

Conversion Outline

Quote Development and Conversion Initiation

- After we have received the conversion quote request form, and received data submissions for review, Shelby will then evaluate the data in respect to the points and expectations noted on the conversion request form. Shelby will then release a data conversion estimate for review.
- If a formal Quote/Agreement is needed, it will be drafted and submitted. A signed agreement is then required before conversion scheduling and processing. This is typically facilitated after signing a Sales agreement for the Shelby software, and before scheduling is coordinated for training.
- Once we receive a signed agreement, we will then define a schedule for conversion processing, coordinating dates with training and your office schedule. An Event Schedule Planner will be released, and will note the steps\dates in fulfillment of the data conversion. The Event Schedule Planner will be sent to the main contact noted on the Conversion Request form.
- The schedule is firmed up and then released to the Training department for coordination/scheduling of purchased training.
Note: An appointment for the on-line review of the First Run will be scheduled through our Training Department, with contact made to the individual noted as the main contact on the Conversion Request form.

Conversion Processing

- A preliminary 'First Run' of the conversion will be processed and uploaded to our server, with a notification sent to the Main Contact via e-mail, including a link to the data.
- An on-line review will then be accomplished. The on-line review will occur over the web and by phone, and will involve one of our in-house 'staff' trainers. If any problems are found (Such as incorrect results, or information excluded), or if any requests are made, the trainer will document and inform the conversion team for consideration in processing the 'Final Run'.
- The conversion team will then evaluate the problems and requests found in the preliminary 'First Run', and will then make necessary changes or communicate methods of resolution that will need to be performed after the release of the 'Final Run'. Additionally, the client will have further opportunity to evaluate the preliminary run and submit additional problems\requests to the conversion team leading up the next step (or some time before).
- At the appointed time (as noted in the Event Schedule Planner), Shelby will be anticipating an upload of a Final Set of conversion data, including (if needed) a backup of your 'live' Shelby Database (to avoid data loss). All activity and processing in Shelby should cease until you receive the converted data and restore to your system, else data loss will occur.
- The conversion programmer will then process the 'Final Run' of the conversion. A preliminary review of the results will be made to assure that problems and approved requests are met.
- The 'Final Run' will then be uploaded to our server, with a notification sent to the Main Contact via e-mail, including a link to the data.

Invoicing for Services and Addressing Residual Conversion Issues

- With release of the Final Run, your organization will have three (3) weeks to finalize review of the conversion and submit changes\revisions for consideration that (if approved) will either be accomplished with query scripts that are run at your location, or through coordination\processing of a conversion re-run.
- Upon release of the Final Run, Shelby will then prepare and send an invoice to the client for the data conversion, in accordance with the terms of the conversion agreement. Payment will be due upon receipt.