



Frequently Asked Questions About Upgrading to a New Version of QuickBooks®

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by Nancy Smyth, Sunburst Software Solutions, Inc.

Construction is an extremely broad term - and includes everyone from your local handyman to a contractor who builds roads and bridges on our nations highways. Because your construction business is unique - it goes without saying that your bookkeeping and accounting requirements will be different as well.

With the economy and company budgets being what they are, many contractors are leaving behind their costly high-end construction specific accounting programs and are switching to QuickBooks® because of its reasonable cost and ease of use - but once they start working with it, they discover many shortcomings and become frustrated. These same contractors are also disappointed by the many accounting professionals who think that EVERY contractor will use the same QuickBooks® Chart of Accounts or Items List.



We know that's just not true! No two contractors, even two plumbers or electricians, need or want to track the same things in the same manner.

In our experience, we've found that anyone can say that they "know" QuickBooks® - but when you start talking about government funded construction projects, prevailing wage, Certified Payroll, AIA Billing, retainage, weighted-average-overtime, getting equipment costs into job costing reports, etc. - you begin to see their eyes glaze over and you feel like you are doomed. We deal with that everyday - even from many of the QuickBooks® Experts.

In their defense, it's not their fault. There aren't a lot of resources available to learn how to set-up and use QuickBooks® in the commercial/government construction industry. Most of the information that is available is either geared toward home builders/developers or your local handyman and they've pretty much become brainwashed into thinking that there is only one way to do things.

Frequently Asked Questions About Upgrading to a New Version of QuickBooks®

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When the bottom-line profit from your business appears to be shrinking - it's a given that you need to assess the situation and turn it around.

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About:

Sunburst Software Solutions, Inc. provides fully integrated, time saving solutions for certified payroll reporting, AIA billing, and payroll and overtime management for contractors using QuickBooks.

Our products leverage 70+ years of QuickBooks, bookkeeping, accounting, software development and construction experience to provide real-world solutions to help you work smarter.....not harder!

Nancy Smyth, President of Sunburst Software Solutions, Inc., is also a Certified QuickBooks ProAdvisor (since 1999) who has used and supported Intuit products since 1986 - specializing in the commercial/government construction industry. Please feel free to send comments and feedback to Nancy at sale@sunburstsoftwaresolutions.com

Visit our blog -

<http://blog.sunburstsoftwaresolutions.com>

OR our new QuickBooks training site

<http://contractorbookkeepingtips.com/> and sign up for our FREE QuickBooks for Contractors tips and to receive information about other training items such as this.

Are You Frustrated by QuickBooks®?

Learn how to get the **MAXIMUM** possible results from QuickBooks® for your construction business!

Running a construction business is a difficult job, especially in this economy - when now more than ever you need to rely on accurate job costing.

Do you wonder if your QuickBooks® job costing reports are providing you with accurate information?

Perhaps:

- you are getting headaches from trying to figure out how QuickBooks® works
- your bookkeeper says "I don't know how to do this" or "QuickBooks® can't do that"
- you are so frustrated and uncertain that you are spending hours updating complex Excel spreadsheets, or worse yet - you are trying to keep it all in your head!
- you are frustrated with QuickBooks® technical support
- you've discovered your accountant doesn't know QuickBooks®
- you've been looking at high-end {costly} construction specific software that would provide you with

better

job costing, but know it's just not in the budget right now

Help is here!

Enjoy the benefit of having a trusted, professional advisor on your team at a fraction of the cost of a full-time staff. My clients and customers enjoy our working relationship because I don't talk "accounting speak" - I can discuss your problems with you and offer up solutions in plain English.

Contact me for help before you throw up your hands in frustration and want to throw your computer out the window!

Together we can determine where all of your cash is going and if all of the job costs are being captured correctly. We can help you to discover ways to determine your labor burden, get your equipment costs into job costing reports, or increase your cash flow.

*Put Nancy's 20+ Years of
QuickBooks® and Commercial Construction
Experience to Work For You!*



Let's get your QuickBooks® and general bookkeeping problems ironed out so that QuickBooks® isn't a pain in your asset!

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1 Should I/Do I NEED to Upgrade QuickBooks®?

