse button.

Backup Options

Use this window to set default options for your manual and automatic backups.

LOCAL BACKUP ONLY

Tell us where to save your backup copies (required)

Browse...

☒ Add the date and time of the backup to the file name (recommended)

☒ Limit the number of backup copies in this folder to

ONLINE AND LOCAL BACKUP

☒ Remind me to back up when I close my company file every times.

Select an option to verify that your company data is OK (that is, not corrupted) when you save.

☒ Complete verification (recommended)

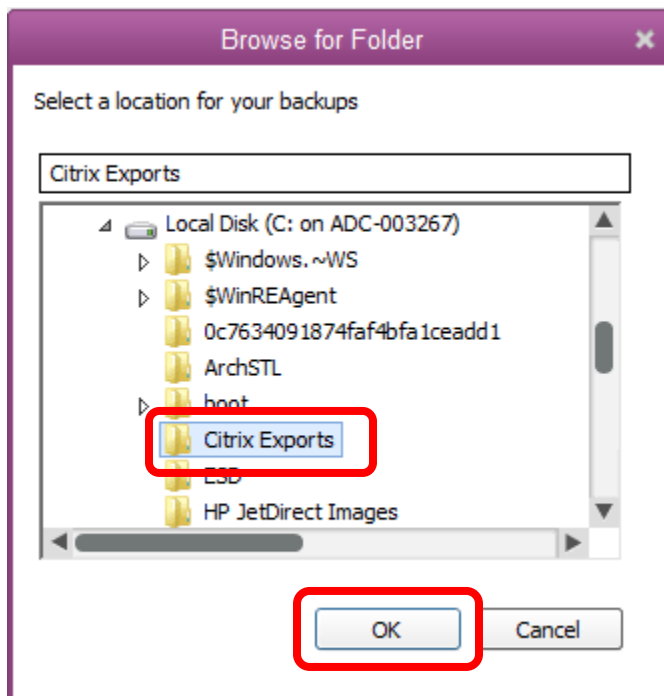
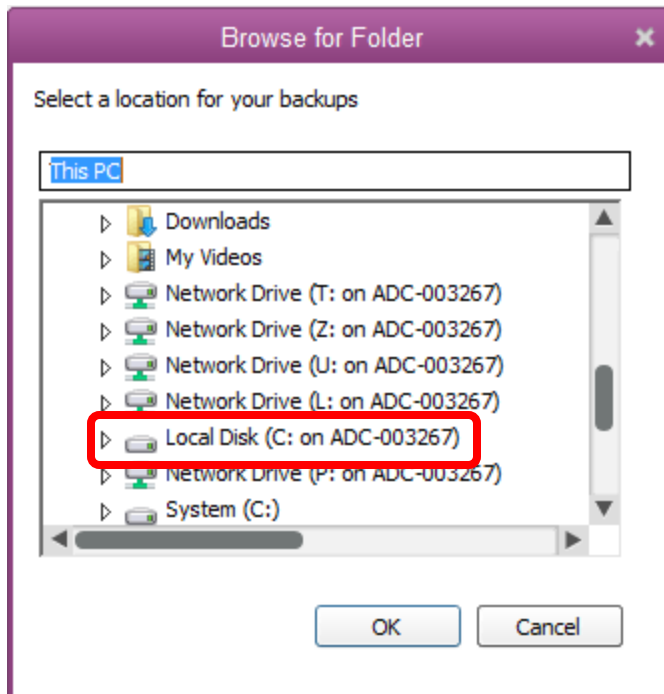
☐ Quicker verification

☐ No verification

[Help me choose](#)

When the Browse for Folder window pops up, make sure you are looking under “This PC”, and then find the Local Disk (C: on XXXXXXXX). ***the Xs in the example to the left will be replaced with the name of your local PC. In the screenshot below, the entry is Local Disk (C: on ADC-003267)*** **Do Not choose System (C:). This is the C: drive of the file server. Choosing this folder will result in QB shutting down for all users.*****

Once you find the Local Disk (C: on XXXXXXXX), expand it by clicking the triangle on the left side. Once expanded, you will see the “Citrix Exports” folder, or whatever folder name you gave the export folder. Select the folder, and click OK at the bottom.



You will then see the backup path in the field, and for the purposes of this backup, we recommend you click the “No verification” selection at the bottom to help the backup complete faster.

Click the OK button at the bottom of the screen.

