

QuickBooks Online Migration Toolkit

Get your clients up and running easier on QuickBooks Online with improved migration assistance and support.



[Making it easier to grow accounting revenue](#) (2:25)

You're there for your clients. We're here for you.

Designing the right suite of solutions for each client's unique business needs can be time-consuming.

The QuickBooks Online Migration Toolkit makes the process easier, and gives you a single destination for all the resources you need.

Ready to get started adding clients to QuickBooks Online?

[Get QuickBooks Online Accountant](#)

Switching is easier with our migration tips, tricks, and training

This toolkit is designed to help you identify your clients who are right for Online, make the business case, prepare their files for migration and get them up and running.

MONTH 1

MONTH 2

MONTH 3

MONTH 4

Plan your migrations including which clients to migrate and the solutions that best fit their needs

Consult with your clients about making the move to online

Prep and migrate your clients

Onboard your clients to QuickBooks Online

[Go to month 1](#)

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Month 1

Plan your migrations including which clients to migrate and the solutions that best fit their needs.



Planning a successful migration

The first step to a successful migration is to build a game plan. Create a list of clients you would like to move to QuickBooks Online and then review plan options to determine which solutions will work best for their needs.

Below are resources to help you along the way with useful tips from accountants who have successfully moved their own clients.

- [A new way of thinking about who's right for QuickBooks Online](#)
- [Ensuring success in your client migrations](#)

QuickBooks Online: Tools to set your clients up for success

QuickBooks Online is constantly adding new functionality to meet the needs of businesses—and their accountants. While moving to Online might have felt like a big change before, with all the latest plans and features, it may now be more seamless than you think.

Use the resources below to compare QuickBooks plans and find the right fit for your clients needs.

- [QuickBooks Online and QuickBooks Online Payroll plans](#)
- [Product Finder Quiz: Find the best plan for your clients](#)
- [Comparison: QuickBooks Desktop and QuickBooks Online](#)
- [Explore the new QuickBooks Ledger plan](#)



Better solutions for every business

QuickBooks Online is the financial hub that runs your clients' businesses. With it, they'll also have access to a connected suite of business management tools like QuickBooks Payments, QuickBooks Payroll, and QuickBooks Time to help them grow their company with confidence.**

And, with hundreds of industry-specific apps plus best-in-class premium apps at their fingertips, they can tailor QuickBooks to meet the unique needs of their industry and business.**

- [The connected suite of QuickBooks business tools](#)
- [Third-party apps for the unique needs of your business](#)



Month 2

Consult with your clients about making the move to Online

Resources for you

Communicating about the move can sometimes be more challenging than the migration itself. These resources include clear, practical tips to help you prepare for client conversations about migration.



Build confidence to move your clients online

These webinars will empower you to have the conversations with your clients you need to start the migration process.

- [Moving online: What's in it for you and your clients & how to get there](#)
- [Profitability - Leveraging Advisory Services to Grow Your Accounting Business](#)



Choose the QuickBooks Online business model that works for you

When considering QuickBooks Online as a part of your business model, you have plenty of options—including ongoing discounts you can extend to your clients.

- [Compare business model options: billing structure, revenue share, and more](#)



Reminder:

Check out these accountant-approved tips for migration conversations from Month 1.

- [A new way of thinking about who's right for QuickBooks Online](#)
- [Ensuring success in your client migrations](#)

Month 2

Consult with your clients about making the move to Online

Resources for your clients

If your clients seem hesitant to consider migration, you can boost their confidence with shareable guides and insights.



Your clients are in good company

Sharing these case studies is a great way to show your clients that moving online pays off.

[More success stories](#)

QuickBooks Online & Payroll make managing 2 stores easy for Bella Grace Paper



[QuickBooks Online & Payroll makes managing 2 stores easy for Bella Grace Paper](#) (3:08)



Switching from QuickBooks Desktop to Online has really been vital in our growth for the business.

Stacie Keller, co-owner, Bella Grace Paper

[Watch video](#)

JR Sanitation's business takes off with the support of QuickBooks Online and pay-enabled invoices.



