



**QuickBooks® Solutions for Your Business**

*“Thinking Beyond the Ledger”*

**THINKING ABOUT  
UPGRADING YOUR  
QUICKBOOKS?**



SEPARATE  
**FACT** FROM **FICTION**

**WITH ANSWERS TO  
THESE COMMONLY  
ASKED QUESTIONS**



## Put Scott's 25 Years of Experience to Work For You

### Don't let QuickBooks be a pain in the asset...

- Getting headaches from trying to figure out QuickBooks?
- Tired of hearing “accountant-speak” from your CPA?
- Frustrated with the QuickBooks tech support group?
- Discovered your accountant doesn't know QuickBooks?



About Scott

### Help is here!

Benefit from having a trusted, professional advisor on your team at a fraction of the cost of full-time staff. My clients enjoy our working relationship simply because I don't talk “accounting or technology speak” – I can discuss your problems and offer solutions in plain English. [See what my clients are saying about the help and insight I have provided for them.](#)

[Contact me for help](#) before you throw up your hands in frustration! Working together, we can determine the extent of your QuickBooks problems and put a solution in place. Let's get your QuickBooks and accounting problems ironed out soon!



Save 20% (or more!)   
On Your QuickBooks Upgrade!



## Do I Even Have to Upgrade QuickBooks?

### Answer

Let me be very specific on my reply and tell you “it depends” ... (accounting-type people can be funny sometimes too, right? 😊)

#### IF YOU ARE USING A QUICKBOOKS ADD-ON SERVICE (PAYROLL, CREDIT CARDS, ETC.):

An upgrade of QuickBooks is required at least once every three (3) years IF your business is connected to any QuickBooks add-on services. Perfect examples of these QuickBooks add-on solutions are the QuickBooks payroll service, QuickBooks merchant services/credit card processing, online banking, bill pay and others.

Intuit, the makers of QuickBooks, follows a very strict “sunset policy”. This means that they only support the current and two prior years’ versions of their QuickBooks product. In most cases, the “sunset” of an older version happens at the end of May. For example, support for QuickBooks 2009 will end at the end of May 2012 (and support for anything older than 2009 has already expired). For complete information on the Intuit sunset policy, visit the [QuickBooks web site](#) and search for “sunset policy”.

If you are in the situation above and do NOT choose to do an upgrade within the necessary time frame, QuickBooks will continue working, but will not be supported. In addition, you will NO LONGER have access to any of the integrated QuickBooks software or services.

For example, if you do not upgrade your QuickBooks 2009 by the end of May 2012, your payroll service will no longer work as of June 1, 2012 and your employees will be bummin’, since they won’t get paid.

#### IF YOU ARE NOT USING A QUICKBOOKS ADD-ON SERVICE

The timetable you choose to upgrade your QuickBooks is completely optional IF you are not using any of the integrated QuickBooks services. Keep in mind that you may not have any support for your version of QuickBooks if you choose not to upgrade based on the sunset policy described above.



**SCOTT’S OBSERVATION:** My suggestion is that you set your budget to ensure an upgrade to your QuickBooks at least once every three (3) years. This policy will ensure that you always have support for your QuickBooks (after all, this is the critical software for all of your business accounting, isn’t it?). In addition, you will benefit from the new features and functionality that the makers of QuickBooks add to the software since the time of your last upgrade.

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About Your QuickBooks Issues



## How often is a new version of QuickBooks released?

### Answer

In the past, a new version of QuickBooks has been released every fall, usually in the September to October time frame. I think it is safe to say that trend will continue in the future. For the latest news and information about QuickBooks, [be sure to subscribe to my QuickBooks blog – it's free!](#)



## Does all of my data transfer from the old version of QuickBooks to the new version?

### Answer

Yes it does! That is one thing you will find to be quite easy during the upgrade process. As soon as you install your new version of QuickBooks, you will go through a “wizard” that will take your existing QuickBooks data and seamlessly update it to the new version.



**SCOTT'S OBSERVATION:** In the event that you are trying to upgrade a version of QuickBooks older than 2006, it may take some extra work to complete the upgrade process. This is due to the fact that there was a significant change to the QuickBooks database in 2006. This extra work is required in only a very small number of cases. If you need help with this, [please contact me for assistance.](#)



## Does my payroll and/or credit card functionality transfer to the new version?

### Answer

Yes it does! Both of these services are “welded” into your QuickBooks company file and they will upgrade into the new version of QuickBooks with no extra work required. Please keep in mind that you need to keep your payroll subscription (which is a completely separate subscription from the purchase of your QuickBooks software) paid up on a timely basis to ensure continued processing of your payroll.

