QuickBooks exit checklist

Before, during and after a move off QuickBooks, with each vendor's official steps · checked November 20, 2026

> **Not accounting or tax advice.** Confirm every step with the vendor and your accountant. The general checklist is our own practical list; the vendor steps summarize each vendor's official page, linked under each item.

Before you switch

☐ Write down what you pay now: plan, add-ons, payroll and per-employee fees, from your latest invoice.

☐ Pick a cutover date with your accountant, such as the start of a month, quarter or fiscal year.

☐ Export and save reports for every year you need to keep: profit and loss, balance sheet, trial balance, general ledger, AR and AP aging, and sales tax liability.

☐ Export your lists: customers, vendors (with 1099 details), items or products, and the chart of accounts.

☐ List open items: unpaid invoices, unpaid bills, undeposited funds and uncleared transactions.

☐ List everything connected to QuickBooks: bank feeds, payment processor, payroll, apps and integrations.

☐ Check how long you can still view or export data after cancelling, in your current plan's cancellation terms.

During the move

☐ Set up the new company: chart of accounts, sales tax settings, invoice templates and users.

☐ Bring data across with the vendor's tool, a migration partner or a manual import (see the vendor steps on this page).

☐ Enter opening balances as of the cutover date if history isn't moving.

☐ Recreate open invoices and bills so customers and vendors see the right balances.

☐ Reconnect bank and credit card feeds, then the payment processor and apps.

☐ If payroll moves too, plan the date with your accountant and the payroll provider so tax filings stay clean.

After the move

☐ Compare the trial balance and balance sheet in both systems as of the cutover date.

☐ Reconcile each bank account for the first month in the new system.

☐ Send a test invoice and record a test payment.

☐ Keep your old QuickBooks exports somewhere safe for as long as your accountant says to keep records.

☐ Cancel the old subscription only after everything ties out, and note the cancellation confirmation.

What each vendor says

Desktop to QuickBooks Online

- Intuit's help article says you can move a Desktop company file with the migration tool in QuickBooks Desktop or with the online migration tool.
  Move your QuickBooks Desktop company file to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/move-quickbooks-desktop-file-quickbooks-online/L6af3Z0Fb_US_en_US
- You can bring all your company data (lists and full transaction history) or only lists and balances, which Intuit suggests for a very large file.
  Move your QuickBooks Desktop company file to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/move-quickbooks-desktop-file-quickbooks-online/L6af3Z0Fb_US_en_US
- Intuit warns that if your QuickBooks Online company already has data, the move can replace it, and that can't be undone.
  Move your QuickBooks Desktop company file to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/move-quickbooks-desktop-file-quickbooks-online/L6af3Z0Fb_US_en_US
- Users don't move with the file. You invite them again in QuickBooks Online.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US
- Bank and credit card connections don't move, for security reasons. You reconnect them.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US
- Inventory starts fresh on your migration date, using first in, first out (FIFO) from then on.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US
- Accrual-basis profit and loss and balance sheet totals should match after the move. Intuit says cash-basis reports may differ.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US
- QuickBooks Online has one default Accounts Receivable account and one Accounts Payable account. The last ones you used in Desktop become the defaults.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US
- If you move from Desktop Payroll to QuickBooks Workforce, Intuit says employees and this year's payroll come across, with this year's paychecks arriving as regular checks plus year-to-date totals.
  Learn how features and data transfer from QuickBooks Desktop to QuickBooks Online, Intuit (help article, updated November 5, 2026): https://quickbooks.intuit.com/learn-support/en-us/help-article/import-export-data-files/expect-switch-quickbooks-desktop-quickbooks-online/L0dEyNosU_US_en_US

QuickBooks to Xero

- Xero describes three steps: pick a conversion date, bring your data across, then book setup help.
  Xero vs QuickBooks: Explore our QuickBooks alternative, Xero: https://www.xero.com/us/versus/quickbooks-alternative/
- Xero suggests a conversion date on the first day of a month, ideally the start of your fiscal year or sales tax period.
  Xero vs QuickBooks: Explore our QuickBooks alternative, Xero: https://www.xero.com/us/versus/quickbooks-alternative/
- A Xero partner can move your QuickBooks data with Jet Convert, Xero's migration partner, including current and previous fiscal year transactions. Or you can import your chart of accounts and contacts yourself and add any unpaid invoices and bills.
  Xero vs QuickBooks: Explore our QuickBooks alternative, Xero: https://www.xero.com/us/versus/quickbooks-alternative/
- Xero points to a step-by-step conversion guide on Xero Central for the full process.
  Xero vs QuickBooks: Explore our QuickBooks alternative, Xero: https://www.xero.com/us/versus/quickbooks-alternative/
- Xero says all its plans include unlimited general users at no extra cost.
  Small business accounting software, Xero: https://www.xero.com/us/small-businesses/xero-for-small-business/

QuickBooks to Zoho Books

- Zoho's migration page offers free migration from QuickBooks Online, QuickBooks Desktop or Xero to Zoho Books, through a request form.
  Free data migration from QuickBooks or Xero, Zoho: https://www.zoho.com/us/books/migration.html
- The page also offers a free migration consultation and links to a step-by-step migration guide.
  Free data migration from QuickBooks or Xero, Zoho: https://www.zoho.com/us/books/migration.html
- Zoho Books prices exclude local taxes, and the Free plan is for businesses with revenue under $50K for the financial year.
  Zoho Books pricing (US), Zoho: https://www.zoho.com/us/books/pricing/

QuickBooks to Wave

- Wave's help article says Wave doesn't carry over QuickBooks transaction history, so keep a copy of your QuickBooks data for your records.
  Switch to Wave from QuickBooks, Wave Help Center (updated November 7, 2026): https://support.waveapps.com/hc/en-us/articles/32526944035092-Switch-to-Wave-from-Quickbooks
- Wave says to recreate unpaid invoices and bills in Wave first, so balances aren't counted twice.
  Switch to Wave from QuickBooks, Wave Help Center (updated November 7, 2026): https://support.waveapps.com/hc/en-us/articles/32526944035092-Switch-to-Wave-from-Quickbooks
- Wave says to run two trial balance reports in QuickBooks: one for the full fiscal year, then another after deleting outstanding invoices and bills.
  Switch to Wave from QuickBooks, Wave Help Center (updated November 7, 2026): https://support.waveapps.com/hc/en-us/articles/32526944035092-Switch-to-Wave-from-Quickbooks
- Then you enter your account balances in Wave as a journal entry from the latest trial balance, and compare Wave's trial balance with the first QuickBooks report.
  Switch to Wave from QuickBooks, Wave Help Center (updated November 7, 2026): https://support.waveapps.com/hc/en-us/articles/32526944035092-Switch-to-Wave-from-Quickbooks
- Wave mentions Wave Advisors for personalized help moving your bookkeeping.
  Switch to Wave from QuickBooks, Wave Help Center (updated November 7, 2026): https://support.waveapps.com/hc/en-us/articles/32526944035092-Switch-to-Wave-from-Quickbooks

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