I'm usually very conservative in regards to this question, especially the last few years with money being so tight for everyone, but typically my answer is "it depends".

If you are using a QuickBooks® add-on service; like payroll, credit card processing, online banking, bill pay, etc. you will need to upgrade at least once every three (3) years.

Intuit has a pretty strict "sunset or retirement" policy. They will only support the current and two older (year) versions. So, if you are currently using QuickBooks® Pro/Premier 2010 and Enterprise 10.0, these versions will be "sunset or retired" by the end of May 2013 - and support for anything older than QuickBooks® 2009 has already expired. For the latest information about Intuit's current sunset policy, visit the [QuickBooks Support Site](#) and search for "sunset policy" (without the quotes).

If you are currently using QuickBooks® Pro/Premier 2010 or Enterprise 10.0 and you do NOT choose to upgrade by the end of May 2013, QuickBooks® will continue to work, but it will not be supported - meaning that you can't call Intuit's Technical Support if your run into a problem. Additionally, you will no longer have access to any of the add-on services mentioned above. If you use one of Intuit's payroll services and you don't upgrade your 2010 version by the end of May 2013 - come June 1, 2013; you are going to have some mighty unhappy employees, because you won't be able to process payroll.

If you don't use any of the QuickBooks® add-ons, you can choose when you want to upgrade without any issue. Just remember, that if you call Intuit Support, you may be totally out of luck.



Nancy's recommendation:

My suggestion is that you plan on and budget for an upgrade every three (3) years. Adopting this type of policy will ensure that you always have a QuickBooks® version supported by Intuit - after all, this is the critical piece of software that you use for your business accounting! You'll also benefit from the new features and functionality that have been added.

One last recommendation - do not install the upgrade until AFTER you've issued your W-2's and other year-end payroll tax returns in January!

Contact Nancy today about your QuickBooks issues --->

2 How Often Is A New Version of QuickBooks® Released?

Over the last several years, a new version of QuickBooks® has been released during September/October. Based on this, I think it's a pretty fair assumption that it will continue this way.

For news and information about QuickBooks® - as well as QuickBooks Tips, Tricks and Workarounds, subscribe to my QuickBooks for Contractors blog ---- it's free!

Subscribe to the QuickBooks for Contractors blog --->

3 Will All of My Data Transfer From My Existing Version of QuickBooks® Into the New One?

Absolutely! It's one of the things that you'll find to be pretty easy during the "upgrade" process. Basically all you need to do is "open" your existing company file with the new version and QuickBooks® will do the rest!



Nancy's recommendation:

If you are currently using QuickBooks® Pro/Premier 2006 OR Enterprise 6.0 or OLDER, there may be some extra steps that you need to make in order for the upgrade process to complete. Intuit made a LOT of database changes in 2006, and some smaller ones in more recent versions. The "extra work" involves upgrading to a version of QuickBooks that is in between your version and the most current one.

One last recommendation - make sure that you have at least 2 backups of your QuickBooks® data file.

4 Will My Payroll Subscription and/or Credit Card Functionality Also Transfer?

Yes they will. Any of the "connected" services such as payroll, credit card processing, online banking, bill pay, etc. are sort of "welded" into your company data file and they'll automatically come along when you upgrade your file.



Nancy's recommendation:

Just something to keep in mind; your payroll subscription is a totally separate subscription than your purchase of the actual QuickBooks software. Payroll subscriptions renew on an annual basis; and you can make annual or monthly payments.

Save 20% (or more) on your QuickBooks upgrade price --->

5 Will the 3rd Party Add-Ons That I Use Be Compatible With the New Version of QuickBooks®?

You need to contact the software developer to ask them!

QuickBooks® add-ons can be written by anyone, so you have to take into consideration when that developer will have access to the new version of QuickBooks in order for them to test their product, make sure it works as expected, make any necessary coding changes if they discover a problem, and

THEN put out an update, patch, etc.

Developers used to be able to participate in an Early Access program (which coincided with official beta testing during June-September) and had a couple of months in which to test their add-on programs with the new version of QuickBooks, make any necessary changes, and quite possibly add enhancements to their own programs - however, the last few years Early Access has not been available. The last couple of years, 3rd party developers didn't get their hands on the new version of QuickBooks until a few days after the new version was announced, which makes it difficult to test and/or make adjustments!

