Move your books from Xero or QuickBooks Online to Claify

Bring your open invoices, bills, credit notes and balances into Claify's own ledger. You keep your old system untouched.

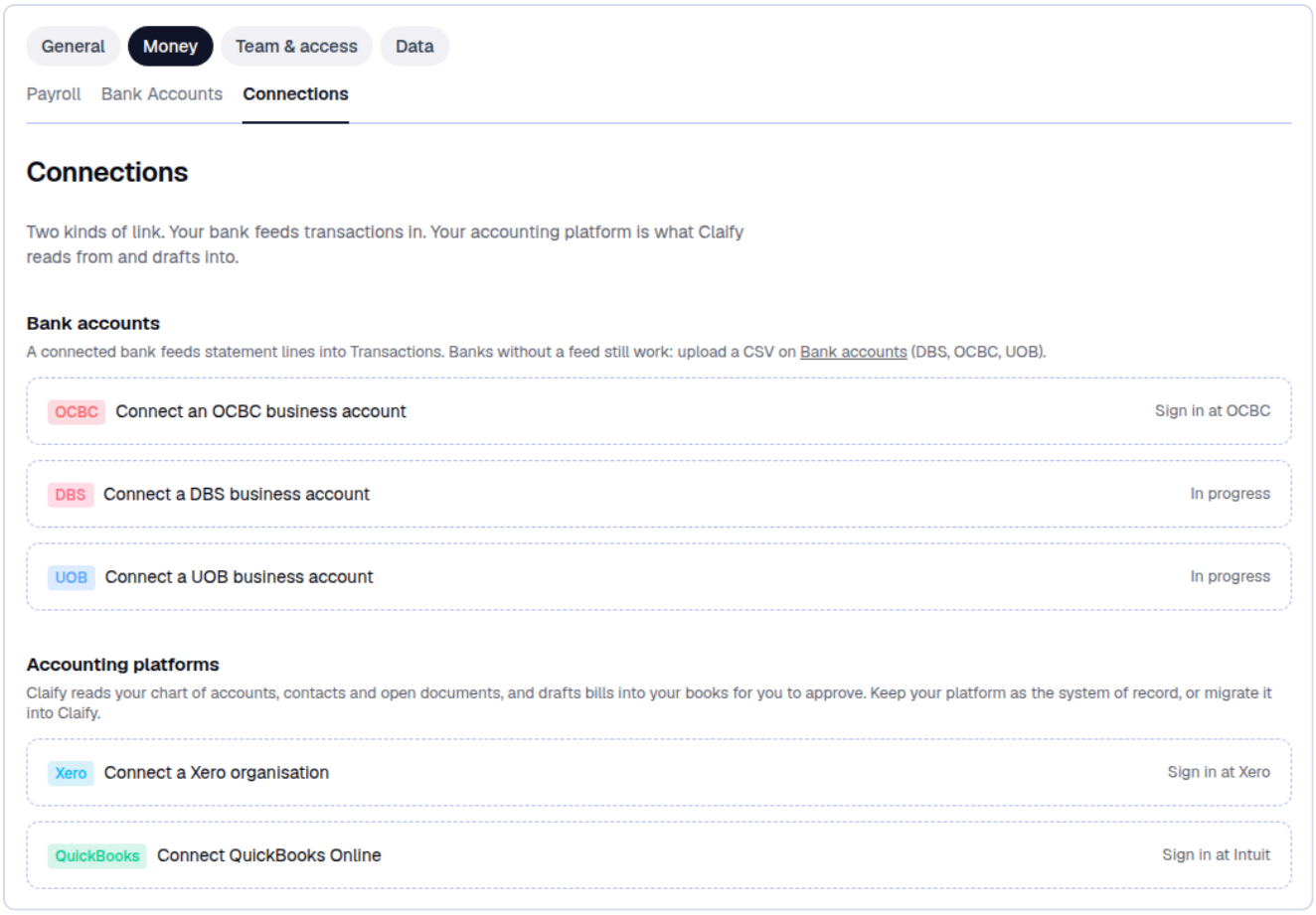
You need: owner access to your Claify organisation, and admin access to your Xero or QuickBooks company. **Time:** 20 to 40 minutes. **Fee:** one-time **S$10.00 + GST = S$10.90** per migration, paid by card at the preview step.

