

Congratulations: Your Data Services Specialist has completed your data conversion! The following checklist will help you review your system and ensure an accurate data conversion.

### **Actions to Avoid Until Data Review Is Complete**

**Duplicate Removal** – This procedure can skew how the original data will match up. Since most fixes will be based off the main IDs of your system, removing any IDs will make system adjustments more difficult.

**Record Deletion** – Deleting main records, gifts, or any other data from your system can cause similar issues as Duplicate Removal. This item DOES pertain to records marked for deletion during the data conversion.

These actions can make adjustments to your DonorPerfect system more difficult. Therefore, we encourage you to avoid them until you've thoroughly reviewed your data conversion. The [Post-Conversion Checklist](#), along with any fixes and changes to your system, should be completed before you proceed with these [Post-Conversion Action Tasks](#) :

### **90-Day Grace Period – Fixes vs. Changes**

Fixes to the system will not incur an additional charge.

A system adjustment is considered a fix if it was:

- Discussed during the mapping.
- Marked on your *Mapping Document*.
- Implemented improperly.

Changes to the system requiring more than one (1) hour of work will incur an additional charge.

A system adjustment is considered a change if it was NOT:

- Discussed during the mapping.
- Marked on the *Mapping Document*.

Note: Data changes submitted after your system delivery may incur additional charges. If they exceed one (1) hour, you will be notified of any applicable charges before any work is done.

If anything is incorrect with or missing from your DonorPerfect system, notify your Implementation Coordinator (IC). When contacting your IC, please have your Client ID ready, as well as a few examples of your concern. Your IC will then determine the best candidate to address your concern.

**Data Review** (Complete Immediately)

Please note that no two systems are alike. Small differences between your former system and DonorPerfect will exist; please be mindful of this when you compare the two systems. In your review of the data, focus on verifying that your Data Services Specialist converted all desired and discussed data, and it appears in the appropriate location in DonorPerfect.

Select five to 10 of your most active donors; then use the checklist below to complete the review of your data conversion.

POST-CONVERSION CHECKLIST	
Date Completed	Suggested Step
<input type="checkbox"/> _____	<b>1. Compare Data Sets</b> Use the Mapping Document to compare the original data to your converted data in DonorPerfect.
<input type="checkbox"/> _____	<b>2. Verify Placement</b> Review that your data was located correctly in DonorPerfect.
<input type="checkbox"/> _____	<b>3. Verify Gifts and Pledges</b> Make sure your gifts and pledges are included and display proper values.
<input type="checkbox"/> _____	<b>4. Verify Additional Data Locations</b> Confirm that the Contacts, Bio, Other Info, and Addresses screens are accurate.
<input type="checkbox"/> _____	<b>5. Verify Expected Fields</b> If you expected any new fields in DonorPerfect, confirm your specialist added them.

POST-CONVERSION ACTION TASKS	
Date Completed	Suggested Step
<input type="checkbox"/> _____	<b>1. Duplicate Removal</b> Create a backup. Then run <b>Duplicate Removal</b> to identify possible duplicates and merge records.
<input type="checkbox"/> _____	<b>2. Record Deletion/Records Marked for Deletion</b> If records were marked for deletion during the conversion, we recommended you use selection criteria* to list the records to be deleted. Manual changes can be made to this list, if necessary. Once any manual changes are made, create a backup before using these selection criteria to globally delete the records marked for deletion. You can manually delete other records from the Search screen using the trash can icon displayed to the right of the donor name listed after a search. Please keep in mind that deleted records cannot be restored into DonorPerfect.

\* Our Support Department can help you create these selection criteria.