

Move to the Cloud with Confidence

Client Migration Guide

This toolkit provides practical guidance, migration insights, and enablement resources to support your confident move to the cloud.



Empower your team and business from anywhere

QuickBooks Online and Intuit Enterprise Suite are cloud-based, AI-powered platforms that support your business, streamline your workflows, and offer more flexible access and collaboration than QuickBooks Desktop.



Stay connected from anywhere, anytime

Access your data and manage finances on the go.** Integrate tools and apps to streamline your work. Continue to be available and responsive, no matter how you choose to work.



Integrate more data for one source of truth

Tailor your solution to your unique business demands with connected services like payments, bill pay, and payroll—and over 750 integrated third-party apps ranging from billing and analytics to CRM to inventory management.



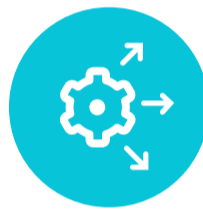
Spend less time on fixes, more time on real work

Say goodbye to file corruption, backups, version mismatches, and hosting issues. QuickBooks Online removes many of the technical problems that slow you down, so you can focus on accounting and tax work—not troubleshooting software.



Ease cross-team collaboration

Work from the same file at the same time as your team members, with visibility into changes in real-time. That means fewer handoffs, fewer questions, and less rework across teams.



Take business further with AI-powered automation

Reduce manual integrations and time-consuming steps with connected data that flows seamlessly. Reclassify transactions faster with AI-powered insights. Streamline financial planning with profitability insights, forecasts, and suggestions built on your last 5 years of data.

