

How to move your data to QuickBooks Online

Now your QuickBooks Online account has been set up, it's time to move your data across from QuickBooks Desktop or Sage.

This document explains how to do this. It's best to take care of these tasks as soon as possible, and certainly before you make changes to your data or start entering new transactions into QuickBooks.

Before you begin:

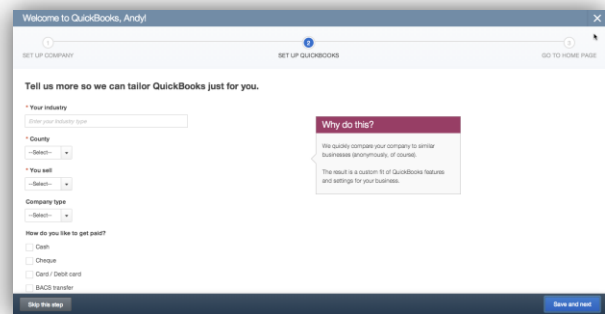
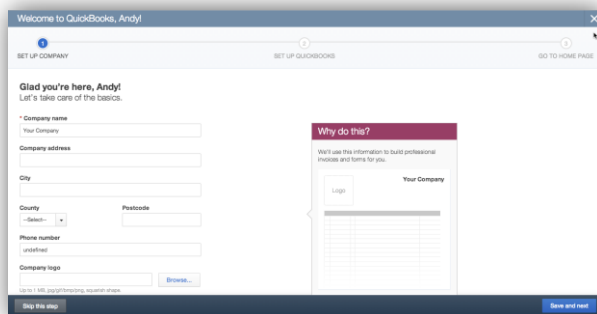
1. Make sure you have received an **order confirmation email** containing sign in details for QuickBooks Online.
2. Keep the **order confirmation email to hand**, as you'll need some details from it during this process.

1. Sign in to QuickBooks Online for the first time

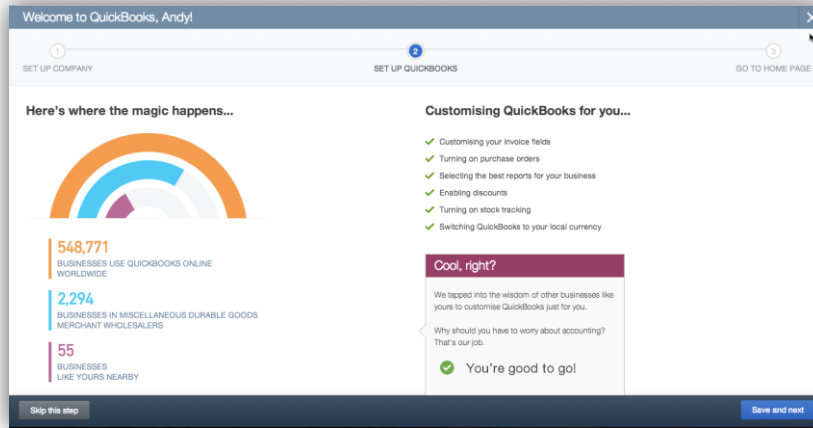
Why do this?

Before your data can be moved to QuickBooks Online, it's important you sign in and enter your basic company details.

1. Visit the QuickBooks Online sign in page at <https://go.qbo.intuit.com/>.
2. Enter the **user ID** and **password** shown in your order confirmation email.
3. Follow the instructions on screen to **set up your company** in QuickBooks:



4. Watch the rainbow appear and then select **Save and next** to finish setting up your company:



Although you've now created a basic company in QuickBooks Online, don't enter any transactions or start using it yet. Over the next steps we'll move your existing data across, so you can pick up where you left off with all your financial details in the right place.

2. Upload your company data to the Movemybooks website

Why do this?

When you upload your company data, our conversion partner Movemybooks will convert it into a format suitable for QuickBooks Online and import it into your account.

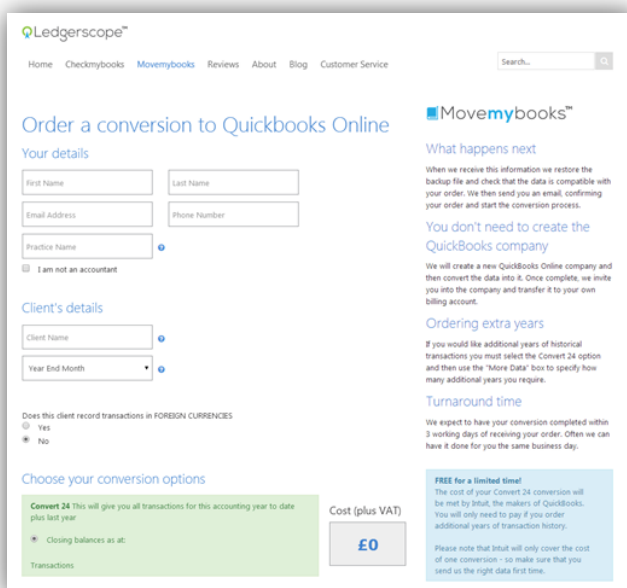
We work with data conversion experts Movemybooks to get your accounting data into QuickBooks Online. This can take up to three working days, although often it's done more quickly.

Movemybooks can only move data into QuickBooks Online from these packages:

- **QuickBooks Desktop 2008** (and later), UK versions
- **Sage 50 Accounts v14 / 2008** (and later), UK versions
- **Sage Instant Accounts v14 / 2008** (and later), UK versions

If you have one of these packages, you're ready to get started.

1. Save a copy of your **Sage or QuickBooks Desktop data** to your computer.
2. Visit the Movemybooks website:
<http://www.ledgerscope.com/movemybooks/moving-to-quickbooks>
3. Select the blue **Convert Now** button.
4. Complete the **on-screen order form**:



The screenshot shows the 'Order a conversion to Quickbooks Online' form on the Movemybooks website. The form is divided into several sections: 'Your details' with fields for First Name, Last Name, Email Address, and Phone Number; 'Client's details' with fields for Client Name and Year End Month; and 'Choose your conversion options' with a 'Convert 24' button and a 'Cost (plus VAT)' field showing £0. There are also informational sections on the right side of the form, including 'What happens next', 'You don't need to create the QuickBooks company', 'Ordering extra years', 'Turnaround time', and a 'FREE for a limited time!' offer.

5. When completing the form, make sure you:
 - Include your **Company ID**. This is contained in your order confirmation email. Providing it ensures your data gets moved to the right QuickBooks Online account.
 - Attach a **copy of the data** you exported from your desktop software. Upload it with the **Select file** button on the form.
6. Select **Send order and upload file**.

You'll see a confirmation message once your accounting data has been uploaded. This may take a few moments, depending on the size of your data file.

Shortly after you complete the order form, the Movemybooks team will send an email asking for temporary access to your QuickBooks Online account. Your data cannot be transferred unless you provide this access, so please keep an eye out for the email and follow the instructions it contains.

Contact us for any further assistance

If you have any questions about these instructions — or any other aspect of QuickBooks Online — please call us on **0808 234 5337**. We're available 8am — 8pm on working days and happy to help.