Most of the time there shouldn't be a problem, but you never know for certain, so if you rely on 3rd party applications to run your business or to perform important tasks – contact the developer and ask them directly!

6 Will There Be a Learning Curve Once I Upgrade?

Usually not. The key pieces for recording your daily transactions (creating estimates, invoices, purchase orders; entering bills, writing checks, paying bills, etc.), usually doesn't change. Many times new features and functionality is added to newer versions of QuickBooks to make these day-to-day transactions easier or more powerful. Sometimes the menu items are moved or re-arranged in order to make them more accessible.

Curious About QuickBooks 2013? Watch a recording of a special 1 hour Google+ hangout demonstrating the new version --->

7 Will I Need To Buy A New Computer?

That's always a good question to ask! You really do want to make sure that your current computer meets the minimum requirements for running the new version of QuickBooks.

Below are the requirements for QuickBooks Pro/Premier 2013 and Enterprise 13.0 (the most current version available):

Operating systems supported:

QuickBooks Pro, Premier, or Bookkeeper 2013 or QuickBooks Enterprise Solutions 13.0:

- Windows 7, all editions including 64-bit, natively installed
- Windows Vista (SP2 or later), all editions including 64-bit, natively installed
- Windows XP (SP2 or later), all editions including 64-bit, natively installed
- Windows Small Business Server 2012, Windows Small Business Server 2011, Small Business Server 2008
- Windows Server 2008 R2, Windows Server 2008, and Windows Server 2003, including 64-bit, natively installed

Database Servers:

- Windows: natively installed Windows 7 (SP1) or Vista with UAC on, XP (SP2 or later), Windows Server 2008 R2, Windows Server 2008, Windows Server 2008 - Terminal Server Config., Windows Server 2003, Windows Small Business Server 2012, Windows Small Business Server 2011, and

Windows Small Business Server 2008

Note: Windows Home Server Edition is not supported.

- Linux: When using an Enterprise Solutions Database Server-only installation: natively installed OpenSUSE 12.2, Fedora 17, Red Hat Enterprise 6.2.

QuickBooks Pro or Premier hardware and operating system requirements (client and server)

- 2.0 GHz processor; 2.4 GHz recommended
- 1 GB RAM for single user, 2 GB RAM recommended for multiple users
- 4x CD-ROM drive required for CD installations
- Display optimized for 1024 x 768 screen resolution or higher with up to 1 Extended monitor
- Windows:
 - U.S. version of only
 - Regional Settings are supported when set to English (United States) with keyboard setting to U.S. only
 - Natively installed
- Disk space requirements:
 - 2.5 GB of disk space (additional space required for data files)
 - Additional software: 250 MB for Microsoft .NET 4.0 Runtime, provided on the QuickBooks CD
 - Additional requirements for Intuit Data Protect in QuickBooks Connected Services offerings
 - Require minimum 2.0 GB Ram
 - Twice the size of the largest File set to back up + 100MB or twice the size to restore. The space is only required from the work folder LocalApplicationData+"Intuit\Intuit Data Protect"

QuickBooks Enterprise Solutions hardware and operating system requirements (client and server)

- Client:
 - 2.0 GHz processor, 2.4 GHz recommended
 - 1 GB RAM for single user, 2 GB RAM recommended for multiple users (2 GB RAM required for Windows 8 64 bit)
- Server:
 - 2.0 GHz processor (1.2 GHz for Linux), 2.4 GHz recommended (2.0 GHz for Linux)
 - 1 GB RAM, 2 GB RAM recommended - Server
- 4x CD-ROM drive required for CD installations
- Minimum 1024 x 768 screen resolution or higher with up to 1 Extended monitor
- Windows:
 - U.S. version of Windows only.
 - Regional Settings are supported when set to English (United States) with keyboard setting to U.S. only
 - Natively installed
- Minimum network requirements:
 - 100 Mbps network card
 - 100 Mbps switch or router
 - 40 Mbps network bandwidth
- Disk space (client and server):
 - 2.5 GB of disk space (additional space required for data files)
 - Additional software: 250 MB for Microsoft .NET 4 Runtime, provided on the QuickBooks CD
 - Additional requirements for Intuit Data Protect in QuickBooks Connected Services offerings
 - Require minimum 2.0 GB Ram

- Twice the size of the largest File set to back up + 100MB or twice the size to restore. The space is only required from the work folder LocalApplicationData+"Intuit\Intuit Data Protect"

RAM requirements for Microsoft Terminal Services

Important: Terminal services is only supported with QuickBooks Enterprise.