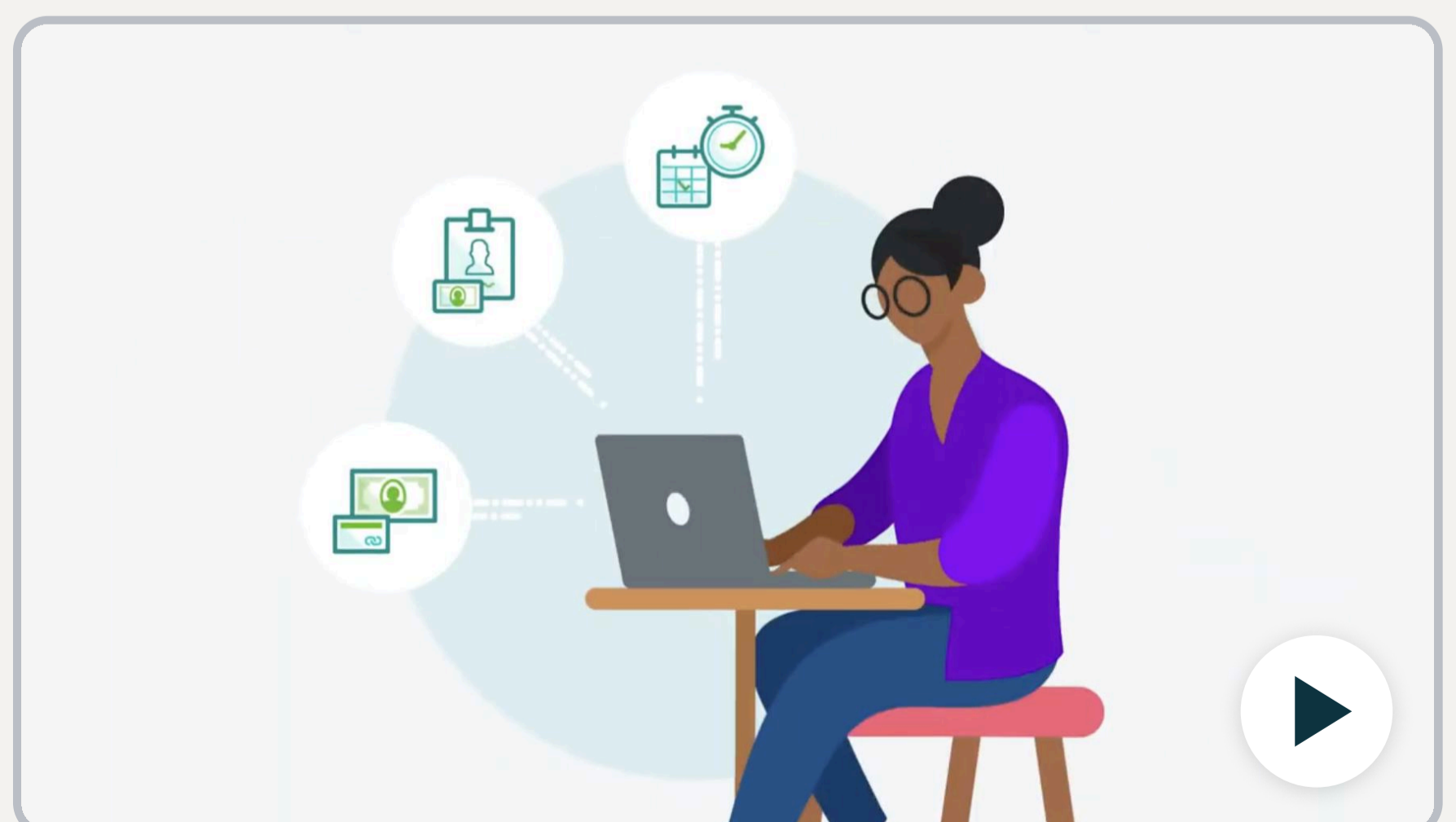


Make decisions using holistic business intelligence

Get cross-portfolio visibility and build investor-ready, multi-dimensional reports. Create and track key metrics with AI-powered analytics to compare revenue streams and gather deeper real-time insights—for smart decisions.

One connected suite provides added flexibility, efficiency, and power

Learn more about how you can keep your business running smoothly in one place, using Intuit Enterprise Suite.



[▶ Intuit Enterprise Suite: A configurable, AI-powered business platform to keep your business growing \(3:42\)](#)

Steps for a successful migration



Let's connect

We have accountant experts standing by, ready to quickly migrate your accounting, payroll, payments, and time tracking data to QuickBooks Online.

These experts work efficiently to help you move what you'd like from any version of QuickBooks Desktop to QuickBooks Online.

Choose your plan

QuickBooks Online is constantly adding new functionality to meet businesses' needs. 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.

Find the right fit for your needs with the resources below.

- [QuickBooks Online plans](#)
- [Product Finder Quiz: Find the best plan for your business](#)



Customize with connected tools

With QuickBooks Online as your financial hub, you can access a connected suite of business management tools like QuickBooks Online Payroll, QuickBooks Payments, and QuickBooks Bill Pay to help run and grow your business with confidence.**

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

- [The connected suite of QuickBooks business tools](#)
- [Explore all third-party apps](#)
- [Start adding apps](#)



What to expect before and after migration

When you're ready to migrate to QuickBooks Online, back up your data using these steps:

1. From the File dropdown menu in Desktop, select **Create copy**
2. Select **Backup copy** or **Portable company file**
3. Save this copy in a safe place



See how QuickBooks can help your business thrive

Here are some resources that show how QuickBooks Online can help your business communicate, collaborate, and get more done.



Guide

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



Webinar

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

Solutions that grow with you

Simple Start

Essentials

Plus

Advanced

IES

Basic income/expense tracking, single user, minimal workflows

A/R, A/P, time tracking, multi-user access

Inventory, projects, job costing, classes, locations

Automation, approvals, roles/permissions, custom reports, scaling workflows

ERP-level reporting, multi-entity, project management, AI automation

 **Intuit Intelligence**

Smart expense organization

Intuit Intelligence uses next-level intelligent automation to speed up expense categorization with improved accuracy.



Accounting AI

Bookkeeping reimagined for today. Smart books that go beyond intelligent categorization to deliver cleaner, more accurate books.



Payments AI

Cashflow, on autopilot. Automate invoices and track late payments—plus get personalized prompts to help you get paid faster.



