Post-Conversion Checklist

MYOB Business Conversions

This checklist explains what you need to complete, after your conversion to MYOB Business.

1. Verifying your data

You will have 7 days of access to MMC Convert for any questions post-conversion.

The conversion is completed on an accrual basis.

Please verify all reports on an accrual basis.

Ensure to verify the below reports to confirm the accuracy of the conversion:

- **Trial balance**:
  Confirm the balance of each account as at the conversion period.

- **Payables reconciliation with tax report:**
  Confirm the balance of each of your creditors as at the conversion period.

- **Receivables reconciliation with tax report:**
  Confirm the balance of each of your debtors as at the conversion period.

For your ease, MMC Convert will send you a comparative profit and loss and balance sheet to match between your source software and MYOB Business.

2. User access

Remove MMC Convert from your user list in your MYOB Business file, 7 days after the conversion is completed.

3. Post-conversion tasks

General

- Create templates for invoices and statements
- Check linked accounts

Inventory

- Journal inventory opening balances

Payroll

- Transfer STP reporting with BMSID
- Set up pay super
- Enter payroll history
- Set up employees with Flare onboarding, for files that include payroll

Settings

- Check settings under business names for sales, income allocation, payroll, purchases and reports
- Add BSB details for Chart of Accounts

Automation

- Apply for bank feeds
- Set up online invoice payments
- Set up capture app