Setup a SharePoint Folder for Customer Data Share

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Purpose

One of the many steps required to implement a product for a new customer implementation or new customer acquisitions is getting the customer's current data converted into our products. This requires the sharing of large data files that email cannot handle.

To prevent delays in data sharing, a folder is created for each customer's data and shared with the Data Conversion resource and customer. This document provides the user with information on setting up a file for new projects.

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Process

To create a folder for customer data:

1. Open Microsoft Teams

2. Locate the Bold-Data Conversion Group Team in Microsoft Teams

    a. General Channel

    b. Select Files

    c. Select the appropriate product folder

        i. SedonaOffice New Implementations – SO Enterprise Projects

        ii. SedonaOffice Acquisitions – SO Acquisitions

        iii. Manitou – Manitou Data Conversions

iv. AlarmBiller – AlarmBiller

3. Share the file location with the Data Conversion resource assigned to the project and the customer during the mapping training conversation