

Moving QuickBooks Desktop to Online

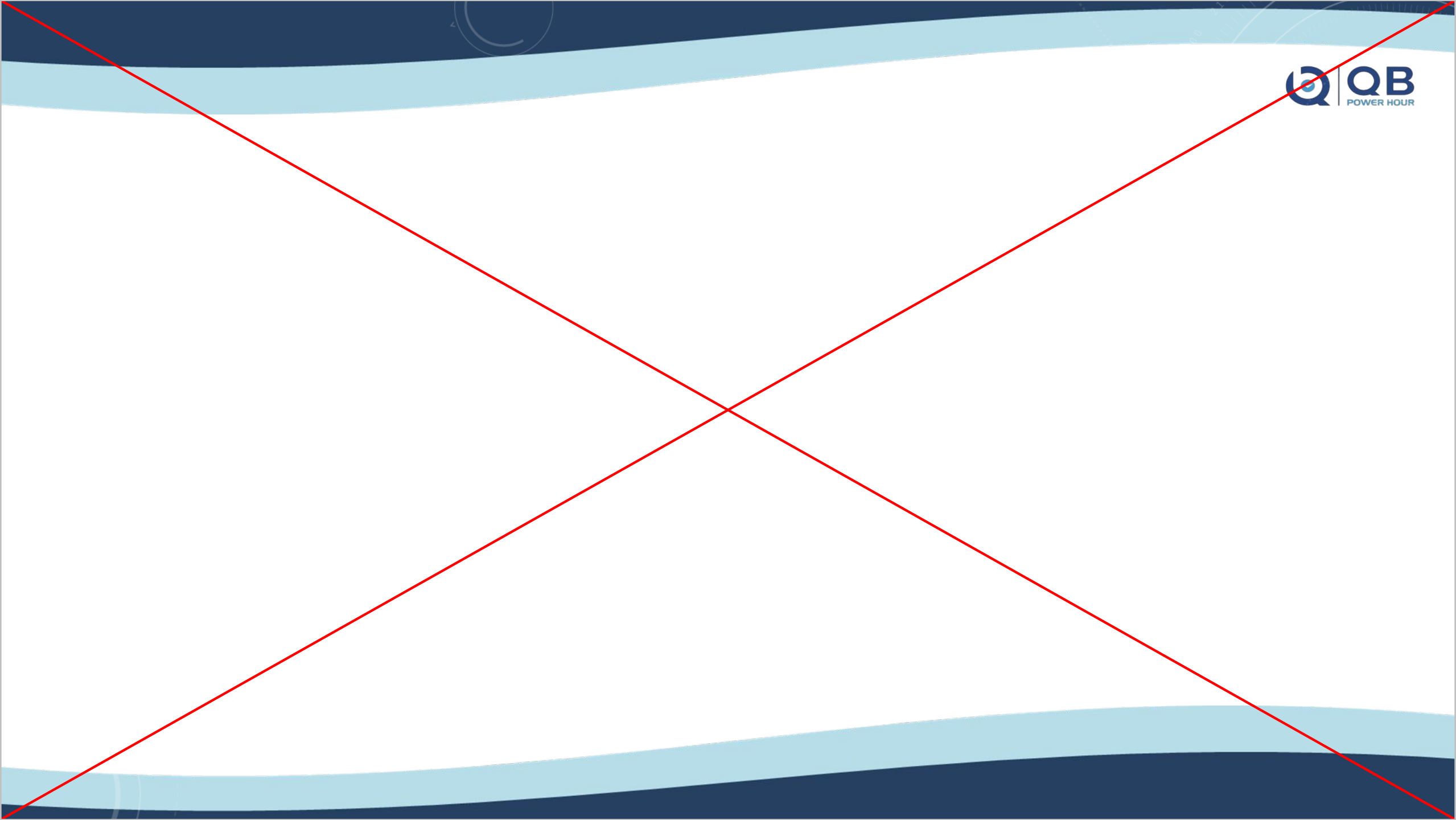
Latest Updates



Sharrin

Tuesday 8/19
9am PT | 12pm ET

Dan



Moving QuickBooks Desktop to Online

Latest Updates



Sharrin

Tuesday 8/19
9am PT | 12pm ET

Dan

Dan DeLong

- **Owner** - Danwidth and schoolofbookkeeping.com™
- Worked at **Intuit** for nearly 18 Years
- **Co-Host** - QB Power Hour
- **Co-Host** Workshop Wednesdays
- **Feature Deep Dive Guest Host** - The Unofficial QuickBooks Accountant Podcast
- **Admin Facebook Group** ~17,600 members
<http://facebook.com/groups/qbpowerhour>
- **Tech Editor** of **QBO for Dummies** (since 5th edition - 2019-2024) and **QuickBooks All-In-One**
- **Top 10 ProAdvisor 2021** - Social Media



Matthew “Spot” Fulton



- Founder of **Parkway Business Solutions**
- **QB Community Live** Facebook group
- Big Data Manipulator
- Workflow Design Nerd with API Experience
- Top Educator/Trainer/Writer 2021
- Top 100 ProAdvisor



Sharrin Fuller



- **Founder of Glass Wallet Ventures** where accounting pros go to stop doing it all and start leading
- **Built, scaled, and sold multiple 7-figure firms** using the exact methods she now teaches
- **Creator of the Clone & Conquer Method™** a no-fluff system for building a team and backend that runs without you
- **Host of *Start 2 Scaling: The \$1 Million Journey*** podcast and creator of the Remote Team Roadmap™
- **Top 100 ProAdvisor for three consecutive years** and 2025's Top QuickBooks Educator
- **Runs 3 companies in just 3 days a week** and helps firm owners do the same with strategic advisory, courses, and her Community Hub

QB Power Hour Webinars Details

Every Other Tuesday at 12:00 ET

Upcoming Webinars:

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
([Channel on Earmark](#))

Show Topics:

- QuickBooks tips, what's new, troubleshooting, etc.
- Marketing, pricing, apps and more
