

## Resolve QuickBooks performance issues: Part 1, Overview

When working with QuickBooks over a network or with a large company file, you may experience certain types of performance issues relating to slowness, taking a long time to open, or other similar behavior. It is important to understand the different types of performance issues that can occur:

- Taking a long time to open the file.
- Company file tasks slow down as the number of users signing into the file increase (multi-user environment).
- Company file runs fine in the morning and slows down as the day progresses.
- Performance issues for everyone in the office.
- Performance issues for only one or two people in the office.
- Intermittent performance issues (certain tasks are quick, while others are slow).
- Similar data issues in multiple data files, indicating that the network is damaging your data files.

Be aware that every day you use QuickBooks, your data file grows larger. As your file grows, it requires more resources to operate. It is not unusual for data files to grow too large for the installed network to support it and you will need to enhance your network.

### Assure your network setup is within these recommendations:

#### Enhance your computers

One of the biggest improvements you will see to performance of QuickBooks is based on how much system memory (RAM) you have on the server computer that is hosting the company file. If you have less than 4GB on your server computer, consider upgrading to a higher capacity. See [Enhance your computers to resolve performance issues](#) for more information or contact a qualified IT professional for assistance in upgrading your hardware.

#### Where your company file is stored

Where you store your company data file can have a noticeable effect on the performance of QuickBooks. Ensure that you are using a Windows

based server computer, and not a Network Attached Storage Device (NAS Drive). You can read more about the preferred company file location by looking at [Optimizing your data file location](#).

### What kind of network do you have?

You will get the best results by having the proper network setup. The following is recommended for your network setup for peak efficiency with QuickBooks:

- A hardwired network (not wireless)
- Gigabit network cards, Gigabit capable router or switch, and Cat6 networking cables. Note: 10/100 network speeds are supported, but if you have many users, you will greatly benefit from Gigabit network speeds.

### How do i know if i have a Gigabit network?

1. On your keyboard, press and hold the **CTRL + SHIFT + Escape** keys.
2. This will open the **Task Manager**.
3. Select the **Networking** tab.
4. Under **Link Speed**, see if your Local Area Connection shows **1 Gbps**, you have a gigabit network. **Note:** If it shows 100Mbps, you do not have a gigabit network.

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### How to fix it

Intuit recommends 5 solutions for resolving performance problems within QuickBooks. The first solution may solve your problem, or you may need to try all possible solutions to resolve the issue. For best results, perform the solutions in the order shown.

**Important:** Some of these steps may best performed by a qualified IT professional, especially if you do not have Administrator access to your server computer.

Be sure to [update to the latest release](#) before troubleshooting performance issues.

## Solution 1: Create a backup file to reset the TLG file and resort lists

Creating a recent backup file can help improve performance in QuickBooks because it resets the \*.TLG (transaction log file) used to track changes to the company file before they are written to the database. You can read more about the [transaction log file](#) here.

1. While in the program, choose the **File** menu, **Backup Company**, and select **Create Local Backup**.
2. Choose **Local Backup** and click **Options**.
3. In the **Tells us where to save** your back up copies, choose your Desktop (or another local location).
4. Ensure that a Complete Verification is selected and click OK.
5. Choose **Save it Now** and click **Next**. In the **Save Backup Copy** window, choose your **Desktop** (or another local location) and click **Save**.

QuickBooks will now create a backup file to your desktop.

### Resort Lists

#### Resort the Master Names List:

1. In the QuickBooks menu bar, choose **Banking > Write Checks**.
2. Click into the Pay to the order of field and press **Ctrl+L**.
3. Select the **Include Inactive** checkbox.
4. Click the **Name** button, and select **Resort List**.
5. Click **OK** on the message "Are you sure you want to return this list to its original order".

#### Resort the Item List:

1. In the QuickBooks menu bar, choose **Lists > Item List**.
2. Select the **Include Inactive** checkbox.
3. Click the **Item** button, and select **Resort List**.
4. Click **OK** on the message "Are you sure you want to return this list to its original order".

#### Resort the Chart of Accounts List:

1. In the QuickBooks menu bar, choose **Lists > Item List**.

2. Select the **Include Inactive** checkbox.
3. Click the **Account** button, and select **Resort List**.
4. Click **OK** on the message "Are you sure you want to return this list to its original order".

