



QUICKBOOKS DESKTOP TO ONLINE

QuickBooks Online conversion checklist

PRE-CONVERSION

- Create a new QuickBooks Online subscription
 - a. Go to QuickBooks Online Accountant.
 - b. Then go to Quick Create and then go to Client
 - c. Now follow the prompts
 - d. Now you have to choose the subscription and who will pay the subscription fees
- Now you have to sign out of QuickBooks Online Accountant
- Then you have to confirm QuickBooks Desktop file will convert:
 - a. You have to open the desktop file and then run some utilities
 - b. Go to file, then Utilities, then Verify Data
 - c. Go to file, then Utilities, then Rebuild Data
 - d. Now you have to tap on F2 to verify the number of targets is below 3,50,000
 - e. For pre-conversion archive you have to create a backup

CONVERSION

- Begin by opening the conversion tool and begin conversion
- Open QuickBooks Desktop
- Go to company, then go to Export Company file to QuickBooks Online
- To start the interview you have to click Continue.
- Then you have to enter your QuickBooks Online Accountant login information and then you have to agree to the Terms of Service
- You have to choose the QuickBooks Online company that you have created and then click on Continue.
- Now Intuit will confirm the conversion has started and then click OK.
- When conversion is finished Intuit will email you.

POST CONVERSION

- Compare the reports.
- Sales tax payments
- Payroll configuration
- Verify the inventory conversion
- Configure permissions and users.
- Company Information
- Reconcile accounts
- Include attachments
- Lists
- Customize sales templates
- Customize sales templates
- Recreate memorized reports
- Connect apps
- Connect QuickBooks Payments
- Connect bank feeds
- Set a closing date