Converting a QuickBooks Desktop file to QuickBooks Online

Ready to convert your files from QuickBooks Pro or Premier to QuickBooks Online? If so, follow these 6 simple steps, and you'll be up and running in no time.

Some important things to note before you start:

Quick Reminder: There are a few limitations to keep in mind before you begin. Your data will not import if:

- Multi-currency is turned on.

- You have build assemblies in inventory.

- You use units of measure in inventory.

- You have more than 350,000 transactions.

If any of these limitations apply to you, our "Do it for me" conversion service can help. Call us at 1-866-854-7605 for more information.

Other import limitations

Payroll data will be converted into QuickBooks Online. However, further setup is needed after conversion. See page 7 for more information.

Inventory counts will be imported, but inventory detail must be entered manually. Because there is some loss of functionality such as multiple units of measure and build assemblies, some businesses with complex inventory needs may not be able to use QuickBooks Online. See page 7 for more information.
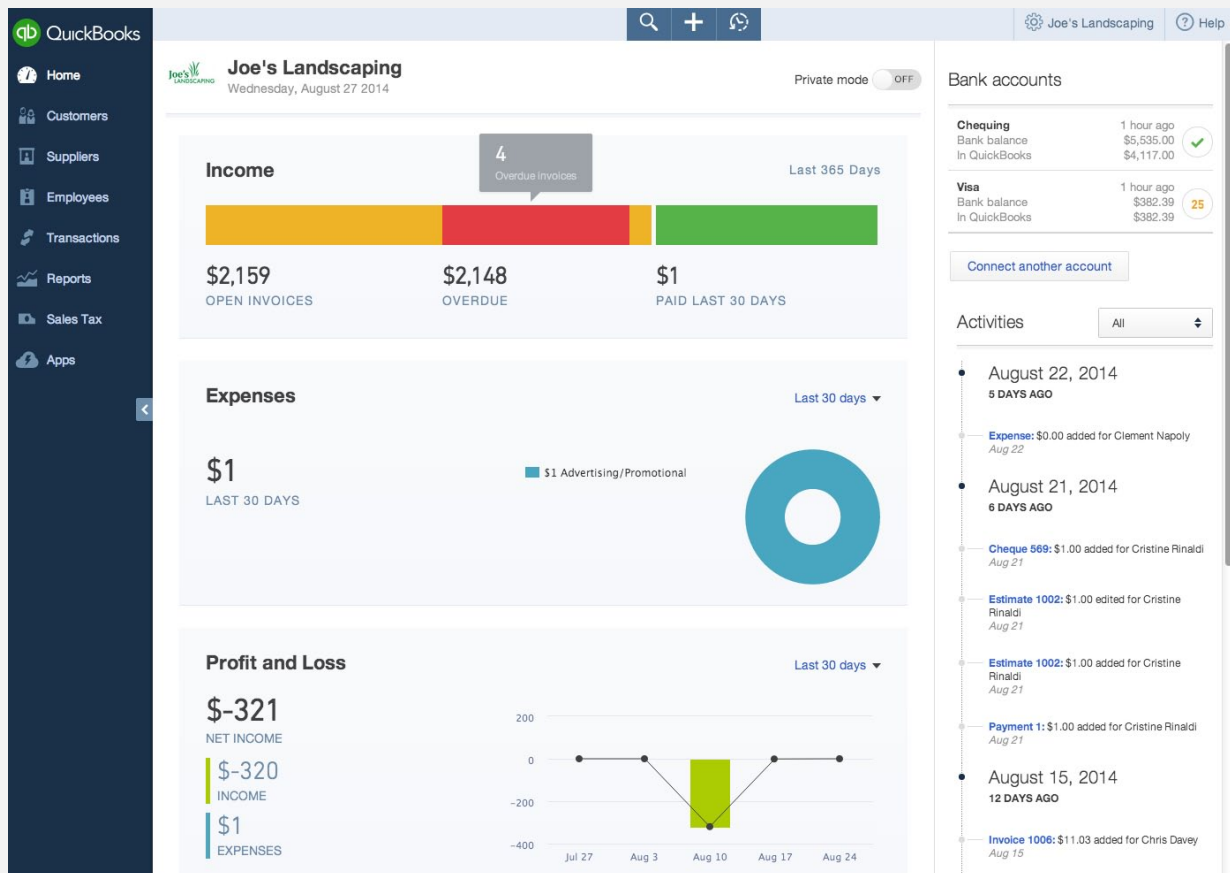
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Step 1.

Sign up for a QuickBooks Online account. It's simple to set up, please visit our website to register.