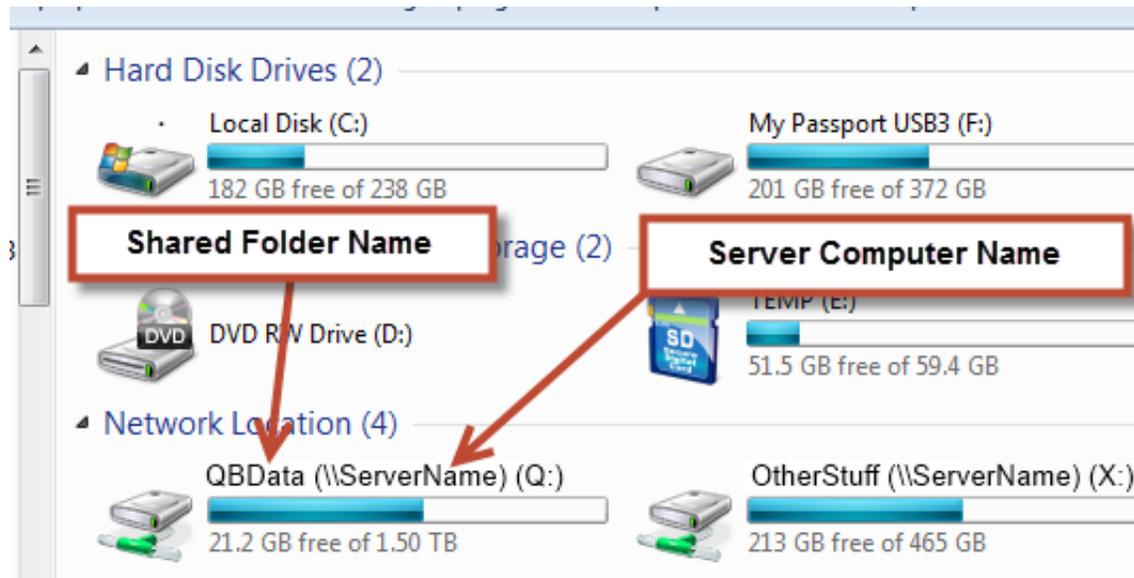
## Solution 2: Test speed from UNC path and from the desktop

### Open the file via the UNC path instead of the Mapped Drive:

Different kinds of network setups can have an affect on QuickBooks performance. If you typically access your company file via a mapped drive (Q:\QB Data for example) you can try accessing the file via the UNC path (\\ServerName\QB Data).

These steps may be a bit technical, you may want to check with your IT professional if you run into any issues with getting the server computer name or file location path.

1. Find the name of server name by opening **My Computer (Windows key + E)** and looking under the network location area.
2. You will see different mapped drives, such as **X:\, Z:\, Y:\,** etc. If you look closely, you will see the **server computer name** denoted by 2 backslashes (\\). This is the server computer name, make sure to write it down for the next steps. Also, you will need the **shared folders name**, this is usually the name right before the server name. **See example:**



3. Now that you have your servers computer name and your shared folders name, put them together like this:

- **\\ServerName\SharedFolderName** and as per the example above, the UNC path would be **\\ServerName\QBData**

4. Make sure to note this path down, then open QuickBooks, and choose **Open or Restore a Company File**.
5. Choose **Open a Company File** and click **Next**.
6. In the Open a Company box, enter in the **UNC path** you got from Step 3 in the file name box and press **Enter**.
7. You will then see a list of your company files, choose the one you wish to open and press **Open**.
  - **If the speed is faster**, you will want to make sure your IT professional can set up a UNC path for future use and not use a mapped drive to access your company files.
  - **If the speed is the same**, proceed below in troubleshooting.

### Test speed locally (if on a network)

You can test QuickBooks in a multi-user environment, to determine if the network or the company file is causing the issues. If the performances issues occur when more than 1 person signs into the company file, proceed to Solution 3. If performance issues occur with one user logged into the company file over the network, then proceed below to copy the file local.

1. Within QuickBooks, press the **F2** button on your keyboard.
2. Under **File Location**, make a note of where your company file is located.
3. Close QuickBooks and have all users logged into the company file log out.
4. Click the **Start** menu and select **Computer**.
5. Browse to the file path you located in step 2.
6. Once you find your company file (QBW), right-click on it and choose **Copy**.
7. On your desktop, right-click in an empty space, then select **Paste**.
8. Now that you have copied your file to the desktop, open QuickBooks and browse to the desktop location to open the file that you just copied.
9. **Test the performance** while the file is local to see if it is faster then being on the network.
  - If the file is as slow as it was on the network, proceed to Solution 5 to test issues within the file itself.
  - If the file is faster while it is local vs being on the network, proceed below to the next solution.

