

Checklist for migrating to Zoho Books

Migration to a new finance system is more than a tech upgrade - it's a strategic move.

Done well, it sets you up for smarter, faster financial decision-making. Done poorly, it can leave you with messy books and frustrated teams. Here's what we at Goldstar IT recommend every Director, CFO and financial controller watch out for when making the move to Zoho Books.



1. Choose your migration timing carefully

Plan your migration to coincide with a natural break in your reporting cycle — ideally year-end or quarter-end. This reduces complexity and avoids messy reconciliations.



2. Understand your Chart of Accounts

Review and rationalise your chart of accounts before migrating. Migrating legacy structures without review often leads to cluttered, inefficient financial reporting.



3. Clean up your Data first

Garbage in, garbage out — any inconsistencies or duplicates in customer, vendor, or item lists will be carried over into your new system and will cause operational issues later. Also, remove any historical rounding balances. Not only will it tidy the ledger but also reduce the data to bring across!



4. Decide how much historical Data to bring across

Migrating full histories can be costly and complicated. Often, bringing in closing balances and key records is sufficient, while keeping full archives elsewhere for compliance.



5. Map your Tax and organisational settings accurately

VAT or other settings such as roles and user access must be mapped precisely during migration to avoid incorrect filings and future penalties. In addition, if using Zoho One think how the data will flow in and out of Books and who will have access to that data.



6. Review Custom Fields and business-specific needs

Zoho Books is highly flexible — but custom fields from your old system may need to be reconfigured differently. Missing this step could impact reporting or compliance.

**7. Ensure Opening Balances are correct**

Opening balances must be carefully validated before going live. Any errors here will ripple through future financial reports and tax filings. This could also be magnified as the new system is embedded.

**8. Align your banking integrations early**

Bank feeds are powerful in Zoho Books, but require proper setup and verification. Early testing avoids downtime and manual catch-up work after go-live.

**9. Train your team ahead of launch**

Even the best system fails without user adoption. Invest time in upfront training so users understand the new workflows, saving time and avoiding frustration later.

**10. Appoint a Project Owner or Champion**

Assign a responsible internal lead (FD, CFO, or trusted delegate) to manage communications, decisions, and timelines, ensuring the project stays on track.

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We recently had the pleasure of working with Goldstar IT to transition our accounting system to Zoho Books, and we couldn't be happier with the outcome. From start to finish, their team demonstrated exceptional professionalism and expertise, making what could have been a daunting task feel effortless.

They clearly excel in delivering digital transformations that cater to a variety of business needs. Whether it's reporting, finance, customer support, or operations, their ability to customise solutions has greatly benefited our company. We highly recommend Goldstar IT to any business looking to implement or improve their digital systems.

- Dale Kearns, Commercial Director, GiftTrees

”**Ready to migrate smarter?**

Whether you need support planning, implementing, or optimising Zoho Books, we're here to help.

To learn more, visit www.goldstarit.com

Alternatively, why not book a free meeting to discuss your migration?

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