A2X → Link My Books: Migration Guide for Accounting Practices

A2X → Link My Books: switching your clients over

This isn't something you do. It's something we do, with you.

Moving a whole client base off one system and onto another sounds like it should be disruptive. It isn't, and a few things make that true.

- Nothing you've already done in A2X gets redone. We review your existing setup and carry it across.
- There's no big bang cutover. Clients move in batches, sized and timed to suit your practice, not ours.
- Nothing gets disrupted mid period. The two systems are never running side by side, so no client gets caught mid settlement when the switch happens.

If you're weighing up moving some or all of your clients across from A2X, here's exactly how that works, step by step.

At a glance

Discovery call:	around 1 hour, once.
Time per client:	15 to 20 minutes of discussion, mostly async over email and a shared sheet, not meetings.
First batch live:	a few days to a week from kick off.
Later batches of 25:	1 to 2 weeks each.
Your time per client:	about a minute, to send the invite.

The process, in three phases

Phase 1: Scoping and agreement

We start with a discovery call to understand how your practice uses A2X now: how many clients, which sales channels, and any custom mappings or tax rules that need to carry over.

From there we put together a like for like cost comparison so you know exactly what you're moving to.

Then we agree a plan together, which clients go first, how many in that first batch, and the order for everyone else. All of it tracked in a shared sheet so you can see exactly where things stand at any point.

Phase 2: First batch

Your first clients are invited to Link My Books. Alongside that, you add us as an additional user on your A2X account, or send over screenshots instead, so we can review your existing mappings and settings and replicate them accurately in LMB.

Once that's done, we walk you through the completed setup, confirm it's all correct, and agree a migration date together. We manage the cutover itself on that date.

From there, it's over to you or your client to switch A2X off, once we've confirmed it's safe to do so. Then we follow up with a wrap-up call to check everything is settling and reconciling as expected.

Phase 3: Rollout and follow-up

The rest of your clients move across in batches sized to suit your practice.

30 days after each migration, we check in by email to confirm all is well and pick up any feedback.

Who does what

Three people are involved in every migration: you, your client, and us. Here’s exactly where the work sits.

Link My Books

We do the heavy lifting. We build and maintain the tracking sheet so you always know where every client stands. We review your existing A2X mappings, tax rules and settings, and replicate them in LMB. We agree the cutover date with you and manage the migration itself. Once mappings are confirmed complete, we tell you it’s safe to switch A2X off.

Your practice

One thing, per client: the invite. That means logging into Link My Books, connecting the client’s Xero or QuickBooks ledger, and sending them an invite. It takes about a minute.

The merchant

Connects their own sales channels. Most sales channels only let the account holder authorise this kind of connection, so it has to be the merchant, not you, and not us. For them it’s a handful of clicks: sign in with Google, Xero or QuickBooks, connect each channel, done.

The questions every practice will ask

What happens to everything we've already posted from A2X?

It stays exactly as it is. We identify where A2X has posted up to and start Link My Books from the next settlement onwards. Nothing already posted gets touched. The one exception is if a client's A2X data turns out to be inaccurate and you want it corrected. In that case you void the incorrect A2X entries and we post over the same period instead. That's the only scenario where migration creates any extra work for you.

Can we bring in historical data, or is it a clean start?

Clean start by default. If you want backfilled data, that's available too, generally 12 to 24 months back, though the exact limit depends on the sales channel and its API.

Will we end up running and paying for both systems at once?

No, and it's worth saying plainly because it's the natural assumption. A2X posting pauses while we agree your migration date, and it never runs alongside Link My Books, because that's exactly what would create duplicate entries. Since both tools post on a settlement basis, the handover is clean: A2X finishes at one settlement, Link My Books picks up at the next. If you want to sanity check how an entry looks in each system before committing, we can export a CSV from both and compare them side by side. That's the safe way to check, rather than posting the same period live in both.

Do our existing A2X reconciliations still hold up afterwards?

Yes, fully. Historical entries and the reconciliations against them are left untouched and stay fully referenceable.

Does the cutover need to land on a VAT quarter or month end?

No requirement either way. Some practices like starting from a VAT quarter end so their LMB data begins with a fresh VAT return, and that works well. Start of month is the simplest default if you'd rather not wait. In practice the cutoff can be as precise as "posted up to this payout, LMB picks up from the next one."

Will everything just get copied over as is, mistakes included?

No. We review your entire A2X setup first, then come back to you with what we propose to carry across. A2X setups quite often contain mappings that are wrong from a tax or accounting point of view, and copying them across would carry that error straight into your new setup. We flag anything that looks off before anything gets replicated. If you'd rather have an exact copy regardless, we can do that too.

Do you need access to our A2X account?

Yes, so we can review your existing mappings, tax rates and settings and replicate them properly in LMB. If you'd rather not add us as an additional user, screenshots of your A2X setup work equally well but do tend to create more work for you.

