ProTracker Cloud™

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# Data Conversion Questionnaire

**Firm Name:**

**Contact Person:**

**Please answer the following questions about your current CRM:**

1. Timeframe: When would you like to “go live” with ProTracker Cloud?

2. Current CRM: What CRM program are you currently using? Please indicate the version number as well. For example: Redtail, Junxure, etc.

3. Contacts: How many contact records do you have? In ProTracker Cloud, a contact is any person, business or other entity that you want to store information about.

4. Clients: How many of those contact records would you consider to be clients? In ProTracker Cloud, a client is any person, married couple, or business that you perform a service for. One or more contacts are associated with each client.

5. Data to Convert: Please answer Yes or No to every item listed below.

| | | | |
|---|---|---|---|
| Contacts | | Documents | |
| Clients | | Letters | |
| Groups | | Email messages | |
| Addresses | | Accounts | |
| Associations (relatives, professionals) | | Tax info | |
| Employees | | Estate info | |
| Notes (history) | | Insurance info | |
| Tasks | | Sales Data | |
| Calls | | | |
| Appointments | | Keywords | |
| Other? (describe) | | | |

Note: Items such as attachments and scanned documents are uploaded separately by you to ProTracker Cloud.

6. Special Conversion Requests:

   Do you store some data separately in Excel spreadsheets that you wish to convert?

   Do you have other external data to be converted? If so, describe its location and format.

7. Custom Fields: If your firm has defined custom fields, please list ALL of them and provide screenshots showing actual data stored in them.

8. Data stored in Other Fields: Do you store some data in fields meant for other purposes, e.g., a Social Security number in a birth date field, or a phone number stored in an address field? If so, you must send screenshots and a description.

9. Addresses: Are your addresses entered in the correct fields? For example, are all home addresses in the Home Address fields? Are all home and business phone numbers stored in the correct locations?

**10.** Screenshots: You must send screenshots of the data stored for one of your married clients in your existing CRM. Include all types of data, including family members and activities (notes, tasks, appointments). **We will send you instructions on how to upload your screenshots later, after we have signed a nondisclosure agreement.**

**11.** Data Location: Is your data stored locally on your own computer or network? **If your data is hosted remotely by a CRM application provider, you will be responsible for acquiring your database from the host provider. We will not contact your provider directly.**

12. Client Folders: Where do you store data files, such as Word documents and Excel spreadsheets, for your clients? Provide the complete file path for one client. For example, F:\Clients\SampleClient\. Do you use the same pattern for all clients? Is the path stored within your current CRM?

13. Contact: Who is the contact for this data conversion process? Please provide full contact information.

14. IT Contact: Do you have an IT person (employee or outside provider) who will be involved in the data conversion process? Please provide full contact information.

**Thank you. Your complete responses help us to provide the best conversion possible.**