QuickBooks/Quicken Conversion Checklist

Track your Intuit conversion project

Internal Requirements – Project Management Team

Confirm Intuit Project Details from email

Reviewed OFX Connectivity website Conversion Resource page

Reviewed end users Conversion Instructions (QuickBooks Desktop, QuickBooks Online, Quicken and Mint)

Developed end user communication

Created webpage where end users can download conversion instructions (recommended)

Submitted Quicken for Windows Critical Message (optional)

Coordinate with your OFX/Online Banking Provider

Confirmed Intuit Go-Live date

Confirmed that future QuickBooks and/or Quicken connectivity and services from project details are correct.

Received confirmation from OFX Provider that they have access to Intuit Branding tool

OFX Provider has confirmed they will submit Intuit branding changes **at least 5 business days before go-live**

Confirm who will alert Intuit about any changes to the Intuit go-live date or project scope (important if applicable)

Internal Requirements – Support Team

Reviewed OFX Connectivity website Post Conversion Resource Page

Reviewed end users Conversion Instructions

Downloaded QuickBooks and/or Quicken for testing purposes

Reviewed Post Conversion Support Troubleshooting Guide

Reviewed information required for Intuit to assist with Post Conversion Support issues

Reviewed deactivate/disconnect videos