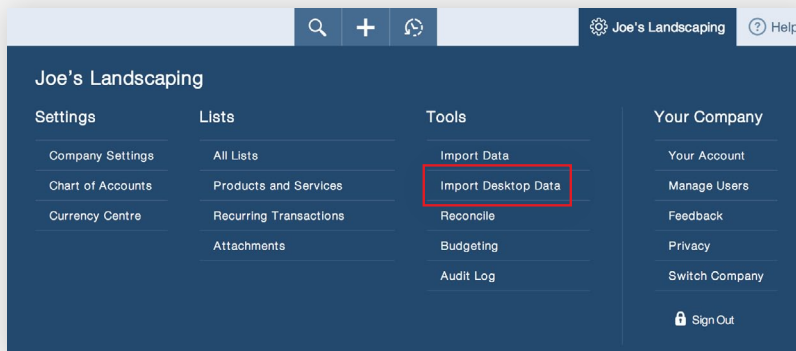If you already have a QuickBooks Online account, you can sign in here.

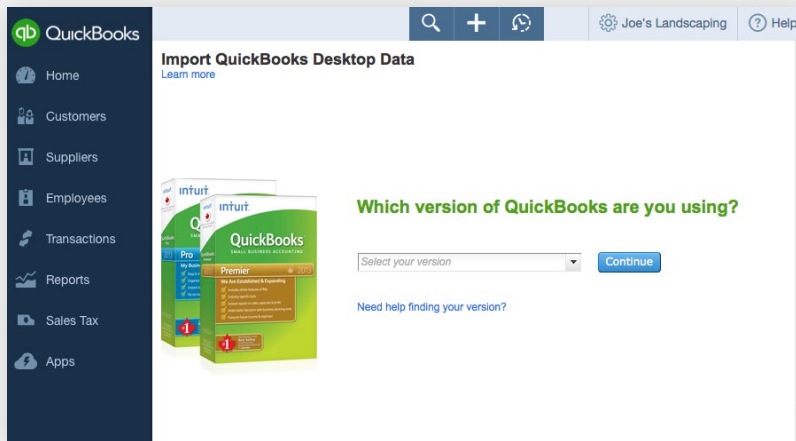Signing in takes you to your dashboard.

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Step 2.

To begin, click on the gear icon (⚙) in the upper right-hand corner and select **Import Desktop Data.**

Select the QuickBooks Desktop version that you are converting from.

Follow the on-screen instructions. The entire next step is carried out in your desktop file.

Note: If you're using QuickBooks 2011 and earlier, you'll need to update your version before you can export the data into QuickBooks Online. Select QuickBooks for Windows 2011 and below and follow the on screen instructions.
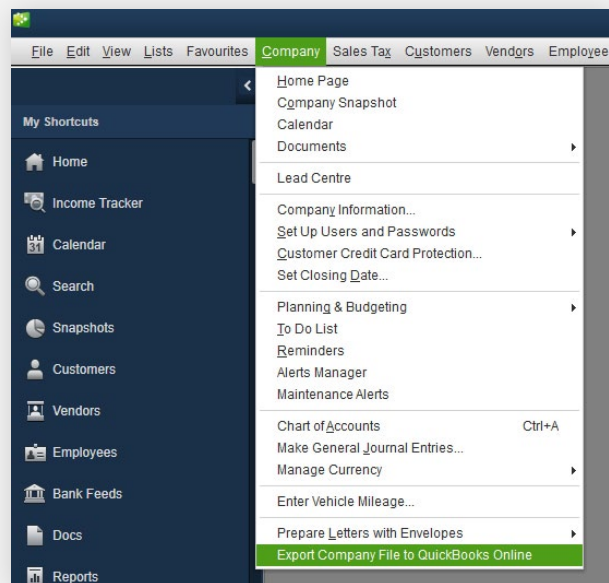
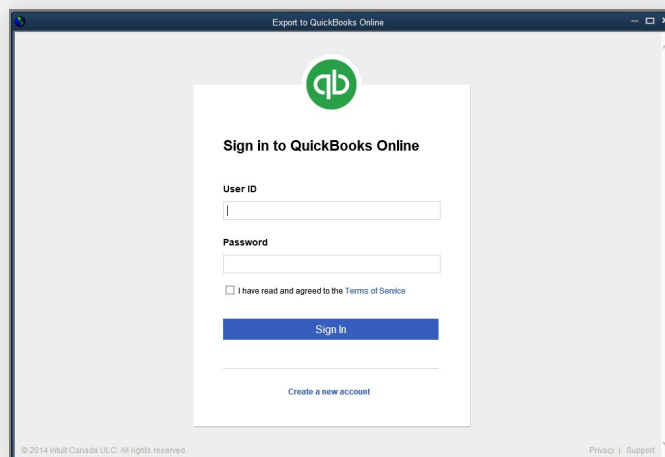# Converting a QuickBooks Desktop file to QuickBooks Online

Step 3.