### Solution 3: Reduce Company File Fragments and perform Disk Defragmentation

1. While your company file is local to the desktop (from solution 1), [create and restore a portable file](#). **Note:**Creating/Restoring a portable file will help reduce file fragments in the company file, which may help improve performance.
2. After creating/restoring a portable file, perform a **disk defragmentation** (if your file is located on a network, go to the server computer).

**Note:** If the computer is using an Solid State Drive (SSD), do not perform a disk defragmentation.

- a. Click the **Start** button and select **All Programs**, then select **Accessories > Systems Tools > DiskDefragmenter**.
- b. Click the **Defragment** button, and follow any instructions that appear on the screen to defragment your hard drive. **Note:** The defragmentation process may take some time to complete, you can start it and then proceed below to the next solution if its taking a long time.

#### **Solution 4: Conflicting 3rd party programs and Anti-Virus software**

Depending on your current setup, there may be some conflicting programs that are running along side of QuickBooks causing performance degradation. If you use QuickBooks in a network environment, you will want to perform these steps on the server itself.

##### **Check anti-virus software**

Some anti-virus security programs can cause performance issues while using QuickBooks. You can try temporarily disabling it to see if performance improves.

1. On the server computer that hosts the company file, **temporarily disable the anti-virus** security software.
2. Open QuickBooks, and see if the performance has improved.
3. If the performance is the same, then proceed to below to **check for 3rd party programs** conflicting with performance.
4. If the performance is better while the anti-virus program is disabled, then you will need to [set exceptions to allow your security program to bypass QuickBooks](#).

**Important:** Make sure to turn your anti-virus back on after testing performance.

##### **Check 3rd party programs**

Running some 3rd party background applications can cause performance issues with QuickBooks. An easy way to diagnose if this is the cause or not is to use Selective Startup. This will load only the basic drivers and startup items required to use your computer.

1. Press the **Windows key + R** on your keyboard to open the **Run** command.
2. type **msconfig** and press **Enter**.
3. Select **Diagnostic Startup** then press **OK**.
4. **Reboot** your computer and test the performance of QuickBooks.
5. If the performance is the same, then proceed to the next solution.
6. If the performance is better while in selective startup, then it is recommended you work with your IT professional to determine which specific program is causing the performance issues.

**Important:** Once you have finished testing the performance in selective startup, follow these steps to get back to normal operation:

1. Press the **Windows key + R** on your keyboard to open the **Run** command.
2. type **msconfig** and press **Enter**.
3. Select **Normal Startup** then press **OK**.
4. **Reboot** your computer.

### **Solution 5: Check for issues within your company file**

If you have narrowed the performance issue to the company file, as in it is slow both on and off the server computer, with the anti-virus disabled, in selective startup mode, and resetting the TLG file, you may be able to further improve performance by checking your data file for performance enhancements.

**Important:** Before you begin, see if the performance is affecting multiple users or just one or two users. Also the frequency of when the performance issues occur. Is it certain times during the day, only when doing certain types of activities in QuickBooks.

#### **Is QuickBooks slow for all users, all of the time**

If the company file is slow for everyone and all the time, you can check the data file for integrity issues. Note: If you are in a multi-user environment, it is recommended that everyone but one person log out of the company file.

1. From within your company file, select the **File** menu > **Utilities** > **Verify Data**.
2. Click **OK** to start the verify process.

3. If there are any integrity issues, QuickBooks will prompt you to run a rebuild on the data.
  - a. If the **Verify finds errors** and you run a rebuild, make sure to check your [QBWin.log file](#) for errors.
  - b. If the **Verify completes without errors**, proceed to the next step.

### Is QuickBooks only slow for some users, but not others, or intermittently

#### Change QuickBooks Search preferences:

- Go to the [Performance issues in QuickBooks 2013 when the Search Index preference is enabled](#) article.

#### Change other QuickBooks preferences:

- You can further maximize performance by [setting additional company and user specific preferences](#).

#### If QuickBooks is slow only when saving transactions (Invoices, Bills, etc):

1. Try using a new template for your transaction. Go to the **Lists** menu and select **Templates**.
2. Click the **Templates** button in the bottom left, and select **New**.
3. Choose the type of template you want to create and click **OK**.
4. Click the **Manage Templates** button in the top left.
5. Over on the right, give your new template a name and click **OK**.
6. Click **OK** again to close out of the Basic Customizing window.
7. Now use your new template on a transaction to see if the performance is improved when saving.

