

Xero Managed Migration

Xero helps simplify the experience of migrating multiple clients' data from their previous accounting system into Xero.



Step 1:

We will work with you to assess and identify your migration needs



Step 2:

Get access to the Managed Migration dashboard and support



Step 3:

We will support you migrating multiple clients' data



Step 4:

Receive full visibility and updates throughout the migration process.

Xero Managed Migration Service

Xero covers the cost of data migration up to \$250 NZD per eligible org*, this covers a standard conversion which includes:

- * Clients' transactional history (up to 2 years)
- * Clients' assets (names, purchase details, etc.)
- * Handles a minimum of 5 client files being migrated

How the service works

- * We partner with you to select the best migration expert based on your clients' needs, to help enable the fastest, most accurate transfer.
- * Receive clear, concise instructions for secure client data sharing, to help minimise your team's admin burden.
- * Migrations are completed in pre-scheduled bulk batches to optimise the process, to support a smooth transition and help to minimise downtime for your practice or clients.
- * You retain full control by testing and validating each completed batch.
- * Get access to a dedicated support team via the managed migration tool, allowing for quick answers so your team can focus on billable client work, not troubleshooting.



Next Steps

Simply reach out to your Xero Account Executive to finalise including the Xero Managed Migration service in your contract.

*Terms apply: Specific requirements will be scoped on a case-by-case basis and outlined in your contract.

Business Ready Conversion

Xero works with Jet Convert to enable us to provide business ready conversions. For more information about Jet Convert visit their website at www.jetconvert.com

What will be converted in a Business Ready Conversion?

Data transfer from: MYOB

A standard conversion* can include:

- * Transactional History - current year data plus previous years financial data (your choice of user data or financial year end data)
- * All transactions within sub ledgers (AP, AR, bank), all manual journal entries, invoices, bills, payments, credit notes, Chart of Accounts, marking appropriate transactions as reconciled and contact listings. (max 75,000 transactions per conversion)
- * All manual fixes to achieve agreed acceptance criteria (e.g multiple AR/AP control accounts, deposits against orders, non-standard GST rates)
- * Jobs/categories converted to tracking (max 100 jobs)
- * Payroll pay template, pay items, payruns and opening balances (max 50 employees)

*A standard conversion is the offering covered by the \$250 NZD subsidisation, there are additional services that you can add on to a standard conversion at an additional cost, which will not be covered by Xero. You can find out more details about these through Jet Converts website.

What does a complete conversion look like?

At the end of your conversion(s) you will receive for each subscription:

- * Trial balance (both systems)
- * Information on special treatment of transactions required for import into Xero
- * Detailed post conversion checklist: Outlines conversion specifics, highlights any system differences, and includes verified trial balances showing matched figures between systems
- * Clear instructions for the Xero user to begin working in the Xero Platform.

Successful Conversion Measure

In order to determine a conversion complete Xero and Jet Convert work on clear guidelines:

- * Trial Balance Reconciliation - opening trial balance in Xero must exactly match the closing trial balance from the originating software or system when compared on an accrual basis.
- * Aged receivables and aged payables balances in Xero must match the originating systems (excluding system differences) or software reports as of the date conversion is complete. Total balance and the breakdown by aging bucket must match.
- * All customer and supplier contact information must be present and accurate in Xero where the an applicable field applies.