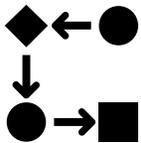




SOFTWARE IMPLEMENTATION SERVICES

As part of Blue Link’s commitment to service, we have a team of in-house expert consultants available to deliver our implementation and training services. Our consultants, and those of our Partners, understand the importance of our products to your business and have the training and background to successfully implement the system for your business.



DATA MIRGRATION

Blue Link takes care of the data migration process to move all relevant data from older systems – without the need for manual data input.



EMPLOYEE TRAINING

Robust on-site and remote training plus additional training resources such as documentation and videos are available to all customers.



CUSTOMIZATION

Every business is unique and so we at Blue Link offer customization to help your business succeed in the marketplace



INSTALLATION & CONFIGURATION

With Blue Link ERP, you get your own version of the software configured to your specific business needs.



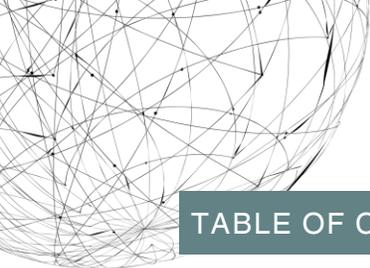


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DATA MIGRATION

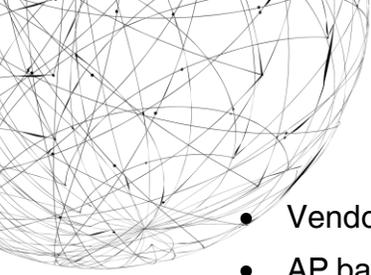
Blue Link provides extensive data migration services in order to bring over historical data from old systems and other file types during the software implementation process. These services are performed by our knowledgeable team of in-house consultants who have experience migrating data from a variety of introductory and legacy systems. With our data migration services, you are not required to manually key any information from your existing solution or other spreadsheets into the system.

We’ve designed our data migration process to ensure that you receive the most up-to-date information for Go-Live while reducing downtime and set-up.

At a minimum, we encourage our customers to consider migrating the following data:

- Customers with outstanding balances
- Outstanding AR balances





- Vendors
- AP balances
- Active inventory items
- Pricing information
- General ledger balances

BLUE LINK'S DATA MIGRATION PROCESS

STEP (1) INITIAL DATA ANALYSIS

Step one of our data migration process is to determine if there is an opportunity to clean up your existing data. As a starting point, you want to make sure that you have valid data in the correct fields of your existing software. For example, if you've stored telephone numbers in address fields, you will want to fix this. This step also provides you with the opportunity to improve the quality of your data. Do you have a lot of duplicate customer records? Are you happy with existing product codes? Do you have duplicate inventory items to account for different UOMs? If you want to change anything, now is the time to do so. One of our consultants will work with you to help clean up your data in the most efficient way possible. This might be done with the help of a simple spreadsheet template, or, if the data follows a logical pattern, our team can write a data conversion import routine to make any necessary changes.

STEP (2) ACCESSING THE DATA

Step two of the data migration process involves our team of in-house consultants working with you and your team to actually access the raw data to begin the migration process. Our team will extract the data from your existing systems and other data sources such as Excel spreadsheets into Blue Link ERP. Depending on your existing company set-up, you may have multiple solutions in which you will need to extract data – such as accounting systems, warehouse systems, eCommerce platforms, spreadsheets and CRM software – and you may have multiple entities in which you will need to migrate data for.

During this step, our team will write a data conversion routine that maps data from your old systems to Blue





Link according to labels, titles and structures and you can migrate as much or as little data as you want. Enlisting the help of our team during this process ensures all important data is imported – including unpaid and opening balances, open sales orders and purchase orders, lot numbers and existing quotes.

As part of the implementation process, we move your data ahead of your Go-Live date. This allows us to validate the data, identify and fix any issues and provides your company with a set of relevant data within Blue Link ERP for training purposes.

STEP (3) DATA MIGRATION

Step three of the data migration process involves re-extracting the data from your existing system right before Go-Live and importing it into Blue Link ERP using our data conversion import routine to ensure the data is the most up-to-date while reducing downtime and set-up. We will also re-validate the data at this stage to ensure it is accurate.

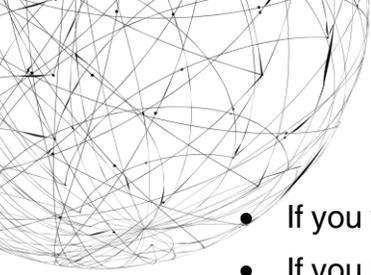
BLUE LINK HAS MIGRATED DATA FROM HUNDREDS OF DIFFERENT PIECES OF SOFTWARE AND ACROSS MULTIPLE OPERATING SYSTEMS. WHETHER IT'S INTRODUCTORY SOFTWARE, LEGACY ERP, SPREADSHEETS OR OTHER APPLICATIONS, BLUE LINK CONSULTANTS CAN WORK WITH YOU AND YOUR CURRENT SYSTEMS TO EXTRACT THE DATA.

