CORE

Migrating Your Data to BQE Core

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The BQE Core Data Migration Utility lets current users of BillQuick, BillQuick Online, ArchiOffice, ArchiOffice Online, and EngineerOffice flawlessly transfer their data to Core.

WHAT GETS MIGRATED:

BQE's team has worked very hard to ensure that every data point in your existing BQE solution has a home in Core. No matter which product you use, the new migration utility will move over essentially all of your company data, including but not limited to:

— *Projects*

— *Time & Expense Entries*

— *Master Lists, e.g. Activity and Expense Items, Clients, Employees, etc.*

— *Budgets & Estimates*

— *Fee Schedules*

— *Invoices*

— *Payments*

— *Checks*

— *Deposits*

— *Vendor Bills*

Even the physical documents that are linked as attachments to your existing records will be moved to Core's cloud document servers and hosted there during your Core trial.[1]

[1] Up to 2 GB will be hosted automatically, but you'll need to contact support for storage beyond that. If you choose to permanently move to Core, you'll receive a complimentary 2 GB of data storage space with your account.

There are some types of records and customizations that won't automatically move over from your current BQE product to Core. Other ones will be migrated, but they'll show up under different labels. Here's what you should know about what will change:

BILLQUICK DATA TYPE	SUGGESTION
Archived Projects with Related Time, Expense, and Payment Info	This data will be migrated only if you restore your projects before the migration. Before migrating, we highly recommend that you contact the BQE Core Migration Team[2]. If you prefer to do it yourself, make sure to backup your company file.
Interactive Gantt Charts	Gantt-allocated tasks will migrate to Core as regular allocated tasks. Additionally, Gantt charts themselves will soon be available in Core.
Delayed Fee Schedules	These are migrated as regular fee schedules.
Custom Fields for Invoices	This data isn't transferred, but you can add memos to the invoices to write notes or flag them.
Company-Wide Financial Budget	Budgets are currently only available at the project and phase levels.
Favorite and Memorized Reports	This data isn't transferred, but you can memorize the desired reports in Core or mark them as favorites as a one-time action. Also, you can add your custom reports to Core.
Assigned Security Roles and Profiles	You'll need to assign security roles and create security profiles.
Audit Trail Log Data	This data isn't currently migrated, but Core will have this feature soon.

ARCHIOFFICE DATA TYPE	SUGGESTION
Standardized Tasks	Tasks are converted into to-dos in Core. You can create new to-dos from scratch.
Billable, RFP, and Internal Project Types	This data is converted but under new names. Billable projects are labeled "hourly," RFPs transfer as "marketing" contracts, and "internal" ones become known as "overhead."
Assigned Security Roles and Profiles	You'll need to assign security roles and create security profiles.

[2] You can contact the Core Migration Team by emailing support@bqe.com or calling + 1 (310) 602-4030.

To reiterate, all other data will be seamlessly transferred during the migration.

While only the account owner is able to log in and access the migrated data in Core, you can then add users and send invites to others in your company so they can use it too.

WHAT HAPPENS TO YOUR CURRENT SOLUTION:

Migrating your data will not affect your existing BQE product. It will continue to work just as it normally does.

If you continue using your current software and decide to move to Core later, you will have to migrate your data again so Core has the latest version. You can transfer your data essentially as often as you want, but Core will only retain the most recent sync.[3]

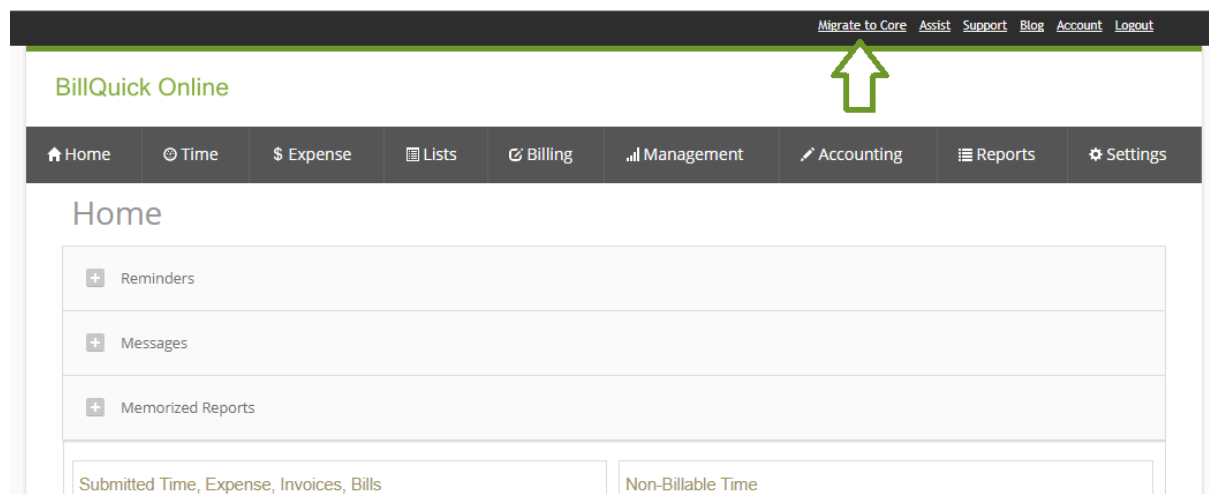## HOW TO MIGRATE YOUR DATA:

