GUIDE

Moving from QuickBooks Desktop to QuickBooks Online

Intuit stopped selling new QuickBooks Desktop Pro, Premier and Mac subscriptions to new US customers in 2024, so many owners are moving to QuickBooks Online. Lists, transactions and balances transfer with Intuit's tool. Reports, reconciliation history and some settings don't, so clean up first and check every balance after.

QUICK FACTS

- **Why now.** New Pro, Premier and Mac sales ended for new US customers in 2024
- **Transfers.** Lists, transactions and balances
- **Check after.** Balance sheet and P&L must match to the penny

Why are owners moving off QuickBooks Desktop?

Intuit stopped selling QuickBooks Desktop Pro Plus, Premier Plus and Mac Plus subscriptions to new US customers after September 30, 2024, and older Desktop versions lose support and connected services on a rolling schedule. Existing subscribers can still renew for now, but the direction is clear. QuickBooks Online also brings bank feeds, access from anywhere and easier sharing with your accountant.

What moves over, and what doesn't?

MOVES OVER	USUALLY DOESN'T
Chart of accounts, customers, vendors and items	Reconciliation reports (balances move, the history doesn't)
Open invoices, bills and transactions	Memorized reports and custom report layouts
Account balances and history	Some payroll history and settings
Most attachments and notes	Audit trail, budgets and some custom fields

Large files can hit limits on how many list entries QuickBooks Online allows. If yours is very large, moving only open items and balances is sometimes the cleaner choice.

General information, not tax advice for your situation.

What should I do before moving?

1. **Reconcile every bank and card account** through the last full month
2. **Run and save reports**: balance sheet, profit and loss by year, open invoices, open bills and payroll summaries
3. **Clean up lists**: merge duplicate vendors and customers, make inactive what you no longer use
4. **Back up the company file** and keep it somewhere safe
5. **Pick a cutover date**, usually a month end or year end

How does the move work?

Use Intuit's export tool from inside QuickBooks Desktop, sign in to the new QuickBooks Online company and start the import. It can take a few hours. Then reconnect bank feeds, set up the bank rules again and move payroll if you run it in QuickBooks.

How do I know it worked?

Run the balance sheet and profit and loss in both systems for the same date and compare them line by line. They should match exactly. Check open invoices and bills, then sales tax payable and payroll liabilities. Anything that doesn't match gets fixed before you do your first month in the new system.

We do this as part of catch-up bookkeeping, and keep the books current afterward.

Common questions

Can I still use QuickBooks Desktop?
If you already have it, you can keep renewing for now. New customers in the US can't buy Pro, Premier or Mac subscriptions. Enterprise is still sold.

How long does the move take?
The import itself takes hours. The cleanup before and the checks after usually take a few days to a few weeks, depending on how tidy the file is.

Will I lose my old data?
Most transactions move over. Keep your Desktop backup and saved reports so you can always look back.

Should I switch to Xero instead?
It's an option, and the move is similar. If your accountant and apps already work with QuickBooks, QuickBooks Online is usually the simpler step.

Want your books off your plate?

One accountant keeps them current, every month. Book a free 30-minute call at eminenttax.com/contact or call (972) 347-4590.

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