Switching checklist: moving to new job software

Work top to bottom. Do not cancel the old system until the last row is done.

#	Phase	Task	Owner	Due	Done (Y/N)	Notes
1	Before you sign	Export the customer list (name, address, phone, email, notes) to CSV from the old system or your spreadsheet				
2	Before you sign	Export open invoices and unpaid balances. Decide whether to finish them in the old system or re-enter them				
3	Before you sign	Export the price book / service list with your current prices				
4	Before you sign	Export job history if the new tool can import it (ask: what file format, and what's the field limit?)				
5	Before you sign	Get the new vendor's price in writing: plan, users, add-ons, card fees, contract length, cancellation				
6	Before you sign	Ask your bookkeeper/accountant how the QuickBooks sync should map (customers, items, tax, payments)				
7	Before you sign	Check the old system's cancellation terms and renewal date so you don't pay twice				
8	Set-up	Import customers, then spot-check 10 records (addresses, phone numbers, duplicates)				
9	Set-up	Load the price book and tax rates; build 3 quote templates you actually use				
10	Set-up	Connect QuickBooks during a test period first; confirm one invoice and one payment sync correctly				
11	Set-up	Set up users and permissions (office vs. field) and install the app on every tech's phone				
12	Set-up	Turn on payments; run one small test charge and refund				
13	Set-up	Set customer notifications (reminders, on-my-way texts) and read every template before it goes live				
14	Go-live	Run old and new side by side for 1-2 weeks on new jobs only				
15	Go-live	Train techs: clock in/out, job notes, photos, collecting payment				
16	Go-live	After 30 days: compare invoices sent and paid against the old way; fix any sync mismatches				
17	Go-live	Cancel the old system only after the final export is saved somewhere you control				

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