- Topics to help accounting professionals succeed in their business

Where to Find our Resources:

- PDF of slides
- Past Recordings and Podcast
- and other Resources

www.qbpowerhour.com/resources

Want CPE for this Session?

- 1 Get the Earmark App
- 2 Take 5 Question Quiz
- 3 Receive CPE Certificate

This session will be recorded and available on demand, we'll email you when the CPE quiz is ready.

 EARMARK

earmark.app

Intuit News:

- MFA vs 2-Step Verification

QuickBooks Desktop Conversion

- **New Options/Updates**

- More Data
- Checklists/Status
- Accounting Only
- Payroll
- Attachments

- **Resources**



Polling Question 1

Do you help your clients with desktop migrations

- ☐ Yes - I do it all the time
- ☐ I need to learn more to feel comfortable
- ☐ No - Tried it once....still licking the wounds
- ☐ N/A

Spotlight Sponsor - [Free 14 Day Trial](#)

method



New Options with Desktop Migration


New Options in Migration

- More Data!!!
 - 2 Million Targets
- Checklists/Status
 - Desktop Checklists
 - Migration Status in Desktop
- Accounting Only
- Lists Only

[Conversion Resource on SoB](#)

Get your data into QuickBooks Online

See how everything looks with your own information. All your info stays in QuickBooks Desktop so if you need to go back to it, you can.



Ready to go

Export to a QuickBooks Online company that you're ready to start using.

[Get started](#)

[See your data in a 30-day free trial](#)

Get your Desktop company data ready for migration

Understand the steps to prepare your company file for migration.

0 of 9 done

[Open Checklist](#)

Make a seamless transition

No need to delete anything

Easily copy your business data to QuickBooks Online and keep the original file.

Your data is protected

Count on updates that include the latest security capabilities.

Free phone and chat support

Our experts are ready to answer your questions so you can hit the ground running.