- Terminal Server cannot be communications server, print server or modem server
- Memory Requirements:
 - 5 users: 2-3 GB
 - 10 users: 3-4 GB
 - 15 users: 4-6 GB
 - 20 users: 6-8 GB

Software compatibility

QuickBooks is capable of integrating with hundreds of third-party applications. The following integrations are provided with QuickBooks; additional RAM will enhance the use of these features. See [Intuit Marketplace](#) for the most up-to-date list.

- Microsoft Office:
 - Office 2010 (including Outlook 2010) both on 32 and 64 bit.
 - Preparing letters requires Microsoft Word 2010, 2007, or 2003.
 - Exporting reports requires Microsoft Excel 2010, 2007, or 2003.
 - Contact Synchronization with Microsoft Outlook requires Outlook 2010, 2007, or 2003.
 - Synchronization with Outlook requires QuickBooks Contact Sync for Outlook (the download is available at no charge).
 - Contact Sync does not work with the Microsoft Business Contact Manager Outlook plug-in. If a sync is performed, duplicate records could result
- QuickBooks Point of Sale 2013 (V11.0), V10.0, V9.0, and V8.0.
- Adobe Acrobat Reader: Business Planner functionality and viewing forms requires Adobe Acrobat Reader 5.0 or later.
- Payroll and other online features and services requires Internet access with at least a 56 Kbps connection speed (DSL or cable modem recommended).
- TurboTax 2012 (Personal and Business).
- Lacerte 2012 and 2011.
- Pro-Series tax years 2012 and 2011.
- QuickBooks for Mac 2013.
- Gmail, Yahoo Email, Outlook Express/Windows Mail, and Thunderbird

Firewall and antivirus software compatibility

QuickBooks 2013 has been tested with the following firewall and antivirus products.

Note: In some cases, it may be necessary to adjust settings in these products to ensure the best possible performance with QuickBooks.

- Windows 7 Firewall (all editions)
- Windows Vista Firewall (all editions)
- Windows XP Firewall (all editions)
- Symantec Norton AntiVirus, Internet Security, Norton 360
- McAfee VirusScan Plus, Internet Security, Total Protection
- Trend Micro PC-cillin Internet Security

- ZoneAlarm

Note: QuickBooks will work with systems running RAID (Redundant Array of Inexpensive Disks) but this is not recommended because performance issues may cause QuickBooks to operate slowly.



Note from Nancy

Windows 8 (Microsoft's newest operating system just released on October 25, 2012) will not officially be supported by Intuit until later this year.

I use Kaspersky Internet Security 12 antivirus software and have no problems with any of the versions of QuickBooks that I have installed on my computers.

8 Can I Do The Upgrade Myself or Should I Hire Someone?

Really the upgrade process is pretty simple. There's not much more to it than either downloading the program from the internet and clicking "Run" a couple of times or inserting a CD/DVD and then following some on screen prompts.

Really though, it depends on how comfortable you actually are with computers in general.

As far as hiring someone to do this for you - well, that of course is entirely up to you.



Note from Nancy

If you have an Intuit support rep OR hire an IT person to install the new version of QuickBooks - make sure that you watch and understand what is being done to **your** computer - don't let others simply do "whatever", or you could end up with a real mess on your hands that will cost you more money to get straightened out.



Nancy's recommendation:

You probably *don't* want to hire your accountant or CPA to do an upgrade for you. In most cases accountants and CPA's only know how to get the information that they *need* out of QuickBooks in order to prepare your taxes.

If you have a Windows Vista, 7 (or soon Windows 8) computer and use QuickBooks 3rd party add-ons and want to hire an IT person/firm - make sure that they understand that when using these operating systems that QuickBooks and the 3rd party application need to be installed and run through a Standard User Account on your computer. I'm finding that many IT people are not doing this and it ends up causing you additional problems.