If after performing all these steps and you are still experiencing performance issues, Press **F2** within the program and consider the following:

- **How large is your company file** (file size)?
  - **QuickBooks Enterprise Solutions:** If your company file size is >500 MB, you can [Improve QuickBooks performance by verifying it is using the correct amount of memory](#).

- **Do any of your lists exceed the recommended limits** (list information)?
- **How many years worth of data do you have** (versions used on this file)?

While there are no actual hard limits for the company file, performance may be impacted if you have; a large file (over 500mb for Pro/Premier and 1.5GB for Enterprise), more than 7 years worth of transactions, or are [exceeding any of the list limits](#), you may be best suited to either [condensing your QuickBooks data](#) or [starting a new company file](#).

If these solutions don't resolve the issue, you can read discussions and post messages and questions relating to your issue on the [Intuit QuickBooks Community site](#) for free. You can [contact an agent](#) for additional guidance. Fees may apply.

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## Improve QuickBooks performance on your network

Many types of networks are in use today to run QuickBooks. Not all of them will run QuickBooks effectively. QuickBooks Technical Support cannot provide support for these environments beyond basic program configuration. Even if the program is configured correctly for multiple users, Intuit cannot guarantee performance on networks other than the recommended ones.

If you are just setting up your network, or if QuickBooks is running slowly, use this article and these resources:

- [Set up multiuser QuickBooks](#)
- [Set up QuickBooks for multi-user access \(recommended setup\)](#)
- [Change the setup for multiuser QuickBooks](#)
- [Hosting your company data file in multiuser mode](#)
- [System requirements for QuickBooks 2014 and Enterprise Solutions 14.0](#)

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## Test your bandwidth speed

### Prepare to test your bandwidth

1. On a file that is larger than 100 MB.
2. Using a copy of your working .qbw file so that other users can continue to work while testing is in progress.
3. Under "real operating conditions" when users are actually working in QuickBooks.
4. On all workstations that are running QuickBooks, because the bandwidth can vary with workstation.

### Steps to run the test

1. Record the size, in KB, of the file you will copy .
2. Copy the file from the network location to your workstation desktop
3. Measure the time to copy, in seconds.

### Calculate your bandwidth

Bandwidth = (File size x 8) / (time x 1024)

1. Bandwidth = Transfer rate in Megabits per second (Mbps).
2. File size = Size of the file in KBytes.
3. Time = Amount of time it took to copy in seconds.
4. The factor 1024 converts KBytes to MBytes.
5. The factor 8 converts MBytes to Mbits.

QuickBooks requires a bandwidth of more than 40 Mbps. If your bandwidth calculation is less than 40 Mbps, your network connection has insufficient bandwidth to support QuickBooks. You need to identify and resolve the bottlenecks.

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### **Additional Information.**

#### **Ways to increase your bandwidth**

1. If your wireless network is providing less than 40 Mbps, hard wire some or all of the connections with CAT-5 or CAT-6 cables.
2. Replace hubs with switches or routers.
3. Use a 100 Mbps switch with a Gigabit port for the server.
4. Use a 1 Gbps NIC on the server.
5. Insure all your workstation NIC's are 100 Mbps or greater.
6. Adding a plug-in NIC to your server and/or workstations could improve your bandwidth.
7. Multiple server NIC's can confuse QuickBooks and slow it down.
8. Limit cable length to 50 - 100 feet without repeaters.
9. Route cables away from electronics that generate interference.
10. Upgrade cables from CAT 5 to CAT 6. Even without Gigabit network interface cards or a Gigabit switch, CAT 6 cables can increase your bandwidth.
11. Periodically check your network for parts that have failed: NIC's, ports and cables can fail and reduce the available bandwidth.
12. Network performance can drop off significantly in a long-distance networked environment, especially with encryption/decryption, such as a virtual private network (VPN).

13. Intermittent errors experienced when wireless connections fail for a few seconds can disconnect your QuickBooks session. Similarly, connection errors in long-distance networking environment (for example, a modem interruption) can cause your QuickBooks session to disconnect.

