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# TLC For Your QuickBooks

## 7 Tips To Keep The QuickBooks Love Alive



Presented by **Scott Gregory**

Certified QuickBooks Enterprise Advisor, Intuit Premier Reseller, CPA



## Don't let QuickBooks be a pain in the asset!

- Getting headaches from trying to figure out QuickBooks?
- Tired of hearing “accountant-speak” from your CPA?
- Frustrated with the QuickBooks tech support group?
- Discovered your accountant doesn't know QuickBooks?

### Help is here!

Benefit from having a trusted, professional advisor on your team at a fraction of the cost of fulltime staff. My clients enjoy our working relationship simply because I don't talk “accounting or technology speak” – I can discuss your problems and offer solutions in plain English. [See what my clients are saying about the help and insight I have provided for them.](#)

[Contact me](#) for help before you throw up your hands in frustration! Working together, we can determine the extent of your QuickBooks problems and put a solution in place. Let's get your QuickBooks and accounting problems ironed out soon!

### Scott Gregory

QuickBooks Expert

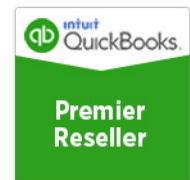
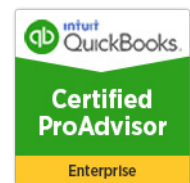


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### Contact Scott Today About QuickBooks

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## TLC for QB TIP #1: Click Window > Close All at the End of Each Day

If you're like me, during the course of the day, you end up with many different windows open in your QuickBooks file.

In order for QuickBooks to start up faster each morning, get in the simple habit of clicking Window (in the menu bar) and then Close All before you exit QuickBooks. This will instantly snap shut all the open windows you were working with during the day. In addition, this allows QuickBooks to avoid having to re-create each of the open windows when it starts up – saves you some time every day!



## TLC for QB TIP #2: Keep Your Computer Tuned Up

It is extremely important to keep your PC in top form – this will help QuickBooks and all the other programs you work with regularly run as quickly as possible and also help minimize potential problems.

### Suggested computer tune-up tips:

- **Make sure that your computer has plenty of memory (RAM)! -** I have seen far too many cases where businesses are using computers that are woefully short on memory and then complain that QuickBooks runs too slow. Computer memory is very inexpensive and adding more of it to your computer can pay off immediately in better performance.
- **Keep your hard drive organized and “defragmented” –** Just like your office filing cabinet gets disorganized as time goes on, your computer hard drive gets the same way. Get in the habit of running the built-in defragmentation software (all versions of Windows have this) on a regular basis (i.e. monthly). A defragmented hard drive is a happy hard drive and leads to better performance!
- **Ensure that your anti-virus software is updated regularly –** You'd be amazed at the amount of crap that gets downloaded to computers as a result of viruses and other bad things that are left unchecked. These bad guys can slow a computer to a crawl and definitely have an impact on the performance of your QuickBooks. Don't risk it – spend the money for a solid anti-virus package and ensure it stays updated.

If you are uneasy doing anything around computers, be sure to enlist the help of a local IT firm to assist you with these tasks. You'll find it to be money well spent.



### TLC for QB TIP #3: Keep Your Network Tuned Up

If you are running QuickBooks in a multi-user environment, it is essential to make sure your network is running optimally. QuickBooks is counting on that to be able to share the file quickly and minimize the number of headaches you might have.

#### Suggested network tune up tips:

- **Get QuickBooks off wireless and/or VPN connections** – [QuickBooks does not play nicely at all with either of these types of computer networks](#). In addition, it is not even supported in these environments. QuickBooks relies on a fast local area network (LAN) connection to work properly.
- **Download a copy of the [QuickBooks File Doctor](#)** – Be sure to get a copy of this free tool and run it to ensure that your network setup has been properly configured to run your QuickBooks in a multi-user mode.
- **Update your network equipment** – Still using a router that was built 7 years ago? Make the investment to keep your network equipment current – lots of improvements have happened in the equipment area and your investment here will allow your entire team to work faster every day.



### TLC for QB TIP #4: Trust, But Verify (Your Data, That Is...)

Every day, you open up QuickBooks and expect to get down to work.

What happens if one day you can't get into your QuickBooks file? Is there anything you can do to be proactive and monitor for potential problems? Yes there is! You will want to get in the habit of verifying your QuickBooks data on a monthly basis (more often is perfectly ok too).

Verifying is simple to do – in single user mode, simply click on File, then Utilities, then Verify Data. Follow the prompts and allow QuickBooks to run some diagnostic checks. In most cases, QuickBooks will report that your data has verified successfully and work can resume.