Open your existing Pro or Premier desktop product. You'll want to make sure you have the most recent update of your QuickBooks version, so from the Help menu, choose Update QuickBooks.

Tip: Don't forget to restart QuickBooks after the Update has been downloaded.

Start your export to QuickBooks Online by selecting **Export Company File to QuickBooks Online** from the Company menu.
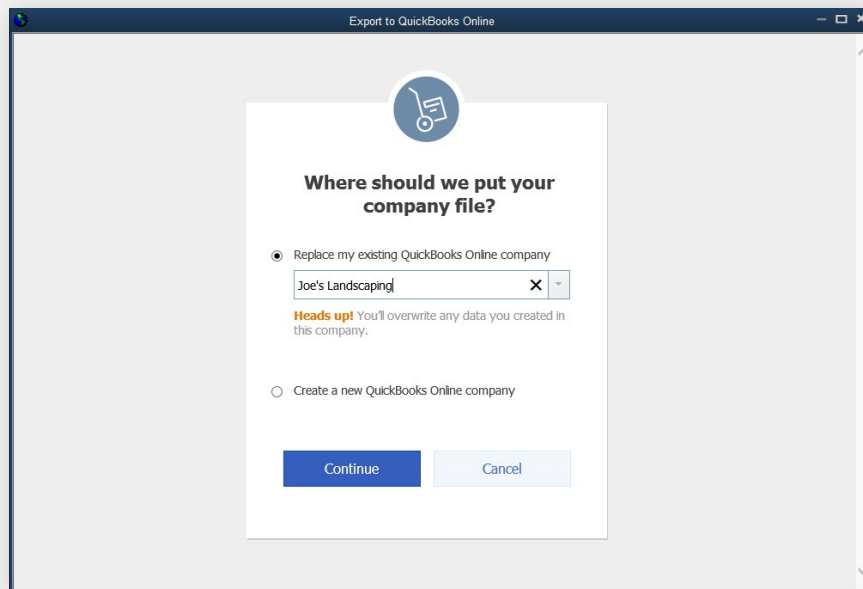

Sign in to QuickBooks Online and click **Submit**.
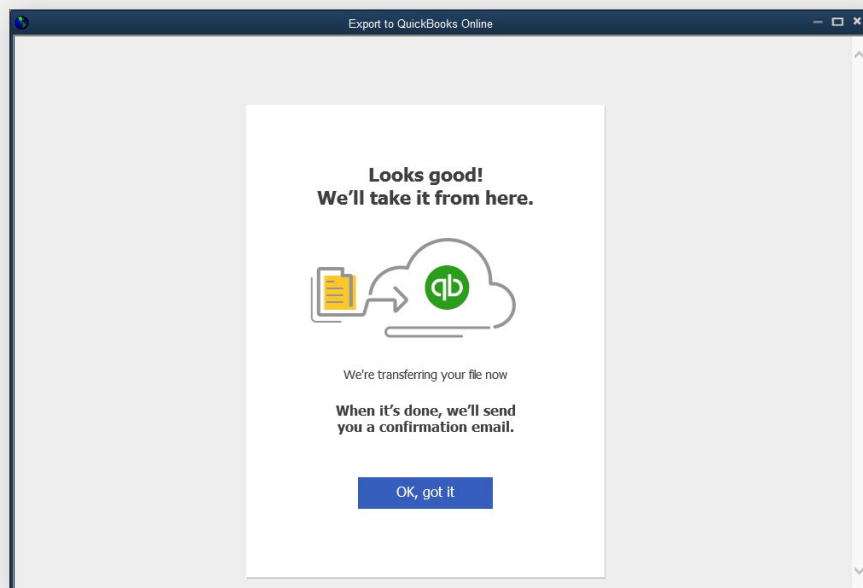
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Step 3 continued.

