Movemybooks

Batch conversions

Batch conversion service

If you have a number of clients that you want to move all in one go, you can hand this task over to us and our friendly specialists will carry out the conversions for you.

We will need to agree a timescale with you, based on your needs and our existing pipeline of work, before we get started.

You will need to get key information organised in advance, so please read this guide which explains the process, what you can expect from us and what we need from you.

Initial consultation and designated email address

We will begin by discussing your specific needs, explaining our process, addressing any questions and establishing a suitable delivery timescale based on your requirements and our current workload.

At the outset, you will be given a specific @movemybooks.com email address for you to use when inviting us into your online accounts (see below).

Access and authorisation

For cloud sources please invite us into each client through your practice account to authorise data access.

For desktop sources we'll provide an online folder where you can upload each client's backup file.

For the destination we will need you to invite us into your practice account which contains the subscriptions to be used for receiving the data.

For your Movemybooks account, add us as a manager using the email address we provided to you.

Optional extras and conversion dates

Be default, we will include transactions up to the date that the conversion is processed. If you wish to give us a different preferred 'transactions to' date for specific clients, you will need to give us a list of clients and dates.

If some or all of the clients to be converted require optional extras, such as extra years, this information will also need to be added to the client list.

Subscription management

Your practice account for the destination software must have the appropriate number of subscriptions and they must be empty, ready to receive the converted data. Alternatively, we can create new subscriptions for you and then transfer them over to you on completion of the batch.

Single point of contact

Assign a single contact from your practice to manage all communications with us.

We aim to make the conversion process as seamless as possible for you. Following this guide and being well prepared will ensure a successful migration experience for you and your clients.

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

www.movemybooks.co.za

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