### **Assure your NIC's automatically detect how fast to transmit and receive data.**

1. Open your Microsoft Windows Control Panel.
2. Double-click System and select the Hardware tab.
3. Click Device Manager.
4. Click the + next to Network adapters to expand the list.
5. Right-click the NIC and select Properties.
6. Click the Advanced tab.
7. Under Property, select the Link Speed & Duplex option (the option may be called something similar).
8. Click the Value drop-down arrow and select Auto (the option on you NIC could be named something else).
9. Click OK and close the window.

### **Gigabit Networks**

1. A Gigabit network is not required to run QuickBooks, however, installing and maintaining a Gigabit network will enable QuickBooks to run faster.
2. You will need a Gigabit Network Interface Card (NIC) in your server and in each of your workstations, a Gigabit switch and Cat 6 cables.
3. You can use a hybrid system if you have a switch with one Gigabit port for the server.

### **Anitvirus and Security Software**

Antivirus and internet security programs are critical tools in maintaining the health and security of your computer. There is, sometimes, a cost in performance due to the computer resources these applications use. These resources are shared by all programs, including QuickBooks. Here are few maintenance tasks you can perform to minimize the negative effects on your computer and on QuickBooks. **Note:** Please be aware that Intuit does not support firewall and anti-virus programs. Please contact your program provider for help you with installing and setting up your program.

1. Download and run the [QuickBooks File Doctor](#) to assist you in setting up your firewall.
2. Update your antivirus and Internet security software to take advantage of improved scanning engines.
3. Avoid using more than one antivirus, internet security, or firewall. Firewalls can be installed on your workstation, your server and your router.
4. Scan your hard drives frequently to protect your network from viruses and other malware.
5. As a troubleshooting tool, you may want to discontinue your anti-virus software to see if your performance improves. If it does, turn on your anti-virus software and seek solutions within the anti-virus settings. Do not leave your anti-virus software off for any significant period of time.

### **Common competing programs:**

Competing programs can use RAM that QuickBooks can use to run faster. Shutting down unneeded applications and processes can enable the operating system to allocate more resources to QuickBooks.

1. Microsoft SQL Server is not needed to run QuickBooks.
2. Microsoft Exchange Server can use large amounts of memory. Some QuickBooks users need to run the Exchange Server and QuickBooks on separate servers.
3. Desktop search and indexing applications such as: Windows Search, Google Desktop, Copernic, Microsoft Indexing Service. You may be able to adjust the settings within these programs to enable QuickBooks to run faster. In the extreme, you may need to disable them when working with QuickBooks.
4. Previous versions of QuickBooks may be running data managers.
  - If you do not need the previous versions, uninstall them.
  - If you do need the previous versions, set the data manager process to start manually.

If these solutions don't resolve the issue, you can read discussions and post messages and questions relating to your issue on the [Intuit QuickBooks Community site](#) for free. You can [contact an agent](#) for additional guidance. Fees may apply.

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## Resolve QuickBooks performance issues, Part 3, Manage your computers

You can increase the performance of QuickBooks by enhancing your server and workstations.

This article is one of a set of four articles about performance issues in QuickBooks. If the steps in this article do not resolve your issues, try the steps in the other articles:

1. [Part 1: Overview.](#)
2. [Part 2: Manage your network.](#)
3. [Part 4: Manage your data file.](#)

If these solutions don't resolve the issue, you can read discussions and post messages and questions relating to your issue on the [Intuit QuickBooks Community site](#) for free. You can [contact an agent](#) for additional guidance. Fees may apply.

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### Enhance your computers

[QuickBooks system requirements will support most QuickBooks users.](#) If your network meets these specifications and you are having performance issues, enhancing your available RAM may improve your issues. Remember your goal is not just to increase the RAM in you network, but to increase the amount of RAM available to QuickBooks.

One rule of thumb for the amount of RAM in a server is to multiply the size of your file, in GB, by the number of your users. If your file size is 500 MB (0.5 GB) and you have 6 users, then this rule suggests 3 GB of RAM in your server. If you have only 2 GB and you are experiencing performance issues, consider upgrading your server to 3 GB of RAM.

#### Virtual Memory

1. Increase a computer's Virtual Memory (VM) to 2 GB plus 2 GB for each major application running on the computer.
2. Be sure that VM is running on an internal hard drive.
3. If your server has multiple internal drives, store the data file on one drive and the VM on another drive.

#### Competing Programs

A competing program is one that is running at the same time QuickBooks is running. Each competing program requires RAM and processor

capacity. You can see the competing programs by opening the Task Manager and clicking the Processes Tab.

