

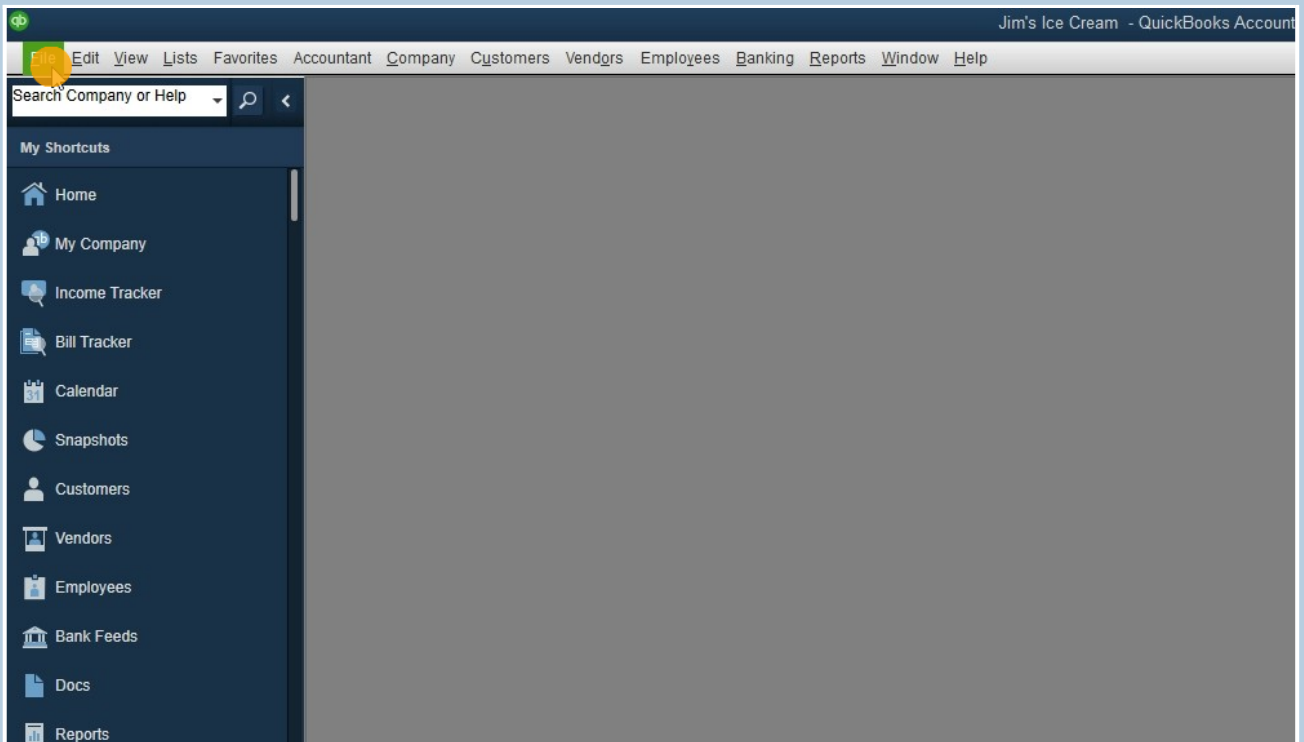
# How to Create Accountant's Copy - Pearson & Cmerek, PC

