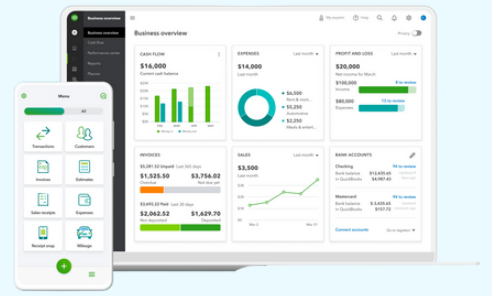


SWITCHING FROM QuickBooks Desktop TO QuickBooks Online




Switch from QuickBooks Desktop (QBD) to QuickBooks Online (QBO) in 5 easy steps! OfficeOps can help you make the transfer stress-free - at any stage of the process.

01 COMPATABILITY

Learn if your books are a good fit for QBO by checking that your file type is compatible, you are not using inventory, your file is up-to-date, and that the total number of targets is within range.

02 PREPARATION

Prepare your files for upload! This includes filing payroll taxes, updating the QuickBooks file, checking that reconciliations are up-to-date and backed-up, then selecting what data to convert.

 **OfficeOps knows what data to convert! Trust the professional to help you make these decisions.**

At this stage, OfficeOps will discuss the process of conversion and timelines during a strategy meeting with you.


03 CONVERSION

OfficeOps will create a QBO file, but the conversion must happen from the desktop your original file is located. An upload can be used in limited cases.

The migration will take 2-3 hours. Once the file is converted, you can connect your bank accounts and log-in.


04 VERIFICATION

Run all data in the desktop from the new QBO files and compare how they are different. Then solve any problems that arise in the books.

 **Verifying data is difficult. We highly recommend a professional bookkeeper like OfficeOps do this part.**

05 CLEANUP & SUPPORT

OfficeOps can help clean-up as you need, such as changing the chart of accounts, reconciling, or streamlining systems.

 **OfficeOps offers training to help you learn the QBO workflow! These 1-hr meetings solve issues and address questions as they arise. They can be scheduled weekly, bi-weekly or monthly to keep you on track and learning.**

