



## QuickBooks ProAdvisor® Alert

From Intuit ProLine™

Dec. 14, 2009

### QUICKBOOKS® 2009 RELEASE 9 AND SALES TAX REPORTS

Dear ,

Today Intuit will be notifying all customers using QuickBooks® 2009 [1] about how to fix a potential issue with the sales tax reports introduced in QuickBooks 2009 Release 9. Sales tax issues will be resolved with the release later this week of 2009 Release 10.

This ProAdvisor Alert includes the full text of that Alert following, along with additional information for QuickBooks ProAdvisors.

### NOTICE TO ALL QUICKBOOKS® 2009 CUSTOMERS



**Dear QuickBooks 2009 User:**

#### ***Sales Tax Report Issue for QuickBooks 2009 Release 9 (R9) Users***

We are writing to let you know about a **Sales Tax Report issue** related to the December 1, 2009 Release 9 (R9) of QuickBooks 2009. If you downloaded R9 earlier this month, the Sales Tax Liability and Sales Tax Revenue reports are not displaying the correct data in some cases. Only customers who have already downloaded and installed R9 may be affected. The issue affects QuickBooks Simple Start, Pro, Premier, and Enterprise Solutions.

**If you are using Release 8 or earlier, this issue will not affect you, and you may continue to rely on the Sales Tax Liability and Sales Tax Revenue reports for any sales tax filings with tax authorities.** (Not sure which release version you have? Open QuickBooks, hit **F2**, and look at the information in the upper left of the screen entitled, "Product.") Click [here](#) for more detailed instructions.

#### ***What You Should Do if You Are on R9***

**If you are currently using R9, and have not filled out your tax information with tax authorities,** you should update your QuickBooks software before you file. The new update (Release 10) is scheduled to be available on Wednesday, December 16. **Only after updating to R10 should you rely on the Sales Tax Liability and Sales Tax Revenue reports for your upcoming sales tax filings with tax authorities.**

**If you are currently using R9 have have used the Sales Tax Liability and Sales Tax Revenue reports to submit information to the tax authorities this month, your submission may be incorrect. As a result, you may need to resubmit your sales tax information after downloading R10 if you meet certain criteria.** Specifically, this issue applies to you only if you meet the following conditions: within QuickBooks, the sum total of items in your Items List multiplied by the number of vendors in your Vendor List equals more than 10,000. [For more information on whether you need to resubmit your sales tax information, click here.](#) If you think you have already submitted inaccurate information to tax authorities and need help with how to resubmit, you can contact Intuit at [QuickbooksEmail@intuit.com](mailto:QuickbooksEmail@intuit.com).

## How to Update to R10

Updating QuickBooks with R10 will correct your sales tax information in the Sales Tax Liability and Sales Tax Revenue reports. You can apply this R10 update in two ways:

- You can **download** this update [here](#), Wednesday, December 16, 2009.
- or -
- QuickBooks will prompt you to apply this update **automatically** on Thursday, December 17, 2009.

Thank you very much, and we apologize for any inconvenience you may have experienced.

Sincerely,

Greg Wright  
Director of Product Management, QuickBooks

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## FOR PROADVISORS: SUPPORT OPTIONS

### QuickBooks R9 and R10

Earlier we alerted you to the unique nature of the 2009 R9 as to its lack of backwards compatibility with R8 and earlier. QuickBooks releases are cumulative. R10 includes the same update to the QuickBooks database as R9. [2] That is, your client on R8 or earlier who updates to 2009 R10 will have the same issues as the client who updated with R9. [3]

(However, we want to make it very clear that R10 removes the sales tax issues introduced in R9: Customers updating to R10 will *not* experience issues with the Sales Tax reports.)

The impact of R10 can be seen in two dimensions.

- **How You Interact with Clients.** The [earlier alert](#) and [related online support](#) includes a list of use cases. ProAdvisors with 2009 R9 who use the Accountant Copy can work through the Accountant Copy with company files in 2009 R8 or earlier. Similarly, ProAdvisors on 2009 R10 will be able to work with client files on R8 or earlier via the Accountant Copy. An updated list of use cases follows in [Appendix A](#) below.
- **Problems with the Update for Clients with Network Implementations (Includes Enterprise Solutions 9).** With QuickBooks 2009 R9, service calls increased exponentially creating long wait times and frustration. Most of those issues have now been resolved but some will still remain. Intuit has significantly expanded its collection of online resources to help those users who run into these issues so they would not have to endure long waits on the telephone lines.

**Direction to Clients.** We have updated (or will soon update) the following link to speak specifically to both R9 and R10:

[www.quickbooks.com/R9](http://www.quickbooks.com/R9)

Thank you very much, and we apologize for any inconvenience you may have experienced.

Sincerely,

~ The QuickBooks ProAdvisor Team

## NOTES

1. The release affects Windows desktop versions of QuickBooks 2009 and QuickBooks Enterprise 9.0. Specific product names include QuickBooks Simple Start, Pro, Premier, and Enterprise Solutions. R10 further affects backwards compatibility with R8 and earlier releases of the same software products.
2. QuickBooks 2009 R9 and R10 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.
3. Backwards compatibility in the QuickBooks 2009 R9 and R10 Accountant Copy includes previous all releases of QuickBooks 2009 and QuickBooks 2008.

## APPENDIX A: QUICKBOOKS USE CASE SCENARIOS

### See Which Situation Most Applies to You

Intuit encourages all users of QuickBooks to update their software to the most current version. Almost always, QuickBooks releases are cumulative. ProAdvisors with clients in QuickBooks 2009 R8 updating to R10 or earlier will face the same issues that were earlier related as to the R9 update.

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 R10, although if one of you has R9 and the other R10 it will not interfere with sharing files.
You and your client both have QuickBooks 2009. You have upgraded to R9 or R10 but your client has not or will not update, for whatever reason, to R9 or R10.	You can still share files via the Accountants Copy.
You have QuickBooks 2009 R9 or R10 and your client has QuickBooks 2008 and will not purchase new software to upgrade to QuickBooks 2009.	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 or R10.	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 the latest release of QuickBooks 2009 or QuickBooks 2010.</b>

Your client upgrades to QuickBooks 2009 R9 or R10, but you want to remain on QuickBooks 2009 R8 because some R8 clients are refusing, for whatever reason, to upgrade to R9.	<p>You have limited options:</p> <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.

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