



Transforming Financial Operations

Harmony Design Group's QuickBooks Migration Journey



INTRODUCTION



In early 2025, Springfield, New Jersey based Harmony Design Group found itself in need of help with the 20-year-old firm's financial and operational efficiency. The company has undergone significant growth in recent years, and their financial system and operations have not kept pace with the expanding demands of the business. Acknowledging that help was needed, the company turned to Endurium Advisors.

Endurium partnered with Harmony to enhance their financial and operational efficiency through a comprehensive suite of services. This included:

- Strategic guidance on financial planning, cost management, and revenue growth.
- Streamlined integration of their landscape management system and QuickBooks for improved reporting and decision-making.
- Greater precision in job costing, cash flow management, and inventory tracking to achieve sustainable growth and operational excellence.

As part of the broader scope of work, one key initiative involved migrating the company from QuickBooks Desktop (QBD) to QuickBooks Online (QBO). This transition was essential, driven by Intuit's strategic shift toward its subscription-based platform and underscored by the company's gradual reduction of support for the legacy desktop version.

THE CHALLENGES

- A prior attempt to migrate to QBO was problematic and never completed.
- Most small business users are not accountants, nor are they experts in QuickBooks. As a result, they often must navigate the software on their own, adapting its features to meet their unique operational needs.
- A project of this complexity requires substantial time and labor. Managing core operations is demanding enough and adding project execution on top can cause significant strain on the business.
- While QuickBooks setups often share common elements in the chart of accounts, each company brings its own unique structure and nuances. This project was further complicated by the differences between the two QuickBooks versions, each with its own terminology and designations for commonly used elements.
- As with any migration to a new platform, technical challenges inevitably arose with some issues requiring assistance from Intuit's customer support team. In several instances, Intuit did not have immediate solutions and had to escalate issues to external subject matter experts.



The Endurium Difference

In all their engagements, Endurium's implementation model goes beyond advisory to provide direct, hands-on support throughout the process. The disciplined approach for this project involved the following:

1. Client Assessment and Preparation Conducted an initial review of user roles, accounting complexity, chart of accounts depth, and any custom fields or reporting needs. Refined scope and priorities in partnership with the client as new details emerged.

2. Client Communication and Planning Established expectations around conversion timeline, access requirements, and potential downtime or dual entry. Adjusted plans dynamically through ongoing dialogue with the client to ensure alignment and responsiveness.

3. Working with Intuit for System Access and Licensing

4. Data Migration to include validation of data mapping, post conversion side-by-side comparison of bank balances, payroll liabilities and aging for AR and AP, as well as addressing any discrepancies or clean up items.

5. Post-Conversion Setup in QBO which involved reconnecting bank feeds and merchant services, as well as rebuilding custom reports and invoices.

6. Training, Transition Support and Advisory including documenting key process changes for billing, payroll, or reporting as well as testing key workflows.

THE IMPACT

Harmony's migration to QBO was completed in eight weeks and the company is now fully operational on the cloud-based platform.

Through its partnership with Harmony, Endurium gained valuable insights from the project. One key takeaway was the importance of identifying user pain points and existing workarounds in the desktop version before initiating any transition work. User experiences vary widely, even within the same industry. This makes early discovery essential to a successful migration.

Transitioning to a new operating model isn't just a technical shift, it's a transformation. And like any major change, it demands ongoing support. With Endurium's hands-on approach and strategic advisory services, Harmony didn't just migrate to QuickBooks Online, they evolved. The move became part of the broader Enterprise Value Solutions engagement, unlocking new efficiencies and aligning their systems for long-term growth.



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LEARN MORE

Discover how Endurium can support your business transformation. Let us help you migrate smarter, scale faster, and focus on what matters most.

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