

QuickBooks Migration Planning Checklist

Work through these questions with your team before deciding whether – and how – to move from QuickBooks Desktop to QuickBooks Online.

Define the Problem

1

- ☐ **What specific problem are we trying to solve by moving to QuickBooks Online?**
 Write it down in one sentence. If you can't, that's worth pausing before anything else.
- ☐ **Is the driver remote access, IT maintenance, collaboration, security, performance, or cost?**
 Different drivers point toward different solutions – naming the real one narrows your options fast.
- ☐ **Have we considered hosted QuickBooks Desktop to solve this without changing platforms?**
 Cloud access and changing accounting software aren't the same decision. Summit's hosted QuickBooks Desktop gives you the same remote access as Online without touching a single workflow your team already knows.

Map Your Current Workflows

2

- ☐ **Which reports does accounting run every month?**
 List them by name. These are the first things to check against QuickBooks Online's reporting engine.
- ☐ **Do we rely on inventory management features?**
 This is one of the areas Desktop users most commonly find works differently in QuickBooks Online. Hosted Desktop keeps it exactly as-is.
- ☐ **Are we using Sales Orders?**
 QuickBooks Online doesn't support Sales Orders the way Desktop does – confirm whether your workflow depends on them.
- ☐ **Do we depend on job costing?**
 Another common gap area. If job costing drives your pricing or profitability tracking, dig into this before committing.
- ☐ **Which third-party integrations or add-ons do we currently use – and are they available on QuickBooks Online?**
 Check each one individually. "Probably similar" isn't the same as confirmed.
- ☐ **Have we documented our current workflows so we can compare them against QBO directly?**
 You can't evaluate what you haven't written down. This becomes your side-by-side comparison later.

Understand the Real Cost

3

- ☐ **How many company files would we need to migrate, and what would that cost on QuickBooks Online at that count?**

 QuickBooks Online charges per company file with no volume discount. Run your specific number – for firms managing several client files, a single Summit hosted environment is often the far cheaper path.

- ☐ **Have we budgeted for staff training time?**

 Even experienced users face a learning curve. Budget real hours, not a single afternoon. With hosted Desktop, there's no new interface to learn at all.

- ☐ **Have we budgeted for rebuilding custom reports from scratch?**

 Custom reports rarely migrate cleanly. Treat this as a project, not a checkbox.

- ☐ **Have we identified features that would require new third-party software?**

 Gaps aren't always deal-breakers, but they usually come with a new subscription attached. Know the cost before you're locked in.

- ☐ **Have we accounted for a temporary productivity dip during the transition?**

 This rarely shows up in migration plans, but it happens on nearly every switch. Plan for it rather than being surprised by it.

Compare All the Cloud Options

4

- ☐ **Have we compared QuickBooks Online, local Desktop, and hosted Desktop side by side?**

 Most businesses only compare two options. There are three – make sure all three get a fair look.

- ☐ **Would hosted QuickBooks Desktop meet our cloud access needs without changing our workflows?**

 If the answer is yes, that's worth weighing seriously before you commit to rebuilding how your team works.

Define Success and Plan the Move

5

- ☐ **What does a successful migration look like one year from now?**

 Define this before you move, not after. It's the only way to judge the decision honestly later.

- ☐ **Who needs to sign off before we commit to a migration date?**

 Name the people. A migration without clear ownership tends to drift.

- ☐ **Do we have a rollback plan if the migration doesn't go as expected?**

 Hope for the best, but don't skip this. It's cheap insurance against a rushed decision.

- ☐ **Have we set a realistic timeline that accounts for training and validation, not just the data transfer itself?**

 The data move is usually the fastest part. Training and validation are where timelines slip.

QuickBooks Online vs. Summit

How the two stack up on the factors that matter most.

COMPARISON POINTS	QUICKBOOKS ONLINE	SUMMIT HOSTED QUICKBOOKS DESKTOP
Anywhere access	✓ Yes	✓ Yes
Same features and workflow as Desktop	✗ No – different product	✓ Yes
Inventory, job costing, Sales Orders	⚠ Limited or different	✓ Fully supported
Existing third-party add-ons	⚠ Case-by-case	✓ Fully supported
Multiple company files	Separate subscription per file	Run unlimited files in one environment
Custom reports	Often need rebuilding	Carry over as-is
Learning curve for staff	Significant	None – same software, same menus
Support model	Intuit support	Dedicated Summit support team

EXPERT GUIDANCE

Still not sure which option fits your business?

Talk to Summit for a no-pressure consultation to walk through your answers above and compare your options.

[TALK TO A QUICKBOOKS EXPERT →](#)

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