LEAP Strato

		LEAP Strato	Morrison & Sons					

Summary	Processes	Practice Management ▾	Office Accounting ▾	Trust Accounting ▾	Investments ▾

Refresh

Transition Summary Report · Matter Balance Report · Accounting Preferences

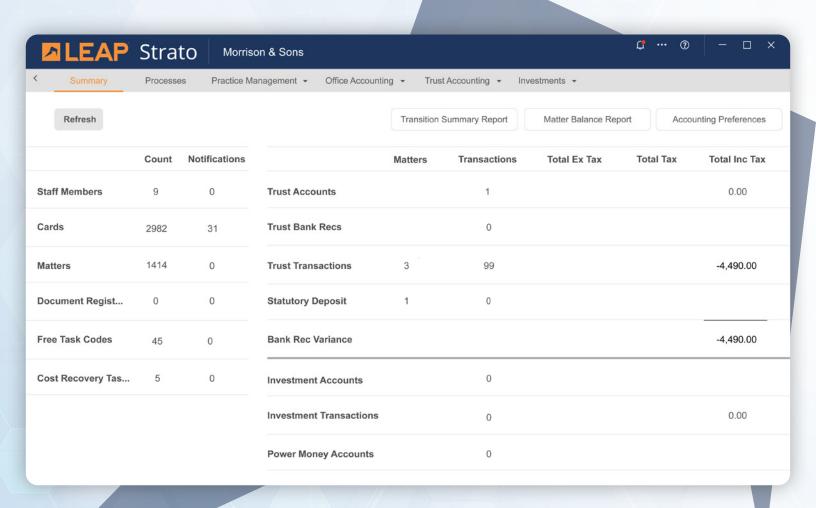|	Count	Notifications		Matters	Transactions	Total Ex Tax	Total Tax	Total Inc Tax
Staff Members	9	0	Trust Accounts		1			0.00
Cards	2982	31	Trust Bank Recs		0			
Matters	1414	0	Trust Transactions	3	99			-4,490.00
Document Regist...	0	0	Statutory Deposit	1	0			
Free Task Codes	45	0	Bank Rec Variance					-4,490.00
Cost Recovery Tas...	5	0	Investment Accounts		0			
			Investment Transactions		0			0.00
			Power Money Accounts		0			

Everything you need to know about the data transition process.

LEAP Strato is the world's only software built specifically to transition PCLaw® users' data into LEAP in as little as two days.

We have over 10 years' experience in migrating law firm data into LEAP. Our world-class software, Strato, automates this process offering an easier data migration, called a transition at LEAP. Our experienced Implementations team gives scope, recommendations, and executes a thorough and phased plan to complete PCLaw data transitions accurately and efficiently which includes financial transactions.

PCLaw Data	Transitions Included
Matter Details	
Matter Reference (20 characters)	✓
Matter Type	✓
Matter Description (80 characters)	✓
Associated Client	✓
Staff Member Acting	✓
Staff Member Responsible	✓
File Responsible	✓
Date Matter Opened	✓
Date Matter Completed/Archived	✓
Archive Number	✓
Comments	✓
Client Details: Company	
Company/Trading Name	✓
Client Details: People	
First Name	✓
Last Name	✓
Salutation	✓
Client Details: Communication	
Street Address	✓
Fax Number	✓
Mobile Phone Number	✓
Home Phone Number	✓
Work Phone Number	✓
Email Address	✓

PCLaw Data	Transitions Included
Contact/People Details	
Gender based on Salutation	✓
Staff Details	
Name	✓
Initials	✓
Username/Email Address	✓
Matter Opening Balances	
Trust Opening Balances	✓
Accounts Receivable Opening Balances	✓
Unbilled Expenses Balances	✓
Unbilled Time/WIP	✓
Retainer Opening Balance	✓
Matter Transactions	
Trust Ledger	✓
Accounts Receivable Ledger	✓
Matter General Account Ledger	✓
Unbilled Time/WIP Ledger	✓
Unbilled Expenses	✓
Other	
Safe Custody Packets	✓
Safe Custody Items	✓
Custom Matter Content (Imported as Comments)	✓
Client Correspondence (generated using PCLaw and associated with documents in your database)	✓

This table represents the information that can be extracted where available and populated in the expected fields. It is dependent on the version of PCLaw you have installed. Any data not represented in this table is not included in the transition.

