MIGRATION PLAYBOOK · BUSINESS APPS

How to migrate from Sage to Xero

Xero points Sage users to Movemybooks, a conversion service that moves the chart of accounts, contacts, balances and up to two years of transactions. Smaller businesses can instead set up the chart of accounts and enter conversion balances. Pick a period end, convert, then check the trial balance.

Updated 4 Nov 2026 3 phases 4 detailed steps 5 official sources

START HERE

How do you migrate from Sage to Xero?

SHORT ANSWER

This moves your bookkeeping from Sage to Xero. You choose a cut-off date, usually the end of a tax or financial period, and either use a conversion service to copy your accounts, customers, suppliers, balances and recent transactions, or set up Xero yourself with opening balances from your accountant.

- **Recommended route:** Conversion service (Movemybooks) at a period end
- **Order:** Pick the cut-off, tidy Sage, convert, then reconcile in Xero before you stop using Sage.
- **3 phases:** Prepare, Convert and Set up and check.
- **You're done when:** Xero trial balance matches Sage at the cut-off date.

Then you connect your bank to Xero, check the figures match, and stop entering work in Sage.

RECOMMENDED ROUTE

Conversion service (Movemybooks) at a period end

Xero names it for Sage, and it moves contacts, balances and up to two years of transactions in one pass.

▼ Other options and when to use them

- **Chart of accounts template and conversion balances**
  : A small business with few open items that wants a clean start.
- **Accountant or bookkeeper conversion**
  : Complex files with inventory, foreign currency or fixed assets.

TOOLS FOR THIS PLAN

Are you ready?
22-question readiness check

Plan your dates
Dated countdown you can add to your calendar

New to the jargon?
Plain-English migration glossary

ORDER TO MIGRATE IN, AND WHY

Pick the cut-off, tidy Sage, convert, then reconcile in Xero before you stop using Sage.

1. **Cut-off date agreed with your accountant**
   Balances and history are taken as at that date.
2. **Sage reconciled and tidied**
   Errors in Sage carry into Xero.
3. **Reports saved from Sage**
   Trial balance, aged receivables and payables for checking.
4. **Conversion run, or balances entered**
   Creates the Xero file.
5. **Bank feeds and users set up**
   Bank connections do not move.
6. **Trial balance checked**
   Proves the conversion before Sage is closed.

SETTINGS CHECKLIST: DECIDE THESE BEFORE YOU COPY

Built-in and third-party tools treat these differently. Tick each one off once you have decided.

Download this checklist (Excel)

- [ ] **Which conversion route**
  Conversion service or do it yourself.

  ▼ How each tool handles it

Built-in method	Xero: Movemybooks converts Sage 50 or Instant from a backup file, and Sage Business Cloud Accounting by authorised access. The DIY route uses a chart of accounts CSV template and account balances in guided setup.
Movemybooks	Moves chart of accounts and balances, customer and supplier details and balances, and transactions, with up to 2 years of history to Xero Standard or Premium.

Tip: Check what the service cannot convert before you choose a cut-off.

Xero: Change to Xero

- [ ] **What may need extra work**

Who handles inventory, foreign currency and fixed assets.

▼ **How each tool handles it**

Built-in method	Xero states there will be some information Movemybooks cannot convert, and links to its limitations.
Movemybooks	Reviewers note inventory, foreign exchange and fixed assets may need special attention.

Tip: Ask your accountant to review these areas after conversion.

Xero: Conversion methods for partners

- [ ] **Conversion balances**

Whether to enter balances yourself.

▼ **How each tool handles it**

Built-in method	Xero: enter conversion balances from your trial balance at the conversion date, with unpaid invoices and bills.

Tip: Use your accountant's final trial balance for the cut-off date.

Xero Central: Enter conversion balances

- [ ] **Other conversion apps**

Whether another service suits you better.

▼ **How each tool handles it**

Built-in method	Xero App Store lists conversion apps by region.