The screenshot shows the 'Backup Options' dialog box. The title bar is purple with a close button. The main text says 'Use this window to set default options for your manual and automatic backups.' There are two sections: 'LOCAL BACKUP ONLY' and 'ONLINE AND LOCAL BACKUP'. In the 'LOCAL BACKUP ONLY' section, the text 'Tell us where to save your backup copies (required)' is followed by a text field containing '\\Client\CS\Citrix Exports\' and a 'Browse...' button. Below this are two checked options: 'Add the date and time of the backup to the file name (recommended)' and 'Limit the number of backup copies in this folder to' with a value of 3. The 'ONLINE AND LOCAL BACKUP' section has a checked option 'Remind me to backup when I close my company file every' with a value of 4 and the word 'times'. Below this is the instruction 'Select an option to verify that your company data is OK (that is, not corrupted) when you save.' There are three radio button options: 'Complete verification (recommended)', 'Quicker verification', and 'No verification'. The 'No verification' option is selected and highlighted with a red box. To the right of these options is a blue link 'Help me choose'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'. The 'OK' button is highlighted with a red box.

Backup Options

Use this window to set default options for your manual and automatic backups.

LOCAL BACKUP ONLY

Tell us where to save your backup copies (required)

\\Client\CS\Citrix Exports\ Browse...

☒ Add the date and time of the backup to the file name (recommended)

☒ Limit the number of backup copies in this folder to 3

ONLINE AND LOCAL BACKUP

☒ Remind me to backup when I close my company file every 4 times.

Select an option to verify that your company data is OK (that is, not corrupted) when you save.

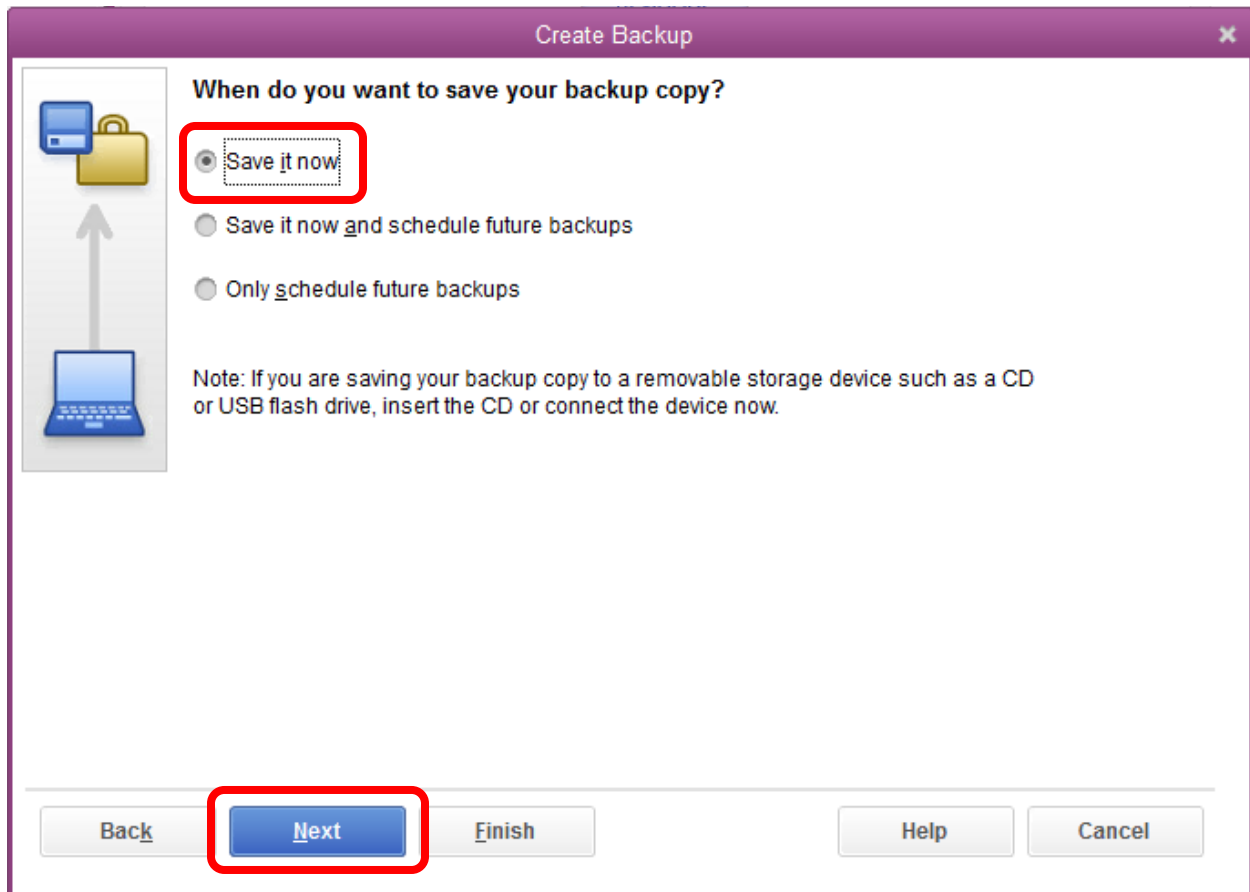
☐ Complete verification (recommended)