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## Is there a big learning curve to the new version of QuickBooks?

### Answer

Good news! You will not have to worry about spending hours and hours getting up to speed on your new version of QuickBooks. Over the years, the core transaction processing within QuickBooks (i.e. creating invoices, writing checks, paying bills, etc.) has remained constant. A number of new features and functionality have been added in newer version of QuickBooks to make these processes easier, but you will be able to plug right in and keep working after the upgrade is complete.



## Can I do the upgrade myself?

### Answer

The answer to this question really depends on how comfortable you are with computers in general.

If you consider yourself to be “tech-savvy”, the upgrade process is very well defined and can be done relatively easily.

However, if you are reluctant to mess with anything on your computer or just don’t feel comfortable undertaking the upgrade, there are options for you.

[I have helped hundreds of clients over the years get their QuickBooks upgraded successfully.](#) Think of it this way – I hand you the keys to your new software once the installation and upgrade is done. You don’t have to worry about any of the details – you just plug in and go.

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## Who should do the upgrade for me if I don't want to do it myself?

### Answer

A couple of thoughts to share with you on this question:

- [Naturally, I welcome the opportunity to assist you with your QuickBooks upgrade.](#) I can take the uncertainty out of the process and handle the entire process for you. Using remote access technology, I can connect to you wherever you are located to take care of your upgrade.
- You probably don't want to have your accountant do the upgrade. In most cases, your accountant is only familiar with what they need to get out of QuickBooks for their needs and may not be a good resource for the upgrade process.
- If your IT services firm is familiar with QuickBooks, they can be a good resource to handle the upgrade.



**SCOTT'S OBSERVATION:** I have found that many IT services firms are very willing to partner up with [an expert in QuickBooks](#) when it comes to performing QuickBooks upgrades, especially in a server environment. You win, because you then get the highest levels of knowledge in both areas.



## What about my server – do I have to install QuickBooks on that too?

### Answer

If you are using QuickBooks in a multi-user environment, it is essential that the new version of QuickBooks be installed on your server or whatever computer is actually storing your QuickBooks data files, even if you don't refer to that computer as your "server".

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## How long does it take to do the upgrade?

### Answer

The upgrade process really consists of two parts – the installation of the new version of QuickBooks software and then the upgrade of the QuickBooks company data file.



**SCOTT'S OBSERVATION:** I have found that it usually takes between fifteen and thirty minutes PER computer to install the new version of QuickBooks software. If you are installing it on a zippy, new PC, the process will be much quicker than trying to do it on an older computer. The upgrade of a QuickBooks company data file can take anywhere from ten minutes to two hours. This process really all depends on how big the company data file is, how well it has been maintained since the last upgrade, and how much horsepower the computer has on which the upgrade is being performed.



## What happens if I don't upgrade at all?

### Answer

Should you choose NOT to upgrade, please understand that you will still be able to access your QuickBooks data (subject to the limitations mentioned above regarding QuickBooks add-on services). Your QuickBooks software may no longer be supported in this situation. In addition, you will not be able to take advantage of the new features and functionality that are added to QuickBooks.



**SCOTT'S OBSERVATION:** There are many businesses out there that are still using QuickBooks 2002, 2003, etc. For them, they feel that the software is still doing what they need it to do. As mentioned above, I recommend planning for an upgrade to your QuickBooks every three years. Don't be penny-wise and pound foolish when it comes to the critical accounting software for your business.

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**Is it a problem if I haven't upgraded for a long time and now want to make a change?**

**Answer**

In most cases, even if you have skipped a number of years when it comes to upgrading your QuickBooks (i.e. upgrading from QuickBooks 2004 to QuickBooks 2012), the process is very easy.

In a small number of situations, some extra work will be required to complete the upgrade when skipping a number of years like this. This is especially true if you are trying to upgrade any version of QuickBooks prior to 2006. [For more details and insight on these situations, please contact me.](#)



**Can I move from [QuickBooks Pro](#) to [QuickBooks Premier](#)?**

**Answer**

Answer: Yes! The data that you have created over the years within QuickBooks Pro will upgrade easily into the Premier versions (i.e. Contractor, Manufacturing and Wholesale, Non-Profit, Professional Services, etc.). There are no extra steps you have to take during the upgrade process – it is all automatic.



