Here are some instructions for sending the file(s) via Hightail DropBox:

1. Log onto our website at www.bsabio.com and click on the Hightail DropBox located on the right-hand pane of any page;

2. Enter YOUR email address, the Subject and a short Message;
3. Navigate (BROWSE) out to your local drive and locate the file you are sending, tag it (click it) to accept it and send it securely via Hightail;
4. We will receive a notification that it was sent and received and you will receive one confirming it was sent.

Here are step-by-step detailed instructions for using Hightail DropBox to 'upload' (Send) us files securely:

- Go to our website www.bsabio.com and click on the Hightail DropBox to open the dialogue; or,
- Go directly to Hightail DropBox by clicking https://spaces.hightail.com/uplink/BrettWSabioCPA to open that same dialogue window,
- Enter a Subject;
- Enter a Message;
- Navigate to the folder on your local computer by clicking the 'Browse' button;
- Select the file to send by clicking it and click 'Open' to accept the file into the Browse dialogue;
- Then click the 'Send It' button to upload the file;
- The next dialogue window will provide you with your progress, and will automatically close when done;
- The next window will tell you that the file was successfully uploaded;
- You will then receive an email from 'Hightail' telling you that the file was 'received' by Hightail;
- We will receive an email telling us a file was securely uploaded and provide us with the secure link for retrieval;
- When we retrieve and download the file we ALWAYS send a CONFIRMING email as well.
- Fairly simple and straight forward … Absolutely impossible to mess up and send the file ANYPLACE other than to us securely since the DropBox 'BrettWSabioCPA' is registered and licensed to only us.

Here are some guidelines for making your QuickBooks Backup file and transferring it to us:

1. PLEASE ONLY USE QuickBooks Backup - DO NOT ATTEMPT TO ZIP the operating database file (QBW) since QuickBooks now uses 'additional' file extension files that MUST be included with database, as such ONLY a QuickBooks Backup (QBB) file will contain those necessary files;
2. When you do a QuickBooks Backup ... DO NOT CHANGE or MODIFY the file name AT ALL, it is NECESSARY for us to get the SAME file name EACH TIME since features within QuickBooks are LINKED to the ORIGINAL FILE NAME;

3. When you do a QuickBooks Backup ... PLEASE make certain that your OPTIONS include the 'COMPLETE VERIFICATION' of your Company file ... this will ensure that we get a database backup file that has been verified and has 100% file integrity;
4. When you do a QuickBooks Backup ... PLEASE make certain that your OPTIONS also include the 'ADD THE DATE AND TIME TO THE BACKUP TO THE FILENAME' ... this will tell us BOTH when and at what time the back was made;
5. **PLEASE remember to include, either in a separate email to us or within the message from Hightail, the following information**:
   - **USERNAME**
   - **PASSWORD**
   - **QuickBooks Version**
6. *As a final note, you will need to update (upgrade) your QuickBooks operating software EVERY YEAR for your own benefit. Effective January 01, 2023 we will ONLY be supporting the most current year.*

If you use and will sending us a Quicken Backup:

1. Please use only the Quicken Backup operation from the FILE menu;
2. Please make sure to check the box to 'Add date to backup file name';
3. Backup your Quicken;
4. Quicken will create your backup file with the following syntax, **filename-timestamp.QDF-backup** which should be the only file we will require;
5. PLEASE do not change or alter the name when you do the Quicken Backup, we need the exact name to keep your file integrity on our end;
6. You will then need to send us the QDF-backup file;
7. **PLEASE remember to include, either in a separate email to us or within the message from Hightail, the following information**
   - **USERNAME**
   - **PASSWORD**

Thank you for your cooperation. The above steps will allow us to work more efficiently with your data.

Brett W. Sabio, CPA-PFS

Visit our Accounting & Tax website at: www.bsabio.com
Visit our Securities & Financial Planning website at: www.stonebridgefsg.com