

Conversion Checklist for Customers

To ensure the best possible conversion to the Denali Software system we recommend you review and complete all of the following items.

- ✓ Transition during a time of the year that is slower for your business, it does not necessarily need to be at year end. Converting at a slower time of year will be less stressful and allow for testing and training more easily.
- ✓ Review your chart of accounts, customer list, employee list, vendor list, and any other lists to eliminate duplicates or unused accounts. Taking steps to optimize your data prior to conversion gives you the opportunity to:
 - Standardize your data (capitalization, abbreviations, acronyms)
 - Identify missing or duplicate records
 - Purge unnecessary data
 - Reformat your data if necessary
 - Evaluate for corrupted information
 - Test your data's validity when exported
- ✓ Complete a thorough audit of each account on your Trial Balance to be certain that the balance is accurate. If your account balance is inaccurate in the previous system, the inaccurate balance will carry forward to Denali. These balances can often be fixed in the exported document.
- ✓ Ask your CPA or outside accounting support to review your work to allow for any recommendations that will help make Denali work to your advantage.
- ✓ Training is a crucial phase in the conversion/implementation process. We do not recommend cutting corners on training. Adequate instruction on the functionality and features of your new software will lay the foundation for continuous improvement in your workflow processes. We believe that on-site training is the best option for hands-on learning; you can use your own data in your own environment. We also offer phone training and some webinars and videos.
- ✓ Test your converted data.
 - Manually or electronically entering data into a test database in Denali gives you the chance to evaluate critical processes and review vital reports for accuracy.
 - Verifying data integrity, running queries, and comparing reports in Denali with those from the prior system can help identify any issues so corrections can be made before going live.