[Read this article Windows, QuickBooks_3rd Party Apps - The Struggle Within --->](#)

9 How Much Time Should I Plan For The Upgrade?

The upgrade process really consists of six (6) parts:

1. some basic computer maintenance (running Disk Defragmenter)
2. some basic QuickBooks maintenance *before* doing anything (rebuilding your QuickBooks file, checking the number of DB file fragments, creating and opening a portable company file, making two backup files)
3. installing the new version of QuickBooks
4. upgrading your QuickBooks company file
5. some basic QuickBooks maintenance *after* you upgrade your company file (rebuilding your data file, checking the number of DB file fragments, creating an opening a portable company file)
6. uninstalling the old version of QuickBooks after you've made sure that each computer can successfully open the company file with the new version

I've found that it takes anywhere between 15 and 30 minutes to install the new version of QuickBooks on a single computer - if you have a new computer it will be a lot faster than installing it on an older one.

Upgrading the actual company data file (your .QBW file) can take anywhere between 15 minutes and a couple of hours; thankfully you only have to update the company file once! The amount of time this takes will depend on:

- how big the company file is
- how well it has been maintained since the last upgrade
- how much oomph or horsepower the computer has

Running Windows Disk Defragmenter can take anywhere from 2 to 6 hours to run on each computer.



Nancy's recommendation:

To be on the safe side, I'd plan a day or a weekend if you have several computers that need to go through this process.

Some people will laugh at my recommendations (and tend to ignore my warnings) but every year I get calls from clients and customers who need my help because they can get the new version of QuickBooks installed and running on all of the computers in their office network ----- EXCEPT ONE. And that becomes a major pain for everyone concerned.

10 Why Do You Recommend Running Disk Defragmenter As Part of the Upgrade Process?

Your computer, just like your car and yourself, benefits from periodic maintenance and checkups.

I admit it must seem like strange advice to run Disk Defragmenter on the hard drive of your computer before opening your company file in the new version of QuickBooks - so please bear with my explanation.

During both alpha and beta testing I noticed that upon opening a company file and letting it automatically

update OR restoring a backup resulted in a large number of DB (Database) File fragments - in a file that had a total of 172 transactions and 2 DB file fragments in 2012 had over 265 DB file fragments when I updated and/or restored it with QuickBooks 2013.

Naturally, I reported this as a “bug” and this is the exact response I received from Beta Support: Please go through this article - <http://support.quickbooks.intuit.com/support/articles/SLN40302>

The DB error you are getting is not because of the company file or QuickBooks 2013, it is because of your hard disk. Once you go through this article you will understand everything.

In my case, I have my computer (Windows 7) set to automatically defrag every week - so I felt that the DB file fragments in my sample QB file were caused by something else - however, I’m not positive that everyone has the Disk Defragmenter set up to run automatically (or if they even do it). So thought that including this task was just part of “normal” computer maintenance.

11 Can I Switch Versions? Meaning Go From Pro to Premier or Enterprise.

Ok, here's the scoop on "switching" versions.

If you have QuickBooks Pro you can easily switch or upgrade to Premier or Enterprise without any extra steps or hassles.

If you have QuickBooks Premier you can downgrade to QuickBooks Pro (but you'll loose functionality) or upgrade to Enterprise without any extra steps or hassles.

If you have QuickBooks Enterprise and want to downgrade to Pro or Premier, you'll need to hire a "specialist" in that field. Here are two U.S. based companies with excellent service.

QuickBooksUsers.com - <http://quickbooksusers.com/quickbooks-convert-enterprise-to-pro.htm>

QB or not QB - <http://qbnotqb.com/convert-quickbooks-enterprise-to-pro-premier.html>

These folks also provide QuickBooks data file damage and/or corruption.

12 Best Practices & Tips for Installing An Upgrade

Installing/upgrading QuickBooks is a fairly straightforward task, but that doesn't mean that there aren't some things that can trip you up along the way. Below are some “best practice tips”, based on technical support calls from our customers, that will help you to ensure a smooth installation/upgrade.