[Read Article](#)



Clients are always pleased to find out they can get an invoice with a link they can click to pay.

Sindy Cardenas, office manager, JR Sanitation

Month 2

Consult with your clients about making the move to Online




Show your clients how QuickBooks Online can help their business thrive

Here are some resources to help your clients see how QuickBooks Online can help them communicate, collaborate, and get more done.



Guide

[7 reasons to work from the cloud with QuickBooks Online](#) 



Video

[Bring real-time reliability to your accounting](#)

[Find flexibility and real-time collaboration in the cloud](#)



Webinar

[Advantages of switching from QuickBooks Desktop to QuickBooks Online](#)

With online-based accounting, your clients can use the best tool for every job

Last month, we shared these assets with you. Now it's time to share them with your clients, to show them how an ecosystem based in the cloud can expand the possibilities for managing their business.

[Comparison: QuickBooks Desktop and QuickBooks Online](#) 

[The connected suite of QuickBooks business tools](#) 

[Third-party apps for the unique needs of your business](#) 

Pro tip:



If you see this symbol next to a link in this toolkit, it means you can add your logo to the PDF before sending it to your clients.



87% of customers say it's easier to run their business with QuickBooks.¹

Month 3

Prep and migrate your clients

Tips for a seamless migration to QuickBooks Online

Now that your clients are ready to migrate to QuickBooks Online, it's time to start prepping their data and decide the best way forward for migration.

You can choose from 3 options for migrating each client Online

Option 1



Let our experts migrate your client's data for you

We have accountant experts standing by, ready to migrate your clients' accounting, payroll, payments and time tracking data to QuickBooks Online. We can help you move as many clients as you'd like from any version of QuickBooks Desktop to QuickBooks Online, at no charge to you or your clients.*

Call 800-459-5183, M-F, 8 AM to 8 PM ET

[Schedule a call](#)

Option 2



Migrate key desktop data with confidence

Our online tool walks you through the streamlined migration process to move your client's data from QuickBooks Desktop to QuickBooks Online. For something closer to a fresh start, you can now choose partial data migration.

For step-by-step guidance on how it works, visit:

[Move your books to QuickBooks Online with an online tool](#)

Option 3



Your client migrates their own data

If your client wants to handle their own migration, the [Migration made easier guide](#) goes over the best practices for the process. It also provides information on how your clients can get free migration assistance directly from our expert team.

Share this helpful webinar with your clients:

[Successful strategies for moving to QuickBooks Online](#), from Liz Scott, CPA and QuickBooks ProAdvisor

Pro tip: Prep for migration with advice from accountants who have already moved

No matter how you choose to migrate, some prep work is needed along the way to make sure everything is set up correctly at each stage of the move. The accountants we spoke to shared that by properly preparing the company file and following a few key best practices, you can help ensure a smooth migration process.

Watch this webinar for practical advice on how to prepare data:

[3 tips for a smooth migration to QuickBooks Online](#)

Review this step-by-step guide for best practices on moving clients online:

[A tactical guide to migration for accountants](#)

Save time migrating client files with batch migration

Simultaneously move up to 50 of your client files from QuickBooks Desktop Accountant to QuickBooks Online—including Payroll and Payments data.**

[Move files to QuickBooks Online with the Accountant Batch Migration Tool](#)

Month 4

Onboard your clients to QuickBooks Online

Resources for you

Now that you've worked with your client to move their accounting from Desktop to Online, it's time to make sure they're set up for success. Use these resources to help your clients work comfortably in QuickBooks Online.



Prepare for the post-migration meeting with your client

After each successful migration to QuickBooks Online, it's important to work with your client to verify the migrated data, assign workflows, and help their teams get familiar with the new system.

To prepare for an efficient post-migration meeting with your client to plan these final steps, you can use this helpful checklist:

[Post-conversion checklist](#)

On average, setting up QuickBooks takes just

 **50** minutes or less.²

Getting teams accustomed to QuickBooks Online

Proper onboarding is the key to making sure your client is comfortable using QuickBooks Online. In addition to step-by-step training, relationship-building and change management are critical to a successful onboarding experience.

