LeafTally – ERP Readiness Checklist

This checklist helps you know if you're ready to start using LeafTally in a way that actually works. It highlights what you need to prepare, so setup is smoother and the system fits into your daily routine. It's a quick way to make sure you're not just signing up—but ready to see real value.

YOU HAVE A BANK ACCOUNT OR CASH TIN FOR BUSINESS ACTIVITIES
All business transactions, including income and expenses, are recorded and tracked.

YOU HAVE YOUR BASIC RECORDS IN PLACE
Your income, expenses, invoices, and payroll are tracked, even if it's just in Excel or notebooks.

YOU'RE READY TO DROP MANUAL PROCESSES
You're prepared to let go of paper records, scattered spreadsheets, and WhatsApp logs in favour of something more structured.

YOU KNOW WHAT YOU WANT THE ERP TO DO
You've identified your biggest financial or operational challenges and know what features matter most to you.

YOU'RE PLANNING FOR GROWTH
You're thinking beyond the present and want a system that can support your business as it grows.

YOU'RE WILLING TO INVEST A BIT OF SETUP TIME
You can set aside time to enter initial data and get the system working properly from the start.

SOMEONE WILL MANAGE THE SYSTEM
There's a clear point person who will keep the ERP updated and make sure it's being used properly.

YOUR TEAM IS OPEN TO CHANGE
Whoever needs to use the system is willing to learn and adjust to a new way of working.

YOU HAVE INTERNET AND A WORKING DEVICE
You have regular access to the internet and a laptop, tablet, or smartphone to run the system.