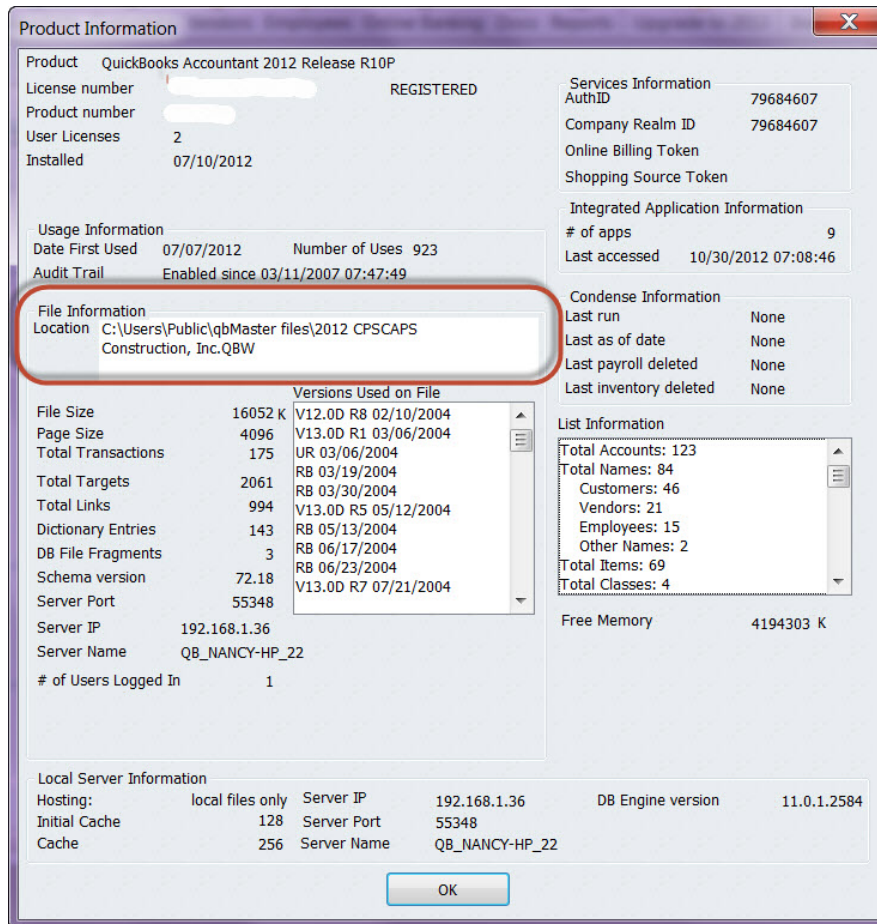
Note from Nancy

PLAN AHEAD and make sure that everything is in order -- DO NOT install the new version of QuickBooks on the day that you need to run payroll, do billing, or perform any intensive task that requires access to your computer and/or QuickBooks company data file.

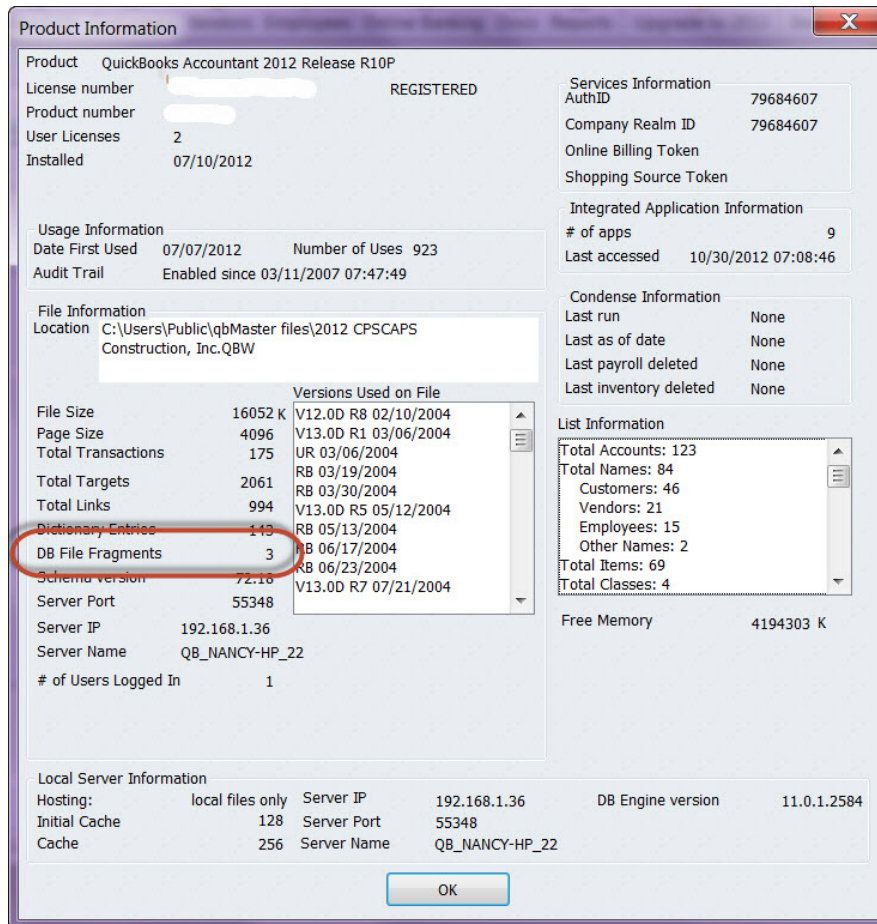
Give this list to your IT/computer person so they will have the proper instructions, print linked articles for additional information.

