ArchiOffice Custom Data Conversion Guide 2016

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DATA CONVERSION

Conversion means a one-way transfer of data from one program to another. This Custom Data Conversion Guide defines the options and data conversion process for new ArchiOffice® users.

Data Conversion Options

ArchiOffice has several built-in integration or synchronization options but you might want to use our *ArchiOffice Consulting Services* in any of the following situations:

- You have a program other than Microsoft Outlook, Entourage, Apple Calendar (iCal), Apple Mail (AppleMail), Apple Contacts (Address Book), or QuickBooks whose data you want to migrate into ArchiOffice.
- You do not have the time or technical confidence to plan, conduct, and test conversions using our built-in synchronization tools.
- You want to customize the migrated or converted data to be optimized for ArchiOffice.

When you have programs other than those listed above, we strongly recommend a custom conversion for your data (*see below*). ***You DO NOT want to risk data errors or waste valuable time.*** Let ArchiOffice Consulting Services handle it for you.

Custom Conversions

Our ArchiOffice Consultants can convert data from a growing number of programs, including:

- Wind2/Deltek FMS
- Deltek Advantage
- Deltek Vision
- Deltek Costpoint
- Deltek Time
- Sema4
- Axium
- BillQuick
- Timeslips
- Microsoft Dynamics
- Creative Solutions Practice Solutions
- Tenrox
- Replicon
- Journyx
- ProSystem *fx* Practice Management
- Sage MAS 90
- HighTower Time and Billing

In addition to these programs, ArchiOffice Consultants have successfully moved data from proprietary software, Microsoft Excel spread sheets and other data sources.

Consulting fee for customized data conversion to ArchiOffice is non-refundable. Conversion time varies depending upon the size of your database.

Data Conversion to ArchiOffice

Our proprietary custom conversion tools transfer the following data from the source program to ArchiOffice.

Source Data	ArchiOffice Data	Notes
Customer records	Contacts (Client)	Contact details only (name and address)
Service Items/ Activity Codes	Job Codes	ID, description, active or inactive status, billable status, bill rate
Expense Items	Job Codes	ID, description, active or inactive status, billable status, cost
Project data	Projects	Contract type and amount, project name, ID, address, project manager, status, client
Employee records	Contacts	Contact details only (name and address), active or inactive status, bill or pay rates (if available in the source data)
Time records	Time Entries	Associated with a project or client. Description, tax, date, status, bill rate, hours, notes, etc. The billable value, billable status, and bill and cost rates might not transfer if not set up correctly in the source.
Expense records	Expense Entries	Associated with a project or client. Description, tax, date, status, cost rate, units, notes, etc. The billable value, billable status, and cost rates might not transfer if not set up correctly in the source.
Invoice records	Invoices	Date, total amount, status, client, project, balance due, etc.

		Links to time and expense records included on an invoice will transfer only if you have created invoices based on time and expense entries.
Payment records	Transactions	Associated with invoices only. Retainer payments should be associated with a project or client. Date, amount, client, notes, etc.
Vendor records	Contacts (Vendor)	Contact details only (name and address), active or inactive status

From this point onwards, your time and billing information will be in a single database (that is, the ArchiOffice database). In other words, all your historical information – billed and unbilled time and expenses, paid and unpaid invoices, payment history–is now in ArchiOffice. After conversion, you can archive your old data at your convenience.

What to Expect

In the conversion process, it is important to set realistic expectations about timetables and tasks to be done by the *ArchiOffice Consultant* and *by you*.

Timetable. . .	Data conversion can take more than 30 days depending on the availability of ArchiOffice Consultants. Data conversions are scheduled on a first-come, first-served basis. You will be given a preliminary start date, and will be kept informed of any unforeseen delays.
	Conversion begins only after the customer provides the information required (*see Conversion Process below*). This information is control information such as record counts and key amounts. ***Data conversion will not start until the information required is provided.*** Delays in receiving information, including source files, might shift your place in the Team's schedule.
	Preliminary data conversion time estimates are based on previous data conversion jobs. These jobs include only the data required to process within ArchiOffice (*see Data transferred . . . below*). The final number of hours required to complete the conversion will depend on unforeseen issues with the data or data beyond what ArchiOffice requires. *Any additional hours required can extend the timetable or increase your*