Search your question

FAQ

[Read step-by-step guides](#)


[What information exports from QuickBooks Desktop?](#)

[What happens to my existing data in QuickBooks Desktop?](#)

[Will my data be safe in the cloud?](#)

[Does QuickBooks Online sync with my QuickBooks Desktop version?](#)

[How does free trial work?](#)



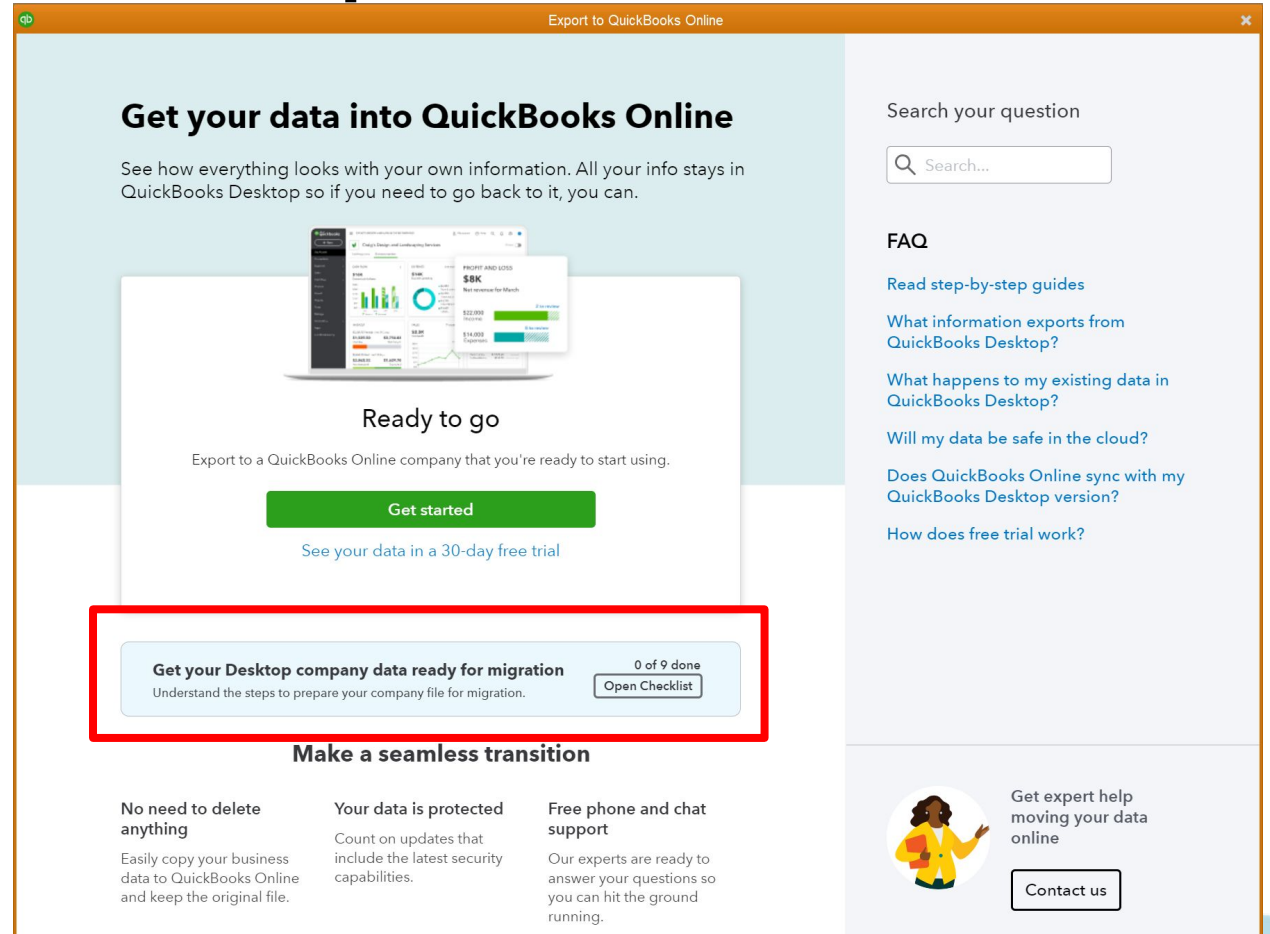
Get expert help moving your data online

[Contact us](#)