1. Shutdown programs and processes running on a computer. This enables the operating system to assign more RAM to QuickBooks.
2. If you cannot shut down a competing program, move either QuickBooks or the competing program to another computer. A common example is the Exchange program that runs your e-mail system.
3. In some systems, there are too many programs running on the Domain Server for QuickBooks to run efficiently. You should consider moving QuickBooks to another server.

## **RAM Enhancements**

1. Add memory chips. If your server has four sockets, and 2 sockets have 1 GB DRAM chips, install two 1 GB DRAM chips in the empty sockets.
2. Upgrade the existing memory chips, e.g., replace 1 GB DRAM chips with 2 GB DRAM chips.
3. Increase workstation RAM to 2 GB. Only rarely will you need more than 2 GB of RAM.
4. Be aware of your operating system's limits on the amount of RAM it supports.

## **Upgrade your operating system**

If upgrading RAM to 3.2 GB of RAM does not resolve your workstation's issue, upgrade the Operating System to address more RAM. Then it can assign more memory to QuickBooks. Upgrade your server Operating System to address more RAM, e.g., upgrade from a 32-bit installation to a 64 bit installation

## **Upgrading Computers**

If you decide to upgrade your server or a workstation, please consider the following;

1. Assure that the computer that will store the file is a true server.
2. Fill all of the RAM slots with the highest capacity chips.
3. A 64-bit computer & operating system.
4. A fast clock speed of 2.2 GHz or more.
5. A fast hard drive rotational speed, e.g., 7,500 or 10,000 rpm, or a solid state drive.
6. A fast Network Interface. A 1 Gigabit per second (Gbps) card on your server can increase bandwidth.

## Terminal Server

If you are running QuickBooks in a terminal server environment, you can estimate the amount of RAM on the server in two ways. The first is that you need 0.5 GB of addressable RAM for each user. If you have five users, you need 2.5 GB of RAM. The second way is:

- For 5 users, you need 2-3 GB addressable RAM.
- For 10 users, you need 3-4 GB addressable RAM.
- For 15 users, you need 4-6 GB addressable RAM.
- For 20 users, you need 6-8 GB addressable RAM.

Note: Intuit supports Terminal Services mode only for QuickBooks Enterprise.

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## Where to store your data file

1. Where you store your company data file can have a noticeable effect on the performance of QuickBooks.
2. You can set up a folder in your c: root directory to store your data file and ancillary files: C:\QBData\filename.qbw.
3. Remember to move the entire data folder when you need to move the data file.

## Use a networked computer

1. Store your company data file on an **internal hard drive** in a computer on your network.
2. Use an external hard drives or a flash drive **only** to back up your data file.
3. We do not recommend using a **Network Attached Storage** (NAS) drive. QuickBooks for Windows is designed to store files on a computer with a Windows Operating System, or with a Windows compatible [SAMBAs share](#) (Enterprise only).
4. QuickBooks works with a server running a **RAID (Redundant Array of Inexpensive Disks)**. Intuit does not recommend them because they have been linked with performance issues.

## Non-Dedicated Server/Host

If you do not have a dedicated host or server, use these criteria to decide on which workstation to save the file. Save your data file on the workstation that:

1. Has the full QuickBooks program installed on it.
2. Is used by the person doing the most work in QuickBooks, to minimize data transfer over the network.
3. Has the most RAM.
4. Has the fastest clock speed.
5. Has the least non-QuickBooks activity.

## Your Data Folder

When creating or moving files, QuickBooks uses these default locations:

1. Windows XP: C:\Documents and Settings\All Users\(\Shared) Documents\Intuit\QuickBooks\Company Files
2. Windows 7: C:\Users\Public\Public Documents\Intuit\QuickBooks\Company Files

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## Optimize your network interface card (NIC) settings.

### View and Edit your NIC settings

Network interface card (NIC) settings can slow the transfer rate if you have duplex mismatches. A duplex mismatch occurs when one NIC is set to a specific link speed and duplex and is connected to a NIC set to a different value. A mismatch can reduce your bandwidth to a few Megabits per second (Mb/s). To avoid this issue, reset all of your NIC's Link Speed and Duplex to an automatic setting.

1. Click the Microsoft Windows **Start** button, select **Settings > Control Panel**. (In some Windows versions, you do not need to select **Settings** before selecting **Control Panel**.)
2. Double-click **System** and select the **Hardware** tab.
3. Click **Device Manager**.
4. Click the **+** next to **Network adapters** to expand the list.
5. Right-click the NIC and select **Properties**.
6. Click the **Advanced** tab.
7. Under **Property**, select the **Link Speed & Duplex** option (the option may be called something similar).
8. Click the **Value** drop-down arrow and select **Auto** (the option on you NIC could be named something else).

