

ESILAW 360 POST MIGRATION CHECKLIST



IMPORTANT

- The items below are administrative tasks you should review before you begin using esiLaw 360 in your firm.
- The data migration transfers your data ‘as is’. If you require data cleanup or changes to your data, it is a billable service available at standard hourly rates. Please contact Customer Support for further information and rates for data services.
- If you have questions about the tasks in this list, please visit our Knowledge Base before contacting support: <https://kb360.esilaw.com/knowledge-base/>

	DESCRIPTION OF TASK	COMPLETE
1.	Ensure that you have installed esiLaw on all computers that require access and make sure to download Crystal Reports when prompted.	
2.	Select <i>File > Switch to Multi-User Mode</i> to make esiLaw 360 accessible to all users.	
3.	Run <i>Verify Client/Matter & G/L Balances</i> under the <i>Firm/Financial</i> menu to ensure that the system balance matches prior and after data migration. If they do not match, reach out to the Migration team.	
4.	Re-check your last bank reconciliation done in your old software for all bank accounts. If it becomes unbalanced after migration, please reach out to esiLaw support team at support@esilaw.com , don't contact migration team.	
5.	It is recommended you setup a clearing G/L for the trust transfer to pay bill feature if you have not set it up in esiLaw before migration.	
6.	Verify that the last receipt number is correct in <i>Global Settings</i> .	
7.	If you are not a Cloud user, configure the backup scheduler to back up esiLaw to a separate location daily. <ul style="list-style-type: none"> • You can do this on the computer where your company file is located by logging in to esiLaw 360 as an administrator and selecting <i>Maintenance > Backup & Restore</i> and then selecting ‘Click here to update the backup scheduler’. 	
8.	Verify your bill templates are available, especially if you needed a custom bill template.	
9.	If required by your firm, verify UTBMS billing and MICR cheque printing is enabled for your esiLaw 360 account.	
10.	Determine whether you will use the Make Deposit feature or not and update <i>Lists > Payment Types</i> with the correct settings. <ul style="list-style-type: none"> • For example, if you plan to use Make Deposits for cheques and cash, verify that the payment types display ‘Add to deposit’. • If you are unfamiliar with the deposit feature in esiLaw, ensure you familiarize yourself BEFORE you begin entering receipts as this will impact the flow of transactions in esiLaw. 	
11.	Review <i>Lists > Disbursement Codes</i> . <ul style="list-style-type: none"> • The data migration will create disbursement codes for all codes deleted in the past that still exist in transactions. Also review all code tax settings. 	
12.	Note that Limitation Dates from esiLaw now display as Events in esiLaw 360. Questions regarding this can be directed to your certified consultant (trainer).	

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13.	Review Passwords under <i>Maintenance > User Accounts</i> to set assigned lawyers for all users as necessary.	
14.	If you are using the Scheduler for importing disbursement such as Copitrak, you must go to the windows Task Scheduler and update all tasks related to 'esiLaw' and change the option to 'Run weather user in logged on or not'. If this step is not completed and the user is logged out of the computer when the task is scheduled, it will not run.	
15.	<p>If you are using UTBMS and have custom LEDES template.</p> <ul style="list-style-type: none"> • Make sure to testing after you go live, as well make sure you test the UTBMS billing template accordingly. <p>There is some custom information related to LEDES Billing that won't be able to be migrated automatically, you may need to manually populate it in esiLaw 360 accordingly. Make sure you know where to find this information.</p>	

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

	DESCRIPTION OF TASK	COMPLETE
16.	<p>Review and configure global settings under <i>Maintenance > Global Settings</i>.</p> <ul style="list-style-type: none"> • There are a several new settings in esiLaw 360 that you can enable or disable. 	
17.	<p>Review User Groups under <i>Maintenance > User Accounts</i> to ensure that all groups have the correct settings.</p> <p>Add any additional features or functions to the group as needed.</p>	
18.	Review <i>Lists > Payment Types</i> to ensure that you have all the necessary types for your firm	
19.	Review <i>Lists > AutoText Codes</i> . There is an option to set Display for all users for AutoText Codes. This allows the firm to share an autotext code among multiple users.	