

Batch conversion service - Xero

Our batch conversion service allows partners to hand over large blocks of client data conversions to Movemybooks, instead of processing them individually.

Movemybooks wishes to provide the best possible experience for Partners and their clients, so it is important that everyone works together and understands the part they need to play:

Xero

Xero will identify Partners (or partners may approach us directly) with a need to move at least 25 clients to Xero in one batch. We can offer our batch conversion service to them, explaining how the service will work. Xero will inform Movemybooks when a new batch customer is ready to move and provide contact details.

The bulk provisioning of Xero organisations (on standard or premium pricing plans only) and providing Movemybooks with access (via an Advisor-role invite to a specified Movemybooks email address) will be undertaken by Xero and/or the Partner.

Movemybooks

Movemybooks will contact the Partner and discuss their requirements. We will explain the process, answer any questions and agree delivery timescales.

A data collection document will be provided to the Partner for them to complete, together with a secure upload location into which the files being converted can be uploaded.

When everything has been received by Movemybooks, we will process the conversions and will be on hand to guide the Partner at all times.

Conversions will be processed by Movemybooks in the Partner Movemybooks account. The Partner will be able to monitor the status of conversions but will not need to action any and should not do so, unless asked to by Movemybooks.

Partner

The Partner will need to provide Movemybooks with a single point of contact at their practice. All future communications between the Partner and Movemybooks will go through that contact.

The Partner will need to register or will already have registered a Movemybooks account and will need to add Movemybooks as a manager on their account. Movemybooks will provide a specific email address to be used for this purpose.

The Partner should complete the data collection document, which will confirm the conversion requirements for each client and include the necessary usernames and passwords. They will also need to upload the files to be converted into the secure folder provided by Movemybooks.

For further information about our batch conversion service, just email our support team at support@movemybooks.co.uk. They will be happy to advise.

www.movemybooks.co.uk