By Nick Cmerek, CPA

8/3/2020

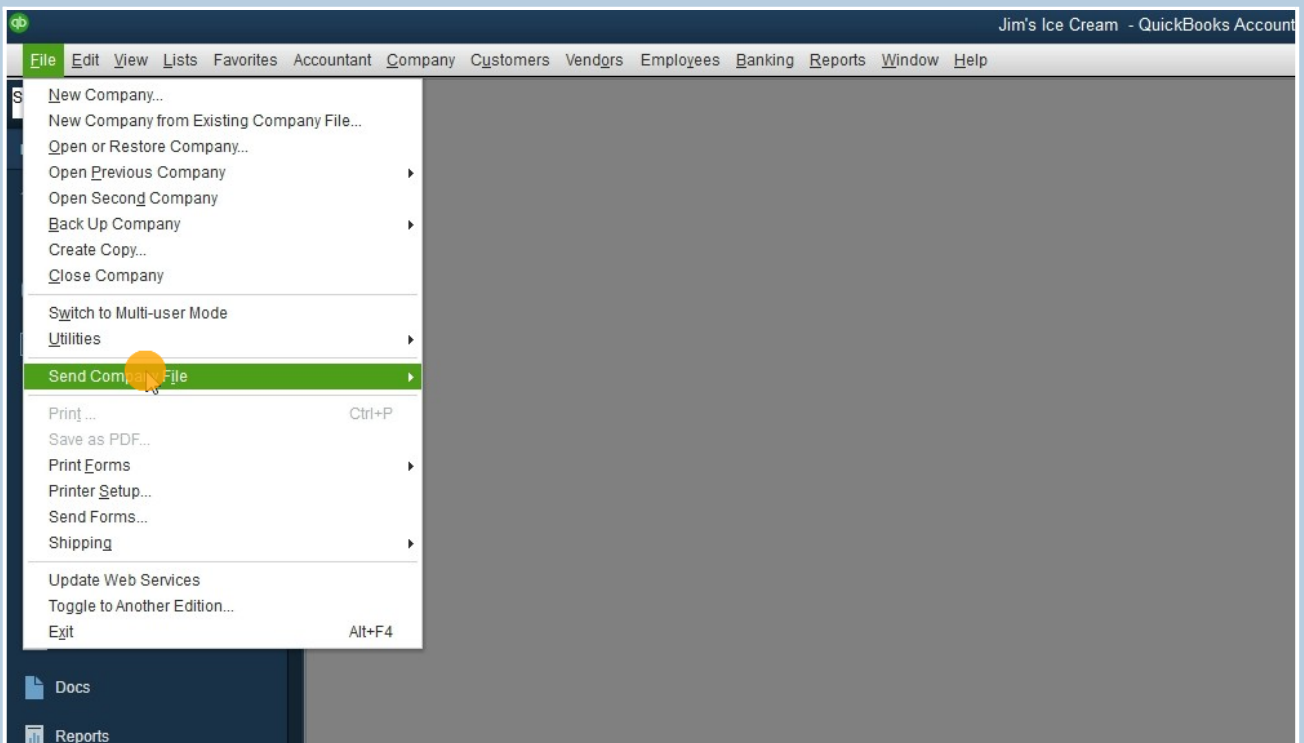
1

Click here: File



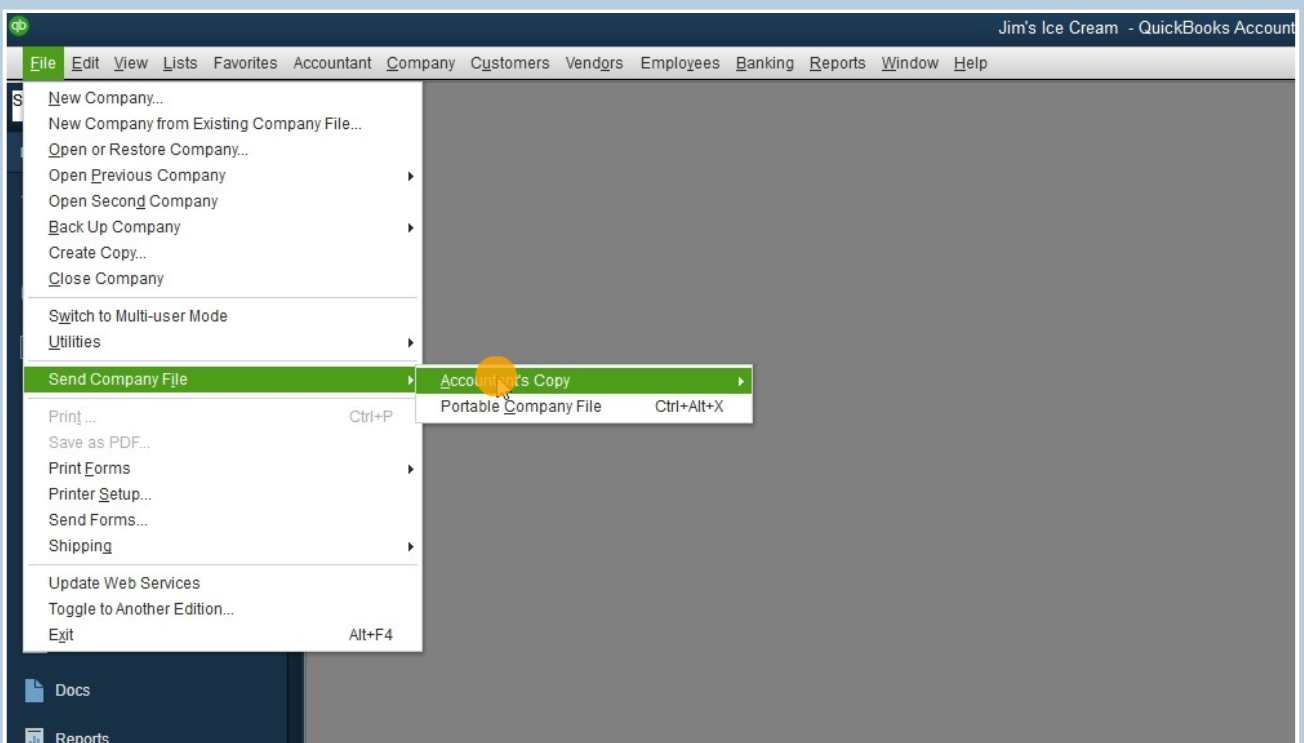
2

Click here: Send Company File