Good to know

- Closed history stays in your old system. Claify starts from your balances at the **cutover date** and carries every **open** invoice, bill and credit note.
- Claify only reads from Xero or QuickBooks through the connection. Nothing is changed there.
- Only the **organisation owner** can run a migration.
- If you only want Claify as an AI layer on top of Xero or QuickBooks, you do not need to migrate. Connect them and keep them as your system of record.

1. Connect your accounting platform

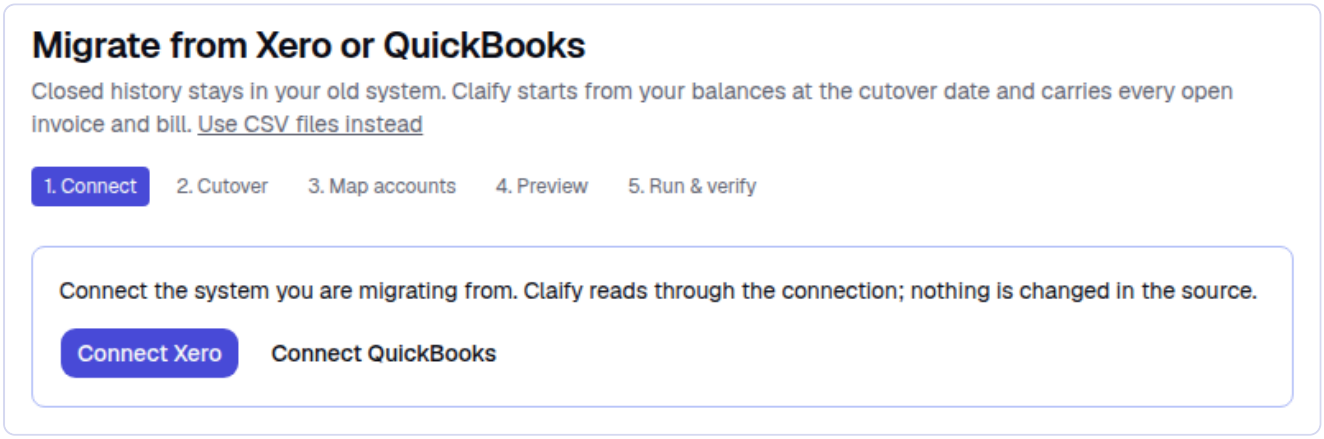
Go to **Settings** → **Money** → **Connections**. Under **Accounting platforms** choose **Connect a Xero organisation** (Sign in at Xero) or **Connect QuickBooks Online** (Sign in at Intuit). Sign in and choose the company.



Once connected, the platform's card has a **Migrate** button. You can also open **Migrate** directly.

2. Open the migration wizard

The wizard has five steps: **Connect, Cutover, Map accounts, Preview, Run & verify**.



3. Choose the cutover date

Pick the source (Xero or QuickBooks) and a **cutover date**, usually the first day of a month. Balances at this date become Claify's opening balances. Click **Read source data**. Claify reads your chart of accounts, contacts, open invoices, open bills and open credit notes.

4. Map your accounts

Each account in your old system needs a matching Claify account. Suggestions are prefilled from the account type. Check them and change any that are wrong. Accounts you leave unmapped are skipped. Click **Continue to preview**.

5. Preview

The preview shows what will come across: contacts, open invoices, open bills, open credit notes and accounts to be created, plus the trial balance from your old system at the cutover date.

QuickBooks: the trial balance is read automatically.

Xero: Xero does not let Claify read the Trial Balance report, so you export it yourself:

1. Open reporting.xero.com (sign in to Xero first).
2. Search for **Trial Balance** and open the report.
3. Set the date to your cutover date and click **Update**.
4. **Export** as Excel or CSV, then upload the file at **Upload trial balance**.

Claify shows how many rows loaded, whether debits equal credits, and any accounts it could not link. Fix these before continuing.

No access to reports? Enter your bank balance at the cutover date (from your bank statement) and click **Use bank balance and continue**, or **Continue without opening balances**. Open documents still migrate. Equity and other balances must then be entered afterwards with a manual journal dated at the cutover date.

6. Pay the import fee and run

Click **Pay and continue**. The fee is S$10.90 (S$10.00 + 9% GST), paid once per migration by card through Stripe. Then click **Run migration**.

The run shows progress for accounts, contacts, invoices, bills, credit notes and the opening balance. Do not close the page. If it stops, the page offers **Run again** or **Resume run**.