Sales Tax AI

Finds and shows you any discrepancies between profit & loss and sales tax liability reports, gives explanations for why they happened, and suggests possible ways to fix them.



Customer AI

Turn interest into new business—automatically. Manage leads, follow-ups, and proposals with Customer AI that never drops the ball—built to accelerate your growth.



Finance AI

Make faster, data-backed decisions and plan for the future with AI planning that analyzes progress toward your KPIs and delivers scenario planning specific to your business.



Project Management AI

Automatically create projects and track work with continuous project cost allocation, helping keep you more on time and on budget.



 **Accounting**

Automated bookkeeping

QuickBooks learns how you categorize income and expenses and then automatically matches and records transactions from then on.**



Automated bank feeds

Connect your bank accounts directly to QuickBooks to automatically sync transactions for accurate, real-time data.



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 Accounting

Tax deductions

Automatically track and maximize tax deductions with features like snap and store receipts, mileage tracking, and expense categorization.



Accounting AI

Bookkeeping reimaged for today. Smart books that go beyond intelligent categorization to deliver cleaner, more accurate books.



AI-enabled expert collaboration

Works with your accountant to fill in and update gaps in your books.



Multiple currencies

Record transactions in other currencies without worrying about exchange rate conversions.



AI-powered reconciliation

Automatic AI reconciliation saves you time by proactively importing your bank statements to get your books clean faster.



Anomaly detection and resolution

Close your books in a fraction of the time with advanced AI that includes anomaly detection that automatically finds and resolves discrepancies with you in control.



Revenue recognition

Stay consistent, compliant, and credible with automated revenue recognition.



Advanced

Basic

Auto-track fixed assets

Automatically track fixed asset values, access all fixed asset info in one spot, and get insights about what may come next.



 Expenses and paying bills

Auto-generated bills

Create bills from handwritten notes, PDFs, photos, and even emails you forward to Intuit Intelligence.



Bill management

Organize and track your business bills online.



Receipt capture

Snap photos of your receipts and categorize them on the go.**



Mileage tracking

Automatically track miles, categorize trips, and get sharable reports.**



Pay bills

Keep your bills and vendor info organized for easier payments.




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 Expenses and paying bills

<p>Contractors</p> <p>Assign vendor payments to 1099 categories, see payment history, and prepare and file 1099s from QuickBooks.**</p>	✓	✓	✓	✓	✓
<p>Free monthly ACH bank transfers</p> <p>\$0.50/standard ACH transaction over monthly allotments. Allotments may vary.**</p>	5	5	5	5	✓
<p>Auto-match transactions</p> <p>When you pay vendors and contractors, QuickBooks records the transaction and matches it for you.**</p>	✓	✓	✓	✓	✓
<p>Roles and permissions</p> <p>Create and manage users and pre-defined roles, assigning them specific access levels to various areas of QuickBooks.</p>	—	✓	Clerk, Approver, Payor	Custom	Custom
<p>Bill approval workflow</p>	—	—	—	✓	✓
<p>Payment release approvals</p>	—	—	—	✓	✓

 Sales and getting paid

<p>Estimates</p> <p>Customize estimates, see estimate status, convert estimates into invoices, and accept mobile signatures.**</p>	✓	✓	✓	✓	✓
<p>Invoices and payments</p> <p>Accept credit cards and bank transfers in the invoice with QuickBooks Payments, get status updates and reminders.**</p>	✓	✓	✓	✓	✓
<p>Auto-generated invoices and reminders</p> <p>Get paid 45% faster.¹ Intuit Intelligence provides personalized invoice reminders that you can send to customers, providing a faster path to cash flow for you.</p>	—	—	—	—	✓
<p>Connect sales channels</p> <p>Connect online sales channels to automatically sync with QuickBooks.**</p>	1 channel	3 channels	All available	All available	All available
<p>Sales and sales tax</p> <p>Accept credit cards anywhere, connect to e-commerce tools, and calculate taxes automatically.**</p>	Automated	Automated	Automated	Automated	Automated
<p>Recurring invoices</p> <p>Automatically invoice customers who have regularly scheduled orders.</p>	✓	✓	✓	✓	✓
<p>Payments AI</p> <p>Cashflow, on autopilot. Automate invoices and track late payments—plus get personalized prompts to help you get paid faster.</p>	—	✓	✓	✓	✓

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Plus

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 Lending

Business checking with 3.00% APY**

Every dollar put away in savings envelopes** earns you interest at over 40x the U.S. average.²



Lending marketplace

We work with select small business loan lenders so you can explore options to finance your business.



