Wedding Sheets Implementation Checklist

Pre-Implementation Setup

Google Workspace Preparation

- [ ] Ensure Google Workspace account with sufficient storage
- [ ] Enable Google Sheets, Forms, and Docs APIs
- [ ] Set up Google Apps Script permissions
- [ ] Create dedicated folder structure in Google Drive
- [ ] Configure sharing permissions for team members

Data Preparation

- [ ] Review existing client data format
- [ ] Prepare service pricing information
- [ ] Gather tax rate data for operating locations
- [ ] Compile list of standard add-ons and equipment
- [ ] Document current contract templates and terms

Phase 1: Core Sheets Setup (Week 1)

Day 1-2: Form Responses Sheet

- [ ] Create new Google Sheets workbook named "Wedding Services Calculator"
- [ ] Import Form_Responses.csv data structure
- [ ] Set up Google Forms integration
- [ ] Configure automatic timestamp and client ID generation
- [ ] Test form submission to sheet connection
- [ ] Implement basic data validation rules

Day 3-4: Service Pricing Sheet

- [ ] Import Service_Pricing.csv data
- [ ] Verify all service categories and packages
- [ ] Update pricing to current rates
- [ ] Add seasonal and weekend multipliers
- [ ] Configure add-on pricing structure
- [ ] Test pricing lookup formulas

Day 5-7: Client Dashboard Sheet

- [ ] Import Client_Dashboard.csv structure
- [ ] Implement all calculation formulas
- [ ] Set up VLOOKUP functions for service pricing
- [ ] Configure conditional formatting rules
- [ ] Test calculations with sample data
- [ ] Validate all formula references

Phase 2: Payment and Tax Systems (Week 2)

Day 8-10: Payment Schedule Sheet

- [ ] Import Payment_Schedule.csv structure
- [ ] Implement payment calculation formulas
- [ ] Set up due date automation
- [ ] Configure payment status tracking
- [ ] Test different payment plan scenarios
- [ ] Add late fee calculations

Day 11-12: Tax & Fees Sheet

- [ ] Import Tax_Fees.csv structure
- [ ] Set up tax rate lookup tables
- [ ] Implement tax calculation formulas
- [ ] Configure processing fee calculations
- [ ] Test tax calculations for different locations
- [ ] Validate fee structures

Day 13-14: Reports Sheet

- [ ] Import Reports.csv structure
- [ ] Set up revenue calculation formulas
- [ ] Implement booking analytics
- [ ] Configure growth rate calculations
- [ ] Test report generation
- [ ] Validate all metrics

Phase 3: Advanced Features (Week 3)

Day 15-17: Data Validation & Error Handling

- [ ] Implement comprehensive data validation rules
- [ ] Set up error handling for all formulas
- [ ] Configure conditional formatting
- [ ] Add data quality checks
- [ ] Test error scenarios
- [ ] Document troubleshooting procedures

Day 18-19: Contract Integration

- [ ] Create Google Docs contract template
- [ ] Set up mail merge fields
- [ ] Implement Google Apps Script functions
- [ ] Configure email integration
- [ ] Test contract generation
- [ ] Validate merge field population

Day 20-21: Automation & Scripts

- [ ] Set up form submission triggers

- [ ] Configure automatic calculations
- [ ] Implement email notifications
- [ ] Set up backup procedures
- [ ] Test all automation features
- [ ] Document script functions

Phase 4: Testing & Validation (Week 4)

Day 22-24: Comprehensive Testing

- [ ] Test complete workflow from form to contract
- [ ] Validate all calculations with manual checks
- [ ] Test edge cases and error scenarios
- [ ] Verify data integrity across all sheets
- [ ] Test performance with large datasets
- [ ] Validate security and permissions

Day 25-26: User Training & Documentation

- [ ] Create user training materials
- [ ] Document standard operating procedures
- [ ] Train team members on system usage
- [ ] Set up support procedures
- [ ] Create troubleshooting guides
- [ ] Document maintenance procedures

Day 27-28: Go-Live Preparation

- [ ] Final system validation
- [ ] Backup existing data
- [ ] Configure production environment
- [ ] Set up monitoring and alerts
- [ ] Prepare rollback procedures
- [ ] Schedule go-live activities

