

PCLAW TO ESILAW 360 MIGRATION PREPARATION CHECKLIST



IMPORTANT

- The items below are administrative tasks you should review before you migrate to esiLaw 360.
- While not a requirement, we highly recommend that your account is balanced before migration.
- The data migration transfers your data 'as is'. If you require data cleanup, contact Sales to put you in touch with a consultant.
- Please note that your trial conversion account is for validation and testing only and any data additions or changes made to your esiLaw 360 trial account will be overwritten during your live conversion.

	DESCRIPTION OF TASK	COMPLETED
1.	Start the free 30-day trial by filling out the registration form at https://www.esilaw.com/trial.html . You will receive an email with the installation link and activation code. Ensure that you have installed esiLaw on all computers and server if applicable prior to your data migration date.	
2.	Verify you are using PCLaw version 12 - 14.x. If you are on a different version, please speak with your Deployment Administrator.	
3.	Make sure all bank reconciliations are up to date. This does not need to be re-done if they had been reconciled at the end of the previous month.	
4.	Post all unposted transactions in PCLaw including those for Disbursements, Time Entries, Trust Cheques, General Cheques, Firm Receipts, Journal Entries, A/P Invoices, and Bills.	
5.	Review your most recent bank reconciliation and correct/reverse any stale dated cheques.	
6.	If necessary, after reviewing the billing templates in your esiLaw 360 trial account (Lists > Templates), please send samples of any customized PCLaw billing templates to your account manager so that we can provide a consult for customization services.	
7.	If you are using UTBMS and have custom LEDES template: <ul style="list-style-type: none"> • Contact support@esilaw.com when starting testing of 360 to ensure UTBMS is enabled on your system. • To ensure it works in esiLaw 360, you may need to pay extra to customize the UTBMS billing template accordingly. • There is some custom info related to LEDES Billing that won't be able to be migrated automatically, you may need to manually populate it in 360 accordingly. 	

The following tasks are optional, but are recommended for best business practice

	DESCRIPTION OF TASK	COMPLETED
8.	Review the Chart of Accounts to make sure that all Total Levels are correct to ensure that your financial reports are adding up correctly.	
9.	Review the Chart of Accounts to ensure all G/L Account types are set up correctly. For example, a bank account should always be defined as an Asset and an Accounts Payable account should always be defined as Liability, etc.	
10.	If you have several years of historical transaction data that you no longer need or use, we recommend you use the Archive feature to archive data before migrating to esiLaw 360.	