Xero Migration

INDUSTRY: ECOMMERCE

A Client Success Story

by Hey Success

Client Background:

- The Client's e-commerce business is based in Australia.

- Current Bookkeeping software were barely used during the past 2 years.

The Challenge

Objective:

Migrate her bookkeeping and accounting software to Xero.
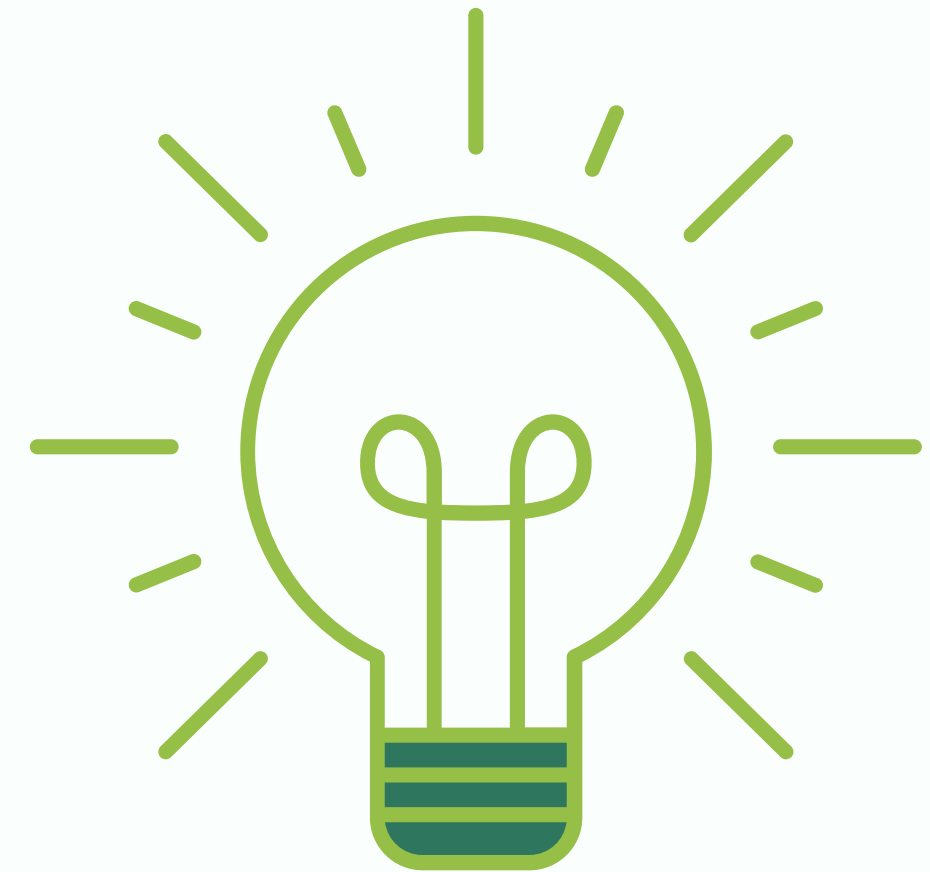
Reasons for migration:
- geography, Xero is more suitable in Australia
- user challenges
- wants a bookkeeping platform that is simpler and easier to navigate

Initial Findings

- The current set-up of the bookkeeping platform is based on the default and was not customised as per the industry of the client.

- The chart of accounts set-up was not ideal for the client's need.

What We Did

XERO SET-UP & PROCESS ALIGNMENT

TRAINING OF END-USERS

XERO Set-up & Process Alignment

The list of our initiatives but not not limited to:

a. Pre-migration analysis, business process mapping & workflow analysis done. Then, set up Xero according to the client's business need.

b. Uploaded initial important data and figures in Xero without any issues.

c. Aligned of Chart of Accounts.

d. Upload of beginning balances at an agreed cut-off period.

Training of End-users

- Provided training on how to navigate Xero.

- Provided feedback to the client on how to efficiently manage their inventory system in Xero.

Final Result

- Complete Xero Setup and Data Migration from QBO to Xero

- Identified the company's financial workflow.

- Set up Xero based on the client's current financial processes in their e-commerce business and QBO account.

- Successfully migrated the dataset from QBO to Xero.

What We Do

Hey Success offers business consulting and professional services to Small and Mid-size Enterprises (SMEs) about system migrations, Virtual Assistant staffing and VA skills training.

Our Services

SYSTEM MIGRATION

Hey Success System Migration Solutions is a streamlined method designed for SMEs to migrate to a new system or the cloud seamlessly. This is the same method we used to create successful migrations for our SME clients.

Transition to your new system faster, with little to no downtime and zero loss of data.

Focus solely on growing your business while also improving its capabilities.

TECHNICAL VA

Our clients typically need someone capable of managing the new system after the migration is complete. We understand the job's complexities, which is why we offer further solutions for you.

Your Own Tech VA will do the virtual work exclusively for you whether to be onboarded as a part of your team or will be managed by us full-time, part-time or freelance.

Flexible Plans to choose from. We also offer staffing solutions and suggestions on what works best for you and your company to handle the task efficiently while saving you money.

VA TRAINING

Hey Success offers VA training and employment in our community.

We can extend this training to your staff, or you can hire from our pool of talents.

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Work With Us
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Successful system migrations have been proven to improve business processes and helps you scale your business in record time.

If you're looking for a partner you can rely on, look no further.

Learn More

Book a virtual coffee ☕, or send us an email at coordinator@heysuccess.com.ph or WhatsApp +63 933 8500 529.

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