

## Condense a QuickBooks Desktop File

When your QuickBooks desktop is running slow, it could be time to Condense the file. Run a Profit and Loss for ALL with columns by year to see how many years are in the QuickBooks file. If you are over ten years, you are a good candidate for Condensing. Here's how:

1. Make sure you are running the most up to date version
  - a. Help
  - b. Get-updates
  - c. Run
2. Run a Trial Balance (accountant reports)
  - a. All Dates
  - b. Customize Report
  - c. Advanced
  - d. ALL columns and rows
  - e. Save to excel
  - f. Click F2 to keep a screenshot of the size of file and number of Accounts
3. Rebuild the file
  - a. Go to File
  - b. Utilities
  - c. Rebuild
4. Don't do the Condense on a server – move the Company file to a computer
5. Condense
  - a. Go to File
  - b. Utilities
  - c. Condense
  - d. Date – Pick Dates (1st time one year, 2nd time 2 years, rest 3 years)
  - e. Create JE
  - f. Remove everything (2 screens, Trans and Lists)
6. Note the time (sometimes this takes hours and it is good to determine exactly how long each subsequent Condense will take. Each Condense may start taking less time. This will help you plan your day.)
7. When done
  - a. Note the time
  - b. Create a Trial Balance as you did above
  - c. Compare the two excel sheets - if slightly off, decide if material
  - d. Click F2 to see your progress

Sometimes I close the QuickBooks file and then reopen it

Go to number 3 and do again.

When finished:

- Rename the new Company File where it is located on the server by right clicking and then renaming.
- When you go to open the file the next time, you will have to click Open a Company File and then find it on the server.
- Change the color on the old file (Edit/Preference/View/Change color) so you don't confuse the two.
- If you have many users they could accidentally open an old file – hide it on the server and take it off the menu when QuickBooks opens.

Your QuickBooks file should run much faster!