	conversion fee. If such a situation arises, you will be informed as soon as possible.
	If you adapted your old software to accommodate the unique information tracking or processing needs of your business (e.g., used data fields for other than their original purpose), the ArchiOffice Consultant will provide an estimate of additional time. This can also increase the data conversion fee.
Data transferred. . .	Standard conversion services include only the data ArchiOffice requires to function properly.
	Since ArchiOffice does not have Vendor Bills, they are not transferred.
	Payroll or accounts payable data is not transferred because ArchiOffice does not handle payroll and payables. Depending on your old data and your new accounting software, the ArchiOffice Consultant will recommend solutions for transferring this data.
	Any other data transfers (or special requests) will be considered an additional service.
QuickBooks and accounting data. . .	If you plan to use QuickBooks as your new accounting software, BQE Software has partnered with third-party certified QuickBooks Consultants who can assist you with setting up your accounting system and transferring payables, banking, payroll and other data.
	When appropriate, BQE recommends making simple journal entries for each G/L account as *Balance Brought Forward*.

Any requests, issues or unique situations that affect the timetable or conversion fee must be authorized and payment made ***before*** conversion work will recommence.

CONVERSION PROCESS

In order to successfully transit from your existing software to ArchiOffice, it is important to understand the process involved.

Up until the final step (Step 4 below) of the conversion process, you will continue to use your current software and database. Only in the final step will you stop using it so we can convert the latest data to ArchiOffice.

Step 1 – Dry-Run

1. After purchasing ArchiOffice, please back up your old database and files, and upload them to our FTP site. Your ArchiOffice Consultant can provide instructions to upload your data file. You can also send your database on a CD via mail.

2. Email the following control information to your ArchiOffice Consultant:

Control Info	Count or Amount ✓
Total number of clients in your database	
Total number of projects in your database	
Total employee records in your database	
Total vendor records in your database	
Total amount of all un-paid invoices	$
Total amount of un-billed time and expense	$
Total amount invoiced	$
Total payments received on invoices	$
Total retainer amount received	$
Value of billable and unbilled time entries	$
Value of non-billable and unbilled time entries	$
Value of billable and unbilled expenses	$
Value of non-billable and unbilled expenses	$
Aging Report Summary for all Clients and Projects (PDF format)	
Aging Report Details for all Clients and Projects (PDF format)	
WIP Report (Unbilled Time and Expense for all Clients and Projects) (PDF format)	

This control information ensures complete and accurate transfer of data. Please be sure the information is accurate because it can cause delays in the conversion timetable.

Step 2 – First User Review

1. After the data is converted and verified against the control information, the new ArchiOffice database will be sent to you for review. If you notice any discrepancy in the data, please contact your ArchiOffice Consultant.

2. If the discrepancy is specific to your database, the Consultant will fix the items for you at an extra cost by running one or more update queries. (This is typically faster and less costly than manually updating many records.)

3. If the discrepancy is identified as a new element or a problem with the conversion program, the incident will be escalated to the BQE Engineering Team. Depending on the situation, this process can take several weeks to rectify.

Step 3 – Final Review

1. After all noted discrepancies are fixed, a new database will be sent to you for final review. After you are satisfied with the accuracy and completeness of the final data, please let your Consultant know that you are now ready for the final step.

Step 4 – Switch Over

1. Book a date with your Consultant when you will stop using your current database. This is typically after you have completed a billing cycle and completed tasks for the month. If possible, schedule the final conversion late in the week to minimize the days for manual tracking of time and expenses.

We strongly recommend you schedule your ArchiOffice Training at this stage. This ensures continuity in the conversion process and also the availability of trainers at the right time.

2. Send the latest database for final conversion on the scheduled day. Normally, the final conversion takes 2 to 3 business days. You ***should not*** use your old software or database.

3. When you receive your final ArchiOffice database, you will need to fine-tune the data for optimum value. Your Consultant will provide a list of edits and manual changes you might need to make.

4. After you have finished the optimization, you can then start working on ArchiOffice and start your trainings.

For more information on ArchiOffice, please check the ArchiOffice Help or visit the ArchiOffice Support page for additional documentation. For questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email sales@ArchiOffice.com

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