

Is your business ready to move from Xero to Sage Intacct?

Work through this checklist before you engage an implementer. The more green boxes you can tick, the smoother your migration will be - and the less you will pay in rework.

How to use this checklist: Work through each section honestly. Items marked Critical must be resolved before migration begins. Important items can be resolved during the early phase of implementation.

SECTION 1 OF 5

Business signals: are you at the right stage?

Sage Intacct is the right move for businesses that have outgrown Xero's reporting, multi-entity, or project tracking capabilities. These signals indicate you are ready.

Readiness signals

Tick the boxes that apply to your business

SECTION 5 OF 5

Who does what: the responsibility split

Knowing who owns each piece avoids delays. LimeLedger handles implementation. Your team owns the business decisions and data validation.

TASK	LIMELEDGER	YOUR TEAM	SHARED
Chart of accounts design	Recommends and builds	Approves	✓
Data export from Xero	Provides templates	Runs the export	✓
Data cleaning and mapping	Cleans, maps, transforms	Reviews and approves	✓
Sage Intacct configuration	Builds everything	Tests and approves	✓
Opening balance validation	Produces reconciliation	Signs off	✓
Integration builds	Builds and tests	Provides credentials	✓
Training delivery	Delivers all sessions	Attends and completes	✓
Business process decisions	Advises and options	Decides	→ You

TASK	LIMELEDGER	YOUR TEAM	SHARED
Payroll data accuracy	Validates format	Owens the data	→ You

FOR REFERENCE

The 14-week timeline



Disclaimer: This checklist is provided for informational and preparation purposes only. It does not constitute professional, financial, or legal advice. Migration complexity and timelines vary by business. All implementation scopes and fees are confirmed in a signed Statement of Work prior to project commencement. Xero is a registered trademark of Xero Limited. Sage Intacct is a registered trademark of Sage Group plc. LimeLedger Pty Ltd is an authorised Sage Intacct Value Added Reseller. © 2026 LimeLedger Pty Ltd. ABN 96 696 961 565. All rights reserved.

Ready to talk? [Book a 30-minute consultation.](#)

We will review your checklist results, answer your specific questions, and tell you honestly what migration would look like for your business - and what it would cost.

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