☐ Quicker verification

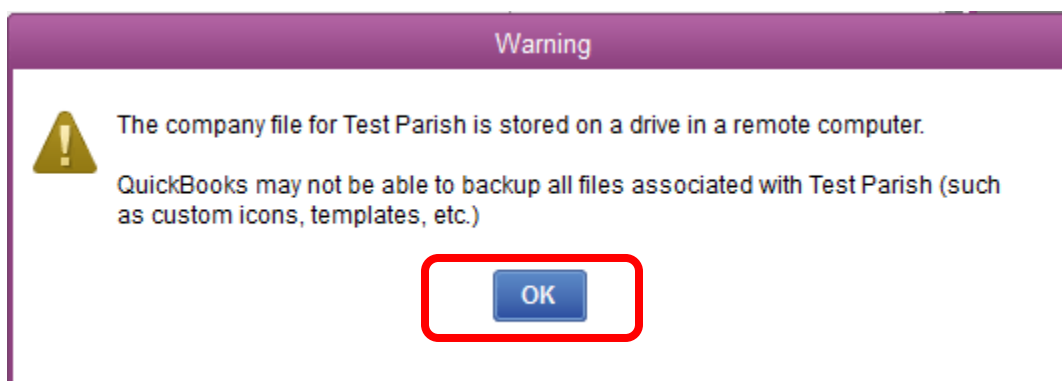
☒ No verification Help me choose

OK Cancel Help

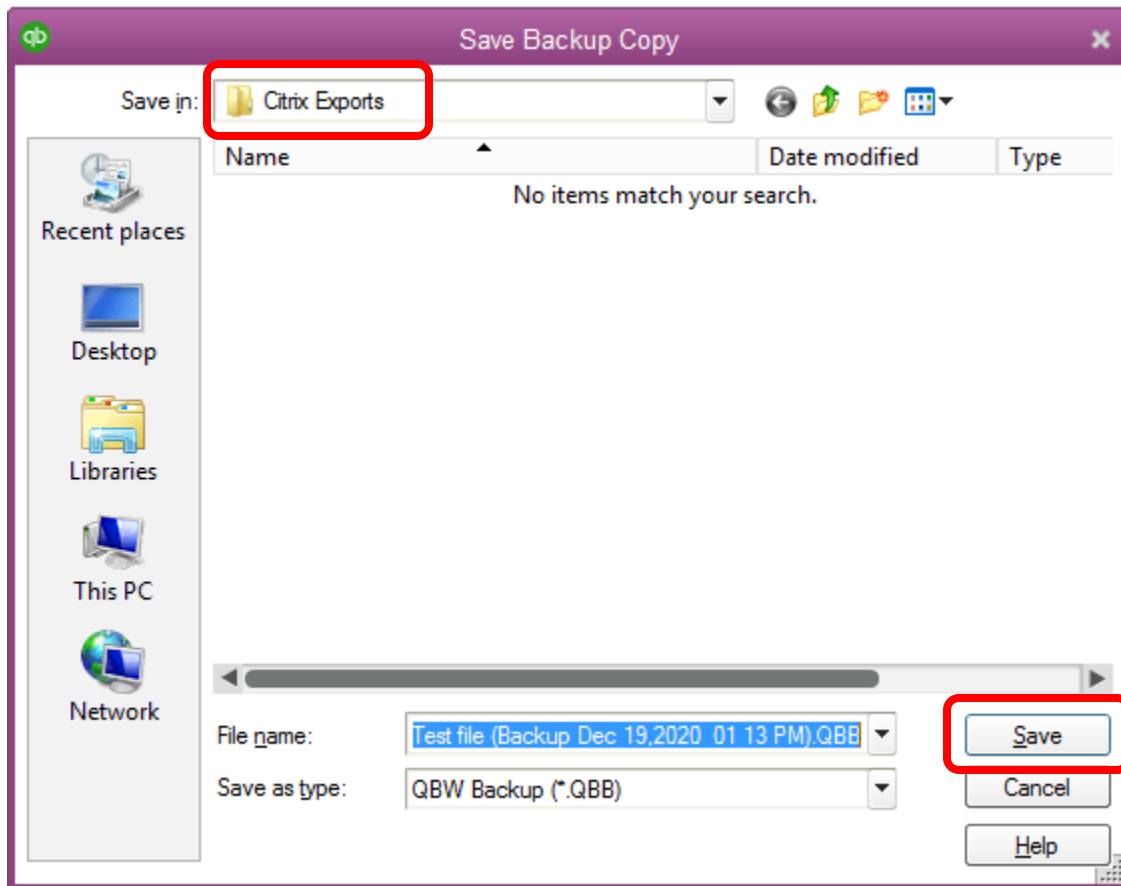
Leave the “Save it now” selected, and click Next.