If you use the on-premise versions of BillQuick, Web Suite, ArchiOffice, or EngineerOffice, take the following steps:

1. Download the migration utility from here.
2. Install it on your PC/server so it is able to connect to your company file.
3. Run it and follow the onscreen instructions.

If you use BillQuick Online or ArchiOffice Online, this is what to do:

1. Look in the top-right of your navigation menu for a "Migrate to Core" button. This is only shown to the owner and administrator's account .

2. Click it and follow the onscreen instructions.

[3] The Core Migration Utility allows for up to three migrations per company in a day.

After you successfully migrate your data, you can immediately access Core and you won't need to set up anything else.

Depending on how much data you have, the migration process will take several minutes to an hour or more. Most company files are transferred in no time, but if you have data that goes back many years it may take longer.

Best Practices: *Please take note of this advice before starting the migration.*
We recommend these general best practices to ensure that your migration is a complete success. If you'd rather have BQE's Core Data Migration Team take care of the entire process for you, please contact your account manager.

1. We recommend that you contact the Core Data Migration Team or your account manager if any of the following applies to you:

— *You archive your data.*

— *You've been using BillQuick with a Microsoft Access database.*

— *You're syncing or integrating your BQE product with any other application, like QuickBooks Desktop, QuickBooks Online, or MYOB.*

— *You have customized programming, triggers, stored procedures, jobs, views, or tools that interact with your company file.*

2. **Migrate your data at a time when no one is using your company file.** Don't undertake the migration in the middle of your billing cycle or at any time when access to your current BQE product is extremely time-sensitive. While the migration process won't put your business processes on hold for too long, it's wise to get started when you know you'll have some free time.

3. **Before migrating,**
   1. Make sure to backup your data file.
   2. Run and print out key reports from your current BQE product. It's helpful to keep these on hand in order to validate your data. We recommend running the following reports:

— *Work in Progress*

— *Aging with Summary*

— *Invoice Register*

— *Balance Sheet*

— *Profit and Loss*

— *Trial Balance*

— *Client Retainer Summary*

4. ***After the data has migrated successfully, verify your data in Core by looking at your migration report.*** This report gives you a bird's eye view of the migration. You'll know what went through, what didn't, and why. We also recommend that you do a deep-dive by looking at Core's lists and time and expense screens, running reports, and matching up the numbers. You should also check all of your previously printed-out reports against Core's reports.

5. ***Perform a mock-up billing cycle.*** Use your own data or enter sample data to try out the

— *Create a client, project, and employee.*   — *Create checks.*

— *Enter time and expense records.*   — *Create journal entries.*

— *Submit/approve workflows.*   — *Create deposits.*

— *Run pre-billing reports.*   — *Enter credit card charges.*

— *Create a draft invoice.*   — *Run a profit and loss report.*

— *Review the final invoice.*   — *Run a balance sheet report.*

— *Record the payment.*   — *Run a trial balance report.*

— *Create vendor bills.*

whole cycle except for sending the invoice:

6. ***You should continue using your existing BQE product for your day-to-day needs until you've validated all of your data and you're completely satisfied with your migration.*** In order to guarantee a smooth transition in the event of any inconsistencies in data, you should use your current product for time and expense, invoicing, project management, reporting, and accounting needs. Take this time to explore Core and all of its possibilities while validating your data.

While this document covers everything you should need for a smooth transition, don't hesitate to contact customer support or your account manager should additional questions arise.

Happy migrating!

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