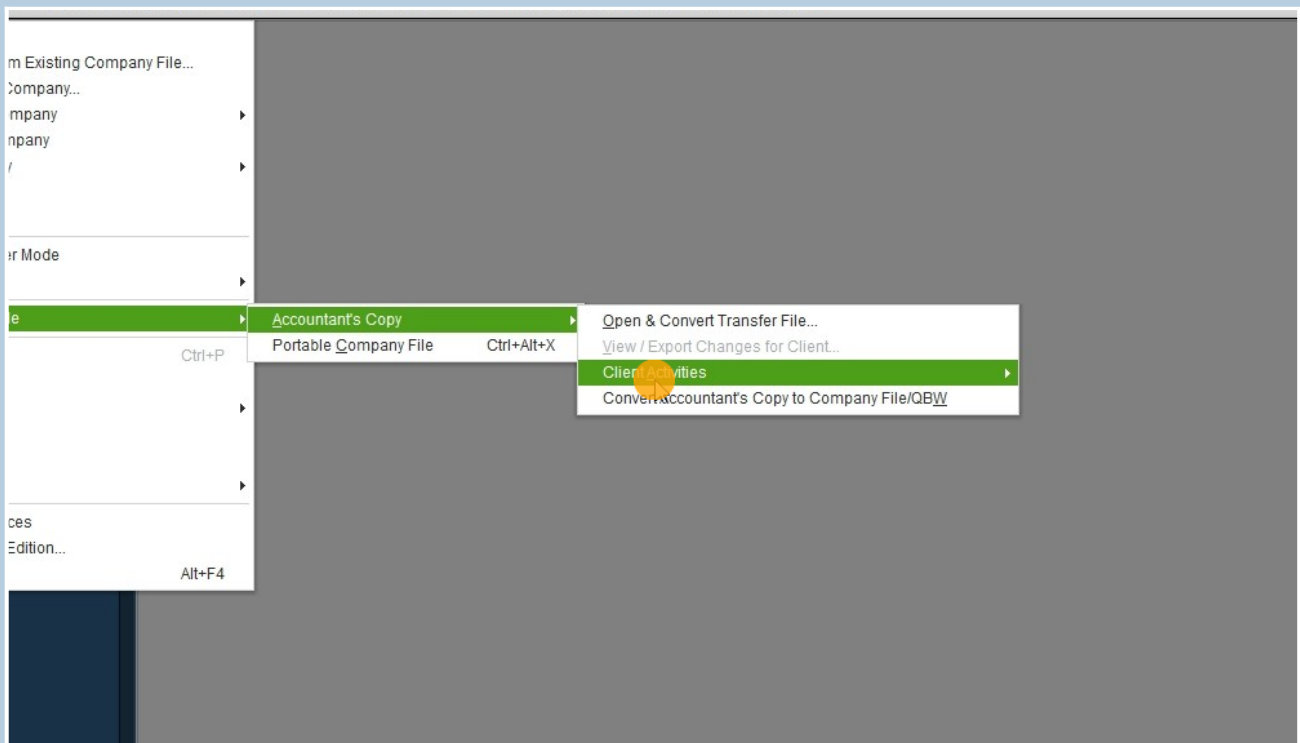


3

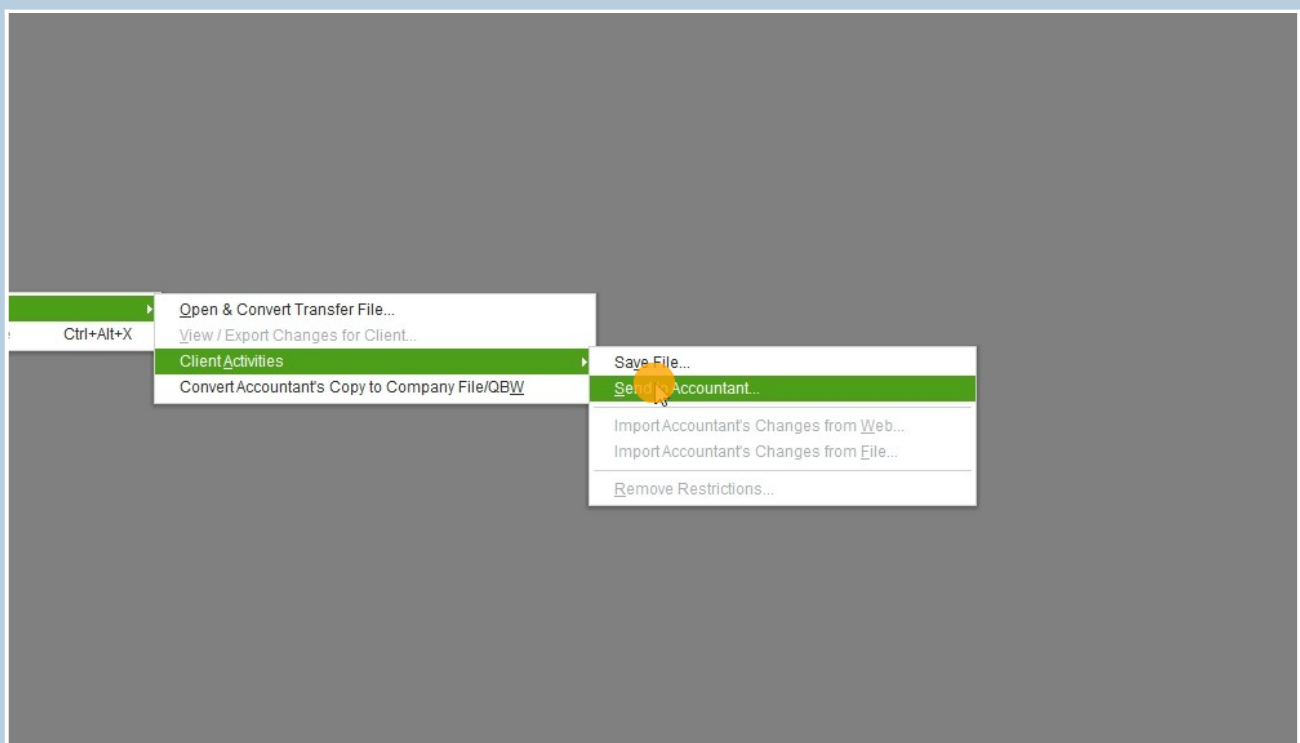
Click here: Accountant's Copy



[Click here: Client Activities](#)