Checklist and Status in QB Desktop

- Contextual based on File
- Estimated Time
- Completion or Failure

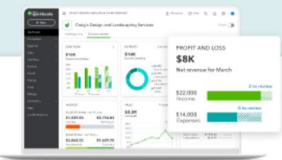
[Conversion Resource on SoB](#)



Export to QuickBooks Online

Get your data into QuickBooks Online

See how everything looks with your own information. All your info stays in QuickBooks Desktop so if you need to go back to it, you can.



Ready to go

Export to a QuickBooks Online company that you're ready to start using.

Get started

[See your data in a 30-day free trial](#)

Get your Desktop company data ready for migration 0 of 9 done

Understand the steps to prepare your company file for migration. [Open Checklist](#)

Make a seamless transition

No need to delete anything Easily copy your business data to QuickBooks Online and keep the original file.	Your data is protected Count on updates that include the latest security capabilities.	Free phone and chat support Our experts are ready to answer your questions so you can hit the ground running.
--	--	---

Search your question

FAQ

[Read step-by-step guides](#)


[What information exports from QuickBooks Desktop?](#)

[What happens to my existing data in QuickBooks Desktop?](#)

[Will my data be safe in the cloud?](#)

[Does QuickBooks Online sync with my QuickBooks Desktop version?](#)

[How does free trial work?](#)

 Get expert help moving your data online

[Contact us](#)

Post Conversion Best Practices

- Accountant User gets a better Import Summary
- To Do Checklist

[Get the Checklist \(Membership Required\)](#)

[Conversion Resource on SoB](#)

A	B	C	D	E	F	G	H
Post-Conversion Checklist							
Workflows & Assignments							
<p>NOTE: The features and workflows below are listed in the order of what QBO level the feature is available in. Use this worksheet to quickly see what features and workflows are in play and assign the workflow to a team member. As you make your way through the Feature/Workflow assignments, this another opportunity to verify again what QuickBooks Online subscription has the features your client requires. Edit and customize this worksheet to your firm's specific needs.</p> <p>How to use the Workflows & Assignments worksheet:</p> <p>Column A - Identify if a feature or workflow is or will be in use and update the "Choose from dropdown" option</p> <p>Column B - Assign the work to either a client or firm team member by typing in the name or names of the team member(s)</p> <p>Column C - Establish if training in that workflow is required or not and update the "Choose from dropdown" option</p> <p>Columns E,F,G,H - Again verify if the feature is available in the client's QuickBooks Online subscription and upgrade or downgrade as necessary</p>							
Feature in use?	Team member assigned	Team training required	Feature or Workflow details	Simple Start	Essentials	Online Plus	Online Advanced
Choose from dropdown		Choose from dropdown	Invoice billable hours		x	x	x
Choose from dropdown		Choose from dropdown	Invoice delayed charges		x	x	x
Choose from dropdown		Choose from dropdown	Set up custom fields for sales transactions		x	x	x
Choose from dropdown		Choose from dropdown	Manage recurring sales transactions		x	x	x
PAYROLL							
Choose from dropdown		Choose from dropdown	Set up time-tracking-only users		x	x	x
EXPENSES							
Choose from dropdown		Choose from dropdown	Manage accounts payable		x	x	x
Choose from dropdown		Choose from dropdown	Set up custom fields for expense & AP transactions		x	x	x
Choose from dropdown		Choose from dropdown	Manage recurring expense & AP transactions		x	x	x
SALES							
Choose from dropdown		Choose from dropdown	Manage Inventory (FIFO)			x	x
Choose from dropdown		Choose from dropdown	Set up Customer types			x	x
Choose from dropdown		Choose from dropdown	Set up Price rules			x	x
Choose from dropdown		Choose from dropdown	Manage billable expenses			x	x
EXPENSES							
Choose from dropdown		Choose from dropdown	Purchase orders			x	x
Choose from dropdown		Choose from dropdown	Expenses by customer			x	x
REPORTING							
Choose from dropdown		Choose from dropdown	Project tracking			x	x
In use		Choose from dropdown	Budgets			x	x
TBD		Choose from dropdown	Class tracking			x	x
Choose from dropdown		Choose from dropdown	Location tracking			x	x
Not in use		Choose from dropdown	Reports-only users			x	x
SALES							
Choose from dropdown		Choose from dropdown	Import invoices or sales receipts from CSV				x
Choose from dropdown		Choose from dropdown	Batch-enter invoices, sales receipts, or deposits				x

