



Transitions to LEAP Order Form

LEAP Rep

Part A - Client Details

Firm Name	<input type="text"/>		
Contact for Conversion	<input type="text"/>	Your LEAP Contact during Conversion	<input type="text"/>
Phone	<input type="text"/>	LEAP Phone	<input type="text"/>
Fax	<input type="text"/>	LEAP Fax	<input type="text"/>
Email	<input type="text"/>	LEAP Email	<input type="text"/>

Part B - Conversion From

- | | |
|--|---|
| <input type="checkbox"/> Perfect Balance Classic | <input type="checkbox"/> BHL |
| <input type="checkbox"/> Open Practice | <input type="checkbox"/> Locus Affinity |
| <input type="checkbox"/> Locus | |
| <input type="checkbox"/> KG2000 | |
| <input type="checkbox"/> Other _____ | |

Part C - Conversion Type

(Please see overleaf for details)

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> FreshStart | |
| <input type="checkbox"/> QuickStart | |
| <input type="checkbox"/> Transactions | <input type="checkbox"/> Data Consolidation |

Part E - Scheduling

LEAP does not commit to specific delivery dates. Subject to the availability of resources: -

FreshStart

Conversion completed with 3 weeks of acceptance of order.

QuickStart

Conversion completed with 3 weeks of acceptance of order.

Transactions

Trial conversion within 4 weeks and Final conversion within 12 weeks of acceptance of order.

Part D - BAS Reporting Method

- | |
|----------------------------------|
| <input type="checkbox"/> Cash |
| <input type="checkbox"/> Accrual |
| <input type="checkbox"/> Hybrid |

Part F - Special Requirements

Part G - Order

Name	<input type="text"/>
Position	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/>

LEAP Office Use Only

<input type="checkbox"/> LEAP Documents and/or	<input type="checkbox"/> LEAP Accounting
<input type="checkbox"/> Existing Docs Client	<input type="checkbox"/> Client to Match File Numbers
Docs:	<input type="checkbox"/> Conveyancer <input type="checkbox"/> Solicitor <input type="checkbox"/> Law Society Precedents
Sales Signature	<input type="text"/>
(only sign when financial commitment has been made by the client)	
Date	<input type="text"/>

Explanation of Transition Types

	Perfect Balance Classic	KG2000, Locus, Open Practice	Non-Standard
<p>FreshStart</p> <p>No Trial Conversion.</p> <p>FreshStart is not available if the client has LEAP Documents and Perfect Balance Classic or a competitor product, and the data IS NOT IDENTICAL. If this is the case, the client must select QuickStart or Transaction Conversion.</p>	<p><u>Electronic components</u> Staff Departments Rates Client Details Matter Details Matter Types</p> <p><u>Exclusions</u> Archived/Deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money Safe Custody Register MYOB setup</p>	<p><u>Electronic components</u> Staff Departments Rates Client Details Matter Details Matter Types</p> <p><u>Exclusions</u> Archived/Deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money Safe Custody Register MYOB setup</p>	<p><u>Data to be imported</u> Client details Matter details Staff Details</p> <p><u>Exclusions</u> Safe Custody and Archived/Deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money Safe Custody Register MYOB setup</p>
<p>QuickStart</p> <p>No Trial Conversion.</p>	<p><u>Electronic components</u> Staff Departments Rates Client Address Phone Fax Email Matter Details Matter Types Safe Custody Register</p> <p><u>Exclusions</u> Archived/deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money MYOB setup</p>	<p><u>Electronic components</u> Staff Departments Rates Client Address Phone Fax Email Matter Details Matter Types Safe Custody Register</p> <p><u>Exclusions</u> Archived/deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money MYOB setup</p>	<p><u>Data to be imported</u> Client details Matter details Staff Details Safe Custody</p> <p><u>Exclusions</u> Archived/Deleted matters</p> <p><u>Manual Components</u> Opening balances including Trust Controlled Money MYOB setup</p>
<p>Transactions</p> <p>Trial and Final Conversion.</p> <p>In addition to the standard Data Matching and Data Cleansing, the Conversion Team will also check/reconcile/audit all financial transactions in the categories listed.</p> <p>If the client has LEAP Documents and Perfect Balance Classic or a competitor product, and the data IS NOT IDENTICAL, the client will also need Data Consolidation.</p>	<p><u>Electronic components</u> Staff Client Address Matter Details Matter Types Safe Custody Register Transactions imported Unbilled WIP Unbilled Disbursements Unbilled Anticipated Disbursements Unbilled Cost Recoveries Unpaid Invoices A locked history for all other transactions which is viewable in LAC but where the transactions cannot be changed Balances imported Trust Debtors NB: Invoice Details are provided in a separate Excel spreadsheet</p> <p><u>Manual Components</u> Controlled Money Setup MYOB Reconcile debtors</p>	<p><u>Electronic components</u> Staff Client Address Matter Details Matter Types Safe Custody Register Transactions imported Unbilled WIP Unbilled Disbursements Unbilled Anticipated Disbursements Unbilled Cost Recoveries Unpaid Invoices A locked history for all other transactions which is viewable in LAC but where the transactions cannot be changed Balances imported Trust Debtors NB: Invoice Details are provided in a separate Excel spreadsheet</p> <p><u>Manual Components</u> Controlled Money Setup MYOB Reconcile debtors</p>	<p>Subject to separate specification and quote and availability of resources.</p>