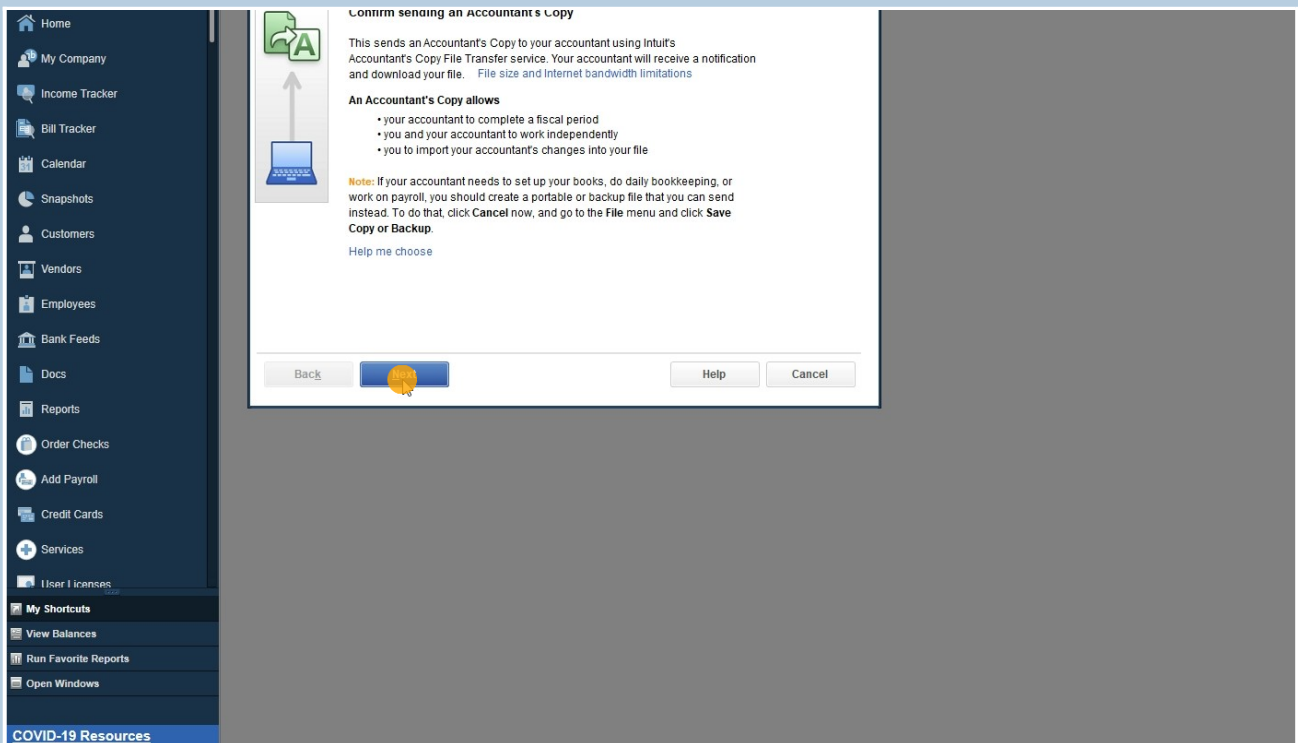


Click here: [Send to Accountant](#)



