



# MANAGELY™ DATA CONVERSION SERVICES

This list is a baseline of what is included out of the box for companies electing to utilize migration services from external applications to Managely utilizing a Bold Technical Consultant. If there are any additional items not included on this list reach out to your Account Executive to discuss feasibility and any additional fees that may apply.

## Customer Information

• Customer Number • Customer Type • Customer Status (activate, terminated, prospect, etc ...) • Customer Since Date • Customer Phone • Employee • Terms • Invoice Delivery Method • Name (Business or Residential) • Payment Terms • Delivery Method of Invoices • Open Invoices • Bill to Name, Email, Phone, Number, Address, • Customer Comments (up to 250 characters) • Master Customer • Comments (Free Text up to 250 characters at the customer record page) • Customer Contacts

## Site Information

• Site (physical location of system) • Site Number • Site Name • Site Address • Site Phone • • Site Since Date • Site Comments (up to 250 characters)

## System Information

• System Number (Central Station ID) • System Type (burglar, fire, etc ...) • Panel type • Warranty (Parts/Labor) • System Service level • Central station provider • System Since Date • System Comments (up to 250 characters)

## Recurring Information

• Customer Number • Recurring Reason (New Sales, Upgrade, Etc.) • ID • Description • Monthly Amount • Cycle (monthly, quarterly, semiannual, annual) • Next Invoice Date • Recurring Start Date • Invoice to Master • Item Code

## Work Order

• Customer Number • Site Number • Type (Installation, Service, etc.) • Status (Ready to Bill, Go-Back, etc.) • Description (up to 500 characters) • Created Date • Closed Date • Total Amount

## Employee

• Fire and Last Name • Phone • Email • Description • Job Title • Employee Number • Employee Since • Address • User Code

## General Ledger

• Account Number • GL Description • GL Account Type • Active / Inactive • Name • Is Credit Account • Inactive Date (if applicable)

## Parts and Warehouses

• Name • Part Code • Manufacturer • GL Account • Cost • Is Panel • Vendor • Long Description • Accounting Category • Warehouse Code • Warehouse Name • Description • GL Account Number • Address

**Disclaimer:** The data conversion process involves items that will be entered into Managely programmatically (BOLD) and some items that will be entered manually by the (Customer). Data extraction (extracting data from customers' existing system) is the responsibility of the customer, and upon request can be evaluated by Bold for feasibility and an additional fee.