

ESILAW LEGACY 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 or changes to 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 any questions about how to navigate the items in this list, please review the esiLaw Help page by selecting Help > Help & Support or visiting <http://www.esilaw.com/help/vfp/esilaw/help.htm>, before contacting support

	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 esiLaw Legacy or Classic 2015.1.4, or later and go to Help > About. <ul style="list-style-type: none"> • An installer to update your esiLaw from 2007.1 or higher to 2015.1.4 is available at https://www.esilaw.com/support/ESILAW2019Update.html. 	
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 esiLaw including those for Disbursements, Time Entries, Trust Cheques, General Cheques, Firm Receipts, Journal Entries, A/P Invoices, and Bills.	
6.	Review your most recent bank reconciliation and correct/reverse any stale dated cheques.	
7.	Review the Control Accounts in Settings > System Settings to make sure that all control accounts fields display a valid G/L number and enter 9999 for control accounts that do not apply to your firm.	
8.	If you have recently closed files, make sure that you have run the Moved Closed Transactions in Clients/Contacts. The System Balance report will display a message if this needs to be done.	
9.	Send samples of any customized invoice templates to your Deployment Administrator so that they can be forwarded to a third party consultant for a quote.	
10.	Please note, if you have assigned Suspense lawyer code 99 to a lawyer/timekeeper, this will require an additional license in esiLaw 360.	
11.	It is encouraged that you clear as many vendor invoices as possible and confirm that you will post vendor invoice/payments manually in esiLaw 360 if needed.	
12.	If you are using UTBMS and have custom LEDES templates: <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. 	

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

	DESCRIPTION OF TASK	COMPLETED
13.	<p>Correct any credits in A/R.</p> <ul style="list-style-type: none"> The Client Listing will display errors in the distribution of Firm Receipt payments. For example, where a payment was applied to fees only instead of to fees and disbursements or vice versa. The Aged A/R Listing will display credits where there was no client bill to apply a payment to or where the payment was applied to the incorrect bill number. 	
14.	<p>Make sure that your Trial Balance balances to zero. esiLaw support can assist in reconciling these balances.</p>	
15.	<p>Review the Chart of Accounts in G/L > G/L Maintenance to make sure that all Total Levels are correct to ensure that your financial reports are adding up correctly.</p>	
16.	<p>Review the Chart of Accounts in G/L to ensure all G/L Account types are setup 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.</p>	
17.	<p>Run a System Balance and File Health report.</p>	
18.	<p>If you have several years of historical transaction data that you no longer need or use, we recommend you use the Archive feature in esiLaw to archive data before migrating to esiLaw 360.</p> <ul style="list-style-type: none"> Refer to the Help file > Maintenance or contact support for assistance with archiving data. 	