

Customer Check List

A description of the conversion process to ensure a smooth crossover to Deal Pack

	Completed	Date
1) After the signed contract, amount due at inception, and 50% of the quoted conversion fees are received, you must provide us your data from your previous system in ASCII fixed delimited format or Excel format with headers. Along with your data, we will need a Balance Report, Inventory Report (if applicable), a Repo/Charge Off Report, and 3 customer histories. If you wish for us to input your Chart of Accounts, please forward that too.	<input type="checkbox"/>	_____
2) Licenses will be installed by technician for demo and training purposes. Also, make sure your network is functioning properly, and remember that the conversion will overwrite previously saved data.	<input type="checkbox"/>	_____
3) Send in 10 forms for programming, free of charge. We can only program from originals, and we need at least 5 blank copies of each with one filled out. We also provide PDF programming at an additional fee, which provides great flexibility in creating custom forms for your business. Also, you can contact Frank @ Safeguard to order laser checks and other paper products. Call 877.664.3392 for more information.	<input type="checkbox"/>	_____
4) Assign a system administrator for the conversion process, and make sure we have their contact information. Once we have your data converted, this person will be responsible for reviewing and signing off on the accuracy so we can move to the final steps of the process.	<input type="checkbox"/>	_____
5) Schedule on-site, ABCoA site, or web-interactive training for your employees who will be using Deal Pack. Contact Evie @ 800.526.5832 x 211 for more information.	<input type="checkbox"/>	_____
6) Once you receive your forms, test them to ensure they are printing accurately and contact ABCoA support if any further corrections need to be made.	<input type="checkbox"/>	_____
7) Schedule dates for the final conversion and review all the steps to make sure everything is ready for business to go live with Deal Pack.	<input type="checkbox"/>	_____
8) Don't forget to sign up for any additional products you may need like credit reporting, BookItOut, and more!	<input type="checkbox"/>	_____
9) Once you receive your final conversion, enter your beginning balances and any information that was not converted. Don't forget to add your vendors and enter your parameters!	<input type="checkbox"/>	_____
10) Sign off on the conversion and go live using Deal Pack. Remember that Deal Pack support is here at 800.526.5832 from 9am – 6pm EST and we are more than happy to assist you with anything you may need, enjoy!	<input type="checkbox"/>	_____

REMINDER: We cannot move forward with a final conversion without the pre-conversion sign off sheet signed and returned.