Walkthrough of Migration

Intuit News: Multi - Factor Authentication vs 2-Step Verification



Multi-Factor Authentication vs 2-Step Verification

The Same

- 6 digit codes sent to verify login attempt

.....But Different

- MFA
 - Mandatory
 - Occurs when new login is detected
- 2-Step
 - Optional
 - Happens every time



[S of B Blog Article](#) - Manage Intuit Account

Resources - MFA, 2-Step, and Passkeys



[Intuit Article - MFA & 2-Step](#)

[S of B Blog Article](#) - Passkeys

Polling Question 2

Do you have 2-Step Verification currently enabled?

- ☐ I thought MFA and 2-Step Verification was the same thing
- ☐ This is the first I'm hearing of it
- ☐ I use passkeys
- ☐ I use an Authenticator App
- ☐ N/A

Spotlight Sponsor - [Learn More](#)

 Qbox

Migrating QB Payroll Best Practices

What Happens to Payroll during Migration

- Financial impact of Payroll migrated first
 - Employee List
 - Paychecks Liability Checks => Checks
 - Liability Adjustments => Journal Entries
- Payroll Setup Occurs After Migration
 - Employee Setup -
 - Earnings and Deductions
 - Direct Deposit
 - Current Year Payroll Only
 - YTD Payroll
 - Tax Payments



[S of B Blog Conversion Page](#)

Migrating Attachments

Attachments in Desktop

- Documents are stored in Same location
- Not part of the backup
- Once attached, Originals are not needed

[QuickBooks Document FAQs](#)



Migrating Attachments - The Deets

In the past, not possible with DT migration, need third party to move (\$\$\$\$)

All files must be local C:\ or D:\

Must be done from Desktop (not Web portal)

