

SmartOffice Data Conversion Solutions

GETTING YOU UP AND RUNNING IN THE SHORTEST AMOUNT OF TIME

DATASHEET

When your existing database contains irreplaceable client history, upgrading to a new software solution can be daunting. To make your upgrade to SmartOffice® as smooth as possible, E-Z Data provides packaged service offerings coupled with proven software utilities to make your transition headache-free. E-Z Data conversion utilities include:

- Turnkey conversion of client, policy, and investment data, as well as notes and activities
- Pre-configured conversion routines for importing data from a variety of commercial applications, including ACT and Goldmine
- Experienced resources that deliver complete, accurate, custom conversions from other commercial or homegrown systems
- An integrated conversion wizard designed to provide users with a step-by-step guide for completing any additional data conversion

E-Z Data has the experience to help convert your data accurately and completely, so you can be up and running on your new system as quickly as possible.

For non-standard conversions, SmartOffice provides a simplified ASCII import utility for contact records. This utility supports conversion from most contact management systems.

Applications containing more complex data, such as those that allow the user to customize data entry forms, may require custom conversion scripts and can be managed by E-Z Data's experienced conversion services team.

Available Standard Conversions

Product	Basic Contact Information							Investment				Policy		System						
	Contact	Dependents	Address	Phone	Web Address	Business Key Relation	Agent	Int Parties	Letter	Notes	Invest	Sec Master	Portfolio	SubAct	Transaction	Policy	Product	Rider	Sets/ Tags	Users
ACT	•		•	•		•			•											
ACT for Advisors	•		•	•		•			•											
Advisors Assistant	•		•	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Broker's Ally	•		•	•					•											
CLASS	•		•	•		•	•													
Client Data System (CDS)	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Client Info Plus for Win	•		•	•		•	•	•	•					•	•	•	•	•	•	•
Contact Partner FDP	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
DataPlus	•					•		•	•						•	•	•	•	•	•
DataMax	•		•	•	•	•	•	•	•	•	•			•	•	•	•	•	•	•
GBS	•		•	•	•	•	•	•	•	•	•			•	•	•	•	•	•	•
Goldmine	•		•	•					•											•
Prowler	•	•	•	•		•	•	•	•	•	•			•	•	•	•	•	•	•

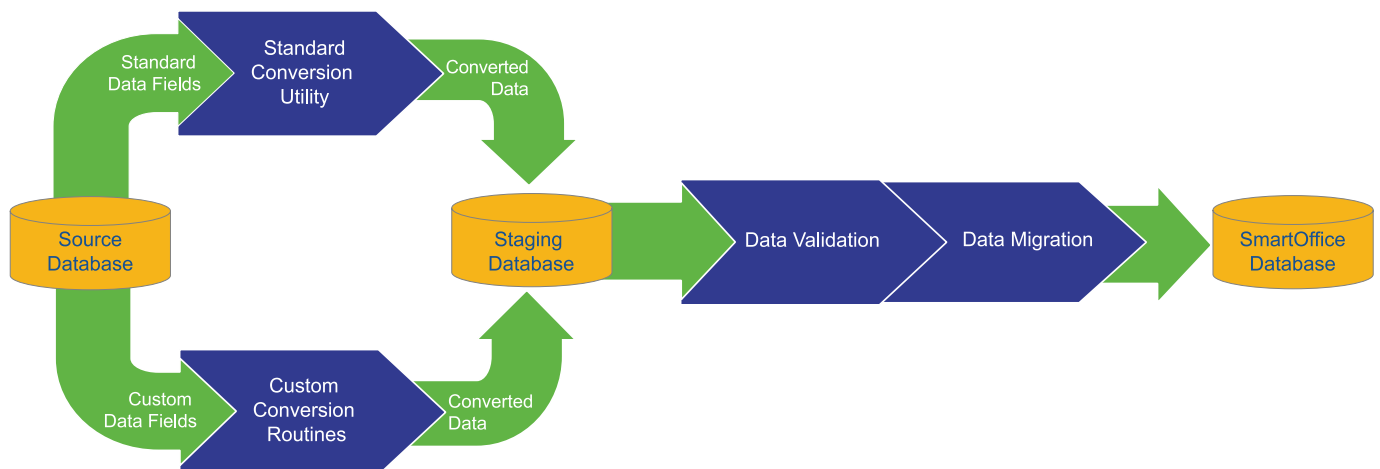
A proven process ensures fast, accurate conversion

To ensure fast, accurate conversions, E-Z Data employs a proven data migration methodology. Our data conversion services team follows a standard process when moving client data from existing database programs into SmartOffice:

1. Standard data fields are mapped for the standard conversion utility.
2. Custom data fields are identified, and migration routines are built.
3. Both standard and custom data are translated into the SmartOffice staging tables.
4. Data validation ensures that mappings and edit rules are correct. Errors in the data or edit rules are addressed prior to actual migration.
5. Validated entries are flagged as 'ready to migrate'.
6. The SmartOffice Auto Migration program looks for records flagged as 'ready to migrate'.
7. The Auto Migration program moves converted data from the staging database to the SmartOffice production database.

For clients upgrading to SmartOffice, E-Z Data provides a fast, easy migration path from CDS®.

This proven process ensures that data is converted accurately and completely — all in the shortest possible time frame.



For more information about SmartOffice Data Conversion solutions from E-Z Data, contact us today at 800-777-9188 or www.ez-data.com.