Tip: Check the app supports your Sage edition and region.

Xero App Store: Conversion apps

THE PLAN, PHASE BY PHASE

1 Prepare — Before the cut-off

Agree the cut-off date with your accountant.

Reconcile bank accounts and clear suspense items in Sage.

Save the trial balance and aged reports.

> **Watch out:** Errors in Sage carry into Xero.
>
> **WAYS AROUND IT**
>
> - Reconcile and fix before converting.

Show the detailed steps (1) →

2 Convert — After the cut-off

Upload a Sage 50 backup

or authorise Sage Business Cloud access.

Or import the chart of accounts and enter balances.

> **Watch out:** Some information cannot be converted.
>
> **WAYS AROUND IT**
>
> - Review the service's limitations and plan manual entries.

Show the detailed steps (2) →

3 Set up and check — Week after conversion

Connect bank feeds and invite users.

Compare trial balance and aged reports with Sage.

Set up invoice

templates and recurring items.

> **Watch out:** Bank feeds start fresh in Xero.
>
> **WAYS AROUND IT**
>
> - Connect feeds from the cut-off date.

Show the detailed steps (1) →

You are finished when

- Xero trial balance matches Sage at the cut-off date.
- Aged receivables and payables match.
- Bank feeds and users are set up.
- Sage is kept read-only for records.

CLICK BY CLICK

What does each step involve?

Open a part when you reach it in the plan. Each step says where to go, what to do and what you should see.

About this migration

What it covers, limits at a glance —

Xero offers two ways off Sage: a conversion service that reads a Sage 50 backup or connects to Sage Business Cloud, and a do-it-yourself route using Xero's chart of accounts template and conversion balances. The first brings history and contacts; the second gives a clean start with less detail.
Coming from MYOB or QuickBooks instead? See MYOB to Xero or QuickBooks to Xero.

SAGE PRODUCTS	CONVERSION SERVICE	MOVES
Sage 50 or Instant, and Sage Business Cloud Accounting	**Movemybooks: backup upload or authorised access**	**Chart of accounts, contacts, balances, transactions**

HISTORY
Up to 2 years to a Xero Standard or Premium plan

DIY ROUTE
Chart of accounts CSV template plus conversion balances

CUT-OFF
Choose a period end, ideally after a tax return

1 What do you need before you migrate from Sage to Xero?

Need	Details	Where to get it
Sage backup or admin access	Sage 50 backup file, or Sage Business Cloud login to authorise.	Sage
Xero organisation	Standard or Premium plan for 2 years of history via Movemybooks.	Xero
Cut-off reports	Trial balance, aged receivables and payables.	Sage reports
Accountant sign-off	On the cut-off and balances.	Your accountant

2 Prepare Sage

1 step

1

Reconcile and save reports

Where: Sage > Banking and Reports

Reconcile every bank account to the cut-off date, then save the trial balance and aged reports as PDF.

✓ **You should see:** Reports you can compare with Xero.

3 Convert to Xero

2 steps

1

With a conversion service

Where: Xero App Store > Movemybooks

Upload the Sage 50 backup or authorise access to Sage Business Cloud. The service collects, converts and emails you when it is done.

✓ **You should see:** Your Xero organisation has accounts, contacts and transactions.

2

Or enter conversion balances

Where: Xero > Accounting > Advanced > Conversion balances

Import the chart of accounts, then enter balances from the trial balance and add unpaid invoices and bills.

✓ **You should see:** The conversion balances match the trial balance.

4 Set up and check

1 step

1

Compare reports

Where: Xero > Reporting

Run the trial balance and aged reports at the cut-off date and compare with Sage. Record results in the data validation report.

✓ **You should see:** Figures match.

WORTH KNOWING

What can go wrong, and how do you avoid it?

The detail behind the plan: options compared, and what experienced engineers check first. Tap any item.

