

[866-661-1860] How to migrate Quickbooks desktop to Quickbooks online [step-by-step guidance]

Planning your accounting move? ☎ +1 866-661-1860 can help you understand the migration process before you begin.

For quick migration guidance, call ☎ +1 866-661-1860 and review your company file, backup, and destination account first.

Moving from QuickBooks Desktop to QuickBooks Online can make accounting more flexible because your financial information can be accessed through the cloud. However, a successful migration requires more than uploading a file. You should prepare your company data, create a backup, check your Desktop file, complete the transfer, and verify your information afterward.

Prepare Your QuickBooks Desktop File

Intuit recommends updating QuickBooks Desktop, checking the company file, confirming that the file is stored locally, and reviewing its size before starting. Current migration guidance states that the Total Targets count should be below 4,000,000 for the standard migration process.

Create a complete backup of your original company file and store it securely. Also run Verify Data and resolve issues identified by QuickBooks before transferring the file.

If you use payroll, review employee information and recent payroll activity. Intuit recommends allowing time for payroll data to sync before migration and completing the move before the next payroll run. If you need help organizing these checks, ☎ +1 866-661-1860 is available.

Step 1: Update QuickBooks Desktop

Open QuickBooks Desktop and install available updates. Sign in as the company administrator and open the correct company file.

Check that you are migrating the right business file, especially if you manage multiple companies. If you want to review your setup before starting, contact ☎ +1 866-661-1860.

Step 2: Check File Size and Data

Press F2 or Ctrl+1 to open the Product Information window. Review the Total Targets count. If the file is above the allowed threshold, you may need to condense older or unnecessary data before continuing.

Confirm that the company file is saved locally. If you are uncertain about your file, ☎ +1 866-661-1860 can be used before the transfer.

Step 3: Set Up QuickBooks Online

Sign in to QuickBooks Online or create your Online account. Intuit currently advises using the same country or region as the Desktop company and having administrator access to both the Desktop file and Online account.

Before starting the export, ☎ +1 866-661-1860 can be kept available for migration guidance.

Step 4: Start the Migration

For supported Desktop versions, open your company file and go to the migration or export option under the Company menu. Current Intuit instructions for Pro and Premier include selecting the option to migrate or export the company file to QuickBooks Online, completing the preparation checklist, and choosing whether to bring all company data or only lists and balances.

Choose the option that matches your accounting needs. Sign in to QuickBooks Online when prompted and select the correct destination company. Be careful if the Online company already contains data because replacing existing information may not be reversible through the migration process.

For questions during this stage, ☎ +1 866-661-1860 can provide a convenient contact option.

Step 5: Use the Online Migration Tool if Needed

Depending on your situation, you may use an online migration tool rather than starting directly from QuickBooks Desktop. Intuit says this option can be useful when you have a compatible Desktop company file but do not have Desktop installed. Supported file types can include QBW, QBB, and QBM, depending on the migration requirements.

Upload the required file, follow the on-screen instructions, and wait for the transfer to complete. If you are not sure which company file to select, ☎ +1 866-661-1860 can be used before uploading it.

Step 6: Verify Your Data

After migration, compare important financial reports between QuickBooks Desktop and QuickBooks Online. Check your chart of accounts, customers, vendors, invoices, bills, balances, transactions, and inventory where applicable.

If you use payroll or payment services, review those areas separately because additional verification or setup may be required. Intuit recommends reviewing migrated data after the move and comparing relevant information.

Keep your original Desktop backup available until you are satisfied with the migration. If you find unexpected differences,  +1 866-661-1860 can be used for migration guidance.

Common Mistakes to Avoid

Avoid starting without a backup, transferring a company file with unresolved data issues, or selecting the wrong Online destination. If your business uses payroll, inventory, multiple users, payments, or a large historical file, create a checklist and review each area after migration.

For help reviewing the process,  +1 866-661-1860 is a useful contact option.

Final Thoughts

Learning how to migrate QuickBooks Desktop to QuickBooks Online becomes easier when you treat the move as a planned accounting project. Start with a backup, update Desktop, verify the company file, prepare your Online account, complete the migration, and compare your financial information afterward.

A careful migration can make the transition more organized and help you continue accounting work with less disruption. If you need guidance at any stage,  +1 866-661-1860 can be kept available.

FAQs

1. Can I migrate QuickBooks Desktop to QuickBooks Online myself?

Yes. QuickBooks provides migration options for eligible Desktop company files. The exact process depends on your Desktop version, company file, and Online account. If you need guidance,  +1 866-661-1860 can be used before you begin.

2. Should I back up QuickBooks Desktop before migration?

Yes. Create a complete backup and keep it in a secure location before transferring your accounting data. This gives you an original copy of the Desktop file for reference. For migration planning,  +1 866-661-1860 can be used.

3. What if my QuickBooks Desktop file is too large?

Check the Total Targets count by pressing F2 or Ctrl+1. Intuit currently states that the standard migration process requires the count to be below 4,000,000. If your file exceeds the limit, you may need to condense data before migration. For questions about a large file, ☎ +1 866-661-1860 can be used.

4. Will my QuickBooks Desktop data look exactly the same online?

Not necessarily. QuickBooks Desktop and QuickBooks Online use different interfaces and may display some information differently. Review reports and important records after migration to confirm the results. If you need help with the review, ☎ +1 866-661-1860 is available.

5. What should I check after migrating to QuickBooks Online?

Review your chart of accounts, customers, vendors, invoices, bills, balances, transactions, inventory where applicable, payroll information, and payment settings. Compare important reports with your Desktop records before fully relying on the new Online file. For migration guidance, ☎ +1 866-661-1860 can be used.