

# Greenstone Mergers & Acquisitions Checklist

---

- Kick-off meeting with project manager and implementation resource held to discuss goals and timelines
- Onsite analysis meeting and departmental process meetings held
- Project plan created
- Dataset management and consolidation work started
- Raw data for names and addresses converted and loaded
- Initial training for new staff members completed
- Data files for balances testing period completed
- Actual data file balances created
- Load and validate AR/AP/INV/GRN balance
- Complete dataset management and consolidation work
- Load outstanding checks
- Load payroll balances
- Go live!
- Load trial balance
- Load patronage and equity balances
- Complete follow up and system review