ACCOUNTING SYSTEM SETUP / 01

BUILD THE CURRENT-STATE BRIEF

Give every professional the same high-level business, system, user, and transition context.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Entities, locations, operating activities, decision-makers, and information users

Why the system is being set up or changed and the outcome I want

Current accounting, invoicing, payment, payroll, expense, inventory, sales, tax, and reporting tools

Available record types, data periods, opening information, known gaps, and current ownership

Important integrations, reports, approvals, deadlines, transition windows, and business constraints

My three priorities for the first accounting-system setup conversation

Preparation only. Not accounting, tax, payroll, reporting, retention, cybersecurity, privacy, internal-control, software-selection, migration, validation, contract, or legal advice. Keep private data and credentials out.

ACCOUNTING SYSTEM SETUP / 02

DEFINE THE PROPOSED SETUP SCOPE

Separate current facts from the configuration and migration each professional proposes.

Provider-proposed discovery, software or environment assumptions, configuration, and account structure

Source records, data preparation, periods, imports, mappings, transformations, and opening information

Provider-proposed validation, reconciliation, exception handling, acceptance criteria, and approvals

Banking, payment, invoicing, payroll, expense, inventory, sales, tax, and reporting integrations

Users, roles, permissions, approvals, administrator ownership, backups, recovery, and audit history

Testing, training, cutover, parallel work, support, documentation, export, and handoff

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ACCOUNTING SYSTEM SETUP / 03

PREPARE SECURE REVIEW AND HANDOFF

Tick only what is known or ready to discuss. Keep private records and credentials elsewhere.

- [ ] Entities, current systems, users, and decision-makers are identified
- [ ] Requested data periods and record types are listed at a high level
- [ ] Known gaps are described without assuming a correction or accounting treatment
- [ ] Setup, migration, validation, integrations, and reporting are separated
- [ ] Passwords, account numbers, taxpayer identifiers, employee data, and private records are excluded
- [ ] Access, backup, recovery, approval, and administrator ownership are ready to discuss
- [ ] Testing, training, cutover, support, documentation, and handoff are ready to compare
- [ ] Every professional will receive the same high-level setup brief

Approved process for records, access, credentials, account invitations, permissions, and stakeholder review

Issue log, exception review, acceptance, change approval, cutover, correction, and escalation questions

Training, operating guide, administrator handoff, support, export, and end-of-service records promised

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ACCOUNTING SYSTEM SETUP / 04

QUESTIONS FOR THE ACCOUNTING PRO

Record how the professional would scope, validate, secure, transition, and support the setup.

Discovery: what systems, records, users, periods, decisions, and secure review are needed first?

Setup: how are configuration, account structure, imports, mappings, integrations, and exclusions documented?

Validation: how are exceptions, reconciliations, acceptance criteria, approvals, and corrections handled?

Access: how are roles, permissions, authentication, backups, recovery, ownership, and offboarding handled?

Transition: what testing, training, cutover, parallel work, support, export, and handoff are included?

Proposal: what assumptions, dependencies, deliverables, fee structure, recurring terms, and changes are documented?

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ACCOUNTING SYSTEM SETUP / 05

COMPARE THE SAME SETUP SCOPE

Use A and B in every box. Clarify differences before choosing.

Professional A / Professional B / discovery and proposal dates

Configuration, account structure, data periods, imports, mappings, validation, and integrations - A / B

Access, backups, testing, training, cutover, support, documentation, export, and handoff - A / B

Responsibilities, acceptance, assumptions, exclusions, written terms, complete fee structure, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a CPA & Accounting request for accounting-system setup. Share entities, current tools, users, data periods, integrations, reporting needs, timing, and the requested outcome at a high level so participating pros can compete with proposals. Compare setup, migration, validation, access, training, support, handoff, written terms, and fit. Keep credentials, identifiers, account details, and private records out of the request.

One request. Every pro's best offer.

Start a request

Participation varies. A secure records, systems, users, and transition review may be needed before a final engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/accounting/accounting-system-setup

Internal Revenue Service: Recordkeeping (official reference)

National Institute of Standards and Technology: Cybersecurity basics (official reference)

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