

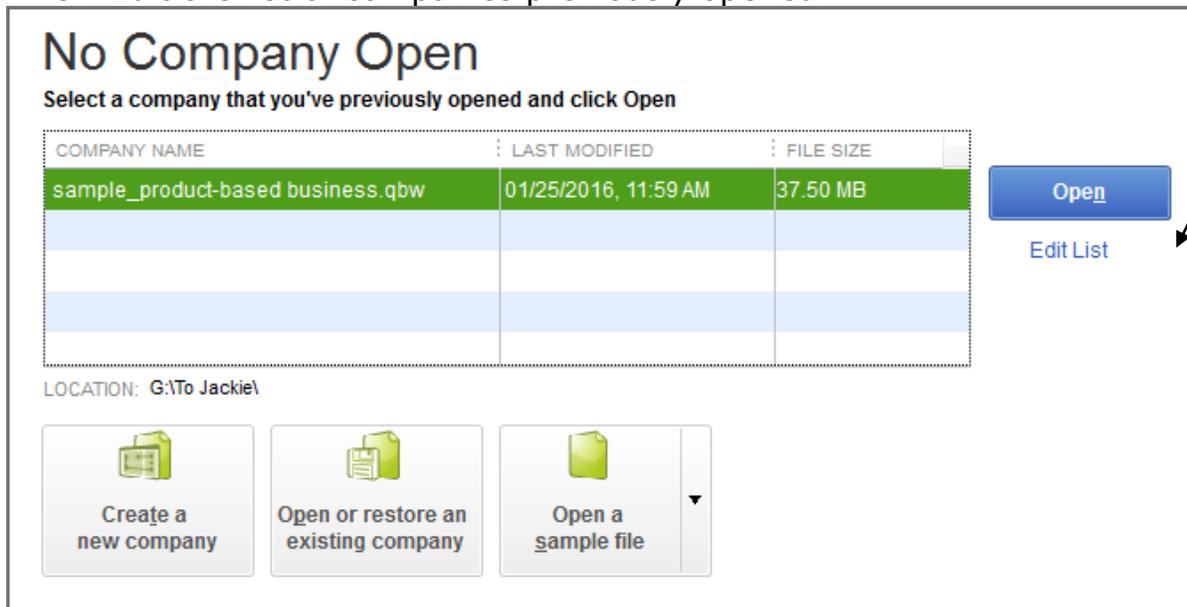
Database Version Control SOP

Global Plan

Anytime you pass your database to GO! or any other party, it is vital that you practice good version control. You do not want to open the wrong database, do a bunch of work, and then discover you have to re-do all the work in the correct version of your file.

Steps

1. Backup your database before sharing. File > Backup Company > Create Local Backup
2. Close the company. File > Close Company. Do not close the software.
3. Edit the list of companies previously opened.



In the No Company Open window > Choose Edit List > Check all databases for your company in the list.

4. Upload the backup or a copy of your database as agreed on with the other party.
5. Move your current QBW (database) file to Old or Archive (see below).
6. When you receive the file back, you will need to restore the backup (see below) or save the database to your QuickBooks Database folder (see below).

Where to store your QB database

Work with your IT support staff to understand where your QB folder should be located. At minimum it should be stored in the documents section of your C drive.

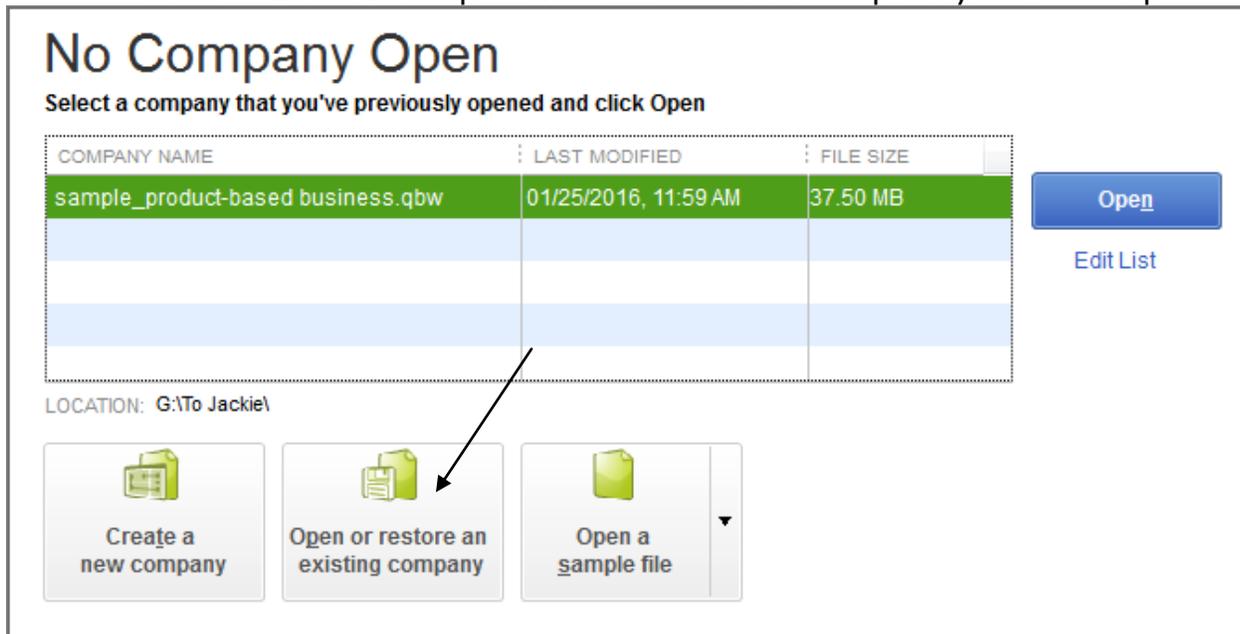
Create a folder called "QB Database"

Inside that folder create a folder called "Old" or "Archive"

After you have shared your database, you need to move the version you have into Old or Archive so you do not open it accidentally. Cut and paste or right click and drag the files in QB Database into the Old/Archive folder.

Restoring a Backup

1. Download the backup from GO! or whomever you are working with. Save the backup to your desktop for ease.
2. Open your QB software.
3. If QB opens a file (database) choose File > Close Company.
4. Choose Open or restore an existing company > Restore a backup copy > Next > Local Backup > Next > Choose backup on your desktop*



*Ensure there is only one backup on your desktop and you are choosing the file you just downloaded. Backups should have a date and time stamp in the name of the file. This will help you ensure you are working with the latest and greatest backup.

5. Open > Next > Save Company File As > Navigate to your QB Database folder > Save

You have now saved the latest QBW (database) file in your QB Database folder. Ready to start working!