Attachments less than 30MB

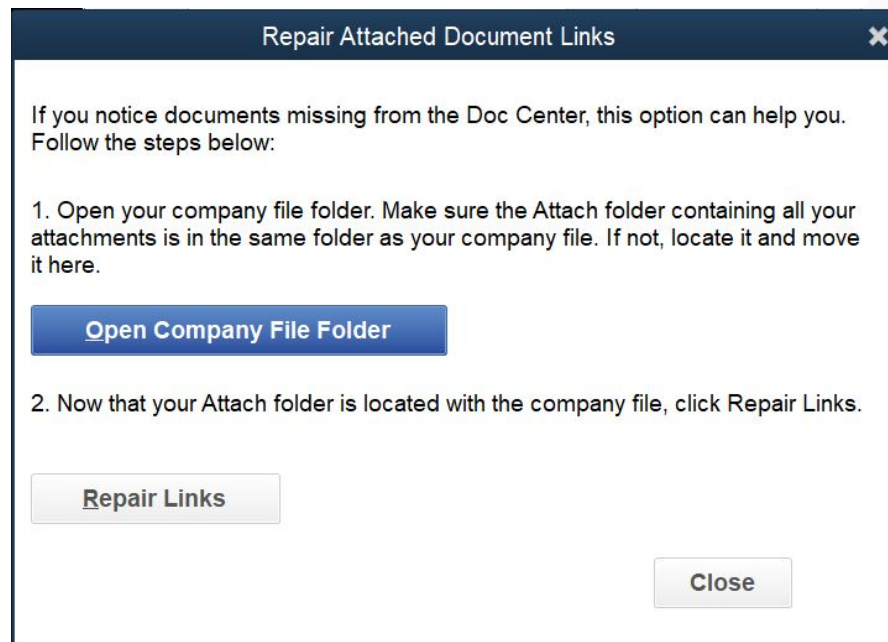
Only certain file types

- CSV
- DOC
- GIF
- JPEG
- PDF
- PNG
- TIFF
- XLSX
- XML



Migrating Attachments - Process

- Locate the Documents folder
- Compress it
- Move it Local
- Clean up Links



Polling Question 3

Was this information useful?

- ☐ Yes
- ☐ No
- ☐ N/A



QB Power Hour Store



Dad Hat with Leather Patch (Rectangle)

\$19.35



Unisex Softstyle T-Shirt

\$18.75



QB Power Hour - Magnetic Induction C...

\$49.50



QB Power Hour Color Morphing Mug, 1...

\$12.99



[Buy Your Swag Here](#)

Get Swag & Support The Show

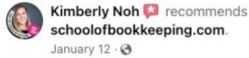
- Wireless Chargers
- Heat Activated Coffee Mugs
- T-Shirts
- Hats

[Want to Create Your Own Swag Store?](#)

Quick Answers at schoolofbookkeeping.com

- Chat/Email Support
- Day/Monthly/Annual Options
- Bundle with QBO subscriptions


[Learn More](#)

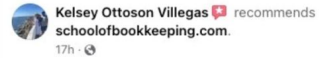


Kimberly Noh recommends schoolofbookkeeping.com. January 12 · 🌐

The School of bookkeeping is the place to go for all things bookkeeping.

Kimberly Noh - Noh Hassle Bookkeeping







Kelsey Ottoson Villegas recommends schoolofbookkeeping.com. 17h · 🌐

Dan has been absolutely amazing and so helpful! I am so grateful to have found SchoolofBookkeeping. Always prompt, correct and helpful answers! Thank you, Dan!

Kelsey Ottoson Villegas - OttoBooks LLC






Lidiya Louk recommends schoolofbookkeeping.com. about 3 years ago

I had a great experience with a QuickBooks Desktop to QuickBooks Online conversion. There were some challenges in the process, but the team performed very well and got me to a great outcome. Thank you again!!

Like 2 Share



Shanon Young recommends schoolofbookkeeping.com. about 3 years ago

Very knowledgeable and helpful. So quick to answer all my questions. Highly recommend! Thanks Dan!!