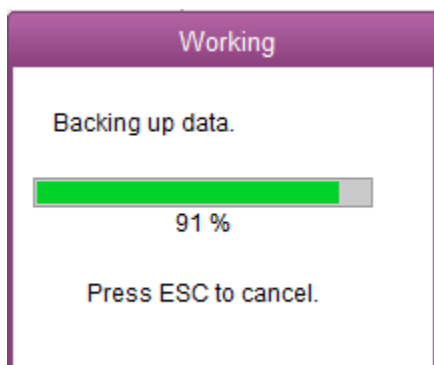
When the Warning screen appears, click OK.

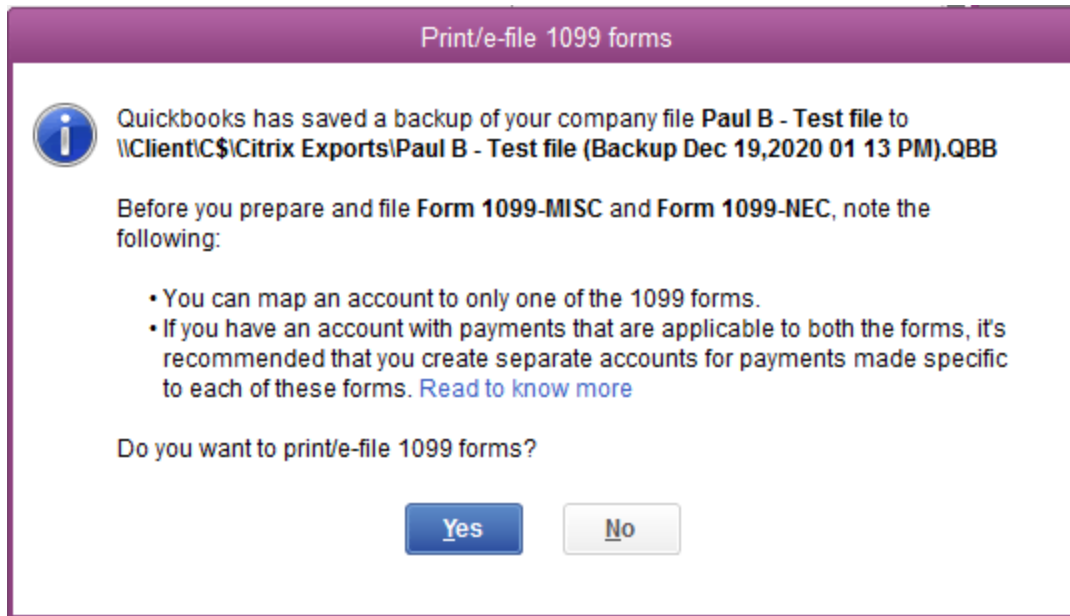


You will then be prompted to confirm the backup location. Click Save.



You will see a Working window. Once the backup is completed, you will be prompted to print/e-file the 1099 forms. Make the appropriate selection to finish the process.





We recommend that, once the backup is complete and you have finished processing the 1099s, you go to the folder where you saved the backup on your local PC and delete it. It is not necessary to retain the backup and will only take up space on your local hard drive.

This is something new to QuickBooks and we anticipate receiving questions. We ask that you contact only **ONE** of the following individuals so that your concerns can be addressed as soon as possible.

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