

QuickBooks to AccountEdge Conversion Service - FAQs

The QuickBooks to AccountEdge Conversion Service is a service created and operated by one of our Certified Consultants. We do not support or guarantee the results of the service.

Moving from QuickBooks to AccountEdge can be completed seamlessly, and in a way that retains essential data while enabling users to leverage all the enhanced functionality of AccountEdge. Here are some responses to frequently asked questions:

What QuickBooks versions can be converted?

Macintosh versions: 2006, 2007, 2009, 2010, 2011

Windows versions: 2007, 2008, 2009, 2010, 2011

How much does it cost and how fast is the turnaround?

The cost is \$499. Allow one week for the conversion. It can be rushed for an additional fee. We need a backup copy of your file and the administrator password.

What Data is Converted? What are the Benefits?

QuickBooks data records tend to be structured to satisfy the most basic requirements. AccountEdge is much more robust and flexible, and our conversion process is designed to maximize this flexibility. QuickBooks purposely made their transactions hard to transfer to other accounting software. Their records do not follow normal conventions, which makes it impractical to transfer to other 'normal' accounting programs. Here is a brief overview of key conversion considerations:

Chart of Accounts

The Chart of Accounts is the basis upon which all financial reporting is based. AccountEdge presents superior opportunities for management reporting and analysis. Reports can be configured to best fit the hands of management, while still satisfying all the requirements of external parties, including your bank and major creditors, as well as regulatory agencies. In addition, a properly organized Chart of Accounts enables you to instantly examine key financial ratios in an understandable graphic format using AccountEdge's powerful Business Insights functionality.

For these reasons, your QuickBooks Accounts List will be massaged to ensure that you get all that AccountEdge has to offer.

Cards (Contact Records)

To successfully manage business relationships, it is essential to have complete details, and to be able to 'slice and dice' the information instantly as management requires. For instance, you might be planning a marketing field trip to a specific city or postal code. Wouldn't it be nice to

be able to conveniently see all the business contacts in that area, so that you can organize the trip to make the best use of your time, and avoid overlooking opportunities?

In QuickBooks, City, Province & Postal Code are combined in a single field, which makes such analysis all but impossible. When your contact records are converted, this data is split into separate fields so that you can use the information to best advantage, in a professional business-like manner. Other Contacts are imported as Personal Contacts.

Here are some other contact record considerations:

QuickBooks accommodates one 'Extra' contact per card

AccountEdge will accommodate up to five unique contacts per card (Customers or Vendors). Existing 'extra' contacts from the QuickBooks record are imported as the 'second' contact in AccountEdge. In a customer card, this is normally taken to be the default 'Ship To' address, but once the information is transferred to AccountEdge, it is entirely up to management as to how this information might be used. QuickBooks 'Extra Contact' and 'Separate company name' per card are imported into contact field of address 3 and contact field of address 4.

QuickBooks Sales Rep assigned to a Customer

In AccountEdge, Sales Reps are 'normally' Employees, and AccountEdge includes powerful reporting capabilities to analyze Sales by Salesperson. So if you have a contractor or other third party that you wish to assign as a 'Customer Sales Rep', you can create both a Vendor Card and an Employee Card. Now you have the best of both worlds.

QuickBooks 'Type' of Customer or Vendor

AccountEdge accommodates up to six custom fields per card. These are completely customizable for Customers, Vendors and Employees. For Customers, you might want to know if they are Retail, Wholesale, Town, Country, or out of Province. For Vendors, you might want to be able to sort by service provided (Painter, Plumber, Drywaller, etc.). For Employees, you might want to sort by Position, Department, Group Insurance eligibility, etc.

QuickBooks 'Type' information is imported into the first custom list field in AccountEdge.

QuickBooks 'Note Pad' data for every card type

This information is imported into the 'Reminder Log' file in AccountEdge.

Inventory Items

AccountEdge includes inventory capabilities that meet or exceed the needs of most businesses, including capabilities that are normally available in much more costly 'higher-end' programs. In conversion, almost all item information is imported. Fixed Assets cannot be imported.

QuickBooks Item Fields

The Description Field in QuickBooks is sometimes larger than 30 characters. In this case the description may be truncated on import, but the original data will be imported into AccountEdge's expanded description field (which can optionally be used by default for Sales and Purchases). AccountEdge's expanded description field can be up to 254 characters. Customizable fields can be imported into any of six custom fields in AccountEdge.

Open Sales and Purchases (Pre-conversion transactions)

Opening sales and purchases are imported to reflect original date, transaction ID, and balance due or payable.

Budgets

AccountEdge accommodates up to two years of budgeting information. Available data is imported.

To Do Notes

To do notes are imported into the AccountEdge Reminder Log.

Jobs

QuickBooks Jobs are imported, with the exception of projected end date. Note that in AccountEdge multiple jobs can be associated with a single Customer, and that consolidated reports are available by Customer as well. AccountEdge is unique in the powerful tools to manage job-related reimbursable expenses, including 'out-of-scope' costs.

Other Imported Information

- Types – Customer, Vendor and Job
- Payment Methods
- Shipping Methods
- Payment Terms
- Sales Tax Codes
- Price Level List
- Class List

How Do I Sign Up?

[Fill out this form](#) to get started with the QuickBooks to AccountEdge Conversion Service.