Like 2 Share

Upcoming Events

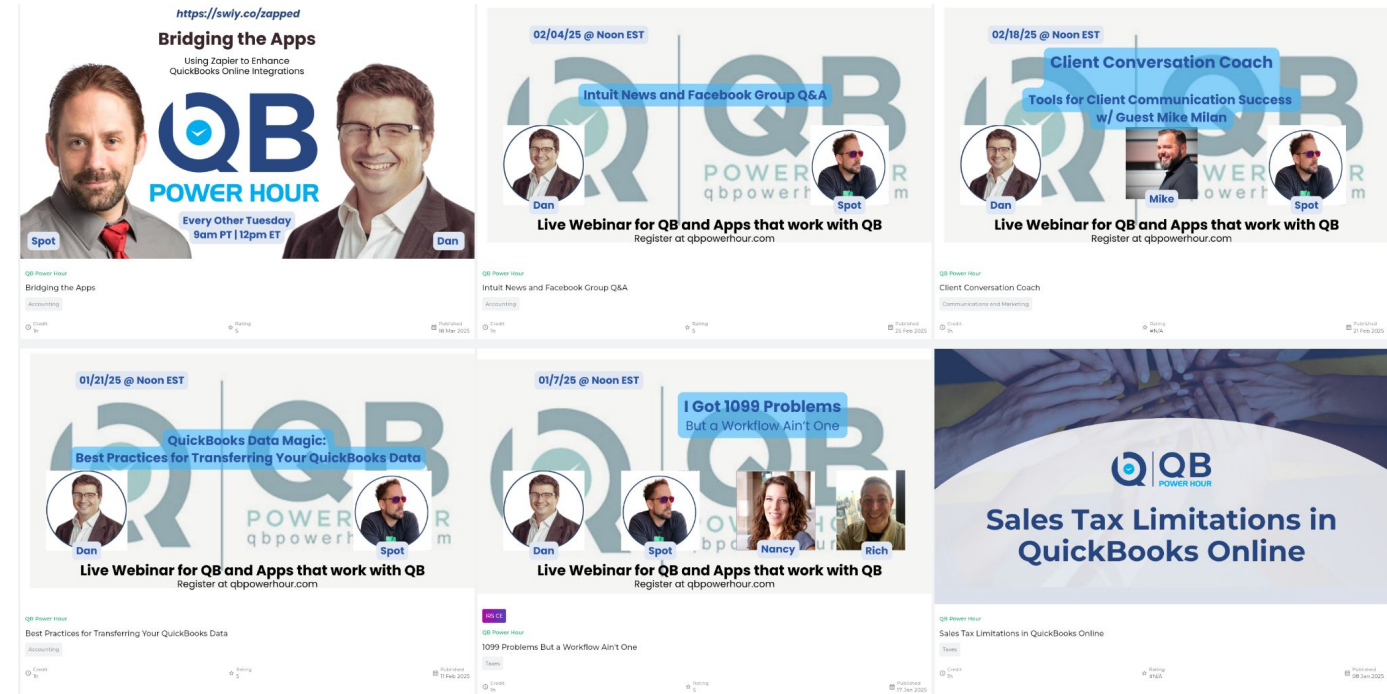
- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:
<http://qbtrainingevents.com>



Appendix

QB Power Hour on Earmark

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
- [Channel on Earmark](#)



Housekeeping

QUESTIONS



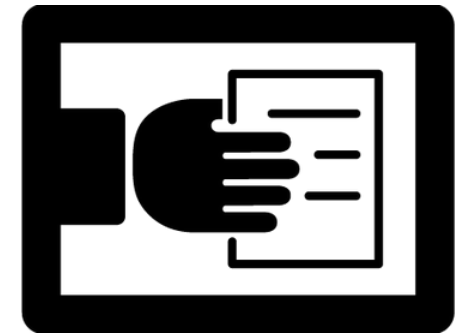
PLEASE USE THE Q&A
ICON FOR QUESTIONS
ON TODAY'S TOPIC

COMMENTS



IF YOU HAVE
COMMENTS, USE
CHAT

HANDOUTS



ALL HANDOUTS ARE
[HERE](#) OR ON OUR
[WEBINAR ARCHIVE](#)



Best Practices in Troubleshooting QuickBooks

Tuesday, April 1, 2025 @ 9:00 am PST | 12:00 pm EST

Dan DeLong
Matthew “Spot” Fulton



Michelle L. Long, CPA, MBA

- **Owner** of Long for Success, LLC, Kansas City, Missouri
- **International speaker** – Intuit Trainer/Writer Network
- **Author** – 5 Books (Available on Amazon), numerous Intuit Academy courses, co-author QB and QBO Advanced Certifications
- **Co-Host** – <http://QBPowerHour.com>
- **Facebook Group** ~17,000 members
<http://facebook.com/groups/qbpowerhour>
- **Linkedin Group** ~160,000+ members – <http://tinyurl.com/qbgroup>
- **Honors & Recognition** – Most Powerful Women in Public Accounting, Top 100 Small Business Influencer, Top 10 ProAdvisor (Top Trainer/Writer & Top Social Media), SBA Financial Services Champion & more

Long
for Success LLC

