

Help your clients move from desktop to the cloud

Here's a quick overview on how clients can import QuickBooks data into QuickBooks Online.

Start a QuickBooks Online Company

- Answer a few simple questions
- Check "Yes" to import QuickBooks data
- Select the QuickBooks edition from the list

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Welcome to QuickBooks, Jeff	Do you w	ant to impo	ort data fron	QuickBooks fo	r Windows or Mac?
Tell us more so we can tailor Q "Ner industry Adverting paneles "You set	Yes	No			
Company type Company type Linitial Listing partnership = De prev wird for impact from Galakilionitis for Windows or 7 © YileN	u., 1	We-guickly compare your company to annier businesses pronymoully, of counsel. The result is a outport to of Qualifornia features and settings for your business.			
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2 Open QuickBooks for Windows software

- Make sure it's the latest version, choose Help > Update QuickBooks
- Restart QuickBooks
- Choose Company > Export Company File to QuickBooks Online
- Sign in with the User ID and password for QuickBooks Online and select the company file name

Help						
Internet Connection Setup New Business Checklist						
Year-End Guide	Company	Custor	mers	Vendors	Employees	В
Add QuickBooks Services App Center:Find More Busine	Chart of Accounts Ctrl+A Make General Journal Entries					
Update QuickBooks 🐧	Document Management					
Manage My License	Enter Vehicle Mileage					
	Prepare Letters with Envelopes					
	Export (Compan	ny File	to QuickBo	ooks Online	Ŗ

3 Get ready to use QuickBooks Online

- Look for an email when the data import is finished often within minutes
- Click the "Sign In" link and get started.
- Invite your accountant to share the books. In the upper right corner, click your
 Company Name > Manage Users > Invite Accountant.





Tip: Have your logo handy when you set up QuickBooks Online and your invoices and forms will look great from the start.