However, in some cases, problems are discovered with your data. If that is the case, QuickBooks will alert you of the need to run the Rebuild operation. In the event you see that message, do not wait or hesitate – go ahead and run the Rebuild operation right away. This process will work on fixing whatever problems may be lurking in your QuickBooks data file



## TLC for QB TIP #5: Backup, Backup, Backup

Many good businesses have had bad things happen to their computers and critical QuickBooks data. Don't let your business become a statistic! Backup your QuickBooks (and other critical business) data on a regular basis!

### Here are the two key aspects to a successful backup program:

1. Automated
2. Offsite

Backing up your QuickBooks to an external or flash drive is good, but not good enough. What happens if a natural disaster destroys the office and your external or flash drives along with it? Your backup strategy will be deemed a colossal failure at that point. At a minimum, make sure those drives leave the building on a regular basis.

Even better, invest in an online data backup service such as [Carbonite](#). A very small investment (less than \$60 per year) in either of these services can pay big dividends in protecting your QuickBooks. They are both very easy to set up and they can ensure that your data is backed up automatically and offsite. Isn't your data worth it?



### CRITICAL NOTE FOR QUICKBOOKS DATA ON SERVERS!

You may be thinking that the above discussion on backups isn't relevant since your IT people have everything on the server backed up.

### Two key things you need to know:

1. Even if the data is being backed up on a server, it is ESSENTIAL for you to run the "internal" QuickBooks backup on a monthly basis. Easily done by clicking File > Save Copy or Backup, this "internal" backup helps keep the inner workings of QuickBooks in top shape. If this step is NOT done, it is very common to see QuickBooks files run very slowly and have other problems.
2. Have you checked to ensure your server backup is working properly? As the business owner, it is essential that you coordinate with your IT folks and run periodic tests to ensure that what you think is being backed up is actually getting backed up. I have seen many cases where this review has unearthed some problems that could have been disastrous if not fixed!



## TLC for QB TIP #6: Yes, Install The Updates

I know, these screens that pop up periodically when you open QuickBooks are annoying, aggravating, a pain, (you get the idea...).



However, it is essential that you choose to “Install Now” on them sooner rather than later. I recommend waiting two weeks or so from the time you first see the update before installing. Then run a quick “Google check” to see if issues are being reported with the update. If not, continue on and install it. If so, hold off for a while longer.

In case you are not familiar with what is happening here, these “nag screens” are telling you that some updates to QuickBooks have been compiled and need to be installed on your QuickBooks. These updates are the result of Intuit collecting feedback on bugs and things that are not working properly within the software.

**TIP FOR MULTI-USER QUICKBOOKS OFFICES:** Be sure that all users of QuickBooks install these updates as soon as they appear. By doing this, you will minimize the chances of QuickBooks not working properly because some in the office are using a more current update than others.



## TLC for QB TIP #7: Keep Your File Out Of The “Red Zone”!

Unfortunately, QuickBooks does not provide any warnings that your data file may be getting too big for itself.

Instead, many businesses end up finding out the hard way that their QuickBooks company file has been pushed into the “red zone” and may very well be too big. Common symptoms of this include: very slow response time, especially when running reports, unexpected crashes of the software, and other misbehavior.

Just like with the steps above, you can be proactive when it comes to keeping your QuickBooks file out of the “red zone”

In fact, I have put together a separate guide that walks you through everything you need to know. Called “[Danger! Danger! Is My QuickBooks File About to Implode?](#)”, you’ll learn how easy it is to monitor the size of your data file and learn about other key indicators of the health of your QuickBooks

**Don’t hesitate – [download your free copy today!](#)**



### YOU MAY ALSO BE INTERESTED IN THESE OTHER GUIDES AND LINKS FROM SCOTT:

- [15 Trouble Spots that May be Lurking in Your Business Finances](#)
- [4 QuickBooks Blunders That Drive Your CPA Nuts](#)
- [Save Big on your next QuickBooks upgrade](#)
- [600+ pages of free QuickBooks tips and insights](#)

## Scott's QuickBooks Services

*"I would definitely recommend Scott Gregory to anyone looking for a QuickBooks specialist." - Margo Strunk, AllCraft Wellman, Inc.*



Take the guesswork out of using QuickBooks for your financial needs – get the help of a trusted QuickBooks expert that has been helping businesses for years:



### ✔ ONE-TO-ONE CONSULTATION

Let me help resolve areas of confusion and ensure you are using QuickBooks the right way- don't waste time sitting in a "QuickBooks class" and then discover the class doesn't answer your specific questions! We can meet on-site or over the Internet for as little as an hour, or as long as it takes to get things right!

