implementation & rollout

We developed the following implementation strategy using our 4-step onboarding process*. A dedicated onboarding specialist (OS) will partner with the your team to manage all aspects of the project including communication, scheduling, timelines, status updates, and quality assurance.

1 Kick-off call & consultation (1.5 hours)
Getting to know you (and your budgets)

▸ Review & discuss your current setup, budgeting docs, formulas, etc. to establish a list of files we'll need to match your structure
▸ Create an action plan & timeline for file transfer, system configuration, and historical data import

2 Building your foundation (2 days)
Gathering the materials

▸ Roundup necessary files established in kick-off call
▸ Meeting with OS to identify any missing formulas needed and/ or data cleanup areas
▸ Establish admin training session dates

3 System Configuration (3-5 days)
Preparing for import

▸ Universal configuration settings are established
▸ Import template for ERP is built & verified
▸ Historical data is uploaded and validated by Budgyt

4 Site Review & Admin Training (up to 5 hours)
Handing over the keys

▸ Verify site structure & settings with OS
▸ Admin training
▸ (Optional) User training
▸ Additional training & support packages available for purchase

our **user retention** is **6x higher** than the industry average

G2 Users Most Likely To Recommend — Mid-Market — SPRING 2024

G2 Easiest To Do Business With — Mid-Market — SPRING 2024

G2 Easiest Setup — Mid-Market — SPRING 2024

Capterra BEST EASE OF USE 2024

Software Advice BEST CUSTOMER SUPPORT 2024

GetApp CATEGORY LEADERS 2024

We build a custom Excel import template that matches your structure in your accounting software so you can budget the way you actualize.

After onboarding, you'll use this template for our seamless file-based integration between the two systems. **Budgyt also enables a daily importing via an FTP set-up** that eliminates redundant, manual tasks.

⬈ VIEW FAQs ON IMPORTING DATA

how importing is done

FILE-BASED INTEGRATION

1
ERP SYSTEM

GL EXPORT
3-5 MINUTES

2
PRE-MADE IMPORT TEMPLATE

PASTE INTO CSV TEMPLATE
1-3 MINUTES

3
BUDGYT PLATFORM

IMPORT CSV
1-3 MINUTES

NOTE:
WE BUILD YOUR CSV IMPORT TEMPLATE DURING ONBOARDING

TOTAL TIME
5-11 MINUTES

API OR AUTOMATED IMPORTING

1
ERP SYSTEM

SCHEDULED EXPORT*
INSTANT

2
PRE-MADE IMPORT TEMPLATE

AUTO-SEND TO FTP SITE
INSTANT

3
BUDGYT PLATFORM

AUTO-SYNC
3-5 MINUTES

NOTE:
ESTABLISHED APIs SKIP STEP 2 AND INSTANTLY SYNC

TOTAL TIME
INSTANT/3-5 MINUTES

Assuming your ERP has automated exporting capabilities.