9. Click **OK** and close the window.

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## Resolve QuickBooks performance issues, Part 4, Manage your data file

If you are having issues with the performance of your QuickBooks installation, your company file may be the root cause. You have options you can use to resolve such issues.

Be sure that all QuickBooks installations, including the data manager on the host /server, are running the latest release of your current QuickBooks version. To update QuickBooks, from the menu bar, select **Help** and then choose **Update QuickBooks**.

If these solutions don't resolve the issue, you can read discussions and post messages and questions relating to your issue on the [Intuit QuickBooks Community site](#) for free. You can [contact an agent](#) for additional guidance. Fees may apply.

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### Your company data file size

QuickBooks' performance decreases as the size of the company file increases. There are no actual limits on the size of your company data file, but performance may be hindered if your network is not capable of handling files that have:

- More than 500 MB in Pro or Premier.
- More than 1.5 GB in QuickBooks Enterprise Solutions.
- More than seven years of transaction history.

### Reduce the size of the company file

If you have a large file and performance is slower than what is needed, you can reduce the size of your company file. Be aware that all of these options are complex and require a lot of time and work. You can:

#### Run the Condense Data Utility

#### Truncate your company file

This capability is not built in to QuickBooks, nor does Intuit offer truncation as a separate service. You can remove transactions up to a selected date and then set up opening balances as of that date. You can truncate by (1) Sending your company file to a third party vendor OR (2) Obtaining third party data transfer and opening balances applications. Truncating your file in a previous calendar year should not affect DIY with DD payroll. If you have Assisted Payroll, consult Payroll Support before truncating your file.

**Start a new company file.** Starting a new company file will not affect DIY with DD payroll. If you have Assisted Payroll, consult Payroll Support before starting a new file. If you decide to start a new company file, you have two options:

1. [Use the Condense Company Data option to delete all transactions](#). This leaves you with a shell that has only your lists.
2. Create a new file from scratch. This sounds simple, but it is not. It is a lot of work and will take time.
  - a. In the old file, go to File > New Company. Follow the wizard that appears.
  - b. In the old file, [export your lists](#). Open the files and clean them up by deleting inactive or no longer needed list entries.
  - c. [Import the cleaned files into the new file](#).
  - d. Set up the opening balances. Go to [www.marketplace.intuit.com](http://www.marketplace.intuit.com) to find utilities that will do this for you.

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## Set company and personal preferences

### Company Preferences

1. Log in to your company file as the Administrator.
2. Switch to single user mode.
3. From the **Edit Menu**, choose **Preferences**.
4. Click the **Company Preferences** Tab.
5. In the side bar, choose **Bills**.
  - Clear the **Warn about duplicate bill numbers from the same vendor** checkbox.
  - Click **Yes** in the **Save Changes** window.
6. In the sidebar, choose **Items & Inventory**.
  - Clear **Warn about duplicate purchase order numbers**.
  - Click **Yes** in the **Save Changes** window.
7. In the side bar, choose **Sales & Customers**. Clear these checkboxes:
  - **Warn about duplicate invoice numbers** .
  - **Warn about duplicate Sales Order numbers**.
  - Click **Yes** in the Save Changes window.

8. In the sidebar, choose **Search**.
  - Clear the **Update automatically** checkbox.
  - Click **Yes** in the **Save Changes** window.
  
9. When all of the company preferences are set, click **OK**.

## Personal Preferences

1. From the **Edit Menu**, choose **Preferences**.
2. Click the **My Preferences** Tab.
  
3. In the sidebar, chose **Desktop View**.
  - a. Select **Don't save the desktop** radio button.
  - b. Clear the **Show Home page when opening company file** checkbox.
  - c. Clear the **Show Getting Started window** checkbox.
  - d. Click **Yes** in the **Save Changes** window.
  
4. In the sidebar, chose **General**.
  - Select the **Keep QuickBooks running for quick startups** checkbox.
  - Click **Yes** in the **Save Changes** window.
  - **Note:** This option is a tradeoff:
    - If checked, QuickBooks starts faster, but may run slower.
    - If unchecked, QuickBooks starts slower, but may run faster.
  
5. In the sidebar, chose **Reminders**.

- Clear the **Show Reminders List when opening a Company File** checkbox.
- Click **Yes** in the **Save Changes** window.

