

10 STEPS TO A SUCCESSFUL ONSITE SUCCESSWARE IMPLEMENTATION

An implementation team is available to assist our clients with the use and setup of their financial related modules (opening balances, agreements, payroll, project management etc).

This implementation service is not intended to replace our normal training class, and it is not designed to teach the normal day-to-day processes learned in class. We will take the information learned in class and customize it to fit your company's day-to-day operation. There is not enough time in one week to teach all of the screens of day-to-day operations and do an implementation as well.

1.) Data conversion [contact SW at (888) 251-2779]

Note: This is not part of the implementation process & must be completed prior to on-site implementation (fees from SuccessWare may be assessed for this Service).

2.) Bank statements reconciled through the end of the period preceding the implementation

3.) Notes Payable - Open balances

Amortization schedule

4.) Accounts Payable - Open

5.) Inventory (need to have an accurate end of month count prior to the activation month)

6.) Accounts Receivable - Open

7.) Check registers reconciled through the end of the period preceding the implementation

8.) Balance sheet & Income statement through the end of the period preceding the implementation

9.) Computer checks formatted for SuccessWare [Call Denise at 1-888-251-2779 for details]

10.) Directions to your facility from the hotel.

11.) Lodging reservations close to facility with continental breakfast to help keep costs low

It is essential that the initial setup of SuccessWare be accomplished immediately upon return from the training class. You have 2 hours of free Implementation Phone Support for you to get started. Use of the software on a daily basis is necessary to assure that you do not lose the information learned in training. This setup will include company setup, user information, and job and call types. This will insure you can start the call taking process prior to implementation.

Call Taking, Dispatching and other normal processes are easily handled before activating your financial modules, and need to be started as soon as you return and SuccessWare has completed your data conversion.

If you have any questions, please call the Implementation Team at: (309) 347-5320