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