

QuickBooks Online Migration Toolkit

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



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.

Step 1

Learn about the new and improved QuickBooks Online and build a list of clients you'd like to migrate this year

[Go to Step 1](#)

Step 2

Consult with your clients about making the move to Online

[Go to Step 2](#)

Step 3

Prep and migrate your clients

[Go to Step 3](#)

Step 4

Onboard your clients to QuickBooks Online

[Go to Step 4](#)

Step 1: Learn about the new and improved QuickBooks Online, and build a list of clients to migrate this year



How to decide which clients to migrate

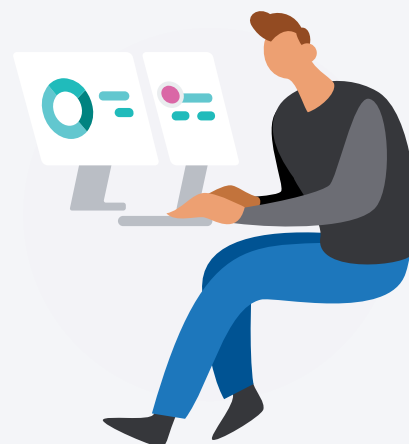
Wondering which of your clients are right for QuickBooks Online? According to 8 leading accountants, in 2023, that might not be the right question. Here's a guide based on their advice about how to think through what's right for your clients—and what's right for your business.

- [A new way of thinking about who's right for QuickBooks Online](#)

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 making the move from QuickBooks Desktop to QuickBooks Online might have felt like a big change, with all the latest features, it might now be more seamless than you think.

- [What's new in QuickBooks Online & QuickBooks Online Advanced](#)
- [Comparison: QuickBooks Desktop and QuickBooks Online](#)
- [Comparison: QuickBooks Enterprise and QuickBooks Online Advanced](#)



Better solutions for every business

QuickBooks Online is the financial hub that runs your clients' businesses. With the addition of third-party apps, your clients can create custom ecosystems that have streamlined processes for their industries and unique business needs.**

- [Apps to complete your setup](#)

Step 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 testimonials is a great way to show your clients that moving online pays off.

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



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](#)



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

4 out of 5 of QuickBooks Online customers agree that switching from QuickBooks Desktop was well worth the effort.¹

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

In Step 1, we shared these guides 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.

[What's new in QuickBooks Online & QuickBooks Online Advanced](#)

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

[Comparison: QuickBooks Enterprise and QuickBooks Online Advanced](#)

[Apps to complete your setup](#)

Step 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

We have experts ready to migrate your clients' accounting, payroll, payments and time tracking data to QuickBooks Online.

To get help and learn about free migration assistance,* call **1-888-462-3818, M-F, 9am - 5pm EST**



Option 2:
Migrate key desktop data with confidence

Our [online guide](#) walks you through the streamlined migration process to move your client's data from QuickBooks Desktop to QuickBooks Online.

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, they can refer to the "[Get help moving your data to your QuickBooks Online account](#)" guide for information on how to obtain free migration assistance from our knowledgeable experts.

Step 4: Onboard your clients to QuickBooks Online

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.

8 out of 10 QuickBooks Online customers said that getting up and running was faster than they expected.¹

Getting teams accustomed to QuickBooks Online

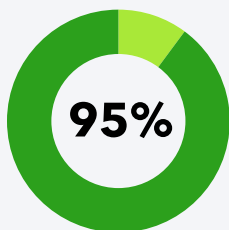
Proper onboarding is the key to making sure your client is comfortable using QuickBooks Online. In addition to step-by-step training, relationship-building and change management are critical to a successful onboarding experience.



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.**



of accountants say that they're able to give better advice to their clients when they use QuickBooks Online.¹

Moving clients online is more efficient than ever

Now with an improved migration experience and better support.**



Improved data migration guide

Our [online guide](#) walks you through the migration process to move your clients' books from QuickBooks Desktop to QuickBooks Online. Manage your client's migration yourself or have our experts help you through the entire process.



More options for data migration

Your clients now have more options when it comes to the data they want to migrate—they can choose to move some or all of their data. For clients with older or larger company files who want something closer to a fresh start, they can choose to migrate lists and balances, or lists only.



We'll move your clients online

To save you and your clients time, we have experts standing by, ready to migrate your clients' accounting data to QuickBooks Online.* We'll help you move as many clients as you'd like from any version of Desktop to QuickBooks Online.

Ready to get started adding clients to QuickBooks Online?

[Get QuickBooks Online Accountant](#)

Important offers, pricing details, and disclaimers

***Offer Terms**

Free assisted migration and personalized setup from QuickBooks Desktop Pro or Premier ("Desktop") to QuickBooks Online Simple Start, Essentials, Plus or Advanced ("QuickBooks Online") who sign up for assisted migration or personalized setup to QuickBooks Online. The assisted migration offer is eligible for Desktop customers migrating their data and setting up QuickBooks Online. 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 Online Technical Support: Support hours exclude occasional downtime due to system and server maintenance, company events, observed 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-ca>

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.

Claims

1. Based on Intuit survey Jan 2022, amongst remunerated QuickBooks Online users who expressed an opinion, when they compared QuickBooks Online to their prior QuickBooks Desktop Pro, Pro Plus, Premier, Premier Plus or Mac Plus products. Survey did not include Enterprise customers.