

Sedona Office Standard Merge Process

06/20/2024 5:19 pm EDT

Merge Process (Existing Customers):

The data conversion process is almost the same whether you are working with a new customer or with an existing customer. However, there are some key differences that both you and the customer must be aware of to ensure that there are no disruptions to the customers' existing business.

Numbering

The biggest item that needs to be made aware of is numbering. Since the data source may include customer numbers, invoice numbers, etc. that already exist in Sedona Office, you will need to adjust the source data to stop duplicates:

1. For customer numbers this is relatively simple as there is a field in Sedona Office called "Old Customer Number". This allows the customers to assign a new number while also keeping a record of the legacy Customer number. There are a couple of ways to easily create customer numbers and it is up to the customer to decide what works best for them.
 1. The Customer can add a branch prefix or suffix to the customer number such as CMP-1234. This is another way of keeping the original number available while avoiding any overlap. One thing to be wary of is the character limit for customer numbers. The length of the number cannot exceed 15 characters.
 2. If both the source data and the Sedona office data use straight integers the scripts can add the max customer number in Sedona Office to the source customer number to continue the numbering system.
2. The Service ticket numbers can be changed in a similar way, but the character limit is 10. There is also no "old ticket number field" so you may want to provide the customer a list that maps the old customer number to the new ticket number especially for open tickets coming over.
3. Invoice numbers are the most difficult as they are required to be integers. The best way to deal with this is to add a 1 followed by as many 0s as necessary to ensure that the invoices will not be overlapped during the 6+ week conversion process. Once the live conversion is complete, it is recommended that the customer change the "next invoice number" to be one higher than the imported invoices so that the system doesn't accidentally run into the imported invoices in the future.

Mapping

While data mapping is important in all conversions, it is especially important in merges as companies are typically acquiring other companies that run their businesses differently and will have different names for similar items.

Live Merge

The go live for a merge is called a live merge. Once again the process is similar, but in addition to the customer needing to stop working in the legacy system, the business operations in Sedona Office will need to stop for the duration of the merge.