

Only what the new system needed

A Sage 50 cutover to QuickBooks Online Advanced, timed to a new order system

Summit Memorials was moving orders and inventory to a memorial-industry order system that works with QuickBooks Online. That system could not go live until the books moved. We brought over the opening position as of February 6, 2026, and nothing the business no longer needed.

Feb 6

2026 conversion date for the opening position

~14,000

customers in Sage; only those with open invoices moved

Feb 17

delivered, 11 days after the Sage file arrived

1 day

from delivery to the client's thank-you

THE CHALLENGE

Summit Memorials Ltd makes and installs granite and bronze headstones, grave markers and monuments, with installation in cemeteries across Alberta, British Columbia, Manitoba and Saskatchewan. It has been in business since 2005 and is based in Edmonton.

Its books ran in Sage 50 Canadian edition on a local server. The business was adopting a memorial-industry order system that integrates with QuickBooks Online and would take over orders, purchase orders and inventory.

The specific problem

The first plan was a full migration with transaction history, inventory, and sales and purchase orders. After talking to its accountant, the client asked for current data only. The work became a cutover: bring over exactly what QuickBooks Online needed on day one, into a QuickBooks company the client had already set up, and leave everything else to the new order system.

STARTING POSITION

FROM

Sage 50 (Canadian edition)

- On-premises, server-based file
- Orders and inventory by location
- Almost 14,000 customers
- Fiscal year starting December 1
- US dollar purchases at a 1.00 rate

TO

QuickBooks Online Advanced

- Opening balances as of February 6
- Current-year profit and loss
- Open receivables and payables
- Customers with open invoices only
- Orders and inventory left to the order system

THE SOLUTION

We loaded opening balances as of February 6, 2026, the current fiscal year's profit and loss, open receivables and customer deposits as individual transactions, and open payables. Only customers with open invoices came across, not all 14,000.

NOT MIGRATED

Before December 1, 2025
Prior years

No history moved, on the accountant's advice

LOADED INTO QUICKBOOKS ONLINE ADVANCED

Dec 1, 2025 to Feb 6, 2026
Current year

Profit and loss to the conversion date

February 6, 2026
Opening position

Balances, open AR and AP

The load went into the client's existing QuickBooks Online Advanced company, with its live bank feeds left in place.

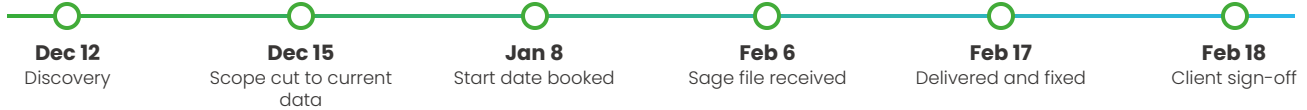
VALIDATION

Payables matched Sage. We flagged two differences that already existed in Sage: its receivables report and balance sheet disagreed by \$2,286.70, and customer deposits by \$2,286.57. The client raised three problems with our load during review, and all three were fixed the same day.

RESULT

The migration was delivered on February 17, 2026, clearing the way for the new order system. After same-day fixes, the client paid and thanked us for a successful migration the next morning.

TIMELINE



WHAT WENT WRONG, AND HOW WE HANDLED IT

A revenue credit that should not exist.

Loading open invoices created a matching credit to a revenue account. The client caught it; we cleared it the same day.

A mis-mapped account.

A \$2,285.00 permit expense landed in permit revenue. Reclassified the same day.

A slow start on our side.

Our internal handoff listed the wrong Sage username, and work did not start until a week after the file arrived.

A missed weekend target.

We told the client we expected to finish over the weekend, and delivered on Tuesday, February 17.

ENGAGEMENT MODEL

Fixed-price standard migration, quoted after a review of a backup of the Sage file. A 50% deposit reserved the start date around the client's year-end review and vacation; the balance was due on completion.

Moving off Sage 50 alongside a new industry system?

Talk to us about what your new setup actually needs from your books, and what can stay behind.

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