



## QuickBooks ProAdvisor® Alert

From Intuit ProLine™

Nov. 18, 2009

### MAJOR QUICKBOOKS 2009 UPDATE

Dear ,

QuickBooks 2009 R9 is coming soon, and it is a different kind of update. It will require your careful review of what versions of QuickBooks your clients are using, and how you may be working with them to share files.

### WHAT: RELEASE 9 REQUIRES CARE, COORDINATION



#### QuickBooks 2009 Release 9 (R9) Won't Be Backwards Compatible with Earlier Releases of the 2009 Software

Intuit QuickBooks 2009 R9, going out live as an Automatic Update on December 1, has important improvements for both you and your clients. [\[Note 1\]](#) We strongly recommend that both of you use the update.

However, **unlike other updates in recent history**, this update will not be backwards compatible with earlier releases of QuickBooks 2009.

**Accountant's Copy Remains Good Alternative:** Backwards compatibility continues for the Accountant's Copy. That is, if you update to QuickBooks 2009 R9, you will still be able to receive, open, and return an Accountant's Copy of your clients' files in earlier releases of QuickBooks 2009 and QuickBooks 2008, and your client could accept and upload the Accountant's Copy without moving to QuickBooks 2009 R9. [\[Note 2\]](#)

We provide more information on different use case scenarios at [Appendix A](#).

### WHY: DATABASE UPDATE AND MORE



QuickBooks 2009 R9 includes a patch to the underlying QuickBooks database that further improves data stability in significant ways. Specifically, QuickBooks 2009 R9 will take advantage of a new Sybase SA10 patch. [\[Note 3\]](#)

While QuickBooks is already remarkably stable, we estimate this patch will remove many remaining data issues in whole or in part. The update will also improve speed of execution for heavy users, as well as improve performance in selected reports. Beyond the database updates, the release addresses a large number of specific issues. The full range of benefits of QuickBooks 2009 R9 will be identified in the Release Notes, available tomorrow, Nov. 19.

### WHEN: MANUAL AND AUTOMATIC UPDATES



## Our Schedule

Intuit currently expects R9 to be released as follows:

- **Tomorrow, Nov. 19, 2009:** QuickBooks 2009 **R9 release notes** and the **manual update** are made available at the [QuickBooks Updates site](#).
- **Tuesday, Dec. 1, 2009:** The **Automatic Update** is pushed out to appear as an update in-product. Users should be encouraged to allow automatic updates and to accept the patch.

**Early Notice.** We are giving early notification so you can review your client base and determine your options.

Depending on how you decide to handle the release, you may decide to reach out and advise your clients. See "Your Clients" in next section for more information.

## HOW: ADDITIONAL RESOURCES COMING SOON

### More Information on Its Way

As noted above, Intuit will post detailed release notes tomorrow, Nov. 19. Intuit will also be posting a specific knowledge base item related to this unique release.

### Your Clients

Left to their own devices, most clients will become aware of this update on Dec. 1, when they are prompted by in-product messaging. This means that you have two weeks to prepare clients about the update. The *QuickBooks ProAdvisor Newsletter* (expected in the next few days) will have further information around language you can use in an email message to your clients about the update.

## WHERE: LOCATION OF UPDATES AND INFORMATION

### All the Usual Places

On our [QuickBooks Updates site](#), you will have access to the manual download of Release 9 as well as full release notes, as of tomorrow, Nov. 19.

In our knowledge base for accounting professionals, you will find one or more items available on or about the same date. [The Knowledge Base or KB item on the general QuickBooks site will be posted here](#). A more "ProAdvisor-appropriate" version will be posted on the ProAdvisor support site tomorrow. The link for the item will be included in the next *QuickBooks ProAdvisor Newsletter*.

In the desktop version of QuickBooks 2009, R9 will appear as an automatic update prompt, on or after Dec. 1.

### More Information in *QuickBooks ProAdvisor Newsletter*

Your next copy of the QuickBooks ProAdvisor Newsletter is expected a day or two after the Manual update is posted. The issue will have more information on this release.

## NOTES

1. The release affects Windows desktop versions of QuickBooks 2009 and QuickBooks Enterprise 9.0. It further affects backwards compatibility with earlier versions of the same software products.
2. Backwards compatibility in the QuickBooks 2009 Accountant's Copy includes previous releases of QuickBooks 2009 and QuickBooks 2008.
3. QuickBooks 2009 R9 will move the underpinnings of the QuickBooks database from Sybase SA10 patch 3712 to patch 3960. Intuit has tested the patch in multiple scenarios and found that with the patch, QuickBooks 2009 shows significant improvements in many areas of data handling, including those areas which are associated with rare instances of data corruption, especially among heavy users.

## APPENDIX A: USE CASE SCENARIOS

### See Which Situation Most Applies to You

The options related to backwards compatibility may be clearer if we review several use case scenarios between you and your client.