Select the QuickBooks Online company file you created at the beginning of this process.
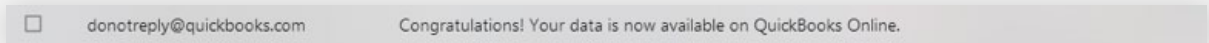Click **Continue.**

Confirm your choice by clicking **OK, got it.**

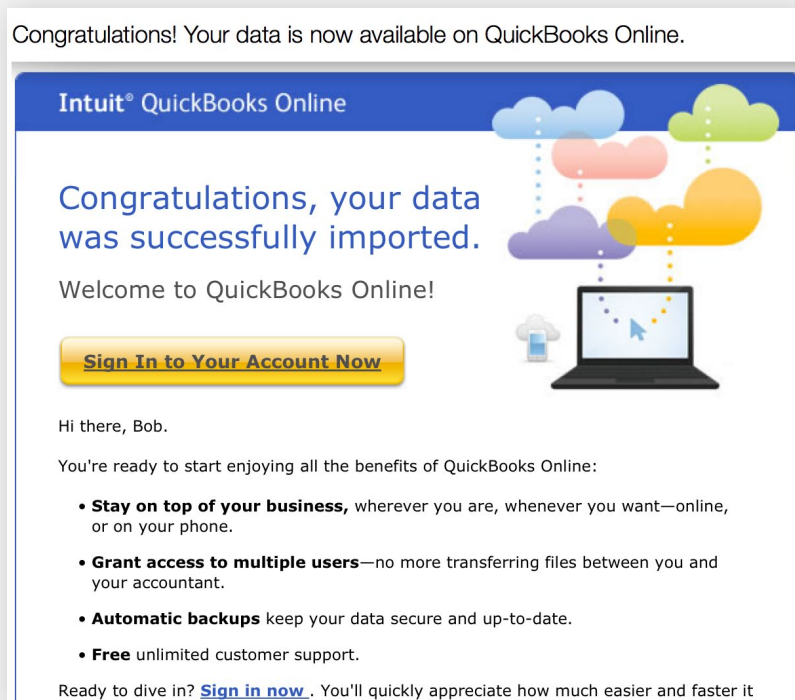# Converting a QuickBooks Desktop file to QuickBooks Online

Step 4.

Check your inbox for your email.

| ☐ | donotreply@quickbooks.com | Congratulations! Your data is now available on QuickBooks Online. |

Step 5.

Click the link and **sign in.**

Congratulations! Your data is now available on QuickBooks Online.

Intuit® QuickBooks Online

Congratulations, your data was successfully imported.

Welcome to QuickBooks Online!

Sign In to Your Account Now

Hi there, Bob.

You're ready to start enjoying all the benefits of QuickBooks Online:

- **Stay on top of your business,** wherever you are, whenever you want—online, or on your phone.

- **Grant access to multiple users**—no more transferring files between you and your accountant.

- **Automatic backups** keep your data secure and up-to-date.

- **Free** unlimited customer support.

Ready to dive in? **Sign in now** . You'll quickly appreciate how much easier and faster it

You are now signed in to QuickBooks Online. In order to view your company from your QuickBooks Online dashboard and sign in here.

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Step 6.
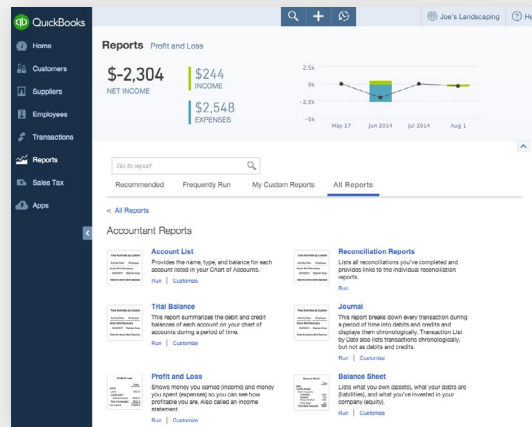
Your file has been converted to QuickBooks Online. Make sure that all data converted properly by comparing reports in both programs. Run both a Balance Sheet and a Profit and Loss report filtered for all dates. Any payroll data and sales tax filings transfer seamlessly. And you can pick up right where you left off with reconciling.

If you are using payroll and/or inventory, here are the additional steps you'll need to complete:

Payroll: Once the file is converted, there are a few tasks to complete before you can begin using payroll. First, select **Employees** from the menu bar and click **Turn on Payroll**. Follow the onscreen prompts. Next, complete employee profile information. Finally, enter 2014 prior pay details. You're now ready to begin processing payroll in QuickBooks Online.

Inventory: Inventory items are added, and the balance in the Inventory Asset account is correct. However, quantity on hand and cost data may not convert and will need to be completed after conversion. Turn on inventory tracking under **Company Settings**. Review each inventory item for proper quantity and cost. (Not all data is converted across).

Congratulations on your decision to convert to QuickBooks Online!

Please provide us feedback by clicking on the gear icon (⚙) in the upper right-hand corner and selecting **Feedback** under **Your Company**, so we can continue to improve the conversion experience!