Does it matter if we're on Xero or QuickBooks?

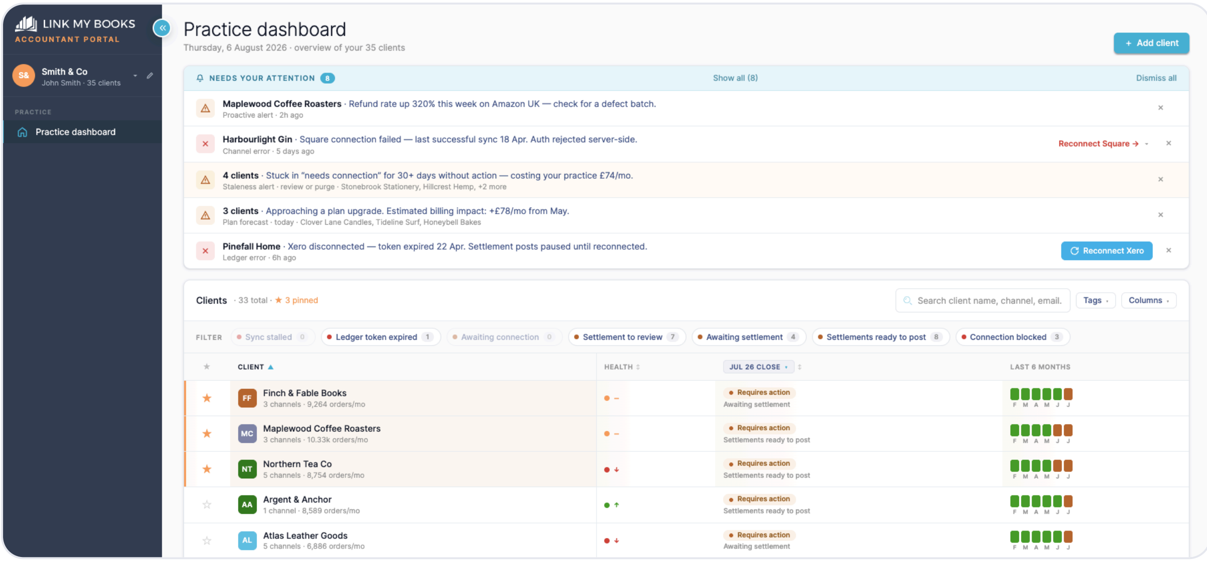
No, the process is identical either way.

We've got a lot of clients on A2X. How long would the whole move take?

It scales the same way no matter how many clients you've got, it repeats in batches for as long as you need. Your first batch of 5 to 10 clients is about building confidence and typically lands within a week. After that, batches of 25 to 50 clear in around 1 to 2 weeks each, and you set the pace throughout. A practice moving 100 clients, for example, might typically expect to be fully migrated within two to three months, though that's entirely up to how quickly you and your clients want to move.

One more thing: the practice dashboard

Something else is worth flagging here, because a lot of tools in this space stop at the individual client level, and ours doesn't. The practice dashboard gives you one screen for your whole client list, not just one client at a time.



Every client's listed by name with their channels underneath, so you can see straight away who's closed off for the month, who needs a quick review, and who's still got things waiting to post. Click into a client and it shows exactly what's outstanding on each channel, and keeps a running record too, so you can check which months are closed for any client without logging into a single one of their Xero or QuickBooks accounts.

That's the difference between finding out something hasn't posted a couple of days before a VAT return is due, and knowing about it weeks earlier with time to just click it through.

There's a reporting side as well. Each month you can generate a report for a client, branded with your logo and practice name, covering revenue, channel split and how their P&L is shaping up. Download it as a PDF or send it straight over, the kind of update that turns into a growth conversation rather than just a bookkeeping one.

What changes for your clients

Almost nothing. Once they've created their account and connected their sales channels, that's it. Their numbers keep flowing through to Xero or QuickBooks exactly as they did before, only through a different system behind the scenes.

If anything, there's an upside. Link My Books includes financial analytics your clients won't have had under A2X, the kind of thing you can bring into a growth conversation with them, not just a bookkeeping one.

Recommended batch size

Start small: 5 to 10 clients in your first batch. That's not a technical limit, it's so you can see how the process works and build confidence before scaling up. What sets the pace at this stage is your own familiarity and available time, not how many clients you've got.

Once you're through that first batch, batches of 25 to 50 work well. From here it's mostly down to how quickly your clients respond to their invite and connect their channels.

Ready to talk it through?

If you're ready to move some or all of your clients across from A2X, book a call with our partner team. We'll walk through your client base together, agree a plan, and get your first batch started.

Book a partner call

> When an HMRC VAT enquiry landed on one of our accountants' desks, the full Link My Books audit trail reconciled to the penny, and HMRC waved it straight through. That's the kind of scrutiny your numbers can hold up to from day one.

LINK MY BOOKS

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