



QuickBooks Conversion Success Kit

Essential Steps for Seamless Transition from QuickBooks Desktop to QuickBooks Online

Preparation Checklist

Detailed steps to gather necessary data and backup files.

Verify that your QuickBooks Desktop is updated to the latest version.

Back up your QuickBooks Desktop company file.

Run the Profit and Loss report for the current fiscal year to date and save a copy.

Run the Balance Sheet report for the current fiscal year to date and save a copy.

Gather all user access information and permissions for QuickBooks Online setup.

Conversion Process

Step-by-step guide on using the QuickBooks conversion tool.

Download and install the QuickBooks Online Conversion Tool.

Open QuickBooks Desktop and log in as an Admin in single-user mode.

Launch the QuickBooks Online Conversion Tool and select the company file to convert.

Follow the prompts to connect to your QuickBooks Online account.

Review the data to be converted and confirm the conversion process.

Post-Conversion Setup

Instructions for verifying and customizing settings.

Log in to QuickBooks Online and verify that all data has been imported correctly.

Customize your company settings such as fiscal year, currency, and tax preferences.

Set up user roles and permissions according to your team's needs.

Reconcile your bank accounts to ensure that balances match.

Run key financial reports to verify data accuracy post-conversion.