Access capital

Apply for a QuickBooks Line of Credit or QuickBooks Term Loan to help bridge cash flow gaps and keep business on track.**



 Customer Hub

Customer management

Centralize all customer information and filter for insights with custom fields.



Notes and tasks management

Keep an organized list of notes and to-dos for each customer—with automated reminders that you can assign to specific employees.



Referrals, feedback, work requests and testimonials

Capture referrals, testimonials, feedback, and work requests from your customers.



Appointment scheduling

Let your customers and leads schedule phone or video meetings with you.



Contact forms NEW



Customer AI

Turn interest into new business—automatically. Manage leads, follow-ups, and proposals with Customer AI that never drops the ball—built to accelerate your growth.



Lead management

Track new leads and existing customer opportunities in one place—and view their status in the sales cycle.



Contract upload and e-signature

Upload and store contracts and get e-signatures from your customers.**



Proposals BETA

Design and send professional, personalized proposals, and get approval with e-signatures and online deposit payment, turning prospects into customers.



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Essentials

Plus

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 Time

Enter time

Enter employee time by customer/project and automatically add it to invoices.

—

✓

✓

✓

✓

 Project management

Project profitability tracking

Track all your projects in one place, track labor costs, payroll, and expenses.

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Basic

Enhanced

Enhanced

Project Management AI

Automatically create projects and track work with continuous project cost allocation, helping keep you more on time and on budget.

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✓

✓

Project workflow automation

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✓

Change orders

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✓

Project Manager user role

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✓

Budgets by Project

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✓

 Inventory

Inventory tracking

Track products, cost of goods, see what's popular, create purchase orders, and manage vendors.

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✓

✓

✓

Purchase orders

Create and send purchase orders to your vendors whenever you need to buy supplies, then add it to a transaction so your books are up to date.

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✓

✓

✓

Sales orders

Keep track of items you agreed to sell to customers in the future.

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✓

✓

✓

Shipping labels

Create labels that are automatically populated with customer info.

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✓

✓

✓

Business intelligence

Cash flow planning

See your historical cash flow based on your past bank transactions and plan for future events.

✓

✓

✓

✓

✓

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Business intelligence

<p>Budgeting</p> <p>Create budgets with real-time data you can collaborate with your team on.</p>	—	—	✓	✓	✓
<p>AI-powered profit & loss insights</p> <p>AI-powered insights proactively surface trends, anomalies, and what's causing them, personalized to your business.</p>	—	—	✓	✓	✓
<p>AI-powered balance sheet insights</p> <p>Go beyond traditional balance sheets with insights on reducing expenses, maximizing profits, and uncovering possible hidden costs and roadblocks.</p>	—	—	✓	✓	✓
<p>Forecasting</p> <p>Use your historical financial data to analyze trends and create projections of future outcomes, so you can make better-informed business decisions.</p>	—	—	—	✓	✓
<p>Budget and forecast workflow automation</p>	—	—	—	—	✓
<p>Custom report builder</p> <p>Build and save reports that are tailored to your business needs.</p>	—	—	—	✓	✓
<p>Data sync with Excel</p> <p>Seamlessly send data back and forth to Excel for more accurate business data and custom insights.</p>	—	—	—	✓	✓
<p>Finance AI</p> <p>Make faster, data-backed decisions and plan for the future with AI planning that analyzes progress toward your KPIs and delivers scenario planning specific to your business.</p>	—	—	—	✓	✓
<p>KPI scorecard</p> <p>Performance tracking made easy. Track progress against your custom business goals and key performance indicators, all in one place.</p>	—	—	—	✓	✓
<p>KPI library with custom KPIs NEW</p> <p>Access a library of financial and operational metrics—and create custom KPIs tailored to your business—to track exactly what matters in one trusted place.</p>	—	—	—	✓	✓
<p>Advanced reporting NEW</p> <p>Create professional, polished reports with visual formatting, calculated fields, and global settings—so you can highlight what matters and save time on repetitive edits.</p>	—	—	—	✓	✓
<p>Customizable management reports</p> <p>Build branded, presentation-ready report packages that combine KPIs, dashboards, and commentary into a cohesive story for executives, boards, or customers.</p>	✓	✓	✓	✓	✓

