



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