7. Check the result

When it finishes, Claify compares its trial balance with your old system's, account by account.

- **Verified:** every mapped account matches the source. Open **Trial balance** to look, then go to the dashboard.
- **Differences found:** Claify lists them. Export your old trial balance again **as at the cutover date** (a single date, not a range), use **Replace trial balance**, and click **Run again**.

Running it twice

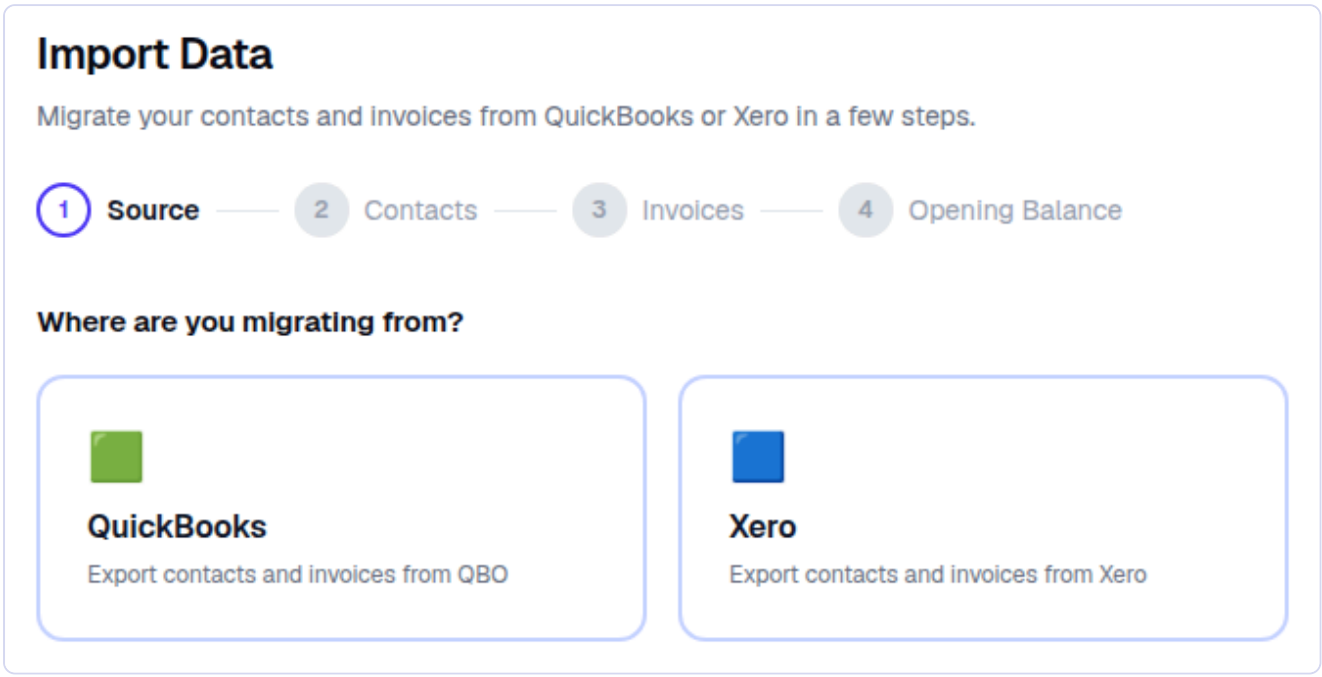
A migration is safe to run more than once. Contacts and documents already copied are skipped (the wizard shows "already present"), nothing is duplicated, and the opening balance is recalculated.

- **Run again** after a failure or a difference is free: it is the same migration.

- **Start a new migration** (for example after a trial period) begins a new run with its own import fee.

Prefer files? Use the CSV import

At the top of the wizard, click **Use CSV files instead**. It has four steps: **Source, Contacts, Invoices, Opening Balance**. Choose QuickBooks or Xero, export contacts and invoices as CSV from your old system, and upload each file.



After you migrate

Two common ways to go on:

1. **Claify as the main system.** Let the old subscription lapse at renewal.
2. **Keep Xero or QuickBooks as the main system.** Use Claify as the AI layer: Snap and the bill inbox can still draft bills into Xero or QuickBooks if you choose it as the target.

Need a hand? Use **Contact support** in the Claify sidebar, or email support@claify.homeauto.sg.
