MIGRATION PLAYBOOK · BUSINESS APPS

How to move from QuickBooks Desktop to QuickBooks Online

Intuit's migration tools copy your Desktop company file into QuickBooks Online, either all data or lists and balances only. Clean up and reconcile first, import within 90 days of signing up, then rebuild bank feeds, users, memorised reports and recurring payments.

Updated 4 Nov 2026 3 phases 5 detailed steps 3 official sources

START HERE

How do you move from QuickBooks Desktop to QuickBooks Online?

SHORT ANSWER

This moves your accounts from QuickBooks Desktop on your computer to QuickBooks Online in the browser. You tidy and reconcile the Desktop file, then Intuit's tool copies it into a new QuickBooks Online company. Afterwards you reconnect bank feeds, invite users again and rebuild a few reports and recurring payments.

- **Recommended route:** Intuit's desktop or online migration tool, into a new QuickBooks Online company
- **Order:** Clean up first, import once into an empty company, then rebuild and check.
- **3 phases:** Clean up Desktop, Migrate and Rebuild and check.
- **You're done when:** Balance sheet and P&L match Desktop at the migration date.

Pick a quiet time, such as just after a month end, and finish well before your next payroll run.

RECOMMENDED ROUTE

Intuit’s desktop or online migration tool, into a new QuickBooks Online company

Intuit's own tools move lists, transactions, balances and many attachments, and report what did not transfer.

▼ **Other options and when to use them**

- **Lists and balances only**
  : You want a clean start and will keep Desktop for history.
- **Accountant-led migration**
  : Payroll, inventory or multi-currency files you want checked by a professional.

TOOLS FOR THIS PLAN

Are you ready?
22-question readiness check

Plan your dates
Dated countdown you can add to your calendar

New to the jargon?
Plain-English migration glossary

ORDER TO MIGRATE IN, AND WHY

Clean up first, import once into an empty company, then rebuild and check.

1. **Update Desktop, verify and rebuild data**
   Intuit asks for the latest release and a verified file before moving.
2. **Reconcile and clear the bank feed queue**
   Bank feeds and uncategorised feed items do not move.
3. **Save reports for checking**
   You compare balances and sales tax after the move.
4. **Sign up for QuickBooks Online in the same country**
   Intuit requires the same country or region as the Desktop company.
5. **Run the migration**
   Within 90 days of sign-up.
6. **Rebuild and reconcile**
   Users, bank feeds, reports and recurring payments need setting up again.

SETTINGS CHECKLIST: DECIDE THESE BEFORE YOU COPY

Built-in and third-party tools treat these differently. Tick each one off once you have decided.

Download this checklist (Excel)

- [ ] **Which tool**

Desktop export, online tool or Mac export.

▼ **How each tool handles it**

Built-in method	Intuit: Desktop migration tool in Pro Plus, Premier Plus and Enterprise Accountant; online migration tool takes .QBW, .QBM or .QBB from Desktop 2011 or newer (older files need File Doctor first); Desktop for Mac 2020 and newer.

Tip: Use the online tool if Desktop is hosted elsewhere and you only have a backup copy.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

- [ ] **All data or lists and balances**

How much history to bring.

▼ **How each tool handles it**

Built-in method	Intuit: choose all company data, or lists and balances only, which keeps customers, vendors, accounts, employees and items with current balances but no full transaction history.

Tip: Keep Desktop read-only access for history if you choose lists and balances.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

- [ ] **What you rebuild**

Who sets up items that do not convert.

▼ **How each tool handles it**

Built-in method	Intuit: memorised reports, the audit trail and past reconciliation reports do not convert; recurring payment transactions, bank connections, users and employee custom fields must be set up again.

Tip: Print or save key memorised reports before the move so you can rebuild them.

QuickBooks Help: What to expect when you switch

- [ ] **Existing data in the target**

Which QuickBooks Online company receives the import.

▼ **How each tool handles it**

Built-in method	Intuit: if the target company has data, you are asked to replace it, and that cannot be reversed.

Tip: Import into a new, empty company.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

- [ ] **Payroll timing**

When to migrate around pay runs.

▼ How each tool handles it

Built-in method	Intuit: Desktop payroll moves to QuickBooks Workforce; finish the move at least 7 business days before the next payroll date.

