



Introducing Xero's Data Migration Service

What is Xero's Data Migration Service?

The Data Migration team will do the heavy lifting when it comes to moving a batch of 10 or more of client's data, so you can concentrate on using Xero tools such as Xero Tax.

What will we migrate?

WE WILL MIGRATE	YOU WILL NEED TO MIGRATE
✓ Last year's financial accounts balances from your old accounts production software	✓ Any Tax information into Xero Tax
✓ Debtor and creditor balances as a total	✓ Invoices and bills for those balances
✓ Comparative period balances (up to 5 years)	

What else do we do?

- * **Client setup information** - we can add financial information, business information (entity type etc) and the chart of accounts of your choice.
- * **Xero Tax** - We can make all the connections between your clients and Xero Tax pulling in the data held in the Xero subscription to create a draft filing for the previous year, it's the cleanest place to put in things like opening losses, capital balances etc, so that when you come to complete the next year the balances pull through as clean opening balances.

What do we need from you?

One of the team will be in touch to talk you through the process, but in anticipation of hearing from us please start gathering a list of clients you wish for us to migrate along with the data to be migrated for those clients.

Post migration tasks

There are some actions you'll need to do in Xero once the migration is over. We'll send you instructions but these shouldn't take longer than one minute per client.

FOR MORE INFORMATION ABOUT XERO'S DATA MIGRATION SERVICE PLEASE CONTACT YOUR PARTNER CONSULTANT OR EMAIL PARTNERSERVICES@XERO.COM