SedonaOffice Pre-Conversion Process

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Actions Done Prior to Data Conversion:

1. Set up of server and installation of Sedona office. This is handled by the customer's IT if the customer is enterprise, or by our Implementation team if the customer is hosted.

2. Customer specific General Ledger Accounts are imported with help from Bold Group CPA Consultant (Currently Bob Esquerra)

3. Setup tables are created by the customer with aid from Bold group Application consultant.

4. Legacy data is acquired from customer – The customer can provide data in several forms:

    1. SQL Database

    2. CSV Files

    3. Filled Out Master Template

5. Data Conversion Specialists review sources to determine the quality of data. If the data is workable – Move to data conversion, if not, see step six. A filled-out Master Template is always the best source as the conversion scripts are preset to work with this document.

6. If the data is hard to work with, meet with the customer to discuss how to clean it up. This can be done either with setting "rules" (such as "If you see the words 'fire', 'burg', or 'alarm' on a recurring line, set the recurring line to monitoring). Alternatively, we can work with the customer to manually fill the master template. The customer will then need to continue manually adding the data that changes over the six week process.