RebelPDF

FREE CHECKLIST

The 30-day PDF software switch checklist.

Switching PDF software does not have to be risky. Use this checklist to move your team in stages, from Acrobat or any other editor, and cancel old seats at renewal.

BEFORE YOU START

Get the facts.

Ten minutes of homework saves surprises later.

- [ ] Write down your current renewal date and any early-cancel fee.
- [ ] Count how many people actually edit PDFs each week.
- [ ] List the PDF tasks your team does most.
- [ ] Pick a pilot group of three to five editors.

DAY 1

Deploy the free Reader.

Nobody loses anything on day one.

- [ ] Push RebelPDF Reader to every PC with Intune, the Microsoft Store or your RMM.
- [ ] Leave the old editor installed for now.
- [ ] Tell staff what is changing and when.
- [ ] Share a short "how to open and sign" note.

WEEK 1

Pilot Studio.

Prove it on real work.

- [ ] Assign Studio licenses to the pilot group.
- [ ] Turn on Microsoft or Google SSO.
- [ ] Set which AI platforms are allowed, or turn AI off.
- [ ] Connect SharePoint, OneDrive or Google Drive.

WEEK 2

Move real workflows.

Test the jobs that matter most.

- [ ] Edit, convert and OCR real documents.

- [ ] Redact a test file and confirm the text is gone.
- [ ] Send a document for signature.
- [ ] Write down questions and fixes.

DAY 30

Retire old seats.

Switch the rest at renewal.

- [ ] Assign Studio to the rest of your editors.
- [ ] Let old editor seats end at renewal.
- [ ] Remove the old app when nobody needs it.
- [ ] Review license use in tenant admin each quarter.

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