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Certified Payroll Solution - QuickBooks Compatibility Update Procedure

Each year when Intuit produces a new version of QuickBooks we have to do a compatibility update for Certified Payroll Solution in order for it to work with the new version. These compatibility updates are usually available on the same day that the new version of QuickBooks is available for purchase and we notify you via an email Newsletter that they are available.

*These compatibility updates **MUST** be downloaded and installed in order for CPS to “talk” to the new version of QuickBooks.*

The following instructions are recommended for upgrading to a new version of QuickBooks and obtaining your CPS Compatibility update. This information was emailed to all customers in a newsletter and is kept in our On-Line Support Area for future reference.

We will break this article into the following sections:

1. Before installing ANY new version of QuickBooks
2. Obtaining Your Certified Payroll Solution compatibility update
3. After installing your compatibility update
4. Connecting to QuickBooks

1. Before installing the new version of QuickBooks - (if you have already installed the new version of QuickBooks you should still follow the instructions for A, B, and D below)

- A. While in your existing QuickBooks package, in single-user mode and logged in as the Administrator; go to the Edit Menu, choose Preferences, scroll down to and select Integrated Applications and click on the Company Preferences tab. Highlight and individually remove each application listed here. Click OK.
- B. Backup your QuickBooks data to external media such as a CD or USB Drive, making the name of the backup [Your Company Name]-QB{version}. For example if I were to backup our existing Sunburst company file that was currently being run with QuickBooks 2007, I would name my backup Sunburst-QB07.
- C. Install the new QuickBooks package and update your existing company file – **do not restore the backup you made above.**
- D. When your existing file has been converted, Rebuild your QuickBooks Data file. To rebuild your data file – from the QuickBooks File menu, choose Utilities, and Rebuild Data. The first thing that the rebuild function will make you do is a backup, save it somewhere other than the CD or USB Drive where you saved your previous backup. Once the backup has completed the rebuild utility will make 2 passes through your QuickBooks data file, do not be concerned if it appears to get stuck at 99% on the first

pass or at 50% on the 2nd pass. It simply means that it has found errors and is busy correcting them.

2. Obtaining Your Certified Payroll Solution compatibility update

- Start Certified Payroll Solution, go to the Help menu and choose Check for Updates.
- Download and Install the update “Version Number” as directed in our Newsletter to you.

3. After installing your compatibility update

- Start Certified Payroll Solution, go to the Help Menu, choose About and verify that your current version is the same version number that you just downloaded and installed. If it is click the OK button. Repeat if you need to install additional updates.
- After you have installed any necessary updates, from the CPS System Setup menu, choose System Preferences, and click on the Data locations Tab. This tab consists of 3 white “boxes”, click into the middle box and delete the contents of the QuickBooks File Location box.

4. Connecting to QuickBooks

- Start QuickBooks. Login as the QuickBooks Administrator in Single User Mode and wait until it is fully loaded.
- Start CPS. From the Run Menu choose Certified Payroll. If there is currently information in all of the date fields, simply click Next.
- When QuickBooks displays the “Application Certificate” window, grant permission for CPS to access your QuickBooks data file. We usually recommend the last option of “Yes, Always even if QuickBooks is not running” and then choose a user with appropriate permissions in the Log in As Drop down menu.

Following these instructions should provide you with a successful upgrade experience as these are the exact same steps that you would be asked to perform by a support rep should you call for help; thus eliminating the call.