Compare all the ways to do this

3 options –

Conversion service

LOW EFFORT

Best for: Most Sage users

+ Contacts and history
+ Fast
– Some items not converted

Conversion balances

MEDIUM EFFORT

Best for: Small businesses wanting a clean start

+ Full control
– Manual work
– No history

Accountant-led

MEDIUM EFFORT

Best for: Inventory, foreign currency or assets

+ Professional checks
– Coordination

OUR ADVICE

Use the conversion service for most Sage files and have your accountant check the trial balance. Use conversion balances for a clean start.

Not everything converts

SAVES TIME –

Xero notes some information cannot be converted by Movemybooks.

WHAT TO DO

Read the limitations before booking and plan manual entries.

Xero: Conversion methods for partners

History depends on your Xero plan

COST LEVER

Up to 2 years of transaction history converts to a Xero Standard or Premium plan.

WHAT TO DO

Choose the plan before converting if you need history in Xero.

Xero: Conversion methods for partners

Balances must be right on day one

COMPLIANCE

Conversion balances set the starting point for every later report.

WHAT TO DO

Use the accountant's final trial balance for the cut-off.

Xero Central: Enter conversion balances

Keep Sage for records

COMPLIANCE

Detailed history older than the converted period stays in Sage.

WHAT TO DO

Keep a final Sage backup and reports for your record-keeping period.

Xero: Change to Xero

Specialist areas need review

REDUCES RISK

Reviewers of Movemybooks point to inventory, foreign exchange and fixed assets as areas needing attention.

WHAT TO DO

Have your accountant check these after conversion.

Xero App Store: Movemybooks

FINISH SAFELY

How do you check it worked, or roll back?

Full validation checklist

4 checks

Run these before you declare the migration complete. Record the results in the data validation report.

Check	How to check	What good looks like
Trial balance	Compare at the cut-off.	Matches.
Aged receivables	Compare totals and a sample of customers.	Matches.
Aged payables	Compare totals and a sample of suppliers.	Matches.
Bank	Reconcile the first month in Xero.	Balances agree with statements.

Rollback plan

If it goes wrong

ROLL BACK IF

- Converted figures cannot be reconciled
- Tax or payroll deadlines at risk

POINT OF NO RETURN

Sage keeps its data. Until you stop using it, you can keep working there while the Xero file is fixed.

1

Keep working in Sage

Where: Sage

Continue entries in Sage while fixing Xero.

✓ **You should see:** Books stay current.

2

Reconvert

Where: Xero

Fix issues and run the conversion again into a new organisation.

✓ **You should see:** Clean data.

Agree the triggers and who decides before the go / no-go meeting. Use the rollback plan template.

Common problems and fixes

4 errors

`Trial balance does not match`

Cause: Wrong cut-off date or unreconciled items.

Fix: Compare by account and post adjustments with your accountant.

`Contacts missing balances`

Cause: Open items not converted or entered.

Fix: Add unpaid invoices and bills as conversion balances.

`Bank balance wrong in Xero`

Cause: Feed started before the cut-off.

Fix: Delete duplicate statement lines before the cut-off.

`Fixed assets missing`

Cause: Not converted.

Fix: Register them in Xero fixed assets.

Search the full error library →

FAQ

Frequently asked questions

Which Sage products convert?

Xero lists Sage 50 or Instant and Sage Business Cloud Accounting for Movemybooks.

How much history moves?

Up to 2 years to Xero Standard or Premium.

Can I do it myself?

Yes, with the chart of accounts template and conversion balances.

When should I switch?

At a period end agreed with your accountant.

SOURCES

Official sources

5 official pages this guide is based on

Vendors change limits and features, so confirm details on the source before you rely on them. Last checked 4 Nov 2026.

- Xero: Change to Xero
- Xero: Conversion methods for partners
- Xero App Store: Movemybooks
- Xero Central: Enter conversion balances
- Xero App Store: Conversion apps