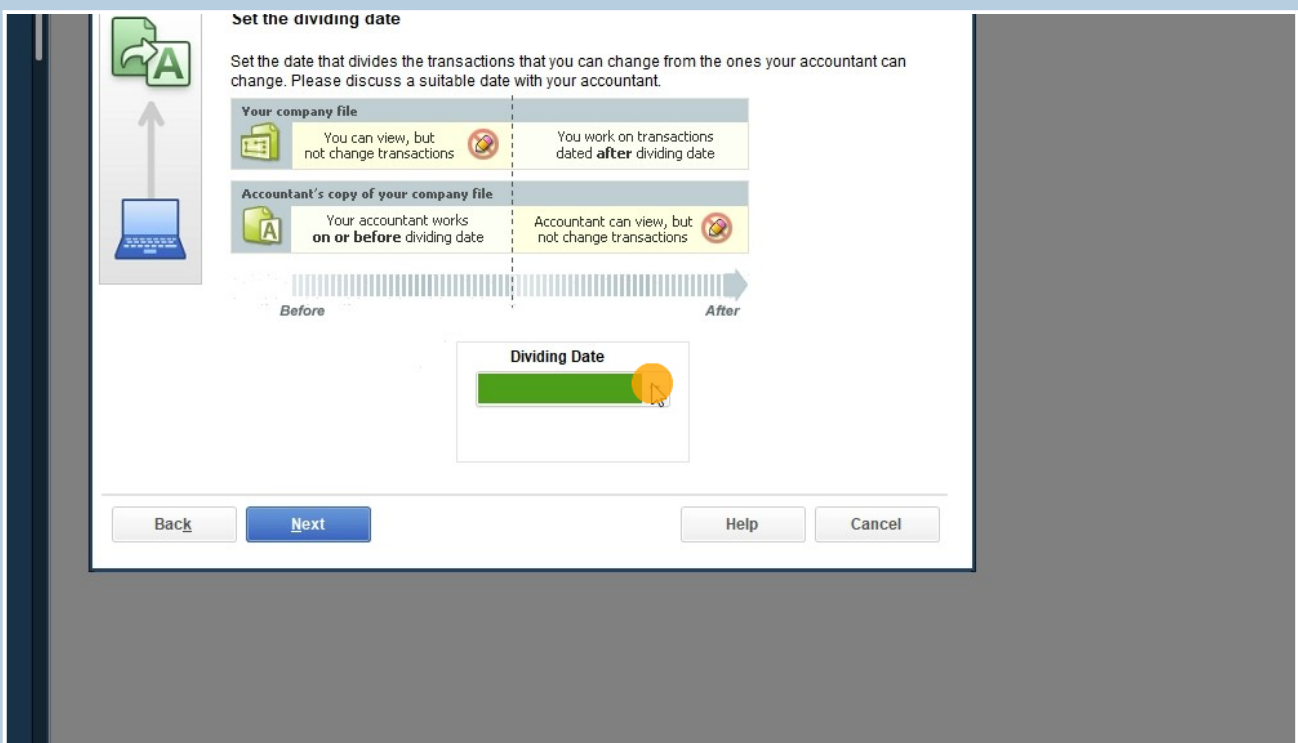
6

Click here: Next



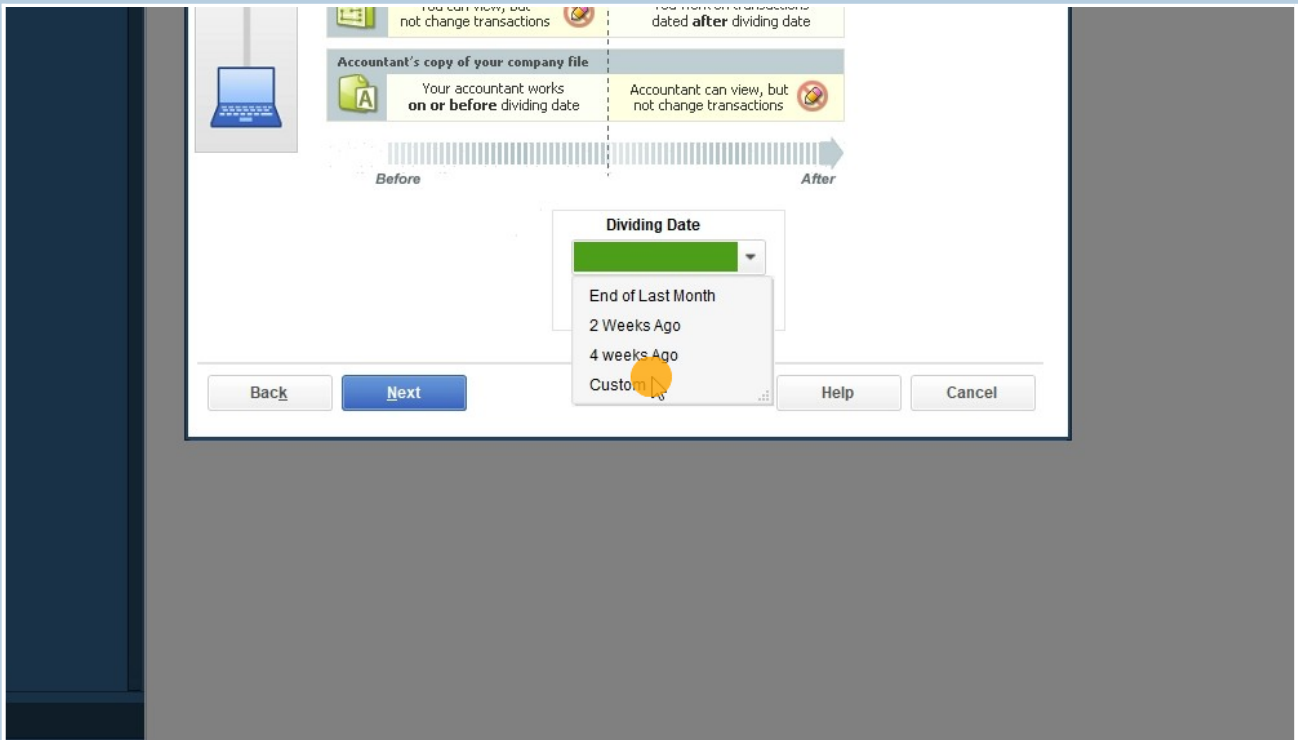
7

Click here: Dividing Date



