Sawadee TAX · Moving-in guide

Moving-in guide — keep the books you have

Move books kept in Excel, another program or by an accounting firm without starting over.

1. **Gather in Excel**
   Paste staff, suppliers, customers and past expenses into our Excel template — or just use the file you have.

2. **Import at once**
   Settings → My data → 'Move existing records in': upload the file or paste cells. The kind and the columns are found for you; rows already in the books are skipped.

3. **Opening balances**
   Settings → My data → 'Opening balances': start date, cash, unpaid bills and money customers owe, on one screen.

4. **Bank statements**
   Upload bank statements (Excel, CSV, PDF) on the Bank matching screen and they are paired with the receipts and invoices in your books.

5. **POS sales**
   Import a POS Excel once and its columns are remembered — after that just send the file on LINE.

6. **Link your accountant**
   Add your accountant in Settings → Accountant and send each month's books by LINE or mail with one button.

- ✓ Exports from other programs work too — when columns can't be matched, the AI helps once.
- ✓ Stuck while moving? Ask in a free consultation.
- ✓ The Excel template comes in five languages.

ⓘ Sawadee TAX helps you keep the books and prepare filings. Check what you file with your accountant.

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