

Basic Setup Packages

These offerings will get you started on Xero right away. For details of the services included in each package, see the What's Included section below.

Assessment	New Business Setup	
\$ 325 One-Time Fee	\$ 450 One-Time Fee	\$ 675 One-Time Fee
Initial consultation	Initial consultation	Initial consultation
Assessment of existing QB/Xero	-	Assessment of existing QB/Xero
Written recommendations	-	Written recommendations
Meeting to Review	-	Meeting to Review
-	Xero Customizations	Xero Customizations
-	-	Data Import
-	Bank Feeds Setup	Bank Feeds Setup

Premium Setup Package	Full service Setup Package
\$975 One-Time Fee	\$1,175+ One-Time Fee
Initial Consultation	Initial Consultation
Assessment of existing QB /Xero	Assessment of existing QB /Xero
Written Recommendations	Written Recommendations
Xero Customization	Xero Customization
Meeting to review	Meeting to review
Data Import	Data Import
Bank Feeds Setup	Bank Feeds Setup
Training	Training
Support	Support
-	Add-on consulting
-	Add-on setup

What's Included

Details of what's included in the setup packages above

Initial consultation

- After you sign up, we'll send you a checklist to gather information in preparation for our initial consultation.
- We'll schedule an initial 30-minute phone call or video chat to determine your specific Xero setup needs based on your industry and individual business practices.

Review of existing QuickBooks or Xero file

- If you are converting to Xero, we will perform a detailed assessment of your current accounting system to identify any errors, missing transactions, and/or catch-up work that needs to be performed.
- We do this for all conversions in order to ensure your accounting is up-to-date and accurate before moving to the cloud.
- Additionally, we want to make sure you will enjoy similar or better functionalities and processes for your accounting.

Written recommendations for accounting setup

- We will document our findings and provide you with a written assessment, including recommendations for your accounting procedures moving forward.

Meeting to review recommendations

- We will schedule a 30-minute phone call or video chat to discuss the status of your bookkeeping and business processes to determine the most cost-effective and beneficial setup and ongoing services for your company.

Xero customization

- After the initial consultation, we'll create a Xero account for you under our partner dashboard. Or you can transfer your existing Xero subscription to us. You always retain ownership of your data.
- We'll enter your company contact information, EIN, social media links (for online invoices), and financial year end info.
- We'll enter your sales tax ID number and sales tax rates for one jurisdiction.
- We'll set up a Standard branded invoice template for you with your logo and company contact info and any specific payment instructions. We can optionally create a completely custom DOCX invoice template for you at our hourly rates.
- We'll also customize your email settings, including the default email template for emailed invoices. We can also customize the email templates for credit notes, receipts, purchase orders, remittance advices, repeating invoices, and statements. We can also set the default email address for emails to come from, if you have an inbox for accounting purposes. For example, "accounting@acme.inc".
- We'll customize your Xero Chart of Accounts based your industry and our initial consultation.

- We'll customize the layout of your Income Statement and Balance Sheet.
- We'll set up any tracking categories you may have (up to 30 included).
- If you have fixed assets, we'll add those to your Fixed Asset Register (up to 10 included).

Data import

- We'll enter your Xero conversion balance (trial balance) from your previous accounting system. We can optionally enter monthly comparative income/expense journals for periods prior to the conversion date for an additional \$75 per month.
- We'll import your customers and vendors, including their emails and address information.
- We'll import your inventory items list.
- We'll import any open invoices (receivables). Up to 30 invoices are included.
- We'll import any unpaid bills (payables). Up to 30 bills are included.
- We'll import your employees to Xero Payroll for an additional \$50 per employee.
- We'll also set up user logins for your individual team members, if applicable. With Xero, you get unlimited logins, so there's no need to share a login. This way it's easy to tell who has done what in the accounting system. You can also set detailed permissions for your team members, so each team member can only see what they need to see.

Bank feeds setup

- Once we've created, set up, and imported all data to your Xero file, we'll schedule a one-hour training session to orient you and your employees to Xero with a remote screen sharing session. You'll get to "learn by doing" as you or your employee take turns practicing various functions in Xero.
- During this training session, we'll show you how to enter your bank logins to Xero to set up the automatic bank feeds. We'll never ask you to tell us any bank logins with the ability to move funds.

Training

- As Xero-certified Advisors, we will provide 2 hours of one-on-one or group training for you and your staff.

Support

- We will provide you with 30 days of phone and email support.
- If you require additional training or support, we are available to help out at discounted hourly rates (as long as you maintain your Xero file with Bookkeeper Buddy).

Add-on consulting

- We will help you harness the efficiency of the cloud. As Xero-certified Advisors we are also certified and trained on many of the 300+ add-on solutions available to Xero users.
- We will evaluate your existing accounting procedures and provide you with solutions to save time and money, whether by increasing staff efficiency or reducing current accounting costs.
- We offer solutions for invoicing, accounts payable, time tracking, practice management, expense reporting, and many others,

Add-on setup

- We will set up and integrate one accounting add-on. 30-minutes of training included.
- Pricing differs by add-on. Contact us for details.