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Instructions for using our File Management System

Dear Client,

Because of file-size limitations placed on e-mails by certain providers, we currently offer a convenient, secure way to transfer files to our office. Detailed instructions are as follows:

1. Log on to <http://jrkpc.com>
2. Click on *File Management* in the left column.
3. Input your username in the top box which immediately below the heading, *Client Login*. User names can only be obtained by contacting our office.
4. Click the *Login* button below the top box, which will bring up a popup box labeled *Authentication Required*.
5. Input your username and password and then click *OK*. Unless otherwise specified, your password will be the same as your QuickBooks password.
6. The default screen is *View Files* which will list all files previously uploaded that have not been deleted by you or our office. These can be downloaded by clicking on the file name.
7. To upload a new file, click *Upload Files* on the left menu.

Most files uploaded to our website are QuickBooks file. Below is a brief explanation of the various file types possible. Your particular version of QuickBooks might not have all that are listed.

Working File (.qbw) – This is the full, un-compressed version of your data.

Backup File (.qbb) – This is the full, compressed version of your data.

Portable File (.qbm) – This is a compressed version of your data. The file size is smaller than the Backup File, which is ideal for e-mailing or transferring via our website.

Accountant's Copy Transfer File (.qbx) – This is a compressed version of your data. The file size is smaller than the Backup File. The purpose is to allow our office to make limited changes to your data and then overlay the changes on your existing data. However, it often limits functionality.

Capabilities of the various file types vary based on each version of QuickBooks. At this point, we recommend either the **Backup File** or the **Portable File**. Please contact us with any questions.