Tip: Migrate just after a pay run and month end.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

THE PLAN, PHASE BY PHASE

1 Clean up Desktop — Week 1

Update Desktop, then verify and rebuild data.

Categorise and reconcile bank and card transactions.

Save balance sheet, P&L and Sales Tax Liability reports.

> **Watch out:** Uncategorised bank feed items do not move.

WAYS AROUND IT

- Clear the bank feed queue before migrating.

Show the detailed steps (1) →

2 Migrate Week 2

Sign up for QuickBooks Online in the same country.

Run the migration into an empty company.

Read the report of what transferred.

Watch out: Import must happen within 90 days of sign-up.

WAYS AROUND IT

- Sign up only when the Desktop file is ready.

Show the detailed steps (2) →

3 Rebuild and check Weeks 2 to 3

Reconnect bank feeds

and invite users.

Rebuild memorised reports and recurring payments.

Compare balances with the saved reports.

> **Watch out:** Inventory is recalculated with FIFO.
>
> **WAYS AROUND IT**
>
> - Compare inventory value and cost of goods sold with your accountant.

Show the detailed steps (2) →

You are finished when

- Balance sheet and P&L match Desktop at the migration date.
- Bank feeds, users and recurring payments are set up in QuickBooks Online.
- Sales tax liability matches the saved report.
- Desktop is kept read-only for history.

CLICK BY CLICK

What does each step involve?

Open a part when you reach it in the plan. Each step says where to go, what to do and what you should see.

About this migration — What it covers, limits at a glance −

Intuit gives three ways to move a Desktop company file to QuickBooks Online: an export from Desktop Pro Plus, Premier Plus or Enterprise Accountant, a browser-based tool that takes a company file or backup, and an export from Desktop for Mac. Most data converts, but some items, such as bank feed connections and memorised reports, must be set up again.
Moving to Xero instead? See QuickBooks to Xero.

TOOLS	ONLINE TOOL ACCEPTS	IMPORT WINDOW
Desktop migration tool, online migration tool, or Desktop for Mac export	**.QBW, .QBM and .QBB files from Desktop 2011 or newer**	**90 days from QuickBooks Online sign-up (180 for accountants)**

OPTIONS	REBUILD	INVENTORY
All data, or lists and balances only	**Bank feeds, users, memorised reports, recurring payments**	**Recalculated with FIFO from the migration date**

1 What do you need before you move from QuickBooks Desktop to QuickBooks Online?

Need	Details	Where to get it
Admin access to both	Admin on the Desktop file and the QuickBooks Online company.	Desktop and Intuit account
Latest Desktop release	Update before migrating.	Help > Update QuickBooks Desktop
Company file on your computer	Ask a hosting provider for a copy if hosted.	Your host or IT
Saved reports	Balance sheet, P&L and Sales Tax Liability.	Desktop > Reports

2 Prepare the Desktop file

1 step

1

Check file size and verify data

Where: QuickBooks Desktop > F2 (Product Information), then File > Utilities > Verify Data

Check Total Targets in Product Information and condense the file if Intuit's tool reports it is over the limit. Then verify and rebuild data.

✓ **You should see:** Verify Data reports no problems.

3 Run the migration

2 steps

1

Export from Desktop

Where: QuickBooks Desktop > Company > Move to QuickBooks Online > Export Your Company File to QuickBooks Online

Select **Get started**, sign in, choose all data or lists and balances, choose whether to track inventory, select the target company, complete the checklist and select **Export**.

✓ **You should see:** An email confirms the import is complete.

2

Or use the online tool

Where: QuickBooks Online > Settings > Import desktop data

Upload the .QBW, .QBM or .QBB file and follow the prompts.

✓ **You should see:** The company shows your data.

4 Rebuild and check

2 steps

1

Reconnect and rebuild

Where: QuickBooks Online > Banking; Settings > Manage users; Reports

Reconnect bank and card accounts, invite users, rebuild memorised reports as custom reports and recreate recurring payments.

✓ **You should see:** Feeds, users and reports work.

2

Compare balances

Where: QuickBooks Online > Reports

Run the balance sheet and P&L at the migration date and compare with Desktop. Record results in the data validation report.

✓ **You should see:** Balances match.