LEAP | **PCLaw**

Ready to switch to LEAP?
Book a demo now

We make your transition simple in 5 easy steps.

1   **Initial Consultation**

Within three working days after receiving your order, we will:

- ▶ Arrange a transition preparation call with you
- ▶ Explain the process leading up to the data collection, transition, and installation
- ▶ Confirm the scope of the transition you have requested
- ▶ Arrange for a data quality check
- ▶ Provide you with our housekeeping document
- ▶ Confirm the details of your transition with a LEAP Consultant

2   **Data Quality Check**

During the data quality check, we will:

- ▶ Import your data using LEAP Strato, designed for PCLaw
- ▶ Provide a Data Quality Report explaining potential issues to resolve before the transition
- ▶ Provide guidance on what issues to resolve
- ▶ Discuss the transition time frames and options available to you

Then, we ask that you:

- ▶ Analyse the Data Quality Report
- ▶ Perform any housekeeping necessary and return the signed report to LEAP
- ▶ Confirm your availability for the data collection date, to provide:

  - ■ Access to the data being collected
  - ■ Reports for verifying the accuracy of your data
  - ■ A point of contact for any questions that may arise during the transition

3   **Accessing Your Data for Collection**

If your data is held on:

- ▶ In-house servers – we require remote access to the database and document management system
- ▶ A hosted server – you must arrange for your hosted supplier to provide remote access to your data and document management system

If there is a significant amount of data, we may request a trial transition where we perform a test extraction and import the test into LEAP, checking that your data is:

- ▶ Relevant
- ▶ Accurate
- ▶ Complete
- ▶ Consistent
- ▶ Accessible

4 Performing the Transition

When ready, you will:
- ▶ Schedule the transition date

On the data collection date, we will:
- ▶ Extract agreed-upon data from PCLaw and collect relevant reports
- ▶ Import agreed-upon data into our transition environment
- ▶ Provide a Data Transition Report for your review
- ▶ Import the data into LEAP and verify all the transitioned data once you've signed off on the Data Transition Report

5 LEAP Installation and Training

The final steps of the transition include:
- ▶ Importing any 'Additional Services', if requested and agreed upon by LEAP and yourself
- ▶ A detailed review, by you and your firm, of the transitioned data
- ▶ Confirm approval of a successful transition
- ▶ Installation and training by your LEAP Consultant

5 tips for preparing your data for the transition

1. Close or archive all matters that have been completed

2. Check that all matters have valid descriptions, types, and staff assigned

3. Consolidate all duplicate client and contact records that you can identify

4. Allocate office payments received to appropriate outstanding bills

5. Perform an up-to-date Trust Bank Reconciliation

Frequently Asked Questions

Is my data safe?

Data that is collected for the purpose of the transition is held securely with Amazon Web Services. We will retain your legacy data in our archive for six months after the installation of LEAP, after which time it will be removed. Remember to keep a copy of your legacy data, in case you want us to review anything after that period.

How long does the actual transition take?

Transitions take five to seven working days from the time of data collection to the point of handing over the transition to your LEAP Project Manager. The time it takes depends on the quality of your data and the type of transition you choose. Our Implementations team will discuss your options with you.

What if my data is not cleansed/formatted?

We will provide you with a Data Transition report that includes recommendations on cleaning and formatting your data for the transition. It is your responsibility to execute the cleansing before the transition. Although we will not alter your data, we will format client names and addresses, if possible, where they do not naturally map to the LEAP detailed fields.

LEAP | PCLaw

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LEAP™