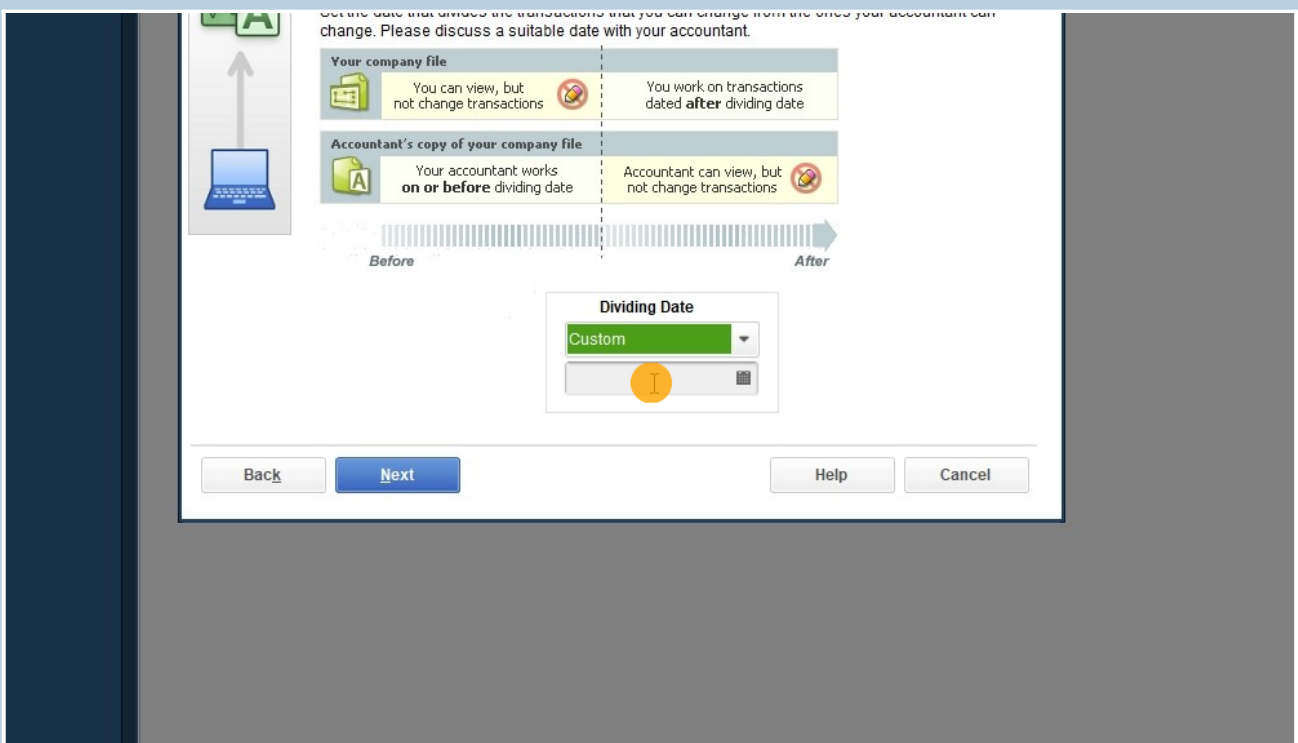
8

Click here: Custom



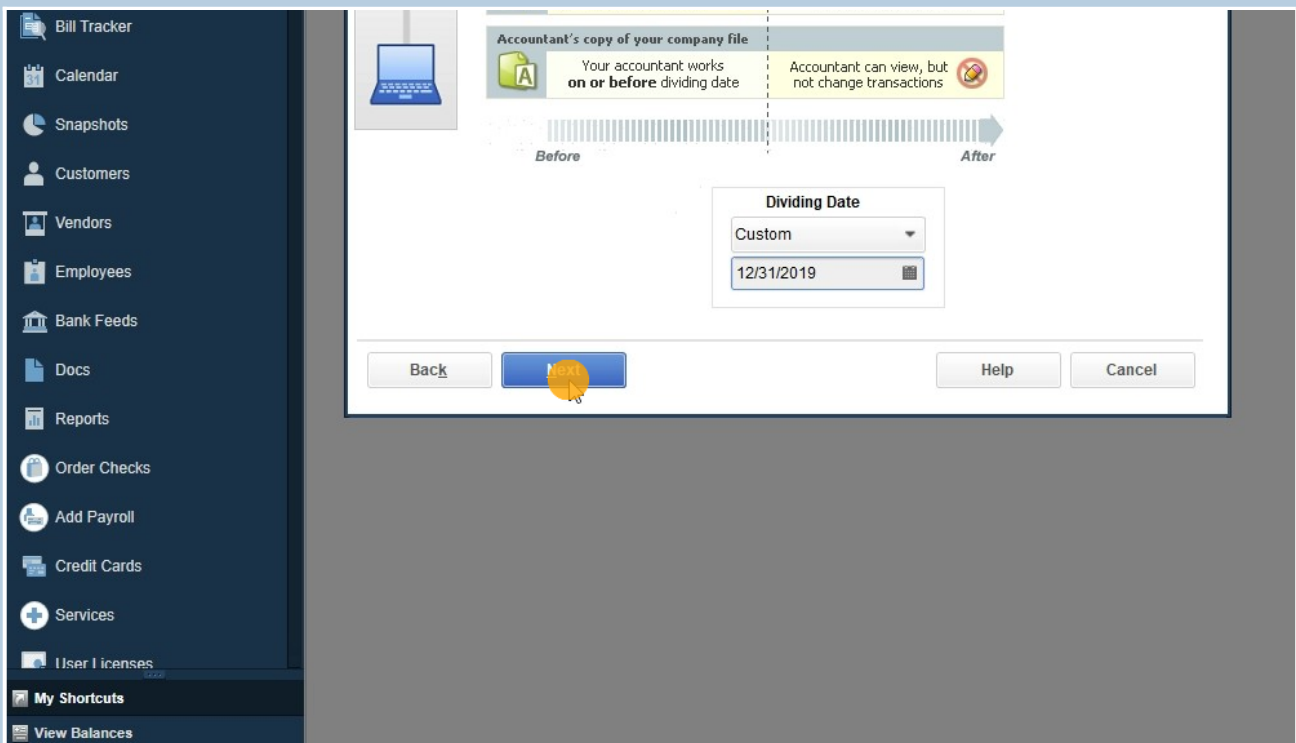
9

Type 12/31/2019 (or whatever period accountant is reviewing)



