

# Modernizing Your Accounts Receivable: A Step-by-Step Guide to a Smooth Transition

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The allure of a modern Accounts Receivable (A/R) system is undeniable. Solutions like Sidetrade and Carixa promise streamlined processes, reduced costs, and improved cash flow. However, a successful transformation hinges on meticulous planning, execution and mandatory cleanup of the old A/R backlogs. This guide outlines the crucial steps involved, with a special focus on the essential groundwork needed *before* going live to ensure a clean start and maximize your return on investment.

## Phase 1: Pre-Implementation - Building a Solid Foundation

This initial phase is all about preparation. By focusing on these key areas, you'll set the stage for a seamless transition and unlock the full potential of your new A/R system:

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## About the Author



Frank Boni, Vice President, Managed Services & Client Operations for Carixa is responsible for Credit-to-Cash SaaS client operations, and outsource and collection operations. Prior to joining Smyyth, Frank had more than 20 years of experience in commercial receivables management, credit, and collections, including serving as Director of Operations and Sales Support for NCO Financial Systems, Inc.

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