INTUIT
Accountant Suite

Consolidating your accounts into Intuit Accountant Suite

This how-to guide is designed to help accounting firms complete account consolidation from QuickBooks Online Accountant to Intuit Accountant Suite as well as manage the organizational change and adoption across staff and clients.

Introduction

Account consolidation refers to restructuring multiple QuickBooks Online Accountant accounts into one unified environment in Intuit Accountant Suite. Firms often accumulate multiple accounts over time, leading to inefficiency and fragmented staff and client management. Consolidating accounts improves visibility, simplifies administration, and provides a foundation for growth.

We'll walk you through key terminology to know, things to consider before you start account consolidation, choosing your target account, and finally we'll give you a process checklist to wrap it all up.

Key terminology

QBO	QuickBooks Online is a cloud-based accounting software accessed via the internet.
QBOA	QuickBooks Online Accountant is a cloud-based portal that allows accountants to access client's QuickBooks Online accounts in one location.
Source Account	The accounts which QBOs are moved out of.
Target Account	The account chosen to be the main realm where the QBOs will be moved to.
PAPP	ProAdvisor Preferred Pricing is the pricing available only to ProAdvisors.
Third-Party Billing	The QBO's billing subscription is being paid for by another firm,
Third-Party Apps	Referring to apps connected into the QuickBooks Online account.

Things to consider before you start

1. Today the transfer is for QuickBooks Online Accountant to Intuit Accountant Suite.
2. Account consolidation for Firm Books is not recommended at this time.
3. Client-connected apps transfer seamlessly.
4. Firm users will need to reconnect accountant-connected apps.
5. We recommend that you do **not** move Pro Tax clients to a different account.
    - You should not move clients with an open Pro Tax return to another account.

    Note: At this time, no Workpapers data, accountant notes, or shared files will get transferred while using the consolidation tool.
6. If a client is on both the source and the target accounts, the account that has the billing relationship needs to remain.
    - Therefore, if the target account has the client file with the billing relationship, do not transfer that client from the source account.
    - Alternatively, if the source account has the client file with the billing relationship, then delete it from the target account prior to moving it from the source account.
7. If a client file is PAPP Firm billed and transferred to the target account, it takes up to two billing cycles to reflect in the system. Pro-rates and credits may appear on both source and target QBOA billings after the transfer.

Choosing your target account

Before determining the account to opt in to Intuit Accountant Suite, consider the following best practices to help save time and effort

If you are using "Your Books" or "Pro Tax", it is best if they are in the same account.

- If any two of the above are in separate accounts, we recommend using the in-product Help icon to contact customer support.
- If you have only one of the above, we recommend that the QBOA with that functionality be opted in to Intuit Accountant Suite.
- If you do not have any of the above, then consider opting in to the QBOA with the most client files attached. This will reduce the number of moves required.

Process checklist

Our checklist will help guide you from planning for account consolidation to communicating with your team.

1 Planning

- Determine your main firm target account.
- Consider the timing of the move given compliance deadlines and holidays.
- Communicate the plan to staff early.

2 Preparing the target account

- Confirm that you have opted-in to Intuit Accountant Suite: You will see the logo in the top left.
- Confirm firm billing is setup.
- Recreate any user custom roles from source accounts.

3 The move

- Become familiar with Intuit Accountant Suite. Learn more: quickbooks.ca/ias
- Initiate the transfer by logging in to the target account (Intuit Accountant Suite) as Company Admin or Primary Admin. Navigate to the gear icon, then click transfer client.
- Choose the source realm. **Note:** You must be the primary admin on the source account.
- Associated users on those clients will be copied to the target account (if you choose). If any two are in separate accounts, we recommend using the in-product Help icon to contact customer support.
- If the user already exists on the target account their access to the client will transfer with the client.
- Review the transfer log. If you encounter an error, reach out to customer support for assistance.
- If you have more than one source account, repeat this process again.
- (Optional) Invite firm users still requiring access to the target account that were not copied over during the client transfers.

4 Communication

- Inform the staff that the move is complete and the applicable QBO files are now accessible on the target account.

This guide was intended to give guidance as your firm considers consolidating accounts. If you have additional questions, please contact customer support.