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# Desktop → Cloud Migration Checklist

A calm, step-by-step checklist for moving your accounts from a desktop or on-premise system to the cloud — without losing a single record. Tick each box as you go. Works for any accounting system.

## 1. Before you move — data clean-up

- ☐ Decide a clean cut-off date (start of a month, quarter, or financial year).
- ☐ Remove duplicate customers and suppliers from your old lists.
- ☐ Fix obvious errors (wrong names, addresses, tax numbers) before they carry over.
- ☐ Archive customers/suppliers you no longer deal with, so you import only what's live.
- ☐ Confirm your chart of accounts is tidy and reflects how the business runs today.

## 2. Export from your old system

- ☐ Export your customer list.
- ☐ Export your supplier list.
- ☐ Export your product / item list (with prices).
- ☐ Export outstanding invoices (who still owes you) and unpaid bills (who you owe).
- ☐ Export or note your account balances as at the cut-off date.
- ☐ Keep a full backup of the old system, archived safely.

## 3. Import & set up in the cloud

- ☐ Set up your business details (name, SST status, financial year).
- ☐ Import customers, suppliers, and products from your exported files.
- ☐ Check the imports on a sample — names, prices, and tax settings are correct.

## 4. Opening balances

- ☐ Enter your bank / cash balance as at the cut-off date.
- ☐ Enter unpaid customer invoices (accounts receivable) as opening items.
- ☐ Enter unpaid supplier bills (accounts payable) as opening items.
- ☐ Confirm the opening totals match your old system's closing figures.

## 5. Inventory (if you hold stock)

- ☐ Do a physical stock-take at the cut-off date.
- ☐ Enter accurate opening quantities and costs for each item.
- ☐ Confirm stock valuation matches your records before you go live.

## 6. Parallel run (about one cycle)

- Record new sales and expenses in the cloud from the cut-off date.
- Keep the old system as a read-only reference for one month or so.
- Reconcile the bank in the new system and confirm it balances.
- Compare a report (e.g. profit & loss) across both to build confidence.

## 7. Go live

- Once a cycle reconciles cleanly, make the cloud system your live books.
- Stop entering into the old system; keep its data safely archived.
- Grant your accountant access so they log in to the same live data.

## 8. Staff training & habits

- Show staff how to raise invoices, record expenses, and take payments.
- Confirm e-invoice and SST are handled as part of normal recording.
- Set a simple month-end routine (reconcile, review, done).

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Tip: the export and import are usually the easy part — an afternoon's work. A clean cut-off date and a short parallel run are what make the switch feel calm instead of risky.