### ✔ INITIAL QUICKBOOKS SETUP

Just starting with QuickBooks? If your company data file is not set up correctly, you will be paying for it over and over again in higher accounting fees and troubleshooting expenses. Ensure you start your QuickBooks journey with a solid foundation! Don't blow this critical step in your QuickBooks journey.

### ✔ TRAINING – INDIVIDUAL OR GROUP

Put my QuickBooks expertise to work with your staff and adapt QuickBooks to the specific needs of your business – I make QuickBooks training easy, and you don't have to leave the office! Don't guess at how to use QuickBooks to meet your specific needs!

### ✔ TROUBLESHOOTING/PROBLEM RESOLUTION

Working together, we can determine the extent of your QuickBooks problems and put a solution in place to prevent them from happening again. Let's talk before you toss your computer out the window!

### ✔ CONVERSION FROM AN EXISTING SYSTEM

Tap into my expertise to help minimize the pains of converting to QuickBooks and ensure success for you and your team! Moving from your existing accounting software to QuickBooks doesn't have to be a scary or budget-busting event.

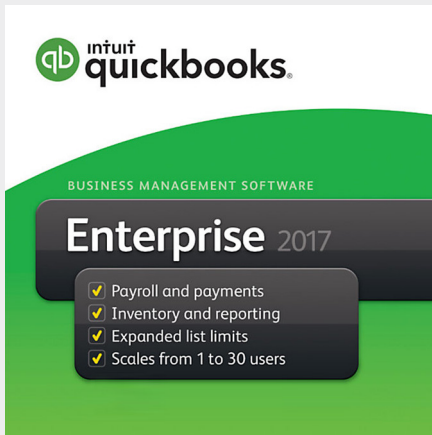
### ✔ HELP SELECTING THE RIGHT QUICKBOOKS ADD-ON SOFTWARE

Trying to extend the functionality of QuickBooks? Avoid the classic mistakes many businesses do when looking for new software, especially packages that integrate with QuickBooks. Work with a QuickBooks expert to ensure your success.



## Discounts on QuickBooks Software

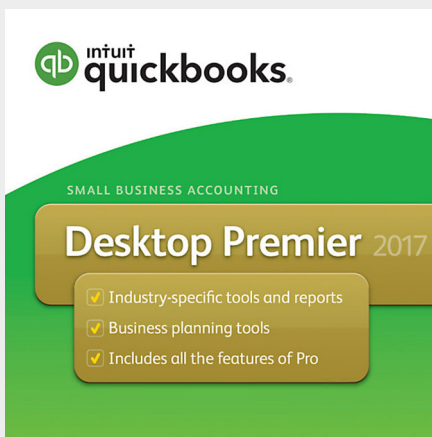
*"Thanks for making our upgrade painless and easy!"*  
- Doug Freer, President, LawnLad, Inc.



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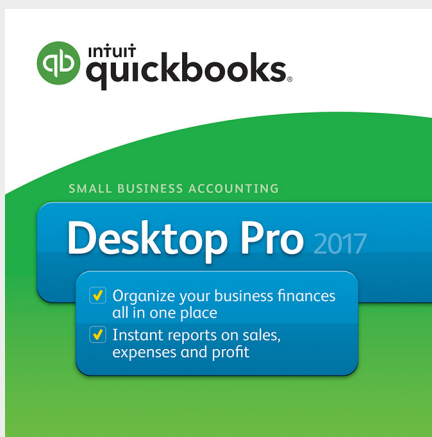
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*“Scott Gregory continues to amaze me. Every single client out of the dozens who have purchased Enterprise Solutions from Scott and worked with him have given him a 100% Net Promoter Score. This is very unusual in our industry. It is considered World Class.” – MARIE ARCHULETA, Channel Sales Manager for Intuit*



## About Scott Gregory

**Certified QuickBooks Enterprise Advisor and Intuit Premier Reseller**

Scott has been helping businesses “get it right” with their QuickBooks and business finances for over thirty years.

During that time, he has assisted well over 1,000 businesses, with services such as QuickBooks software installation, training and coaching sessions, and his “[Better Profits Now](#)” program.

Prior to starting his own practice, Scott served as the CFO for a \$15 million manufacturing firm for more than ten years. During his tenure as CFO, Scott was responsible for: \$4 million in inventory, \$4 million in accounts receivable, inventory control, purchasing, information technology and banking relationships.

He is a member of the Certified QuickBooks ProAdvisor program, a CPA, and certified in integrated resource management (CIRM) by APICS. Scott has taught hundreds of business owners, bookkeepers, and CPAs how to use QuickBooks effectively and efficiently through local community colleges and via webinars.

Thousands of QuickBooks users rely on [Scott’s QuickBooks Blog](#) for insight, tips and tricks each and every month.



## Contact Scott Today!

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