9 QuickBooks Tips and Tricks

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QuickBooks is renowned as an all-in-one platform for bookkeeping. It dominates the business accounting software market due to its streamlined payment processing, automated workflows, support for third-party integrations, and other features.

It's so powerful that accountants sometimes fail to leverage it to its full potential. In this post we'll cover nine QuickBooks tips and tricks to help you get the most out of this software.

1. Cloud-host QuickBooks

Many QuickBooks users are looking to QuickBooks Online to take their software to the cloud. While QuickBooks Online is powerful, it lacks the full functionality of your desktop QuickBooks version. You'll need to cloud host QuickBooks to get the full power of desktop QuickBooks from wherever you and your team are working. To learn how to convert from QuickBooks Online to desktop hosting, check out this post. (It's more effortless than you think.)

2. Regularly maintain your company files

Large transaction log (TLG) files can slow QuickBooks performance when you're working on company files. Manual backups are the only way to clear out those TLG files. The backup file itself isn't important if you're using Swizznet, because we automatically backup the files. As a rule of thumb, clear out TLG files once every three months or when they are about a quarter of the size of your QBW file. To learn how to clear out your TLG files, read this post.

Be sure to maintain your files by [backing them up within QuickBooks](#) once a month,

Also, if you're experiencing discrepancies on reports, missing transactions, or other file errors, [verify your company file](#).

3. Protect and backup data

Be sure to password protect QuickBooks files, create backups of your company files, and restrict who sees bank and CC accounts on the home page. If you host QuickBooks through Swizznet, we'll [back up your files](#) automatically.

4. File size limitations

There's a [limit](#) to how much data you can store within a QuickBooks file. For instance, the max number of entries in a list of names in Pro or Premier is capped at 14,500, while in Enterprise it's >100,000. If your reports are taking close to a minute to run, or your QuickBooks Database File Fragments are between 15-19 (critical) or 20 and above (severe danger) you may be close to the limit. This can result in total, irreversible loss of data in the company file.

5. Add a shortcut to your favorite screen

If you're hosting QuickBooks using Swizznet and Citrix, you can [customize where your applications appear](#) on your desktop and organize them into predetermined categories.

6. What to do when QuickBooks takes too long to open

This is often caused by having multiple windows or reports open in QuickBooks. Change your settings by going to Edit>Preferences>Desktop View, select "Don't save the desktop," and click okay. This will [close all the open windows and reports](#) when you exit QuickBooks.

7. What to do when forms load slowly

This may be caused by entering data with the History Panel still open. [Close the panel](#) by clicking on the arrow. Once you hide it, forms should load faster. For some other tips about steps to take when your QuickBooks performance slows, check out [this post](#) from QuickBooks.

8. Creating an accountant's copy

Creating a QuickBooks accountant's copy allows your accountant to work in a copy of your company file then load it into your company file when they're done. This can be useful if they

don't have access to your file on Swizznet. To learn how to create an accountant's copy, [check out this post](#).

9. Using the QuickBooks Web Connector

If you're using Swizznet to host QuickBooks, [download the QuickBooks Web Connector](#) and upload it to Swizznet in order to sync your QuickBooks file with your online shopping carts and other services.

To learn more about how cloud-hosting with Swizznet can help you get the most out of QuickBooks, [contact us](#) or call us at (855) 795-5767.