Use Case Scenario	Outcome
You and your client both have QuickBooks 2009.	Both you and the client should both upgrade to QuickBooks 2009 R9.
You and your client both have QuickBooks 2009. You have upgraded to R9 but your client has not or will not update, for whatever reason, to R9.	You can still share files via the Accountants Copy.
You have QuickBooks 2009 R9 and your client has QuickBooks 2008 and will not purchase new software to upgrade to QuickBooks 2009 R9.	You can still share files via the Accountant's Copy.
You and your client both have QuickBooks 2008 and are currently sharing 2008 files. In one directory you maintain QuickBooks 2008. In a separate directory you maintain a version of QuickBooks 2009, and you upgrade that version to QuickBooks 2009 R9.	You and your client will still be able to share files as long as you work with the client's 2008 files in your 2008 copy of the software.
Same scenario as above but for QuickBooks 2007; you and client both continue to work in QuickBooks 2007.	Same outcome as above for QuickBooks 2007; you and client both continue to work in QuickBooks 2007.
Same scenario as above but for QuickBooks 2006 and earlier.	Intuit no longer supports QuickBooks 2006 and earlier under its service discontinuation policy. <a href="#">[Note 4]</a> We recommend clients upgrade to a currently supported version of QuickBooks for many reasons, including security. <a href="#">[Note 5]</a>
You have QuickBooks 2009 and your client has QuickBooks 2007 or earlier.	You will not be able to update the file and return it to the client, whether or not you are using the Accountant's Copy. <b>Your best option is to have the client upgrade to QuickBooks 2009 R9.</b>
Your client upgrades to QuickBooks 2009 R9 but you want to remain on QuickBooks 2009 R8 because some R8 clients are refusing, for whatever reason, to upgrade to R9.	You have limited options: <ul style="list-style-type: none"> <li>• Upgrade your QuickBooks 2009 to R9.</li> <li>• Or, install QuickBooks 2010 in its own directory and use the 2010 Accountant's Copy to share files with your client on QuickBooks 2009 R9, so you can maintain QuickBooks 2009 on R8.</li> <li>• Or, less commonly, if you are in an office with multiple machines with QuickBooks, keep one machine on QuickBooks 2009 R8 for R8 clients.</li> </ul>
You have QuickBooks 2010 and your client has QuickBooks 2009 (any release).	You can still share files via the Accountant's Copy.

## NOTES TO APPENDIX A

4. **Service Discontinuation Policy.** Intuit has to balance the needs of its installed user base with the needs to continue to develop and grow the software. The result is the **QuickBooks Service Discontinuation Plan**, in which at least the three most current years' QuickBooks are being supported at any one time. As we go to press, Intuit is currently supporting QuickBooks 2007, 2009, 2009, and the recently introduced 2010. [See more details here.](#)
5. **ActiveX Issue.** Intuit has identified, and created a solution for, a [potential security vulnerability](#) in some of our QuickBooks desktop software (2009 and older supported versions) related to certain Windows ActiveX controls. However, patches are not available for nonsupported versions (that is, QuickBooks 2006 and earlier). To keep everyone's data safe, users are encouraged to upgrade to a currently supported version of QuickBooks.

© 2009 Intuit Inc. All rights reserved. Intuit, the Intuit logo, Intuit ProConnection, Intuit ProLine, EasyACCT, Lacerte, ProSeries, QuickBooks, QuickBooks ProAdvisor, Quicken, and TurboTax, among others, are trademarks, registered trademarks and/or registered service marks of Intuit Inc. in the United States and other countries. Other parties' trademarks or service marks are the property of their respective owners and should be treated as such.

**Program terms and conditions**, pricing, features and service options are subject to change without notice.

This newsletter is provided as a convenience for our customers and is not intended to supplement, modify, or extend the Intuit software license agreement between Intuit and the customer for any Intuit product or service. Terms and conditions subject to change without notice.

**Please Note:** Intuit respects the personal nature of email communication. Every effort is made to offer only information or products that may be of value to you. This critical alert is not subject to other marketing suppressions or unsubscription from the *QuickBooks ProAdvisor Newsletter*. Intuit makes every attempt to restrict critical alerts to only those items that are truly critical, such as discovery of a software bug or other issue. If you do not wish to receive even critical alerts, and you desire to halt ALL communications from Intuit across the board, please send an email to [PAP-Editor@intuit.com](mailto:PAP-Editor@intuit.com). The editor will assist you in this effort.

If you would like to change your e-mail address in our database, please update your QuickBooks ProAdvisor Profile. Each newsletter or alert is mailed using the most recent listing in the ProAdvisor Database.

If you receive an e-mail message that appears to come from Intuit but that you suspect is a phishing e-mail, please forward it immediately to [security@intuit.com](mailto:security@intuit.com).

Intuit Inc., Customer Communications, 2800 E. Commerce Center Place, Tucson, AZ 85706

Intuit® ProLine  
Power to Get More Done™