Fit Small Business

Thank You for Downloading Our

ACCOUNTING SOFTWARE IMPLEMENTATION CHECKLIST

We hope this checklist can help you in planning and implementing your new accounting software. You may adapt this checklist as is or modify it based on your needs.

Review of Current Accounting Software

Stage Status				
◯ Completed	◯ Not Started	◯ Started	◯ Stuck	◯ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Action Items:

- Meet with the accounting team to discuss the state of the current accounting software.
- Gather feedback from employees about inefficiencies in the process (e.g., continued use of spreadsheets for transactions that can't be tracked or entered into the current accounting system).
- Compile a list of missing features that are essential to your business' accounting process.
- Make a "wish list" of features or improvements that accounting department employees would like to see in the new software.

Meeting Notes & Discussions

Action Items & To-Dos

Questions

Goal Setting

Stage Status				
◯ Completed	◯ Not Started	◯ Started	◯ Stuck	◯ Stalled

Person in Charge		Date Started	
Target Complete Date		**Date Completed**	

Action Items:

- **Overall efficiency**: Will the new software make accounting processes faster and more efficient? Can it reduce data entry work of employees?
- **Granularity in tracking and reporting**: Can the software track items of income and expenses that can't be tracked by the current software? Can the software generate reports that are previously created manually in spreadsheets? Does it create custom reports that require a few clicks?
- **Deviation from spreadsheets**: Can the software reduce the use of spreadsheets in at least 80%-90% of the process?
- **Business intelligence integration**: Does the software integrate with business intelligence (BI) software or does it have built-in BI features?
- **Cost and affordability**: Can the business pay for the monthly or yearly and maintenance costs of the software? Can you sponsor training and certifications for employees who will use the software?

Goal Setting Document Link

Meeting Notes & Discussions

Action Items & To-Dos

Questions

Timetable

Stage Status				
○ Completed	○ Not Started	○ Started	○ Stuck	○ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Things You Might Want to Consider:
- **Size of the accounting data**: When you have years of data to back up and migrate, the transition may take longer.
- **Difficulty of the software**: Accounting software can get complex, which requires hours of training and months of support. Remember that accounting department employees will do these training on top of their regular accounting tasks.
- **Size of the company**: The transition will also depend on the company size and how many people should be trained. Larger companies will take more time during the transition while smaller ones will require less time.
- **Willingness to transition**: It's possible that some employees may resist the transition. This friction may slow down your plans. If you encounter this situation, review your goals and try to work with employees toward a solution.

Timetable Document Link

Meeting Notes & Discussions

Action Items & To-Dos

Questions

Accounting Software Proposal

Stage Status

○ Completed ○ Not Started ○ Started ○ Stuck ○ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Software Choices

Product Name

Name of Contact   **Contact No. or Email**

Date Contacted   **Scheduled Demo Date**

☐ Contacted   ☐ Demo Scheduled   ☐ Demo Completed   ☐ Rescheduled
☐ Postponed   ☐ Canceled

Demo Notes & Remarks

Product Name

Name of Contact   **Contact No. or Email**

Date Contacted   **Scheduled Demo Date**

☐ Contacted   ☐ Demo Scheduled   ☐ Demo Completed   ☐ Rescheduled
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Date Contacted   **Scheduled Demo Date**

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☐ Postponed   ☐ Canceled

Demo Notes & Remarks

Accounting Software Evaluation

Stage Status

○ Completed   ○ Not Started   ○ Started   ○ Stuck   ○ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Software Product

Pricing Info	What We Like	What We Don't Like

Software Product

Pricing Info	What We Like	What We Don't Like

Software Product

Pricing Info	What We Like	What We Don't Like

Final Planning Steps

☐ Inform business stakeholders about new accounting software proposal.

☐ Meet with accounting team and upper management to decide which software to choose.

☐ Vote on which software to purchase.

Selected software: [   ]

Relationship manager: [   ]

☐ Contact software provider to complete purchase.

☐ Complete payment.

Preimplementation

Technical Preparation

Stage Status				
○ Completed	○ Not Started	○ Started	○ Stuck	○ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

☐ Gather information from existing company devices.

Link to file:

☐ Assess overall device health, age, and capability to handle the software.

☐ Review device compatibility and specs against software provider's recommended specs.

Software Specs (Recommended):

☐ Create a budget for new device replacements, if any.

☐ Check for existing security issues.

☐ Back up accounting data.

Date Started:		Date Completed:	
Time Started:		Time Completed	
Person in Charge:		Backup Size (GB):	
Backup Location:			

☐ Start data migration to new software.

Date Started:		Date Completed:	
Time Started:		Time Completed	
Person in Charge:			

☐ Set up new accounting software.

Item To Set Up	Status	Person in Charge & Remarks

☐ Test accounting software.

Notes & Feedback:

Implementation & Transition

○ Completed   ○ Not Started   ○ Started   ○ Stuck   ○ Stalled

Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Installation

☐ Schedule installation to all devices.

   Link to calendar or tracker: _____

☐ Make timely announcements to stakeholders.

Training

☐ Arrange training for employees.

   ☐ Contact software support team.

   ☐ Book training schedules in the company calendar.

   ☐ If applicable, request employee access to the training hub.

☐ Make a company-wide announcement or memo about the scheduled training dates

☐ Provide login access to all trainees before training starts.

☐ Distribute training materials to trainees a few days before training starts.

Implementation

☐ Commence use of the new accounting software.

   Date commenced: _____

☐ Set up employee roles and other applicaition controls (e.g., admin access, read-only, input-only, etc.)

Monitoring

Post-training Support

Stage Status

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Person in Charge		**Date Started**	
Target Complete Date		**Date Completed**	

Meeting Date: [   ]   **Meeting Presider:** [   ]

Meeting Notes & Discussions

Hurdles & Bottlenecks

Solutions & Workarounds

Final Monitoring Steps

☐ Check parallel running of new and old software.

Target end date of parallel running:

Target retirement date of old software:

☐ Reach out to software support for current problems and bottlenecks.

☐ Review old software's subscription or license before retiring.

Last day of subscription or license:

☐ Remove payment method to prevent autorenewal.

☐ Retire old accounting software and uninstall from device.

Date of retirement:

Process Documentation

While this part is optional, documenting the whole process can help you in the future in case you need to switch accounting software.

In the process document, you should have at least the following:
- Scope
- Process flowchart
- Steps and explanations
- Employee involvement
- Expected inputs and outputs