



SouthWare Implementation & Conversion Expectations

Congratulations! You have just purchased one of the best business information management systems available. This document will help you understand the changes that will occur during the next several months during your conversion from your current systems to SouthWare's Excellence Series software. Our role is to ensure that upon completion of the project you are successful. To accomplish this, both of our staffs will get to know each other very well during the months ahead. We look forward to becoming your partner for years to come. Welcome! Here is an outline of our recommended processes.

1. **Conversion Planning Session** – During this phase we will sit down and discuss the entire process with you and your managers. We will plan for the data conversion, training classes and your live date.
2. **Installation of the Software** – We install the software on your system and configure all workstations, printers and other devices that will be used on the new software.
3. **Data Conversion – Master Files** – We will begin right away to extract your master file data from your old system. This includes customers, vendors, stock items, etc. We will perform an initial conversion of this data to SouthWare for use during your training in our classrooms.
4. **Training** – During the planning session we will have defined the classes and personnel to attend. Now we will begin with SouthWare 101 to familiarize your staff with the SouthWare environment and functionality. The classes will then proceed application by application as defined in your training schedule. Each class will be approximately a 2-4 hours and will be comprised of a combination of lectures and hands on lab work using your own master file data.
5. **Data Conversion continuation** - This phase will occur simultaneously with the training. During the training sessions you will be using your data so that you can begin to see how SouthWare works in a familiar setting. We will identify changes that may be necessary due to new functionality in SouthWare. We will also convert your "day one" and "historical" data during this phase.
6. **Refresher Training** – This will occur during the last couple of weeks before you go live. During the preceding couple of months we will have assisted you in preparing SouthWare procedure manuals for your company. During this training we will emphasize your company's method of processing.
7. **Going Live!** – This is it, the final moment of truth. Usually during the weekend before going live, you will have closed out your old system and we will have assisted in getting your final transactional data (day one files) into the new system. We will be at your offices during most of the first week on SouthWare to assist with any issues that occur.

After that first week we are there to assist you every weekday from 8:30am to 5:30pm EST via the telephone and remote access to your system for the next year. Please be sure to ask any questions at any time. We want to ensure your complete satisfaction.