



# Thinking About Upgrading Your QuickBooks?

Separate **Fact** From **Fiction** With Answers To  
These Commonly Asked Questions



Presented by **Scott Gregory**

Certified QuickBooks Enterprise Advisor, Intuit Premier Reseller, CPA

QUESTIONS →

← ANSWERS

## 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?

### Help is here!

Benefit from having a trusted, professional advisor on your team at a fraction of the cost of fulltime 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!

### Scott Gregory

QuickBooks Expert



▶ ABOUT SCOTT

### Contact Scott Today About QuickBooks

For the fastest response, email Scott at:  
[Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com)

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## QUESTION: 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 2016 will stop at the end of May 2019 (and support for anything older than 2015 has already stopped). 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 2016 by the end of May 2019, your payroll service will no longer work as of June 1, 2019 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.



### **QUESTION:** 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!](#)



### **QUESTION:** 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.](#)



### **QUESTION:** 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.



### **QUESTION:** 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.



## QUESTION: 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, consult with an IT firm to assist you. If you need an IT firm to work with, [contact me](#) and I’ll be happy to get you connected.



## QUESTION: 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”.



## QUESTION: 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.



## QUESTION: 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 2008, 2009, 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.



## QUESTION: 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 2012 to QuickBooks 2017), 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.



## QUESTION: Can I move from QuickBooks Pro to QuickBooks Premier?

**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.



### **QUESTION:** 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.



### **QUESTION:** 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!



### **QUESTION:** 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.



## QUESTION: 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.



## QUESTION: 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
- [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



## QUESTION: 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.](#)



## QUESTION: What if I need more information?

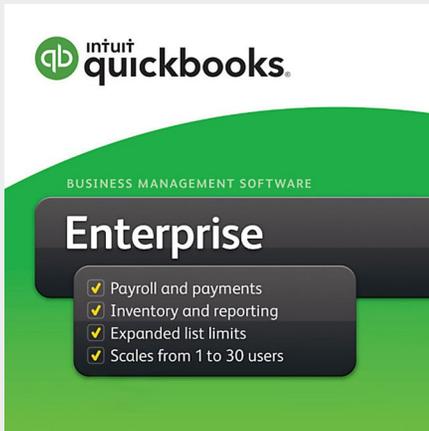
**ANSWER:** If you have additional questions, email Scott at [Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com).

**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 \\$\\$\\$ on your next QuickBooks upgrade](#)
- [Special discounts on QuickBooks Enterprise](#)

## Discounts on QuickBooks Software

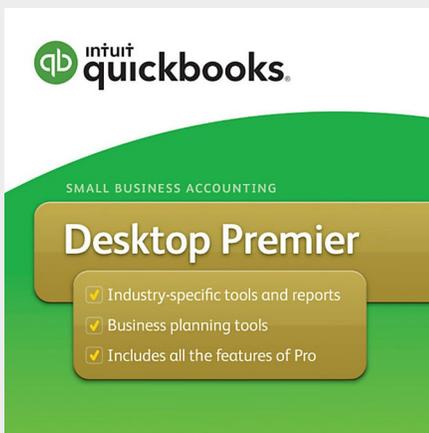
*"Thanks for making our upgrade painless and easy!"*  
- Doug Freer, President, LawnLad, Inc.



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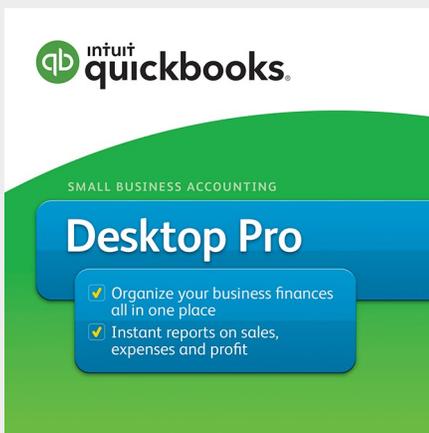
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*“Scott Gregory continues to amaze me. Every single client out of the dozens who have purchased Enterprise Solutions from Scott and worked with him have given him a 100% Net Promoter Score. This is very unusual in our industry. It is considered World Class.” – MARIE ARCHULETA, Channel Sales Manager for Intuit*



## About Scott Gregory

**Certified QuickBooks Enterprise Advisor and Intuit Premier Reseller**

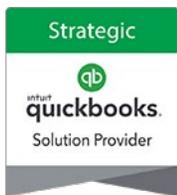
Scott has been helping businesses “get it right” with their QuickBooks and business finances for over thirty years.

During that time, he has assisted well over 1,000 businesses, with services such as QuickBooks software installation, training and coaching sessions, and his “[Better Profits Now](#)” program.

Prior to starting his own practice, Scott served as the CFO for a \$15 million manufacturing firm for more than ten years. During his tenure as CFO, Scott was responsible for: \$4 million in inventory, \$4 million in accounts receivable, inventory control, purchasing, information technology and banking relationships.

He is a member of the Certified QuickBooks ProAdvisor program, a CPA, and certified in integrated resource management (CIRM) by APICS. Scott has taught hundreds of business owners, bookkeepers, and CPAs how to use QuickBooks effectively and efficiently through local community colleges and via webinars.

Thousands of QuickBooks users rely on [Scott’s QuickBooks Blog](#) for insight, tips and tricks each and every month.



## Contact Scott Today!

For the fastest response, email Scott at:

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