

Upgrading company files from QuickBooks 2003 or older to QuickBooks 2008

QuickBooks 2008 can convert company files saved in QuickBooks 2004 or greater. If your company file was last saved in QuickBooks 2003 or older, use the following procedure to upgrade your file to QuickBooks 2008.

Set up your current company file for the conversion

1. In your current version of QuickBooks, print trial balance reports for each of these dates:
 - Today
 - The end date of the last sales tax period for which you sent a GST/HST/QST return (if any)
 - The end date of the last sales tax period for which you sent a PST return (if any)
2. Verify your company file.

To do so, go to the **File** menu, click **Utilities**, then click **Verify Data**.

If the verification was unsuccessful, resolve any issues before upgrading your company file. See the in-product help for assistance, or contact technical support.
3. If the verification was successful, Back up your company file

To do so, go to the **File** menu, click **Utilities**, then click **Backup**.
4. Close your old version of QuickBooks when you're done.

Download and install QuickBooks 2007

1. Download a trial version of QuickBooks 2007 from our QuickBooks Conversion Kit page.

You can download a version of this tool at <http://quickbooks.ca/conversionkit>. Save the .exe file in a temporary location on your computer.
2. In Windows Explorer, navigate to and double-click the .exe file that you just downloaded.
3. Follow the on-screen instructions.

During the installation process:

 - When asked for an installation code, use the following:
07215-18625-15750-710014

This code will allow you to use the trial version of QuickBooks for 30 days, but you will not be able to activate it.
 - When asked where you want to install QuickBooks, choose a different location than your current version of QuickBooks. **Do not install on top of your old version!**

Upgrade your company file to QuickBooks 2007

1. Start QuickBooks 2007.
2. In QuickBooks 2007, open your old company file.

To do so, go to the **File** menu and click **Open Company**. In the Open company window, navigate to and select your old company file and then click **Open**.

3. QuickBooks will detect that your company file is from a previous version. In the Update Company File to New Version window, click **Start Update**.
4. Follow the on-screen instructions.
When asked for a name and location of the new company file, append **"2007"** to the company file name. **DO NOT OVERWRITE YOUR EXISTING COMPANY FILE!** You will need it to view sales tax reports from previous periods.
5. After the upgrade finishes, close QuickBooks 2007.

Upgrade your 2007 company file to QuickBooks 2008

1. Locate the paper copy of the last GST/HST/QST and PST sales tax returns that you filed and have them with you when you start the upgrade process. You will need information from these returns to upgrade your company data.
2. In QuickBooks 2008, open the **"2007"** version of the company file that you just converted.
3. When prompted to upgrade your file, enter YES and click OK.
4. Follow the on-screen instructions.
 - When prompted to back up your data, click **OK**.
 - When asked, enter the correct dates for the last time you filed your GST/HST and PST/QST sales tax returns, if any.
 - When asked if you want to move or rename your company file, we recommend that you allow QuickBooks to move your company file from the Program Files folder to the suggested location.
5. When the conversion is complete, QuickBooks creates a report about what happened during the conversion. Read this information and take any actions that are necessary.
To see the report, go to the **Help** menu and choose **Learning Centre**, click **Key Upgrader Tasks**, then click the link next to **Results of your company file conversion**.
Tip: The Key Upgrader Tasks tab in the Learning Centre contains more information that you may find useful.
6. If you file sales tax (GST, HST, PST, and/or QST), there are some additional steps you must perform. It is VERY IMPORTANT that you perform these steps! If you do not, the amounts on your next sales tax return will be incorrect.

For more details, please go to our knowledgebase at quickbooks.ca/support and read the FAQ article **"How do I upgrade to QuickBooks 2008 if I track sales tax?"** This information is also printed in the Upgrader's Guide that was included in your QuickBooks retail box.