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**Here are some instructions for sending the file(s) via my WinZip Courier DropBox:**

1. Log onto my website at [www.bsabio.com](http://www.bsabio.com) and click on the WinZip Courier 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 me, tag it (click it) to accept it and send it to me in a secure upload to my WinZip Courier DropBox;
4. I will get a notification that it was sent and received and you will get one confirming it was sent.

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

- Go to my website [www.bsabio.com](http://www.bsabio.com) and click on the WinZip Courier DropBox to open the dialogue, or
- Go directly to my DropBox by clicking <https://www.yousendit.com/transfer.php?action=dropbox&dropbox=BrettSabio624544> 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 'yousendit' telling you that the file was 'received' by WinZip Courier;
- I will then get an email telling me a file was uploaded and provide me with the secure link for retrieval;
- When I retrieve and download the file I ALWAYS send a CONFIRMING email.
- Fairly simple and straight forward .... Absolutely impossible to mess up and send the file ANYPLACE other than to me, hence the secure link to my DropBox 'BrettSabio624544' which is registered and licensed to only me. Each time a file is uploaded, even though I have access to my DropBox, it appends the file with a security encryption and password that only I can use since it gets appended on top of my normal access code; that makes it impossible for anyone to gain access to.

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**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 a separate email to us indicating 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. We will continue to support the CURRENT YEAR plus ONLY the IMMEDIATE TWO PREVIOUS YEARS. By using the QuickBooks Backup feature we can usually tell which program version you are working with, but it is still helpful for you to provide the information requested in Item #5 above as well, we will return that same program version when we return a QuickBooks Backup file back to you. In the event you provide us with a version that we are no longer supporting, your backup file will be restored the NEWEST VERSION which will force you to upgrade to the same version. By upgrading each year you will not have to PURCHASE a new installation, which in the long run will save you additionally.

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**If you use and will sending me a Quicken Backup:**

1. Please use only the Quicken Backup operation from the FILE menu.
2. Backup your Quicken to a SEPARATE FOLDER on your local computer since it will create four or five files (.IDX, .QDF, .QEL, .QPH and a .QTX file, there may also be a .DAT file as well).
3. 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.
4. You will then need to send me ALL the files it created, UNLIKE QuickBooks, Quicken DOES NOT USE ONLY ONE FILE (QuickBooks.QBB) for its backup file so it will imperative to include ALL the files it created. You CAN place all these files into a WinZip file if you so desire, or you can simply 'drop' all the files onto my WinZip Courier Drop Box with whatever other files you want to send to me

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

**Brett W. Sabio, CPA-PFS**

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Visit our Accounting & Tax website at: [www.bsabio.com](http://www.bsabio.com)  
Visit our Securities & Financial Planning website at: [www.stonebridgefsg.com](http://www.stonebridgefsg.com)