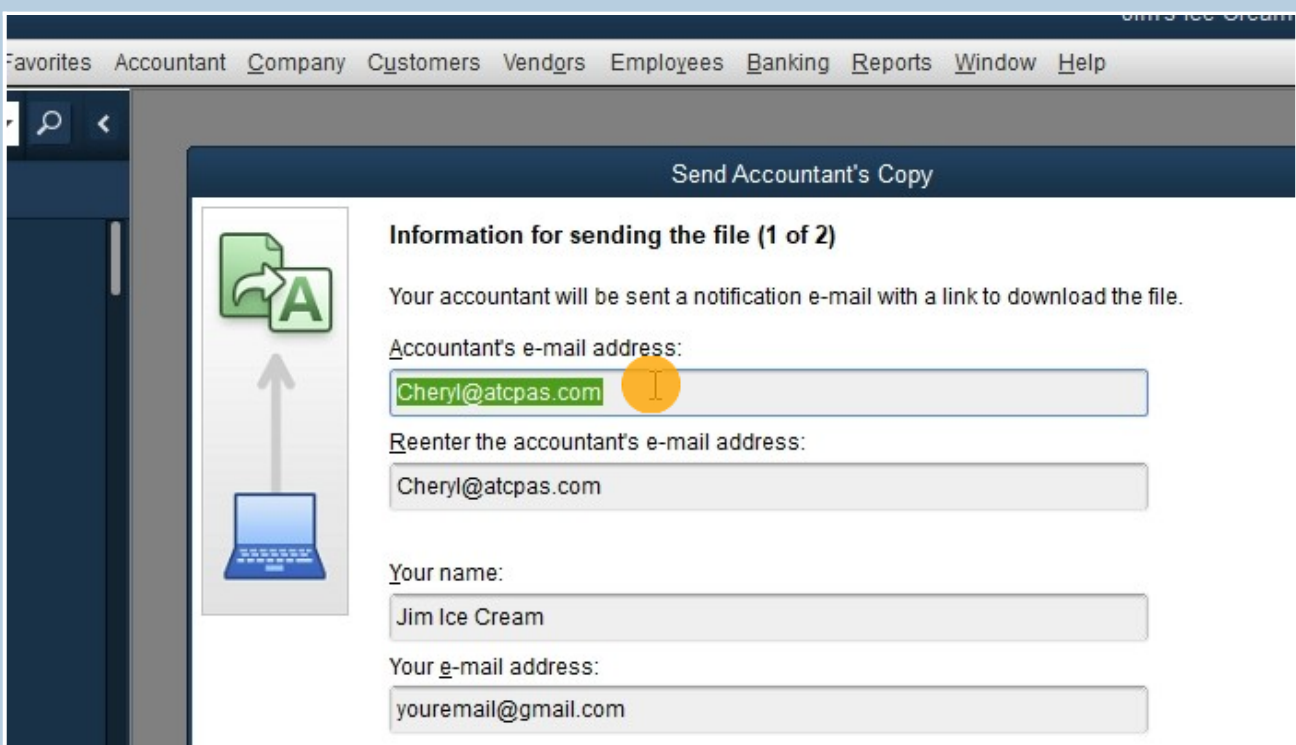
10

Click here: Next



11

Send to Cheryl@atcpas.com



12

Click here: Next

Bill Tracker  
Calendar  
Snapshots  
Customers  
Vendors  
Employees  
Bank Feeds  
Docs  
Reports  
Order Checks  
Add Payroll  
Credit Cards  
Services  
User Licenses  
My Shortcuts  
View Balances

Reenter the accountant's e-mail address:  
Cheryl@atcpas.com

Your name:  
Jim Ice Cream

Your e-mail address:  
youremail@gmail.com

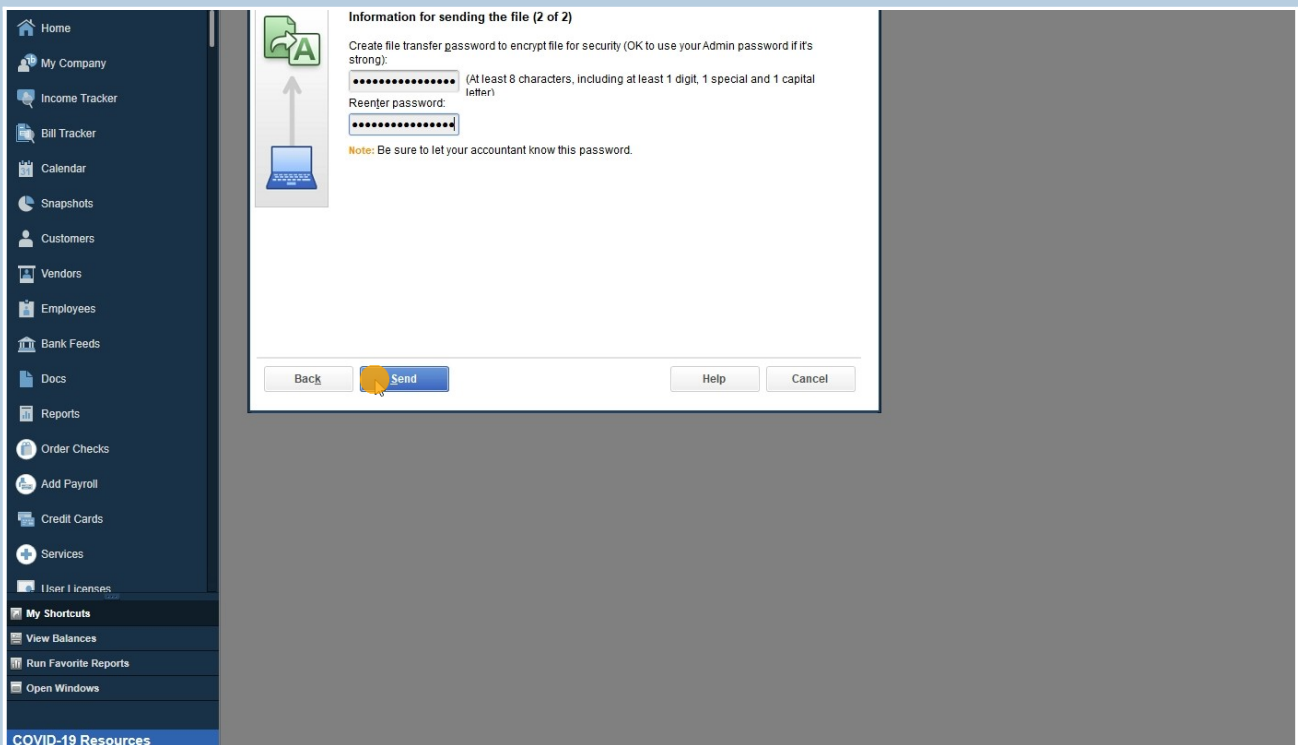
Back Next Help Cancel

13

Type a strong password with 1 uppercase, 1 lowercase, 1 number, 1 special character