Upgrade Do's:

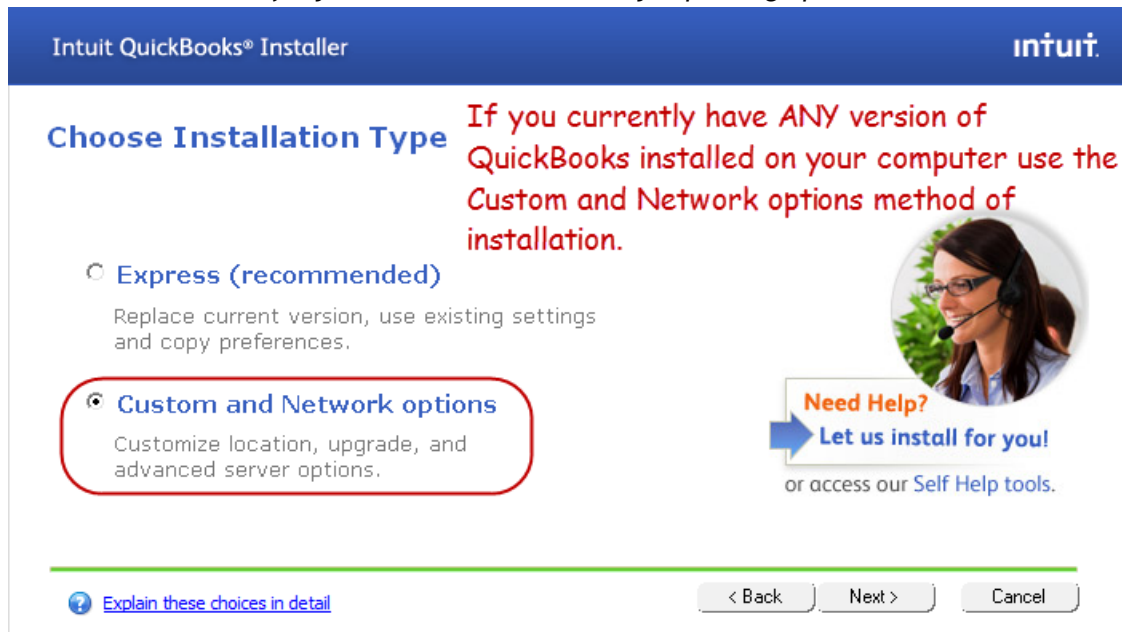
- Install QuickBooks on your "server" first - your server is the computer where the QuickBooks file is located, even if you don't commonly refer to it as a server.
- If your computer is a Windows Vista, 7 (or soon Windows 8) machine, follow Microsoft best practices and install and run ALL of your software under a Standard User Account
- Make sure that you know where your current company data file lives - *with QuickBooks open press & hold down the CTRL and the 1 keys at the same time, this gives you a Product Information window. Here you will see the file location - either take a screen shot or write down the location.*



