

Cloud accounting software checklist

Use this checklist to assess cloud accounting software options and find the right solution for your business.

Consider your business needs

Think about your business needs around current accounting workflows, challenges you're looking to solve, and goals you're hoping to achieve.

☐

Evaluate suppliers first

Your relationship with the supplier will drive how much value you'll gain from the software, so pick one with a strong reputation for customer support.

☐

Research thoroughly

Set aside time to research your options and use the following criteria:

- Level of customer support available.
- Software features and capabilities.
- How well the software can scale.
- Pricing options.

☐

Look for these features and capabilities

Consider the following features and capabilities as essential to today's standards:

- Automation of key financial processes.
- Realtime reporting and analytics.
- High security standards, data protection, and built in compliance.
- Customisable workflows, report templates, and dashboards.

☐

Consider scalability

Ensure potential solutions can grow with you. Look for the ability to expand your number of users, as well as add features such as HR management, payroll, and carbon accounting.

☐

Read user feedback

Read what other businesses are saying about the performance and user experience of solutions.

☐

Test software

Start testing by signing up for any free trials or product tours and ask suppliers for product demos.

☐

Assess usability

When testing, pay close attention to how intuitive the interface is, how easy it is to find what you need, and how many steps it takes to complete typical tasks.

☐

Make running your business easier

Explore how Sage for Small Business simplifies accounting, payroll, and HR admin, so you can grow your business with confidence. [Let's go.](#)

Sage