Contents

Overview ......................................................................................................................................................... 3

Before Converting Financials or Membership.......................................................................................... 3
☑ Remove Duplicate Records .................................................................................................................. 3
☑ Run Clean-Up: Utilities....................................................................................................................... 4
☑ Link Shelby Logins to GlobaFILE Records ........................................................................................ 5

Before Converting Financials .................................................................................................................... 6
☑ Check Balance Sheet .......................................................................................................................... 6
☑ Balance Bank Reconciliation to General Ledger .............................................................................. 6
☑ If Payroll: Employee Social Security Numbers ................................................................................. 6
☑ Install and Run v.5 Check Database Utility ..................................................................................... 7

Before Converting Membership ............................................................................................................... 8
☑ Clean Up: Profiles .............................................................................................................................. 8
☑ Clean Up: Organizations (Groups) ..................................................................................................... 9
☑ Clean Up: Birthdays .......................................................................................................................... 10
☑ Clean Up: Gender ............................................................................................................................. 11
☑ Clean Up: Control Table Information ............................................................................................ 12
☑ Clean Up: Dropping Old Records ..................................................................................................... 13

Other Items to Consider ......................................................................................................................... 13
☑ The Conversion ............................................................................................................................... 13
☑ Additional Setup After Go Live ........................................................................................................ 14

Mappings: Shelby v.5 to ShelbyNext | Membership ........................................................................... 15

Data Upload (Hosted Customers Only) .................................................................................................... 16
☑ Uploading Your Data for Conversion .............................................................................................. 16
☑ Upload the Data ................................................................................................................................. 16
Overview

This checklist is for Customers who are converting to Arena, ShelbyNext | Membership and/or ShelbyNext | Financials from Shelby v.5.

Please be sure that you make a backup before running any utilities. Click this link for assistance with creating a backup of your Shelby v.5 data: http://community.shelbysystems.com/v5/f/159/t/7308

Before Converting Financials or Membership

☑ Remove Duplicate Records

GlobaFILE > Reports > Possible Duplicate Names List

Use the GlobaFILE/Possible Duplicate Name report to search for possible duplicates by head-of-household, title, first/middle name, last name, suffix, address, city, state, postal code and phone number.

For help with setting up this report and combining names, please refer to this community post. http://community.shelbysystems.com/v5/f/159/t/7302
Run Clean-Up: Utilities

Run the Find Lost Names Utility in GlobaFILE

Utilities > Shelby Tools > Find Lost Names - See this community post for more information on ‘Lost Names’ - http://community.shelbysystems.com/v5/f/161/t/7435#pi259=1

Run Remove Duplicate Addresses Utility in GlobaFILE

GlobaFILE > Utility > Remove Duplicate Addresses - This utility makes sure there is only one record in the address table for each unique address.
**Link Shelby Logins to GlobaFILE Records**

**Clean-Up Logins**

If you have Shelby v.5 Logins that are not linked to a record in GlobaFile, you could end up with a duplicate record in ShelbyNext | Financials because the conversion will create a record for that login.

**User Security > Select Name > Update**

- Your v.5 login must have Supervisor Security rights to have access to User Security. Or, you can login as “Supervisor”.
- If the Shelby Login does not have a GlobaFILE record associated with it, the Conversion will create a new record in Arena, using the Full Name field.
- **Not having a GlobaFILE record linked to the Shelby Login in v.5 can result in duplicate records in Arena.**
Before Converting Financials

☑ Check Balance Sheet

Does the total of all your Assets equal the total of all your Liabilities plus your closing accounts [capital]?

General Ledger > Reports > Monthly Reports > Balance Sheet

Click here for some tips if you are out of balance.
http://community.shelbysystems.com/v5/f/159/t/7348

Alert your trainer ASAP, if either of these show your General Ledger as out of balance!

☑ Balance Bank Reconciliation to General Ledger

If Bank Rec and General Ledger do not balance, please refer to page 13 of this document.

☑ If Payroll: Employee Social Security Numbers
☑️ Install and Run v.5 Check Database Utility

**Important:** Prior to converting your financial data, we ask that you run the v.5 Check Database Utility. This utility is used to verify your financial data integrity when migrating from v.5 to another approved product. Running the utility helps to find any potential issues within your financial data that could cause a problem during your conversion. An example of this would be an employee in Payroll who does not have a Social Security number on their record or non-existent General Ledger accounts that are referenced in Accounts Payable.