Simple Start

Essentials

Plus

Advanced

IES

Business intelligence

Dashboards NEW

Track performance in real time with interactive dashboards that consolidate key metrics into one visual view, complete with customizable charts and AI-powered summaries.

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✓

✓

Third-party connectors

Bring in data from third-party apps, so your KPIs and dashboards reflect the full picture of your business.

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✓

✓

Consolidated view

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✓

✓

Consolidated reporting

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Limited

✓

Intercompany transactions

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✓

Intercompany eliminations

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✓

Intercompany allocations

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✓

Connected platform

Users

Control user-access levels, share reports, and allow accountants access without sharing a log-in.**

1

3

5

25

6+

Accountant seats

2

2

2

3

3

Automatic business feed

Keep track of your high-level business performance and get real-time updates on what needs your attention.

✓

✓

✓

✓

✓

Mobile app

Enter transactions, record expenses, invoice customers, and send reports anywhere. QuickBooks automatically backs up your data to the cloud and syncs across all your devices.

✓

✓

✓

✓

✓

Reports

Run and export reports including profit & loss, balance sheets, accounts payable and accounts receivable.

General

Enhanced

Comprehensive

Powerful

Powerful

App integrations

Eliminate manual data entry by integrating apps you already use with QuickBooks Online, so data flows in automatically, and you can see everything in one place.

800+

800+

800+

800+

800+

Business planner

Helps you track, prioritize, and complete urgent tasks across QuickBooks, so you can save time managing your business.

✓

✓

✓

✓

✓

Simple Start

Essentials

Plus

Advanced

IES

Connected platform

	Simple Start	Essentials	Plus	Advanced	IES
User management and permissions Create and manage users and pre-defined roles, assigning them specific access levels to various areas of QuickBooks.	—	Basic	Basic	Custom	Custom
Class and location tracking Measure which products, services, and locations are generating the most revenue for your business—and which can be optimized to perform better.	—	—	40 list items (combined)	Unlimited	✓
Multi-dimensional reporting	—	—	—	1 dimension (class)	up to 20
Workflow automation Save time and mitigate risk with automated workflows and set reminders for improved cash flow and more.	—	—	—	✓	✓
Batch invoices and expenses Create invoices, enter, edit, and send multiple invoices faster.**	—	—	—	✓	✓
Backup and restore Continuously and automatically back up your changes, restore a specific version of your company, and view version history.**	—	—	—	✓	✓
Inclusion of multiple entities' company files	—	—	—	—	✓

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****Product information**

QuickBooks Bill Pay: Subject to eligibility criteria, credit, and application approval prior to first payment. Subscription to QuickBooks Online required. Bill Pay Basic is included with QuickBooks Online when purchased directly from [QuickBooks.com](https://www.intuit.com) or QuickBooks Sales. Not available in U.S. territories or outside the U.S.

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

QuickBooks Checking Account opening is subject to identity verification and approval by Green Dot Bank. QuickBooks and Intuit are a technology company, not a bank. Banking services provided by our partner, Green Dot Bank.

Payments' Merchant Agreement applies. QuickBooks Payments account subject to 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.

****QuickBooks features**

Anywhere Access: QuickBooks Online requires a computer with a supported Internet browser (see [System Requirements](#) for a list of supported browsers) and an Internet connection (a high-speed connection is recommended). Not all features are available on the mobile app and mobile browser.

