



Accounting Software Implementation Checklist

- ☐ Identify key features needed
- ☐ Choose the Right Software
- ☐ Set Up User Roles & Permissions
- ☐ Migrate Financial Data
- ☐ Customize Chart of Accounts
- ☐ Integrate with Other Business Tools
- ☐ Configure Tax Settings
- ☐ Train Employees & Users
- ☐ Set Up Automated Workflows
- ☐ Test System & Validate Data
- ☐ Go Live & Monitor Performance
- ☐ Regularly Update & Maintain Software
- ☐ Review & Optimize Processes