DATA MIGRATION COSTS

There are several factors that can have an impact on the time it takes to move your data and therefore the costs of doing so. At Blue Link we bill for our data migration services based on the actual time it takes to move and clean-up the data. Therefore, if you require a lot of data clean-up, this can have an impact on overall costs. For example:

- If you have a lot of duplicate customer records that you want to consolidate





- If you want to update/change existing product codes
- If you have duplicate inventory items to account for different UOMs that you want consolidated

Alternatively, for start-up companies with no existing data or only a small amount of historical data, the migration process is simplified.

For Blue Link specifically, it's hard to provide an accurate cost for data migration during initial conversations until we learn more about your data, what formats we are working with and how much data clean-up is required. This is why we provide estimates across a large range to account for these types of variables until we know more about your company.

Keep in mind that data migration quotes can vary by thousands of dollars because many software vendors low-ball quotes and ignore the massaging process and can sometimes put the onus on the customer to extract the data or manually enter it themselves.

Although completing steps one and two may seem easy for individuals who have the skill set, even these people often face a number of issues and resort to getting the vendor to perform the migration for them.

EMPLOYEE TRAINING

Blue Link provides extensive training for new customers, available on-site or done remotely by our in-house team of consultants. During the implementation planning meeting, the consultant assigned to your implementation will work with your company to assess the best training method and schedule time accordingly. We understand that initial training can be overwhelming as employees work to learn a new system and improve processes. That is why we also provide a variety of training resources to allow for continuous training and as a resource when you hire new people. These resources include a robust, Help Site built into Blue Link ERP, plus access to over 100 training videos and documentation resources.

NEW CUSTOMER EMPLOYEE TRAINING COSTS

As is the case with the entire implementation, the costs of training are billed based on actual time and





we estimate initial costs based on the number of users and our understanding of your business processes. Typically, we schedule our consultants to be onsite for a couple of weeks as part of the implementation – where the first week is dedicated to training, process evaluation and changes, and the second week is for our team to offer support during Go-Live. This allows our team to be onsite and available for additional training, troubleshooting, report creation, customization and other requests. While onsite, our consultants provide classroom training to whoever you decide needs to be involved. Our estimates for training costs are typically based on the number of people and training more people at the same time tends to require more time and effort (for fielding questions etc.). How quickly training goes will also depend on how familiar your team is with using software, and whether they are able to dedicate time to focus solely on training (as opposed to getting caught up with day-to-day tasks and pulled into other meetings). In order to make the training go as smoothly as possible, it's important that employees have the time to dedicate to learning Blue Link without other distractions. Part of our sales process involves working with your team to put together a training schedule – who will be trained, when and for how long.

TRAVEL COSTS

Blue Link training is done onsite at your preferred office location. This means there will be travel costs with getting our consultants to your facilities and the lodging costs associated with having them onsite. At Blue Link we ask that our customers split these costs with us – we ask that customers pay the hotel and ground transport while we cover the costs of airfare, per diem and incidentals. We will work with your team to ensure these costs are reasonable and fair.

CUSTOMIZATION

All major customization is identified during the sales process and included as part of the initial software costs, however, it is very common for customers to identify additional custom during the implementation process. As a best practice, we encourage you to add any small custom requests identified while our consultants are onsite with you to a [“Wish List”](#) for future review. Frequently, these types of requests are based on existing or old processes that





are either replaced or improved with Blue Link ERP and therefore become obsolete. If the request is still valid after you have been using Blue Link ERP for several months, it is then appropriate to review and schedule the custom work as needed.

INSTALLATION & CONFIGURATION

Installation of the software refers to the actual set up of the software on the server. Those who choose to implement via the cloud are often confused as to why they are paying installation fees if they are accessing the software via the internet, but in this case installation refers to the set up of the software on the vendor's servers - typically in a [secure data centre](#).

Blue Link's cloud-based software is hosted on our servers which customers access via RDP. Each customer will have its own server environment configured for your specific company needs – including amount of additional storage space, number of dedicated SQL servers etc. Therefore, time is required by our IT team to provision this server environment and configure your version of Blue Link ERP. Each version of the software is configured to meet the needs of our customers and common configuration examples include:

- Setting up accounts payable net limits
- Turning on “flags” for specific actions such as customers over their credit limit
- Product categories (drop-down menus)
- User permissions and security
- Bank accounts
- Sales reps and commissions
- Available order statuses
- System defaults - default units of measure, quote status, inventory class etc.



ADDITIONAL RESOURCES

Learn more about Blue Link's software implementation services including how to determine which data to move, tips for migrating data on a budget, and the logic behind typical implementation timeframes.

- [ERP Implementation: 5 Data Migration Tips](#)
- [Do You Need to Migrate All That Data?](#)
- [What is a SaaS ERP Software Implementation?](#)
- [The Logic Behind Implementation Timeframes](#)

