

HOW TO HANDLE ERP MIGRATION

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Upgrading or changing ERP systems isn't rare for clients. Better software release, or existing legacy software stops being supported by the software vendor. Budget is another common reason to migrate your ERP to other software.

That's not to say it's a trivial change. [Given the importance of ERP systems today](#), it's not as easy as choosing a new platform and going for it. Migration is a complex process, and mistakes can be very costly.

At Assetsoft, we make the process straightforward for our client thanks to our simple 5 steps process.

DISCOVERY

The first step is to understand the client's business. This includes their target markets, owned property, amount of properties, departments and users, and related information that helps us understand every client's needs.

Luckily for the client, we carry out this process seamlessly. We use questionnaires and conduct personal interviews with the most important staff to learn what we need for the next step.

SYSTEM SETUP

We take care of setting up the new system for the client, following their requirements. Setup will differ depending on the type of properties owned by the client, but it generally includes several levels of setups.

The most important part of the migration is creating a chart of accounts or COA. We'll work with the clients to create a new COA if it needs to change during the process.

Once the basic setup finishes, we can start migrating the data from the older system to the new one.



DATA MIGRATION AND VALIDATION

This is the most tedious step for migrating ERP systems, so it's recommended to prepare the legacy system data so that it's easier to access it during migration.

Data is divided into 3 categories: static, reported, and transactional data. The first two types don't change during the process, and they include properties and vendors for Static data and previous reported and audited balances for reported data.

Transactional data includes current balances, leases, AR, and other data that needs to be updated live. This category moves to live during the Go-live step

TRAINING AND UAT

The second-to-last step includes training the personnel in each department to use the system properly and user acceptance testing (UAT).

Training requires assessing who's responsible for what knowledge and tasks. UAT won't begin until proper training is given to the right people, and that includes training them with a strong focus on what will be tested during UAT.

After the training, it's time for UAT to report any issues with the new system. These reports help to fix aspects like data or the migration script.

GO-LIVE

After UAT is completed, the client can go live. Assorted considerations during this step include deciding on Go-dark periods to reduce downtime, key user verification, verifying data one last time, and ensuring everything works properly.

CONCLUSION

Migrating to an ERP system can be tedious, but our methodology ensures there's little to no effort from our clients: only providing the necessary data and testing the new system.

If you're considering ERP migration and want to take advantage of our simplified process, [click here to read more.](#)