PRACTICE CS®
PRODUCT TRANSITION TUTORIAL

READINESS CHECK

Here's a handy checklist of the tasks your firm should complete before beginning the conversion of your data from your previous software to Practice CS.

PRE-CONVERSION

○ **Identify a product champion**—Identify a member of your firm who will be the "go-to" person for spearheading the move to Practice CS. Your product champion will attend the Practice CS Getting Started and Conversion Tutorial, as well as all product training sessions.

○ **Determine your conversion method**—Review the available conversion options with your sales representative and determine the best conversion fit for your firm.

○ **Review the CS Professional Suite® system requirements**—To ensure a seamless software transition, review the Practice CS system requirements (available on our System Requirements page) before transitioning to Practice CS.

○ **Download/install Practice CS**—When you're ready to download and install the latest version of Practice CS, refer to our My Product Downloads page for complete details.

○ **Review the Practice CS Getting Started resources**—After installation is complete, refer to the Getting Started resources to become familiar with Practice CS. These resources can be found under the Help > Help & How-To menu in Practice CS.

○ **Review your firm's training needs**—Gauge your firm's comfort level with using Practice CS by visiting the Training page in the Services section of our website to determine which of our many training resources meet your firm's needs.

DATA CONVERSION

○ **Discuss your conversion options with your sales representative**—When you're ready to convert your client data, contact your sales representative for a conversion appointment.

○ **Review the Practice CS Tax Data Conversion Kit for your current software product**—The conversion kit provides a comprehensive overview of the data conversion process. A Professional Services representative will send you the conversion kit when scheduling your conversion appointment. Conversion kits are also available in the Help and How-To Center. Just search on "Practice CS Conversion Kit."

○ **Speak with a Professional Services representative about your conversion appointment**—A Practice CS Professional Services representative will contact you regarding your conversion appointment. He or she will review your firm's needs, and your progress in preparing for conversion.

○ **Prepare/back up client data to be converted**—Using the Practice CS Data Conversion Kit for your current software product, follow the instructions to prepare your data for conversion.

○ **Upload client data via Secure Data Exchange**—Once your data is prepared for conversion, you're ready to upload it using the Secure Data Exchange available on our website (login required).

FOR MORE INFORMATION, CALL CUSTOMER SERVICE AT **800.968.0600** (PRESS 2).

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DATA CONVERSION CONTINUED

○ **Confirm that your data is awaiting conversion**—After you've uploaded your data, you'll receive an email confirming that your data is pending conversion.

○ **Download your converted client data**—After your data is converted, you'll receive an email confirmation directing you to log in to the Secure Data Exchange to download your converted data.

○ **Restoring your converted data**—Restore your data on the SQL database server where Practice CS was installed using the instructions from the Help & How-To Center. See the Practice CS Conversion Kit for more information about using the converted data.

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