

## Checklist: How To Prepare your QuickBooks File for Conversion to Xero

1. **Complete outstanding tasks** - Make sure all bank accounts have been reconciled and all open credits have been applied to their respective invoices/bills.
2. **Clean up your data** - If there are errors or inaccurate information that you have been meaning to fix, take care of it **before** converting your data. For example, if you need to update customers or suppliers contact information like phone number, address or email.
3. **Chart of Accounts** - The chart of accounts cannot have more than 699 accounts, including inactive accounts. If you have too many accounts, delete accounts that have never been used and merge any duplicate accounts.
4. **Turn on account numbers** - Unlike QuickBooks, Xero requires that account numbers (known as account codes in Xero) are used. By turning on this feature and assigning account numbers in your QuickBooks file, Xero will convert those accounts to account codes. **Note: If you do not assign accounts in QuickBooks before converting the file, Xero will assign account codes to all accounts during the conversion.**
5. **Renumber sub-accounts** - While QuickBooks uses sub-accounts, Xero has a flat account structure. Therefore, if you have sub-accounts on your QuickBooks chart of accounts, you will need to make sure that an account number has been assigned to each sub-account.



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