Update your Client Roster

We are already 11 weeks away from the Penelope go-live. Time is flying by so fast!

In the To-Do #1 sent at the beginning of June, we asked you to provide a detailed mock-up of what your schedule would look like for October. If you haven't done so yet, it is important to do it and send it back in priority.

This To-Do #2 will help us migrate only the client accounts that are considered "active". There is a limited number of ClientConnect licences and we want to ensure all the currently "active" clients have one and that we have enough for all new clients.

You will be receiving the list of all your client accounts in Quickbooks (financial software) that are marked as "active". This list will be generated by Daniel as an Excel file and will be saved in each of your own private folders on the server, directly under your DOCUMENTS folder. This to ensure privacy and confidentiality.

When should you receive the list? This will be done last week of July and first week of August. The name of the file should be something like "_Migration List.xlsx". A general notification will be sent when we are starting the process.

Who should you consider "active"? We highly suggest to consider 6 months of inactivity as an inactive account not to be migrated.

Does this mean those clients with "inactive" accounts cannot come back? If those clients are coming back before the Penelope go-live, their accounts will be migrated to automatically. If they are coming back after the go-live, we will recreate their account directly in Penelope.

What about the invoices with a balance owing? We will be working with both systems for quite a while. This means that no invoices created in Quickbooks (paid or unpaid) will be migrated to Penelope. We will keep working with Quickbooks to send reminders, invoices, statements, and to update their past balances with payments.

When does this need to be done by? We are looking at **Friday August 13**.

First map your folders on the CFIR server, then under your own private folder (where you would put your session notes), you will see the DOCUMENTS folder where the file will be saved.
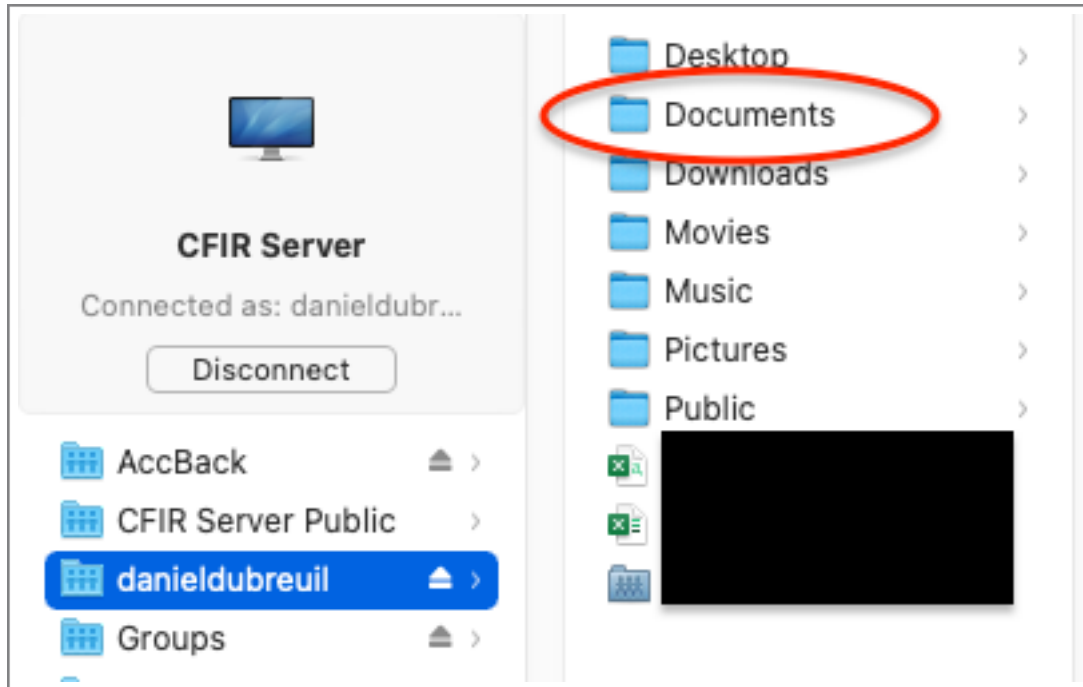
Watch for the file

_Migration List.xlsx

A general email will announce the beginning of the process.

Flag those to set as "inactive"

Put those account names in **Red**. Don't forget to save the document directly where it is.

Communicate when done

You can send an email to Daniel Dubreuil at pa@cfir.ca

Ensure to be done by Friday August 13.

THANK YOU!

From the CFIR Penelope Transition Team