- Make sure that important tasks such as payroll and billing are done
- Make sure that you watch and understand what is being done to your computer - don't let others simply do "whatever"
- Rebuild your QuickBooks file just before you install the new version - *don't know how to rebuild your QuickBooks file, no problem --> [click here to read instructions](#)*
- Check the number of DB (Database) file fragments - *again you'll find this information on the Product Information window. If your file has more than 10 DB file fragments there is data corruption in your company file and you should make a Portable company file and then open that portable company file --> [click here for instructions on creating and opening a portable company file](#)*



- ❑ Make 2 backups of your company data file
- ❑ Install the new version of QuickBooks - making sure that you do not overwrite/replace your existing version. Look for the following screens and prompts during the installation and follow these instructions carefully. NOTE: Screens will vary depending upon version.



Intuit QuickBooks® Installer intuit.

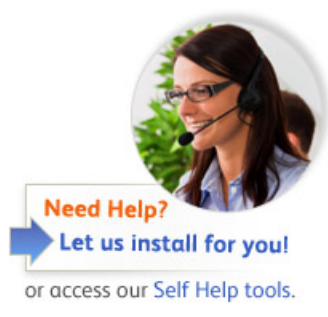
Custom and Network Options

Accept whatever your "current setting" are for your computer.

I'll be using QuickBooks on this computer.

I'll be using QuickBooks on this computer, **[Current setting]**
 AND I'll be storing our company file here so it can be shared over our network.

I will NOT be using QuickBooks on this computer. I will be storing our company file here so it can be shared over our network. (A license is not required for this option.)



[? Explain these options in detail](#)

Intuit QuickBooks® Installer intuit.

Upgrade or Change Installation Location

Accept this option.

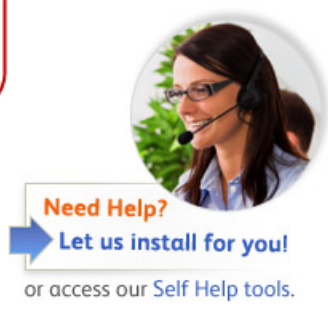
Change the install location

Location
 C:\Program Files (x86)\Intuit\QuickBooks 2012

Replace the version selected below with the version I'm installing now.

QuickBooks Premier: Accountant Edition 2011

C:\Program Files (x86)\Intuit\QuickBooks 2011



[? Explain these options in detail](#)

- Run Disk Defragmenter on the hard drive of your computer (Start -> All Programs -> Accessories -> System Tools -> Disk Defragmenter -> follow prompts)
- Open your existing QuickBooks company data file -> follow the prompts for upgrading your file
- Check the number of DB (Database) file fragments (rebuild your file OR make a portable company file and then open it)
- Install the new version of QuickBooks on each of your remaining computers and run the Disk Defragmenter on each machine

Upgrade Don'ts

- ✓ Don't plan the upgrade for a day where you need to do payroll, billing, or perform any intensive task that requires access to your computer/company data file

- ✓ Don't assume that the 3rd party add-ons that you use are compatible - contact the developer
- ✓ Don't overwrite your existing QuickBooks installation

**Nancy's recommendation:**

Once the new version of QuickBooks is installed and running properly on all of your computers, remove the old version by going to your Control Panel -> choosing Add/Remove Programs {Windows XP} OR Programs & Features {Windows Vista & 7}, find the old version in the list of programs and choose Uninstall or Remove.

**Note from Nancy**

Remember, once you update your company file you cannot open it in your previous version of QuickBooks - UNLESS you have a backup of the file!

13 Notes & More:

Thanks so much for downloading this eBook! Hope you found it informative. If you have questions about the contents of this eBook, please feel free to email me at sales@sunburstsoftwaresolutions.com

If you found this eBook to be helpful, please share it on your favorite social media networking site, by clicking the images below:



Share on Facebook



Share on Google+




Share on LinkedIn




Share on Twitter

Connect with me on these Social Networks (just click the image) - I'd love to hear from you:





Frustrated with QuickBooks®?
Get the MAXIMUM possible
results from QuickBooks® for
your construction business!



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Learn to use QuickBooks in your construction business:

<http://contractorbookkeepingtips.com/>