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

Auto-match transactions: QuickBooks Online will only match bank withdrawals with transactions processed through QuickBooks Bill Pay. Not all transactions are eligible.

Receipt capture: Requires QuickBooks Online mobile ("QBM") application. The QuickBooks Online 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 Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

Mileage tracking: Mileage tracking is only available to the master administrator of the QuickBooks Online account. Requires QuickBooks Online mobile ("QBM") application. The QuickBooks Online 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 Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

Automated 1099 e-file & delivery: Prepare your 1099s in QuickBooks at no extra charge. If you choose the 1099 E-File Service, Intuit will e-file your Federal 1099 information with the IRS, and then print and mail a copy directly to your contractors; fees apply. As part of the paid 1099 E-File Service, we also give your contractors online access to their 1099s. State filing not included. You should check with your state agency on any state filing requirements.

Standard ACH: Limits may apply on total number and amount of payments.

Mobile signatures: Requires QuickBooks Online mobile application. The QuickBooks Online 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 Online mobile access is included with your QuickBooks Online subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

Pay-enabled invoices: Requires a separate QuickBooks Payments account which is subject to eligibility criteria, credit and application approval. Additional fees may apply. Additional terms and conditions apply.

Connect sales channels, e-commerce: Additional third-party terms, conditions, and fees may apply.

Automatic Sales Tax: Underlying sales tax rates are estimated based on the location information associated with each individual transaction. Additional factors that may impact sales tax rates include product type, date, and customer type. Tax information needs to be validated prior to submitting to the IRS.

Annual percentage yield: The annual percentage yield ("APY") is accurate as of December 9, 2024, and may change at our discretion at any time. The listed APY will be paid on the average daily available balances distributed across your created envelopes within your primary QuickBooks Checking account. Balances held outside an envelope will not earn interest. See [Deposit Account Agreement](#) for terms and conditions.

Envelopes: You can create up to 9 Envelopes within your primary QuickBooks Checking account. Money in Envelopes must be moved to the available balance in your primary QuickBooks Checking account before it can be used. Envelopes within your primary QuickBooks Checking account will automatically earn interest once created. At the close of each statement cycle, the interest earned on funds in your Envelopes will be credited to each Envelope in proportion to the average daily balance of each Envelope. See [Deposit Account Agreement](#) for terms and conditions.

QuickBooks Term Loan ("Term Loan") is issued by WebBank.

Beta features have very limited availability and are subject to change. Features may be more broadly available soon.

Collaborate with your accountant: You can connect up to the following for each product: 1 billable user and 2 accounting firms for QuickBooks Online Simple Start, 3 billable users and 2 accounting firms for QuickBooks Online Essentials, 5 billable users and 2 accounting firms for QuickBooks Online Plus, 25 billable users and 3 accounting firms for QuickBooks Online Advanced. Accounting firms must connect using QuickBooks Online Accountant.

Accelerated invoicing: QuickBooks Online Advanced supports the upload of 1000 transaction lines for invoices at one time. 20% faster based off of internal tests comparing QuickBooks Online regular invoice workflow with QuickBooks Online Advanced multiple invoice workflow.

Automatic data backup and recovery: QuickBooks Online uses technical and administrative security measures such as, but not limited to, firewalls, encryption techniques, and authentication procedures, among others, to work to maintain the security of your online session and information.

#Claims

1. Get paid 45% faster when you send invoice reminders with Intuit Intelligence: Based on U.S. Intuit Assist Beta customers using outstanding invoice notifications and AI-drafted invoice reminder features, compared to customers sending standard invoice reminders to the same customers, from January 2024 to August 2024. Not available in QuickBooks Online Advanced.

2. Over 40x U.S. average APY: Average interest rate: The average interest rate is based on the Federal Deposit Insurance Corporation's national rate published the week of December 15, 2025. [Learn more.](#) Terms, conditions, pricing, special features, and service and support options subject to change without notice.

Terms, conditions, pricing, special features, and service and support options subject to change without notice.



Learn more about QuickBooks Online and Intuit Enterprise Suite:

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intuit.enterprise.com