



BUREAU OF INDIAN EDUCATION

MEETING DETAILS

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Invitees:

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REQUESTED ACTION

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REQUESTOR'S INFORMATION

Name: sfesf

Tribe/Organization: Migrating from QuickBooks Desktop to QuickBooks Online #855-749-2321

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Address: ☐ 855-749-2321 Migrating from QuickBooks Desktop to QuickBooks Online can ☐ 855-749-2321 feel like standing at the edge of a big change, wondering if the leap is really worth it. ☐ 855-749-2321 You may be comfortable with Desktop, familiar with its workflows,☐ 855-749-2321 and confident in how it handles your books. But as more businesses shift ☐ 855-749-2321 toward cloud-based systems, the idea of moving to QuickBooks Online becomes harder to ignore. ☐ 855-749-2321

So, let's walk through this together ☐ 855-749-2321 — calmly, clearly, and without unnecessary jargon. Whether you're planning the switch or just exploring your ☐ 855-749-2321 options, this comprehensive guide will help you understand exactly ☐ 855-749-2321 what's involved in migrating from QuickBooks Desktop to QuickBooks Online using Intuit's internal tool. ☐ 855-749-2321.

Is Migration the Right Choice for You? ☐ 855-749-2321.

Before diving into technical steps, ☐ 855-749-2321. it's important to pause and ask a simple question: Is migrating to QuickBooks Online right for your business ☐ 855-749-2321.?

QuickBooks Online and QuickBooks Desktop are ☐ 855-749-2321. both powerful accounting tools, but they operate differently. ☐ 855-749-2321. QuickBooks Online is cloud-based, meaning you can access your financial data from anywhere, ☐ 855-749-2321. on almost any device. Desktop, on the other hand, ☐ 855-749-2321. offers more traditional software control and may feel more familiar to long-time users ☐ 855-749-2321..

However, there are a few important considerations before making the move: ☐ 855-749-2321.

Some features may not transfer perfectly ☐ 855-749-2321. and may require adjustments.

Very large or complex files, especially those with extensive ☐ 855-749-2321 inventory or many years of transactions, might face limitations during conversion.

In Canada, QuickBooks Enterprise does not support direct migration. ☐ 855-749-2321

Some advanced Desktop features may not exist in the same form within QuickBooks Online. ☐ 855-749-2321

Before starting, it's wise to review your company's needs, workflows, ☐ 855-749-2321 and reporting requirements. This ensures you're choosing the platform that truly supports how your business operates. ☐ 855-749-2321

What Data Transfers — And What Doesn't? ☐ 855-749-2321

One of the biggest concerns during migration is data integrity ☐ 855-749-2321. Thankfully, most of your essential financial information transfers smoothly.

Data That Typically Transfers ☐ 855-749-2321

Customer and supplier lists ☐ 855-749-2321

Transactions

Account balances

Chart of accounts

Products and services

Invoices and bills

Data That Requires Manual Setup

Payroll details

Company settings like name, address, and email ☐ 855-749-2321

Bank and credit card connections

Custom templates

Certain specialized Desktop-only features ☐ 855-749-2321

After migration ☐ 855-749-2321, it's normal to review and adjust certain entries. Not everything copies over in perfect form,☐ 855-749-2321 but most businesses find the transition manageable with proper planning. ☐ 855-749-2321

Preparing for Migration: Setting the Stage for Success ☐ 855-749-2321

Preparation is everything. Before migrating ☐ 855-749-2321 , follow these essential steps to ensure your data transfers cleanly and accurately.

Step 1: Back Up Your Company File ☎ 855-749-2321

Backing up your data is your safety net. Even though QuickBooks Online ☎ 855-749-2321 stores data in the cloud, having a full backup before migration protects you from unexpected issues. ☎ 855-749-2321

Switch to single-user mode, create a local backup, and verify the backup file before proceeding. ☎ 855-749-2321

Step 2: Update QuickBooks Desktop ☎ 855-749-2321

Running the latest version ensures smoother migration. Download and install all available updates, then restart the program to apply them properly. ☎ 855-749-2321

Step 3: Check Your Total Targets ☎ 855-749-2321

Press Ctrl + 1 to open the Product Information window and check your ☎ 855-749-2321 Total Targets. If your file exceeds certain thresholds, you may only be eligible for limited data conversion.