6. In the sidebar, chose **Reports & Graphs**.

a. In the **Reports and Graphs** section choose **Don't Refresh**.

**Note:** Reports will refresh only when you choose to do so. This preference can increase your performance if you have several reports open while you are entering transactions.

b. Click to select the **Prompt me to modify report options before opening a report** checkbox.

7. When all of your personal preferences are set, click **OK**.

## Automatic Updates

1. From the **Help** menu, choose **Update QuickBooks**.
2. Click the **Options** tab.
3. In the **Automatic Updates** section, select **No**.
4. Click **Close**.
5. Click **OK**.

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## Optimize operations

### Optimize operations.

1. Reduce your DB File Fragments.
2. Resort your Master Name List (customers, vendors, employees and other names), your Chart of Accounts and and your Item List. your lists weekly.

3. [Verify your company file weekly.](#)
4. [Make a manual backup with full verification to reset the transaction log file \(TLG\)](#) This backup resets your TLG to its normal size. Large TLG files can cause performance issues. Do not delete or rename the TLG.
5. [Create and restore a portable company file..](#)
6. Do not enter zero lines on transactions. A zero line (with a zero price or quantity) adds another target to your data file and increases the size of your data file. Zero lines slow QuickBooks' performance and, if you run cash basis reports with inventory, your COGS could be incorrect.
7. Run accrual reports instead of cash reports: Many transactions, e.g., more than 50,000, tend to degrade the Sybase Sequel server. Cash basis reports take longer to run because QuickBooks must check a transaction's links to determine what is paid and unpaid.
8. If QuickBooks runs slowly when doing payroll, have other users log off and do payroll in single user mode.
9. Close QuickBooks windows that you are not currently using.
10. [Clear the queues of forms to be printed or e-mailed.](#)
11. If you are the only user in the data file, switch to single user mode.
12. Reboot your workstations daily.
13. Log out of the data file if you are not actively using it and do not stay logged in to the company file overnight
14. Perform long tasks in off-peak hours (e-mail or print batches of invoices or statements) in the off-hours (before normal hours, lunch time or overnight)so they do not take resources from other users.
15. Optimize reports. Running reports is an intensive operation within QuickBooks because the can draw on a lot of data. Optimizing reporting and printing reports can save considerable time and resources. The Sales Tax Liability Report and the General Ledger report tend to be long reports. Here are some hints:
  - a. Run long reports in the off-hours, during lunch, overnight, over the weekend.

- b. Customize and memorize long reports.
- c. Copy your company file to an unused workstation, set the driver to print directly to the printer and print your report.

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## Maintain lists

### List characteristics that can hinder performance.

1. **Your lists are approaching the list limits.**
2. Your lists have a large number of inactive entries that you no longer use.
3. Your customer list has many jobs underneath customers.
4. Your account list has many sub-accounts.
5. Your item list has many sub-items.
6. The Customer, Vendor, and Employee centers have custom-sorted name lists.

### WARNINGS Before doing any of the steps below

1. Create a backup of your data file.
2. Be aware that once two entries are merged together, the merge can not be undone.
3. Create an archive copy of your file. If you merge any list entries , open the archive copy to view the history of the merged entries .

### Custom Sorted Lists.

1. Open the center that has performance issues.
2. To the left of the Name column, ensure there is no diamond column.
3. If there is a diamond column, click the diamond to remove it. You do not need to be in single-user mode to remove the diamond.
4. Close the center and reopen it.

## Modify Lists

**Chart of Accounts:** If you are using subaccounts to track source of income or use of expenses, merge subaccounts together or into the parent accounts and set up Classes to do the tracking.

**Item List:** Merge together old and/or inactive items that are no longer sold. Merged items lose their identity; be sure you have an archive copy with the history of each item.

**Customer List:** If your Customer:Job list has several, old jobs underneath Customers, merge them together. If you have old, inactive Customers to whom you no longer sell, merge them together. The merged customers and jobs lose their identity; be sure you have an archive copy with their individual history.

**Vendor List:** If you have old, inactive Vendors from whom you no longer purchase goods, merge them together. The merged vendors lose their identity; be sure you have an archive copy with their individual history.

**Employee List:** If you have old, inactive Employees whom you no longer employ, merge them together. The merged employees lose their identity; be sure you have an archive copy with their individual history and be sure that you have all of their tax forms up to date, printed and submitted to the appropriate tax agencies.