

Thinking of Switching Your Accounting Software from

PC to Mac? How do you convert your data from your existing accounting solution to a new one?

Now that we are all aware that there are multiple great accounting and ERP solutions available for Mac or for a cross platform Mac and PC environment, how do we convert the data from one solution to the next? Changing accounting software ranks up there with getting a cavity filled. Although this type of change is often compared to sitting in the dentist chair, in some cases, it is critical for business growth. So, when the need arises, how do we get divorced from the existing solution and marry a new one?

There are many reasons that a company needs to switch from their existing accounting solution. Primarily we hear the reasons being:

I've outgrown my existing solution and now require more reporting capabilities

- I need more speed and concurrent users
- I need more intricate features to handle my business' uniqueness
- I'm switching from PC to Mac and I need a solution that will still be able to handle all of my needs
- Some companies are in a cross platform scenario, where they need a solution that can work on both Mac and PC at the same time.

A sample of the procedure for system selection and implementation process:

- Assess your company's needs
- Research the available solutions that fit your criteria. Using free services such as www.findaccountingsoftware.com can be very helpful.
- Select the solution the best fits your needs and ensure that their support team will work well with your company.
- Plan a "live date" for the live implementation of the new system to replace your existing one or in some cases run in parallel
- Convert your data
- Staff Training

Sounds simple doesn't it? Except that data conversion step –

HOW DO I CONVERT MY DATA?

Accounting System Data Conversion

How do I convert my data? It's as easy as 1-2-3!!! OK ... realistically we all know nothing is that easy! However, it is possible to organize this procedure into a systematic task that can have you up and running smoothly in an acceptable time period with minimal down time.

When planning conversions to Connected Accounting & ERP, we often discuss several options with the customer. First, you can convert the data yourself. Connected has extensive and easy to use import features that can be utilized by the individual who has previous exposure to

doing data exporting and importing along with advanced Excel skills. With a great support team on the other end of your new accounting solution, you should be up and running with ease.

The second and by far the most sought after option for data conversion is to have one of our conversion specialists convert the data for you. Why is this so popular? When we do a conversion our customer can have peace of mind that it is being performed by a team with years of experience and that it will be done correctly and on time.

Recent Connected Accounting & ERP success story: Window Film Systems, converted from PC to Mac, using our data conversion services. This customer has a multi-user enterprise environment, with multiple sub-companies. As per the general manager, "The conversion was seamless and easy! My previous solution on a PC was a tight knit program, and I was concerned about losing this when switching over to a Mac accounting solution. I can definitely say I am a true fan of Connected!!"

What information should I transfer?

Virtually every company changing solutions has data that they want to retain. A typical data conversion includes the following: Accounts, Account Balances and Budgets, Customers and Balances, Vendors and Balances, Inventory Items and quantities, bill of materials, and bank reconciliation. As long as you can get your data out of the old accounting solution it should be transferrable to the new one.

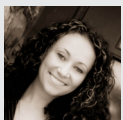
When is the best time of year to convert your data?

Many clients believe that the best time of year to convert to a new accounting solution is the fiscal year end. Our experience shows that this is, in fact, usually the worst time of year to make a change and here's why:

- Year end is typically the busiest time of year for the accounting department
- If the year end is December 31 the company likely has a skeleton staff due to holidays
- If the company is a seasonal business there may be a slower time of year where tackling the project makes more sense

The best time to convert your data would be after a month end. This approach makes for a stress free transition.

Converting your data from one accounting software to another will require commitment and dedication. Having an action plan to follow will make this process easier. Running your business on a solution that fits your company's needs and allows it to grow, makes it worth it!



Eden Scott-Reid has an excellent background in business administration, finance, project management and sales. She is the Business Development Manager at Connected Accounting & ERP Software
www.accountek.com | eden@accountek.com | 1-888-678-5856 x227