

10 ways we've made it easier to migrate to QuickBooks Online

A better migration process with more expert support helps your clients discover the power and flexibility of Online, faster.

1 Migrate key desktop data with confidence

Our improved online data migration tool walks you through the migration process to move your clients' books from QuickBooks Desktop to QuickBooks Online. You can use the online tool even if you don't have access to QuickBooks Desktop or if it's not updated to the latest version.



2 Let our experts migrate your clients' data for you

To save you and your clients time, we have accountant experts standing by, ready to migrate your clients' accounting, payroll, payments and time tracking data to QuickBooks Online.* We'll help you move as many clients as you'd like from any version of Desktop to QuickBooks Online. To get started, call 800-459-5183, M-F, 8 AM to 8 PM ET.

3 Get clients onboarded with free personalized setup

After they make the switch, we'll help your clients get started with a complimentary 1-hour onboarding session.* Our experts will provide a guided tour and step through their frequent business tasks to get the most out of their new QuickBooks Online experience. To schedule a session, call 800-459-5183, M-F, 8 AM to 8 PM ET.



4 Give your clients a familiar way of working

Using the QuickBooks Online app for Windows and Mac, your clients can work how they're used to with a view that's similar to QuickBooks Desktop.** They can keep information for multiple companies open at once, flip between tabs and windows, and stay signed in so they can get to work faster.

5 More options for data migration

Your clients now have more options to choose the data they want to migrate, including partial data migration. For clients with older or larger company files looking for something closer to a fresh start, they can choose to migrate lists and balances, or lists only.



6 Bring your client's top 20 reports to QuickBooks Online

Reports your clients have customized in QuickBooks Desktop—including header, footer, filters, font, number, and display settings—are now automatically created in QuickBooks Online as part of the migration process. Plus, standard reports marked as favorites in Desktop will now appear in QuickBooks Online under Favorites.



7 Bank rules included in migration

Bank and credit card transactions flow into QuickBooks Online automatically to help your clients easily track income and expenses. Now, bank rules created in Desktop migrate over to QuickBooks Online, saving even more time for you and your clients.

8 More than double the file size

Our developers have expanded the ability to migrate customers with large company files, expanding the total target limit to 750,000, up from a previous limit of 350,000 targets.



9 Keep paying employees on time

For clients who've added QuickBooks Online Payroll,* bank account and direct deposit connection details, including direct deposit limits and split payment accounts, are now moved from Desktop to QuickBooks Online as part of the migration process. That helps ensure there are no interruptions in payroll runs.

10 Continued access to QuickBooks Desktop

Your clients will now have view-only access to their old data using Desktop, so they can refer back to reports, inventory, balances, and more for 12 months after canceling their QuickBooks Desktop subscription.**



Ready to get started adding clients to QuickBooks Online?

Get QuickBooks Online Accountant

Important offers, pricing details, and disclaimers

***Free assisted migration and personalized setup** from QuickBooks Desktop Pro, Premier, Mac, or Plus ("Desktop") to QuickBooks Online Simple Start, Essentials, Plus or Advanced ("QuickBooks Online"), or QuickBooks Desktop Payroll, Payments, or Time to QuickBooks Online Payroll, Payments, or Time is available to customers who sign up for assisted migration or personalized setup to QuickBooks Online or until July 17, 2023 and is subject to capacity. Customers must initiate a migration meeting by July 31, 2023. The assisted migration offer is eligible to Desktop customers that are migrating their data and setting up QuickBooks Online. The personalized setup offer is eligible to Desktop customers that are migrating their data, as well as those customers who elect not to migrate their data, who are starting new QuickBooks Online accounts, and setting up QuickBooks Online. Assisted migration and personalized setup is limited to a 1-hour session with a customer success product expert. Intuit reserves the right to limit the number of sessions and the length and scope of each session. Assisted migration results may vary based on business complexity and file size. Terms and conditions, features, support, pricing, and service options are subject to change without notice.

****QuickBooks Online app for Windows and Mac:** The QuickBooks Online app for Windows and Mac ("app") requires a Windows PC or Mac computer with a supported browser (see [System Requirements](#) for a list of supported browsers) and an Internet connection (high-speed recommended). The app is available for QuickBooks Desktop migrators with an active QuickBooks Online Simple Start, Essentials, Plus or Advanced subscription. Multiple company tabs allow for simultaneous sign in across multiple company files. Access to each company file sold separately. Terms and conditions, features, support, and services options subject to change without notice.

****QuickBooks Online Payroll:** Additional terms, conditions, and fees apply.

****Continued access to QuickBooks Desktop:** Available only on QuickBooks Desktop 2023 R3 or newer, view-only access remains for 1 year after your subscription ends. In that time, you won't be able to edit your data with your inactive license, but you can renew your subscription or export your data. To view your data after 1 year, you'll have to renew your subscription. We recommend you export your data or migrate data to QuickBooks Online before you cancel your Desktop subscription.