

## QuickBooks File Upload Instructions

### VIA INTUIT (PREFERRED) QB 2008 and higher

1. Go to FILE menu, select ACCOUNTANT'S COPY, SAVE FILE, NEXT
2. Select ACCOUNTANT'S COPY. NEXT.
3. Set a dividing date (usually end of previous quarter or year end). Please ask us if you are unsure of this date. Click NEXT.

1. Save the Accountant's Copy file in a folder where you will be able to browse for it later.

2. Go to [www.alliantcpa.com](http://www.alliantcpa.com)

3. Click on the CLIENT LOG IN button

4. Click the Browse button to find the file you saved in Step 1 above. Highlight the file and click Open in the browser window. Then click Upload.

5. You will see a progress bar to let you know the file is uploading. When finished, close your internet browser.

6. Please send an email to us to let us know the file is ready to be downloaded to our server. If the QuickBooks file is password protected, please specify the password in your email.