



Slim and Trim:

Fitness for Your QuickBooks® File

When I begin working with new QuickBooks® clients, one of the first things I check is the size of their current data file. (To check your file size, press CTRL and the number 1 at the same time: your results will be displayed on the screen.)

Even though I have seen clients working in files exceeding 100 megabytes, if their company file is approaching (or exceeding) 30 megabytes (30,000 bytes) I know that they are at a higher risk for:

- Data loss and/or corruption
- Slower transaction entry and report processing
- Faulty backups (especially if they are backing up to diskettes)

As with most things in life, preventing (or postponing) the problem is much easier and less costly than handling it after it has occurred, so here are four “preventive health care” concepts regarding your file size.

1. ***Audit Trail***

The Audit Trail (selected in Company Preferences) maintains a background report for every transaction that you enter, modify, or delete in QuickBooks®. Because this is an excellent accounting control and research tool, I almost always advise clients to keep the Audit Trail tracking feature turned **on**. I do tell them, however, that this will increase the size of their data file. I suggest removing the Audit Trail only when I know my client is anticipating or encountering an extreme circumstance. (Note: In 2006 versions the audit trail is always turned on.)

2. ***Number of Transactions***

Transactions increase file size, so when you enter a transaction in QuickBooks®, be aware that each line of the transaction is viewed as a separate transaction. For example, a check with a one-line cost assignment will take up less space than the same transaction “split” (assigned) to various jobs.

3. ***Changing Transactions***

One of the advantages of QuickBooks® is that you can change or correct transactions as needed. Note, however, that every time you change a transaction, then **Save & Close**, the file size increases. So attempt to keep modifications to the necessary minimum.

4. ***Surveying Transactions***

If you are working in your file and just want to review a transaction, after you have looked at it and are ready to move on, rather than clicking on the **Save & Close** button, use the **Esc** key, or simply close the transaction.

Next edition: If your file is already too fat to button its pants!