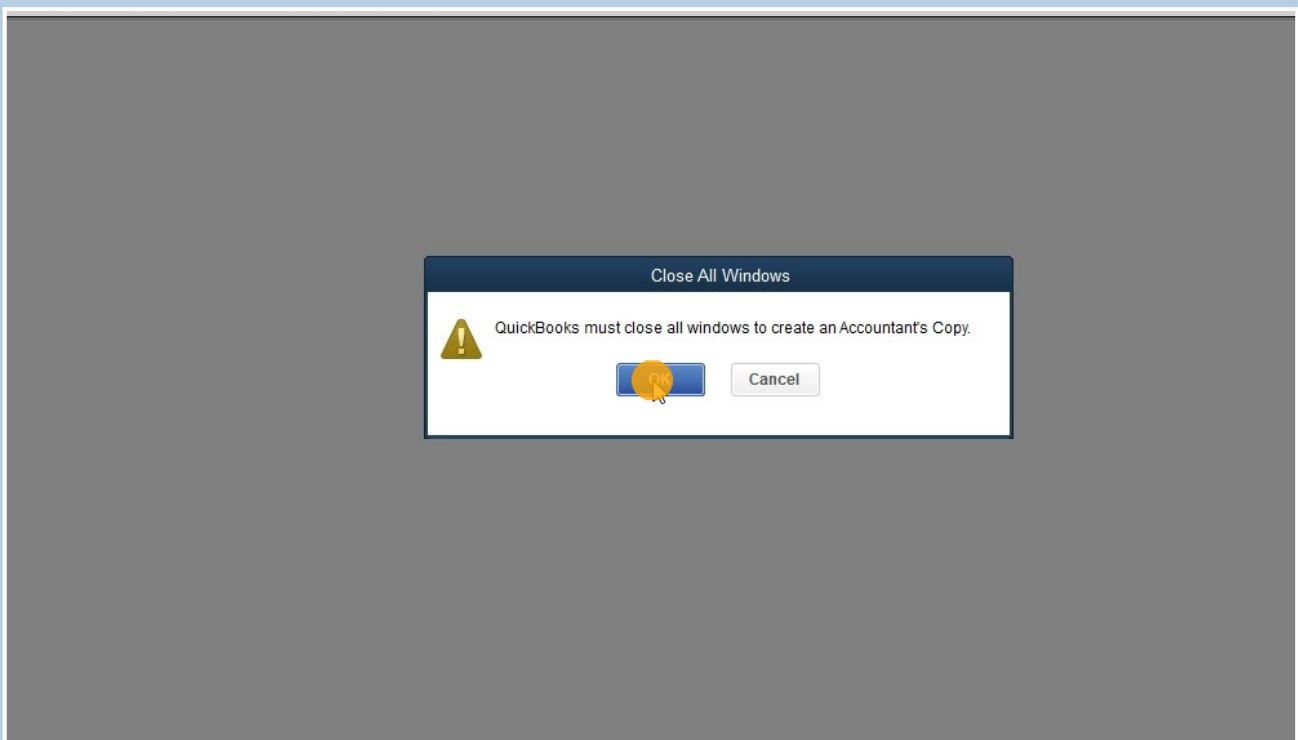
14

Click here: Next



15

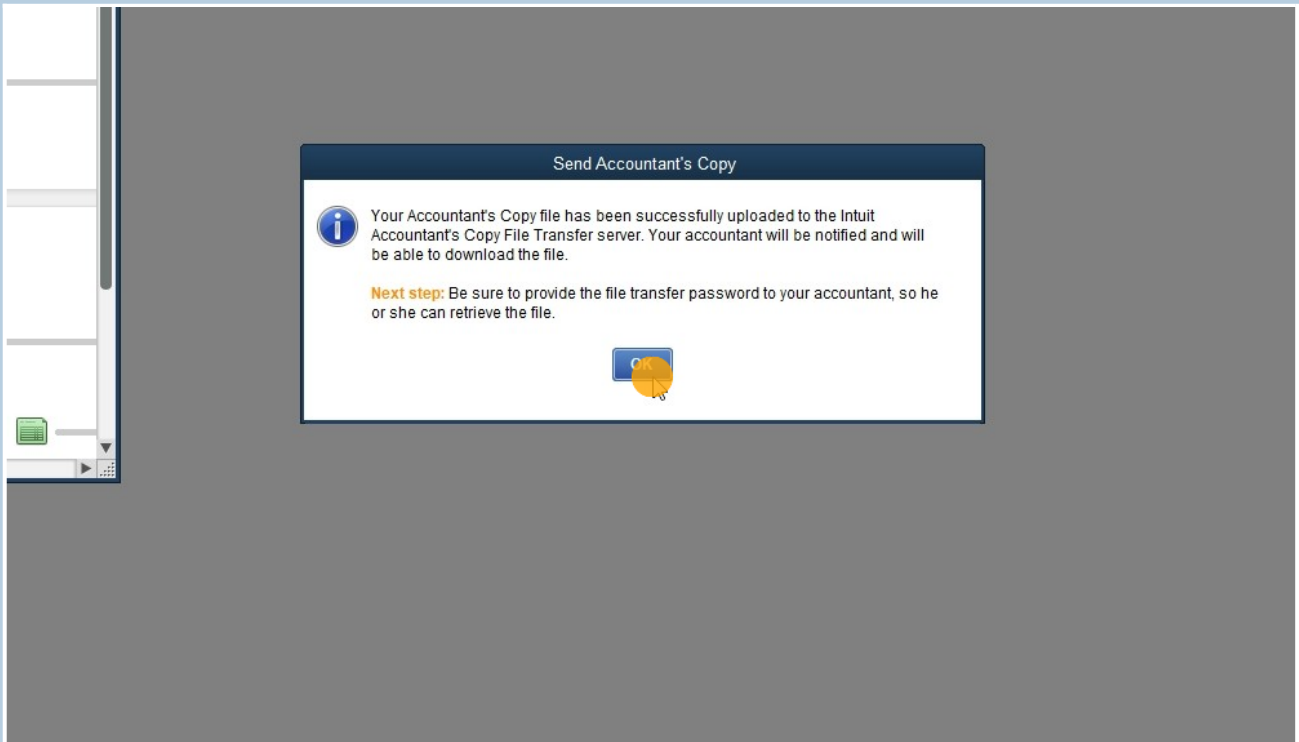
Click here: Ok (QuickBooks must close all windows)





16

Click here: Ok (Successful)



17

Notice "Accountant's Changes Pending"



