



CERTUM SOLUTIONS

IMPLEMENTATION SERVICES

DOs & DON'Ts for successful QuickBooks conversions

DO clean up any historical data before you begin your move.

Conversions must be “apples to apples.” Starting balances in QuickBooks must match your old system. Conversions will take longer if you have old data or out-of-date lists (and can be more costly with a consultant).

DO your research!

Spending some time in your new software before beginning your conversion will help ensure QuickBooks is the right fit for you. It's impossible to know everything from a demo. *Software Tip:* Most platforms either offer a trial period or allow returns after purchase.

DO have an internal project manager.

Be sure to have someone in-house responsible for keeping your project healthy and on track, and for communicating with stakeholders.

DO start on training early.

Start your training during conversion so that you and your team are comfortably using QuickBooks when it's finished.

DO bookmark us in your browser.

You can easily book one-on-one help sessions as needed through our company booking page – <https://calendly.com/certum-solutions>. We are here for you!

DO allow for plenty of time.

Most conversions take about a month, if much historical data is involved. While some can be completed in far less time, you should give yourself extra runway to allow for project bumps and to relieve stress.

DO be patient with yourself and others.

Conversions take effort, but the payoff is huge. There is bound to be a learning curve, but remember your goals and be kind to yourself!

DON'T disappear during conversion.

You might assume this process will leave you with down time, but don't plan a vacation just yet. All stakeholders should be available during this process. New issues always arise that need to be addressed.

DON'T rush through data imports.

Data imports require meticulous attention, and even small errors will cause large problems in the validation process which will slow your whole project down.

DON'T assume your workday won't be impacted by the conversion.

Your entire team is diving into this process together! With this in mind, be prepared for your short-term workload to increase. Planning ahead for this will help you and your team stay afloat.

Certum Solutions can help!

Implementation Services

Certum Solution's expert ProAdvisors are available to assist you with your implementation project. Our hourly opt-in allows you to utilize our experts as much or as little as your company needs.

Ready to get started?
Send an email to
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