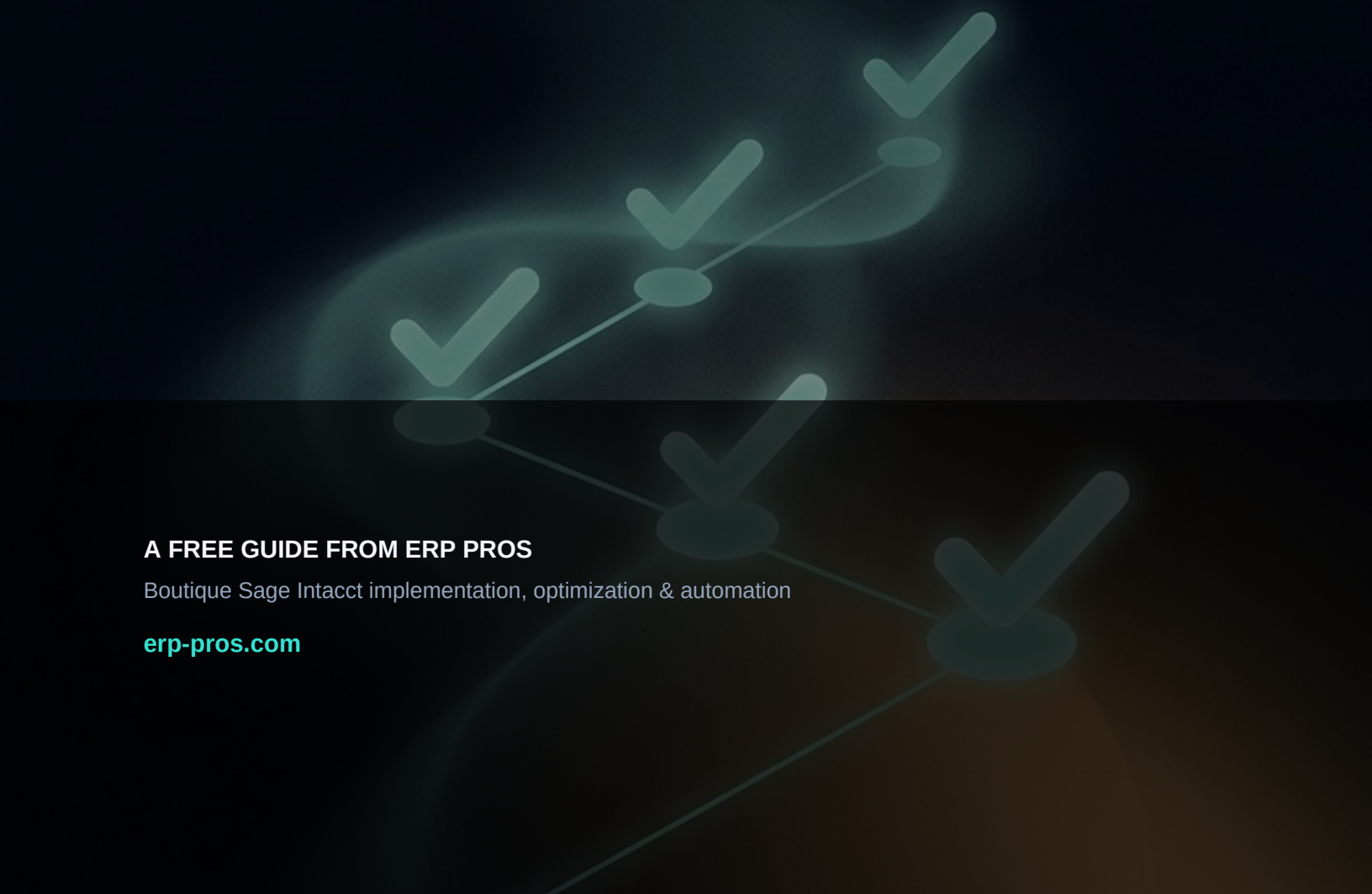
ERP PROS

IMPLEMENTATION GUIDE

Sage Intacct Implementation Readiness Checklist

25 questions to answer before you start — so your implementation goes right the first time.



A FREE GUIDE FROM ERP PROS

Boutique Sage Intacct implementation, optimization & automation

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Before you configure anything, get these answers

Most Sage Intacct projects that go sideways were under-scoped on day one — not mis-built later. This checklist is the same readiness review ERP PROS runs at the start of an engagement. Work through it with your finance and operations leads. Anything you can't answer confidently is where risk (and cost) hides.

1 · SCOPE, ENTITIES & STRUCTURE

- ☑ We've listed every legal entity, and know which need their own books vs. consolidation only.
- ☑ We know our reporting currencies and any inter-company / elimination requirements.
- ☑ We've decided which dimensions (department, location, project, class, etc.) we'll actually use.
- ☑ We know our go-live date and what's driving it (year-end, contract, acquisition).
- ☑ We've named an internal project owner with authority to make decisions.

2 · CHART OF ACCOUNTS & DIMENSIONS

- ☑ We have a current chart of accounts exported and reviewed for accounts to retire.
- ☑ We've mapped old accounts to a clean, dimension-driven Intacct structure.
- ☑ We agree that operational detail belongs in dimensions, not in the account number.
- ☑ We know our required statutory, board, and management report formats.

3 · DATA & MIGRATION

- ☑ We know which historical periods we need in Intacct vs. kept in the legacy system.
- ☑ We have owners for opening balances, open AR/AP, and unpaid transactions.
- ☑ Our master data (customers, vendors, items) has been de-duplicated and cleaned.
- ☑ We can produce a trial balance that we trust to reconcile against after cutover.

4 · INTEGRATIONS & AUTOMATION

- ☑ We've listed every system that must talk to Intacct (CRM, billing, payroll, banks, expense).
- ☑ We know which flows are real-time vs. batch, and who owns each source system.
- ☑ We've identified the top 3 manual processes we most want to automate first.

5 · CLOSE, CONTROLS & REPORTING

- ☑ We've documented our current close steps and how long each one really takes.
- ☑ We know our approval workflows and segregation-of-duties requirements.
- ☑ We've defined the dashboards and KPIs leadership will expect on day one.

6 · TEAM & CHANGE MANAGEMENT

- [x] We know who needs training and at what depth (power users vs. approvers vs. viewers).
- [x] We've scheduled parallel testing time before we rely on Intacct for the close.
- [x] Leadership has set expectations that go-live is a start, not a finish line.

HOW TO SCORE YOURSELF

Green (20+ checked): you're ready to scope a fixed plan. Yellow (12–19): tighten data and reporting before you build. Red (under 12): start with a short readiness workshop — it's the cheapest hour you'll spend on the whole project.

Want us to pressure-test your readiness on a call?
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