Conversion Process

Converting or migrating data from one software system to another can seem daunting and unimaginable, even for someone who has previously been through a software conversion. There are the questions of how easily data will transfer, what data can and cannot be transferred, and which business practices need to be changed to work more efficiently with the new software.

The dream would be to transfer your data with a few quick commands and no headaches. The nightmare is that your data will need to be manually entered and burn up days and weeks of valuable time. In our experience, the reality is somewhere in between these two extremes.

There are a number of reasons why a new software implementation might fail. Our commitment is to help you succeed. We suggest completing the following tasks to help you and your company have a successful conversion experience.

- On occasion, due to a variety of possible circumstances, there is corrupted data in the previous database or old/unused accounts—you may wish to clean up this data so that it is accurate in your new Denali system. Our conversion team can provide suggestions on how, when, and where to clean up your data.
- Take the time to learn the software and what will give you the results you are looking for. We have a variety of training tools to help you learn in the environment and time frame that fits your company and schedule (on-site, online, and phone training).
- Determine exactly what you need from Denali to ensure that your company uses all the functionality to help you succeed. This is where our trainers excel, they can help you figure out the best processes in Denali for your business.
- Switching to a new software is a change, committing to that change will increase your chances of success! Your company will be the most successful when everyone is on board.
- Work with your Denali team by asking questions, answering questions, and being involved in the process. You are the expert on your data, you know what it should look like; help our team understand and verify.

Listed below are some things to consider as you go through the conversion process. They might help you decide what data you want to convert, when the optimal time for a conversion is, and how much training you and your staff should get.

1. Conversions can be completed at any time of year.

Conversions do not necessarily need to be done at year end when it is extremely busy. Picking a time when it is reduced activity for your company allows for reduced stress when learning and implementing a new system.

2. Data tables will be different between the old and new systems.

Every accounting software has a unique data structure that involves different elements within each record. Therefore, there is no one way or open source standard that is available. This can create issues when converting history/legacy information. Your help and review of your data is imperative.

3. The simplest conversion includes Master tables (ex: vendor contact info, customer contact info, GL accounts, employee address info, balance forwards).

Converting to new software is a great time to clean up old and unused accounts, vendors, and customers. It gives you an opportunity to begin fresh with only the current accounts. We can accommodate a change in the Chart of Accounts structure (non-fund to fund, segment length); however, it will also require your assistance in matching up old and new account numbers.

Not everything can be converted. We find this is most often an issue in Payroll but may happen in other modules too. Payrates, benefits/deductions, and leave codes do not convert; they need to be manually entered. We do have some utilities available to help with the process, but there is room for human error and this information will need to be verified by you.

4. Converted/Imported data should go through the posting process.

Importing data directly into tables bypasses the opportunity for the modules to work together. For example, if you import into AR, but not into SA, the information will not be available in the Sales module or reports. We recommend importing into the most influential module and posting throughout the system. This may mean your balance forwards are set back to accommodate historical records, and then closed when all transactions are imported and posted.

5. Training is crucial.

Once your software is installed and your data is converted, training is the next phase in your implementation. We do not recommend cutting corners on training. Adequate instruction on the functionality and features of your new software will lay the foundation for continuous improvement in your workflow processes. We believe that on-site training is the best option for hands-on learning. You can use your own data in your own environment. We also offer phone training and some webinars and videos.

6. Build a partnership.

Accounting software can sometimes feel complex. You are investing time and money into a new system to further your long-term profitability; building a partnership with the Cougar Mountain Team will contribute to your ongoing success.

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