Post-Implementation (Ongoing)

Week 5: Monitoring & Support

- [ ] Monitor system performance
- [ ] Address any user issues
- [ ] Collect feedback from team
- [ ] Make minor adjustments as needed
- [ ] Document lessons learned
- [ ] Plan optimization improvements

Monthly Maintenance Tasks

- [ ] Update service pricing as needed
- [ ] Review and adjust tax rates
- [ ] Analyze system performance metrics

- [ ] Update contract templates
- [ ] Backup all data and configurations
- [ ] Review security settings

Quarterly Reviews

- [ ] Analyze business metrics and trends
- [ ] Review system efficiency and usage
- [ ] Plan feature enhancements
- [ ] Update documentation
- [ ] Conduct security audit
- [ ] Plan system upgrades

Quality Assurance Checkpoints

Data Accuracy Validation

- [ ] All formulas calculate correctly
- [ ] VLOOKUP functions return accurate results
- [ ] Date calculations work properly
- [ ] Tax calculations match manual verification
- [ ] Payment schedules generate correctly
- [ ] Contract merge fields populate accurately

System Performance Validation

- [ ] Sheets load quickly with full data
- [ ] Formulas recalculate efficiently
- [ ] No circular reference errors
- [ ] Memory usage within acceptable limits
- [ ] Concurrent user access works properly
- [ ] Mobile device compatibility confirmed

Security and Access Validation

- [ ] Appropriate sharing permissions set
- [ ] Sensitive data properly protected
- [ ] Edit permissions correctly configured
- [ ] Audit trail functionality working
- [ ] Backup procedures tested
- [ ] Recovery procedures validated

Risk Mitigation Strategies

Data Loss Prevention

- [ ] Automated daily backups configured
- [ ] Version history enabled
- [ ] Multiple backup locations set up
- [ ] Recovery procedures documented
- [ ] Regular backup testing scheduled

- [ ] Data export procedures established

System Failure Contingency

- [ ] Manual calculation procedures documented
- [ ] Alternative contract generation methods
- [ ] Offline data access procedures
- [ ] Emergency contact procedures
- [ ] Rollback procedures tested
- [ ] Business continuity plan created

User Error Prevention

- [ ] Comprehensive data validation rules
- [ ] Clear error messages implemented
- [ ] User training completed
- [ ] Standard operating procedures documented
- [ ] Regular refresher training scheduled
- [ ] Support procedures established

Success Metrics

Efficiency Improvements

- [ ] Contract generation time reduced by 75%
- [ ] Payment tracking accuracy improved to 99%+
- [ ] Pricing calculation errors eliminated
- [ ] Report generation automated
- [ ] Data entry time reduced by 60%
- [ ] Client communication improved

Business Impact Measurements

- [ ] Revenue tracking accuracy improved
- [ ] Cash flow visibility enhanced
- [ ] Client satisfaction scores increased
- [ ] Operational efficiency gains measured
- [ ] Error reduction quantified
- [ ] Time savings documented

System Adoption Metrics

- [ ] User adoption rate >90%
- [ ] System uptime >99%
- [ ] User satisfaction score >4.5/5
- [ ] Support ticket volume <5/month
- [ ] Training completion rate 100%
- [ ] Feature utilization >80%

Final Validation Checklist

Before Go-Live

- [ ] All sheets properly configured
- [ ] All formulas tested and validated
- [ ] Data validation rules implemented
- [ ] Error handling working correctly
- [ ] Contract integration functional
- [ ] User training completed
- [ ] Documentation finalized
- [ ] Backup procedures tested
- [ ] Support procedures established
- [ ] Performance benchmarks met

Go-Live Criteria

- [ ] System passes all quality checks
- [ ] Team trained and confident
- [ ] Support procedures in place
- [ ] Backup and recovery tested
- [ ] Performance meets requirements
- [ ] Security measures validated
- [ ] Documentation complete
- [ ] Stakeholder approval obtained
- [ ] Rollback plan prepared
- [ ] Monitoring systems active

This comprehensive checklist ensures systematic implementation with proper validation at each stage, minimizing risks and maximizing success probability.