



# Pre-implementation Checklist

Task	Assigned to	Due Date	Completed
<b>Change management</b>			
List the goals you plan to achieve with Simpro Premium			
List how achieving these goals will help your employees.			
Appoint a Simpro Champion and Change Management Leadership Team.			
Decide on a cutover or staged implementation and set your expected go-live date/s.			
Plan and delegate implementation preparation tasks.			
Plan time for the Simpro Champion to train staff who are not attending Simpro training.			
Arrange / schedule a suitable training environment and training resources.			
Communicate the implementation plan to your teams.			
<b>Data</b>			
Check that the following databases are up to date. View our <a href="#">Help Guide</a> for more information.			
Customers (including information on existing sites & contracts)			
Suppliers			
Contractors			
Employees			
Customer assets			
Plant and equipment			
Request catalogue price files from each of your suppliers.			
<b>Prepare setup reference materials</b>			
Workflows for each of your lead, quote and job processes.			
List of cost centres you plan to use in Simpro.			



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List of your current chart of accounts (financial figures not required) for cost centre mapping.			
Examples of reports required internally or by your customers.			
List of your hourly labour rates.			
List of your flat price service / installation charges.			
List of your standard service / call out fees.			
Contractor schedule of rates.			
Overhead and employment cost calculations.			
<b>Gather examples of your forms</b>			
Quotes			
Job cards			
Invoices			
Safe work method statements (SWMS).			
Job safety analysis forms (JSAs).			
Compliance or proprietary forms.			
Electronic copy of your company logo (jpeg/png) and letterhead (PDF not compressed).			
<b>Accounting package</b>			
Mark card files that you do not want in Simpro Premium as inactive to ignore them during the import process.			
<b>MYOB</b> - Card file IDs are replaced by the accounting link. Record existing information in card file ID's in an alternative location.			
<b>Xero</b> - Customers and suppliers labelled as contacts will not import through accounting link. Export contacts from Xero to create a manual import files.			
<b>Desktop accounting package</b> - Check that you have .Net Framework 4.0 installed.			
<b>Desktop accounting package in a remote server environment</b> - Talk to your IT manager regarding the required permissions to install the accounting link.			