**Can I move from [QuickBooks Pro](#) OR [QuickBooks Premier](#) into [QuickBooks Enterprise](#)?**

**Answer**

Yes! The data that you have created over the years within QuickBooks Pro or Premier will upgrade easily. There are no extra steps you have to take during the upgrade process – it is all automatic



**SCOTT'S OBSERVATION:** [Feel free to download a copy of my guide that explains some of the key differences between the Pro, Premier and Enterprise versions of QuickBooks – it's free!](#)

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On Your QuickBooks Upgrade!**



## Can I move from [QuickBooks Premier](#) to [QuickBooks Pro](#)?

### Answer

Yes! The data that you have created over the years within QuickBooks Premier (and all the industry-specific versions of Premier such as Contractor, Manufacturing and Wholesale, etc.) will “downgrade” into the Pro format.

**IMPORTANT POINT:** Keep in mind that [there are some differences in functionality between the Pro, Premier and Enterprise versions of QuickBooks](#). If you move from Premier to Pro, even though your data will transfer, you may lose some of that functionality. A good example of this is [the use of sales orders](#). The ability to use sales orders is a function that exists in the Premier versions of QuickBooks, but NOT the Pro version.



## Can I move from [QuickBooks Enterprise](#) to either [QuickBooks Pro](#) OR [QuickBooks Premier](#)?

### Answer

NO! It is not possible to make the move directly from Enterprise into Pro or Premier. The data does not automatically transfer.

To make this move, [it will be necessary to enlist the help of a third-party company such as QuickBooks Users that has the tools to make this transfer possible](#). Extra fees do apply when downgrading QuickBooks Enterprise data into either QuickBooks Pro or Premier formats.



## What are the technical specifications of the new version of QuickBooks?

### Answer

Your best bet for this question is to review these details outlined on the [QuickBooks web site](#).



**SCOTT'S OBSERVATION:** More memory (RAM) and faster processors are always a plus when it comes to the performance of your QuickBooks. This is especially true when running QuickBooks on a local area network. It is essential to ensure that you have enough memory and the proper networking setup so that QuickBooks can run as fast as possible every work day.

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About Your QuickBooks Issues



## What is the maximum number of people that can connect to a QuickBooks company file?

### Answer

The answer to this question depends on which version of QuickBooks you are using:

- [QuickBooks Pro](#) – up to 3 users can connect to a QuickBooks company file (NOTE: In versions prior to QuickBooks Pro 2011, you could have up to 5 users in a company file at the same time. With the 2011, that limit changed to 3.)
- [QuickBooks Premier](#) – up to 5 users can connect to a QuickBooks company file
- [QuickBooks Enterprise](#) – up to 30 users can connect to a QuickBooks company file



## How many licenses of QuickBooks do I need to purchase?

### Answer

The simple answer is this – each person that will be using QuickBooks will need their own separate licensed copy of the software. [Feel free to review my blog for a more detailed understanding of the QuickBooks license agreement.](#)



## What if I need more information?

### Answer

If you have additional questions, contact us at 440-527-5696 or by e-mail to [Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com).

**YOU MAY ALSO BE INTERESTED IN THESE OTHER GUIDES AND LINKS FROM SCOTT:**

- [Key differences between QuickBooks Pro, Premier and Enterprise](#)
- [Danger! Danger! Is Your QuickBooks File Ready to Implode?](#)
- [Save 20% on your next QuickBooks upgrade](#)
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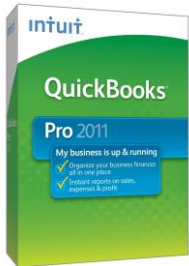
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**QuickBooks**® Expert

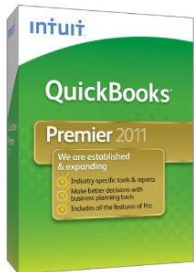


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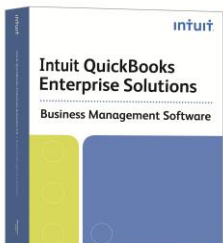
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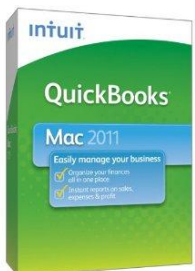
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**About Your QuickBooks Issues**

# Scott Gregory *QuickBooks*® Expert

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