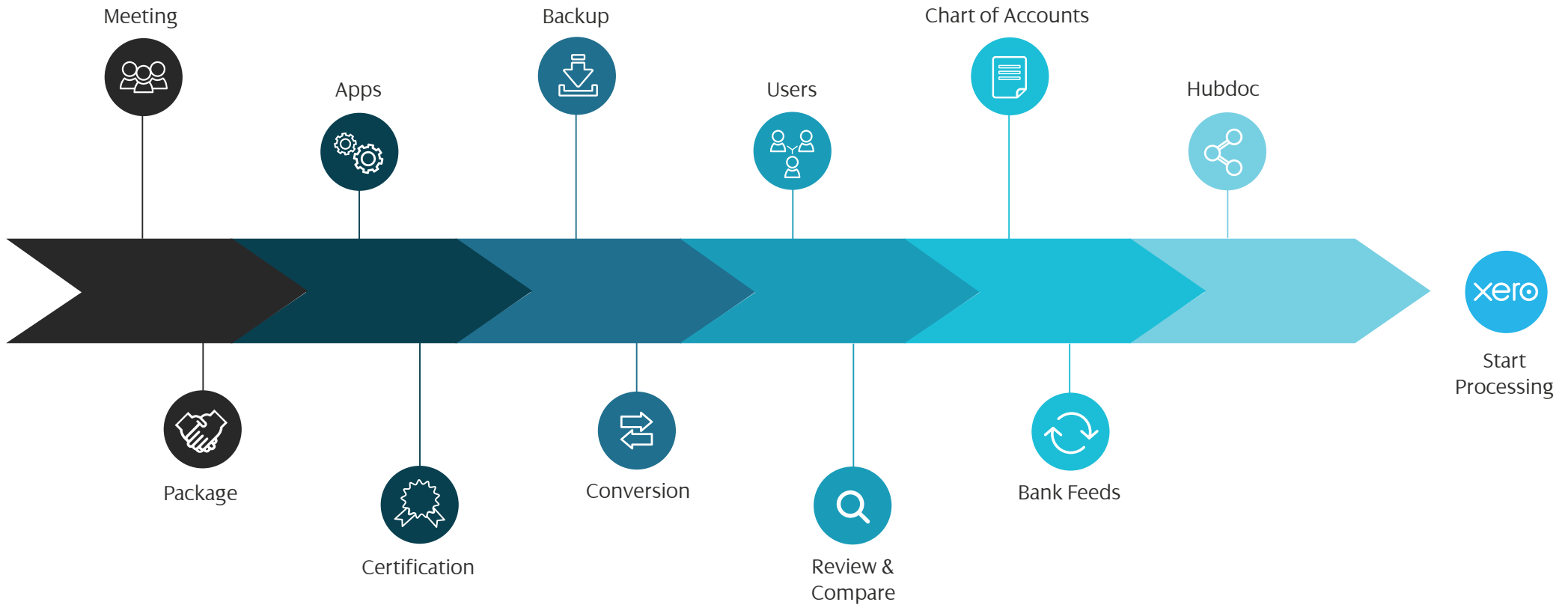




# your xero project plan





## your xero project plan



### Meeting

Initial meeting to understand specific needs.

### Package

Decide on Xero Pricing Plan and approve.

### Apps

Consider any App requirements and integration.

### Certification

Staff to attend Webinar Training for Xero certification.

### Backup

Prepare backup of Pastel / Quickbooks. Share login details to current software.

### Conversion

Confirm years to be converted and convert files.



### Start Processing

Welcome to Xero!



### Hubdoc

Set up Hubdoc (depending on your Xero package).



### Bank Feeds

Connect your Bank to import statements automatically.



### Chart of Accounts

Ensure accounts are updated and allocated to correct sections.



### Review

Review converted TB to previous software.



### Users

Confirm which Users to be added to each entity.



IT STARTS WITH A CONVERSATION

# get in touch



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