WORTH KNOWING

What can go wrong, and how do you avoid it?

The detail behind the plan: options compared, and what experienced engineers check first. Tap any item.

Compare all the ways to do this 3 options −

All data

LOW EFFORT

Best for: Most businesses

+ Full history in one place
– Larger files take longer

Lists and balances only

LOW EFFORT

Best for: A clean start

+ Small and quick
– History stays in Desktop

Accountant-led

MEDIUM EFFORT

Best for: Payroll, inventory or multi-currency

+ Professional checks
– Coordination

OUR ADVICE

Move all data with Intuit's tool unless the file is too large or messy, then consider lists and balances with Desktop kept for history.

90 days to import

SAVES TIME –

You have 90 days from QuickBooks Online sign-up to import Desktop data; accountants have 180.

WHAT TO DO

Sign up only when the file is cleaned and ready.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

Importing replaces existing data

REDUCES RISK –

If the target company already has data, the import replaces it and this cannot be undone.

WHAT TO DO

Use a new company for the import.

QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Online

Audit trail stays behind

COMPLIANCE –

The audit trail and past reconciliation reports do not convert.

WHAT TO DO

Save them from Desktop and keep Desktop available read-only.

QuickBooks Help: What to expect when you switch

Inventory values are recalculated

COMPLIANCE

QuickBooks Online recalculates inventory using FIFO from the migration date.

WHAT TO DO

Check stock value with your accountant after the move.

QuickBooks Help: What to expect when you switch

Users and bank feeds start again

USER IMPACT

Desktop users do not carry over, and bank connections do not move for security reasons.

WHAT TO DO

Plan an hour to reconnect banks and invite users.

QuickBooks Help: What to expect when you switch

FINISH SAFELY

How do you check it worked, or roll back?

Full validation checklist

4 checks

Run these before you declare the migration complete. Record the results in the data validation report.

Check	How to check	What good looks like
Balance sheet	Compare at the migration date.	Matches.
P&L	Compare the financial year to date.	Matches.

Check	How to check	What good looks like
Sales tax	Compare with the saved Sales Tax Liability report.	Matches.
Open invoices and bills	Compare receivables and payables ageing.	Matches.

Rollback plan

If it goes wrong

ROLL BACK IF

- Balances do not match and cannot be explained
- Payroll cannot run in QuickBooks Online on time

POINT OF NO RETURN

Desktop keeps its data. Until you stop using it, rollback is continuing in Desktop.

1

Keep working in Desktop

Where: QuickBooks Desktop

Enter transactions in Desktop while you investigate.

✓ **You should see:** Books stay current.

2

Re-import

Where: QuickBooks Online

After fixing the Desktop file, import again into a new company within the window.

✓ **You should see:** Clean data.

Agree the triggers and who decides before the go / no-go meeting. Use the rollback plan template.

Common problems and fixes

4 errors

`File too large to move`

Cause: Total Targets over the limit.

Fix: Condense the file or choose lists and balances only.

`Move to QuickBooks Online missing from Company menu`

Cause: Enterprise Accountant edition.

Fix: Press Ctrl+1, then Ctrl+B+Q, as Intuit describes.

`Import option no longer available`

Cause: More than 90 days since sign-up.

Fix: Contact Intuit or start a new company.

`Balances differ after import`

Cause: Unreconciled items or inventory recalculation.

Fix: Compare reports by account and adjust with your accountant.

Search the full error library →

FAQ

Frequently asked questions

Can I move a 2010 company file?

Run File Doctor first; the online tool takes Desktop 2011 or newer.

Do attachments move?

Yes, and you get a report of what did not transfer.

Do memorised reports move?

No. Rebuild them as custom reports.

Can I keep looking at Desktop?

Intuit says view-only access continues for a period after cancelling; check your plan.

SOURCES

Official sources

3 official pages this guide is based on

Vendors change limits and features, so confirm details on the source before you rely on them. Last checked 4 Nov 2026.

- QuickBooks Help: Move your QuickBooks Desktop company file to QuickBooks Onli...
- QuickBooks Help: What to expect when you switch from QuickBooks Desktop to Qui...
- QuickBooks Help: Why can't I move my data from QuickBooks Desktop to QuickBoo...