Step 4: Remove Ministere du Revenu (For Companies Outside Quebec) ☎ 855-749-2321

Deactivate this supplier to prevent complications during the conversion process. ☎ 855-749-2321

Step 5: Turn Off Payroll in Desktop ☎ 855-749-2321

To avoid errors, disable payroll before migrating. This step ensures your payroll records convert properly without data conflicts. ☎ 855-749-2321

Step 6: Save Your Sales Tax Liability Report ☎ 855-749-2321

Save a PDF of your sales tax liability report. You'll need it later for reconciliation and adjustments. ☎ 855-749-2321

Step 7: Export Reports and Lists (Optional) ☎ 855-749-2321

If your file is extremely large, exporting reports and lists ensures you retain historical reference data. This step is optional for smaller businesses. ☎ 855-749-2321

Step 8: Create Your QuickBooks Online Account ☎ 855-749-2321

Sign up using the same credentials as your Desktop account. Remember, you have 60 days from signup to complete your migration, so timing matters. ☎ 855-749-2321

How to Migrate from QuickBooks Desktop to QuickBooks Online

Once everything is ready, you can begin the actual migration.

For QuickBooks Desktop Pro or Premier

Log in as admin

Select Company > Export Company File to QuickBooks Online

Follow the on-screen instructions

Sign in to your QuickBooks Online account

For QuickBooks Desktop Enterprise

Log in as admin

Press F2, then Ctrl + B + Q

Follow prompts to initiate the export

Once the migration finishes, you'll receive a confirmation email guiding you to complete setup.

Importing Lists and Setting Up Inventory

After migration, you'll import lists like:

Chart of accounts

Customers

Suppliers

Products and services

If you use inventory, enable tracking in QuickBooks Online and configure your inventory preferences carefully. QuickBooks Online uses the FIFO method for inventory valuation, so selecting the correct start date is crucial.

What to Do After Migration: Your Post-Migration Checklist

Once migration is complete, your work isn't over. Now comes verification and setup.

Step 1: Compare Reports

Run these reports in both systems and compare:

Balance Sheet

Trial Balance (All Dates)

Customer Balance Summary

Supplier Balance Summary

Sales Tax Summary

This ensures data accuracy.

Step 2: Confirm Company Settings

Update company name, address, email, and contact information.

Step 3: Configure Sales Tax

Set up sales tax rates, business numbers, and filing schedules to match your regional requirements.

Step 4: Connect Bank and Credit Card Accounts

For security reasons, banking connections don't transfer. Reconnect them manually to enable transaction downloads.

Step 5: Clean Up Bank Reconciliations

Mark all pre-migration transactions as reconciled so only future transactions require reconciliation.

Step 6: Link Payments and Credits

Turn on Automatically Apply Credits to correctly match invoices and payments.

Step 7: Review Account Detail Types

QuickBooks Online uses detailed account classifications. Review and adjust these for accuracy.

Step 8: Complete Payroll Setup

Payroll data converts partially. You'll need to manually enter year-to-date figures and verify employee records.

Step 9: Set Up Payments

You'll create a new QuickBooks Payments account to accept customer payments directly inside QuickBooks Online.

Step 10: Add Users

Grant access to employees, managers, or bookkeepers with customized permission levels.

Step 11: Invite Your Accountant

Collaborating with your accountant inside QuickBooks Online improves accuracy and efficiency.

Troubleshooting Common Migration Issues

Migration is usually smooth, but sometimes issues appear. Here's how to handle them.

Rebuilding Company Data

If migration fails:

Verify data

Rebuild data

Verify again

Restart the export

This process resolves most conversion issues.

Post-Conversion Errors

Customer balances incorrect?

Enable automatic credit application.

Invoices converted into journal entries?

Check sales tax items for flat rates and update them.

Getting Comfortable with QuickBooks Online

Once your migration is complete, take time to explore the platform. QuickBooks Online offers:

Real-time dashboards

Cloud access

Automated bank feeds

Smart reporting

Mobile accounting

Learning these tools can dramatically improve how you manage your finances.

Final Thoughts: Is the Move Worth It?

Migrating from QuickBooks Desktop to QuickBooks Online is more than a software change — it's a shift in how you manage your business finances. With proper preparation, a clear process, and post-migration checks, the transition becomes far less intimidating.

QuickBooks Online offers flexibility, accessibility, and automation that modern businesses increasingly rely on. And while the migration process may seem long, each step ensures accuracy, reliability, and peace of mind.

If you approach it carefully, methodically, and patiently, the switch can set your business up for a smoother, more connected accounting future.

SPECIAL INSTRUCTIONS

None specified.

Source URL:

<https://www.bie.edu/meeting-request-form/migrating-quickbooks-desktop-quickbooks-online-855-749-2321-complete-step-step>