Before your system goes live.

Go through this with your software provider. Ask them to explain and show what applies to your business. Tick each item when you have checked it together.

Project: ______________________ Review date: ______________________

- [ ] **Who can see our records**
  List where records are kept and who can open them. Ask which outside services receive them, including AI, and see restricted access blocked.
- [ ] **Backups have been checked**
  Ask to see a recovery test, what was recovered and how long it took. Understand any recent work that might need to be entered again.
- [ ] **The records we need are accounted for**
  Compare the old and new records, such as stock, balances and documents. Agree what stays on paper or in the old system, and resolve differences.
- [ ] **Our staff have tried their daily tasks**
  Let staff practise finding an order or updating stock. Check what training and instructions are included, and who helps them get started.
- [ ] **We have a plan for the switch**
  Agree the date, any pause in work and who gives the go-ahead. Ask how new orders and payments are kept if the move needs to be reversed.
- [ ] **We know who to call**
  Record the support contact, hours and expected response time. Confirm who handles repairs, security updates and recovering records.
- [ ] **The costs are explained**
  Separate the build and move from ongoing bills. Check charges for keeping the system online, paid services, support and anything that varies with use.
- [ ] **We can keep control if we change providers**
  Check account ownership, access and a usable copy of your records. Confirm what instructions and software code you receive, and any licence limits.

Still to resolve, who will help and by when

A discussion guide, not a security audit or proof that checks have passed.