Watch this webinar for practical advice on onboarding your clients:
[Getting teams accustomed to QuickBooks Online](#), with Wendy Barlin, CPA and QuickBooks ProAdvisor



8 out of 10 customers say it's easier to understand their business finances with QuickBooks.¹

Month 4

Onboard your clients to QuickBooks Online

Resources for your clients

These resources will help your client feel confident using their new software and supplement the training you provide.



Let us show your clients around QuickBooks Online

Once a client's data is migrated, they can hop on a free, 1-hour personalized setup call where we'll review their migration, show them around QuickBooks Online, and make sure they can tackle everyday tasks. If your client has added Payroll, Time, or Payments, we'll give them a tour of those features as well.*

[Schedule a call](#)

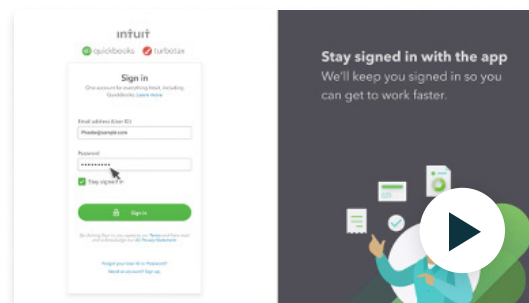
Call 800-459-5183, M-F, 8 AM to 8 PM ET



Onboarding resources

Get your clients up to speed fast with step-by-step onboarding guides and on-demand webinars, so they can get started with confidence.

This [self-paced training](#) right inside QuickBooks Online shows your clients how to set up expenses, create checks and bills, find and use reports, add their team, and much more.



[▶ How to use the QuickBooks Online app for your Windows computer \(3:08\)](#)

Help your clients work the way they want

Using the QuickBooks Online app, 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.

[Watch video](#)



Congratulations!

You and your clients made it through migration. Through your hard work and support, your clients can access the benefits of Online and the opportunities it provides for greater flexibility and real-time collaboration.

Plus, they'll have access to more app integrations so they can continue to customize their solution as their business needs evolve.**



Switching to QuickBooks Online made us more money, made it easier for everyone, and now we can better support our clients.

Lynda Artesani, Artesani Accounting



Get the support you need

No matter your migration strategy, we're here to support you and your client through the process. Reach out with any questions: intuit.me/contact-us

Ready to get started adding clients to QuickBooks Online?

Get QuickBooks Online Accountant

* Offer Terms

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 January 17, 2024 and is subject to capacity. Customers must initiate a migration meeting by January 31, 2024. 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.

** Features

QuickBooks Payments: QuickBooks Payments account subject to eligibility criteria, credit, and application approval. Subscription to QuickBooks Online required. Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services.

Time tracking system requirements: QuickBooks Time requires a computer or a device with a supported Internet browser and an Internet connection (a high-speed connection is recommended). The QuickBooks Time mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile apps and mobile browser. QuickBooks Time mobile access is included with your QuickBooks Time subscription.

QuickBooks Online app: 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 Technical Support: Support hours exclude occasional downtime due to system and server maintenance, company events, observed U.S. holidays and events beyond our control. Intuit reserves the right to change hours without notice. For hours of support and how to contact support, visit: <https://quickbooks.intuit.com/learn-support/en-us>

Third-party apps: While we review each app in the QuickBooks App Store, we can't make guarantees as to how they'll work for your business. Please be sure to review carefully before connecting any apps to QuickBooks. Apps may require a third-party subscription. Third party applications available on apps.com. Subject to additional terms, conditions, and fees.

Premium Apps: Apps may require a third-party subscription. Subject to additional eligibility criteria, terms, conditions, and fees.

Claims

1. Based on survey of existing small businesses using QuickBooks Online in U.S. conducted March 2023.
2. Based on survey of existing small businesses using QuickBooks Online in U.S. conducted March 2023 who set up their chart of accounts and connected bank accounts and credit cards.