



QuickBooks disaster recovery – Are you prepared for the worst?

Can you recover from a disaster with their QuickBooks files?
Are your employees trained on recovery procedures?
Are you sure they're successfully creating periodic backups?

If your answers are "no," you have some disaster recovery planning to do.

The potential costs are very high: Years worth of work could go down the drain in seconds with a simple hard-drive crash.

Prevention Checklist

Prevention is simple for file recovery. Here's how:

Decide who will backup the file, how often they will back it up, and where it will be stored.

Who: Assign a person who is reliable, responsible, and computer-savvy. If you assign your network administrator, be sure that a special procedure is made for the QuickBooks file itself.

How often: The file should be backed up as often as you don't want to re—key the data you've entered. My recommendation: at least daily.

Where: The backup file should be stored offsite, miles away from the original. The offsite procedure should be done at least monthly, if not weekly.

Check for common Dos and Don'ts of the backup procedure:
Don't overwrite the same backup file over and over again. Do use multiple disks and replace these disks at least annually.

Don't simply copy the file. Do use the Backup feature in the QuickBooks file menu.

This information is intended to stimulate your thought process on disaster recovery. It is not intended to be a complete work on the topic, nor does it take account of your particular situation. Please call us with questions before taking any action.

Don't backup the file on the same disk as the original. Do use a removable disk or tape to create your backup.

Don't leave the disks in a hot car or hot office building. Do store them in a temperature—controlled environment.

Consider using QuickBooks Online Backup Service, which makes many of the above steps automatic and error-proof.

Develop a paper trail of transactions entered since the last backup so these can be recovered if necessary.

Periodically test your backup file to make sure your process will hold up in a real emergency.

Create and distribute an emergency contact list with names and phone numbers of the owner and all participants involved in the above steps.

Recovery Checklist

If a real emergency happens, follow this File Disaster Recovery Plan checklist:

Contact the person who is trained to recover the QuickBooks file and bring them onsite if they aren't there already.

Acquire the most recent backup file if it isn't already onsite.

Perform the QuickBooks Restore function.

Re-enter transactions from the paper trail since your last backup. If records have been destroyed, contact third parties such as your bank to help in reconstruction.

Validate the account balances and review the customer, vendor, and employee information for accuracy.

If necessary, notify staff, customers, and creditors of the interruption. For example, if emails were potentially lost, you might ask them to re-send their messages.

Year-end is a great time to review the disaster recovery plan process.

If an emergency does occur, your clients will be very grateful that they were prepared.

A final note. CD's and DVD's are quite inexpensive and easy to store. What's the harm if you make a copy of your QuickBooks file, say once each week and just keep it off site?

This material is general in nature. The solutions we discuss may or may not be appropriate for you. Talk to us before taking any action.

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