The Check Database Utility is available from a private download page in the Shelby Community. You must be a community member to access the download page. To join the Community, open the following address in your browser, fill out the form and then click the **Join Now** button.

Community Registration Page

If you have already joined the Community, open the following address in your browser to access the **v.5 Conversion Utility Download** page.

v.5 Check Database Utility Download Page

If you need assistance with any issues that the script may reveal, please contact our Support Department  
Phone: (888) 772-7362   Email: v5support@shelbyinc.com
Before Converting Membership

☑️ Clean Up: Profiles

Ask yourself the below questions when considering which profiles to convert.

- Are they current and valid?
- Should they be available in Arena?
- Do they include profile comments?
- When were they last used?

Use the **GlobaFILE Profile Analysis** report to identify Profiles that are not used. You can easily delete Profiles that you no longer needed.
Clean Up: Organizations (Groups)

Ask yourself the below questions when considering which groups to convert.

- Are there any inactive Groups that you do not want converted to ShelbyNext Membership/Arena?
- Are there any changes that need to be made to the active Groups?
- Are the members of each Group current?
- Is there Attendance history?

Clearing Attendance History – You may have years of attendance history that you do not want to convert. The v.5 product has a utility to clear attendance history. See this community post for more information – http://community.shelbysystems.com/v5/f/159/t/6821.
Clean Up: Birthdays

Understanding Birthdays

Arena and Shelby v.5 handle birthdates differently. Arena requires a complete birthdate (MM/DD/YYYY) in order to calculate the age. Shelby v.5 does not require a birth year (when no year is specified the program appends the default year of 1796). When converted to Arena, the birth year of 1900 is appended to any record with an existing MM/DD birthdate.

You can use a Selection & Listing report to identify records where the birth year was not included.
Clean Up: Gender

Identifying records with an ‘unknown’ gender specification

Use Selections and Listings to identify existing records with an unknown gender.
Clean Up: Control Table Information

Use GlobaFILE Control Table Information to identify possible duplicate fields such as address types, phone types, relationship types... Duplicate Control Table items can be combined.

See the following community post for help on combining duplicate Control Table Items - http://community.shelbysystems.com/v5/f/159/t/7075

See the following community post for help on identifying unused Control Table Items - http://community.shelbysystems.com/v5/m/queries/25461
Clean Up: Dropping Old Records

**NOTE: This is for the conversion to Arena ONLY.**
Added as a standard feature of the conversion utility, is the functionality for dropping records if they have a ‘>DROP’ profile in Shelby v.5. This will be a choice in the conversion utility.

- If you are converting data into a hosted site, our Conversions Team will automatically drop any records that have the >DROP profile.

- **Note:** >DROP profile will only work for records who do **not** have Contribution history. If you have records with Contribution history that you would like to drop, you will need to first transfer their contributions to another record using the Contribution module’s **Transfer Contribution** Utility.

**NOTE: This is for the conversion to ShelbyNext | Membership ONLY.**
Create a profile code called ‘CONVKEEP’ and add to all Membership and Contribution records that you would like to convert to the ShelbyNext | Membership platform. If you use attendance in Shelby v.5 run a Selections & Listings report through Membership to flag the attendees with the ‘CONVKEEP’ profile code.

Other Items to Consider

**The Conversion**

- If we are hosting your data, please remember to upload your data at least two weeks prior to your **First Run Conversion**. You should receive a notification from our conversion team when the data is due.
- The conversion will take your existing Shelby v.5 database as is and convert that data over to Arena, ShelbyNext | Membership/Financials. If there are changes to be made, you should do that in your Shelby v.5 database before conversion.
- Understand that everything you add to the first run database during your training period will be overwritten during the final conversion process. Think of this as practice data since this data will not be kept, so DO NOT make changes to it that you plan to keep. (Such as setting up new accounts, changing your account structure, or adding new entries....)
☑ Additional Setup After Go Live

(Note: Training or Support will assist with the below setup)

- **Checks** – Additional Setup is required after the conversion.
  - MICR checks are setup through Bank Account Management. Links to image files will need to be setup before printing checks.
  - Check Stock – ShelbyNext | Financials supports Laser Check Stock (8.5x11). You should purchase new check stock if using dot-matrix style checks.
  - Check Images will only convert into ShelbyNext | Financials.

- **GL Special Reports** – Special Reports converted from v.5 will need to have a Report Format associated with them (e.g. Statement of Financial Position, Statement of Activities...).

- **Security** –
  - ShelbyNext | Financials v.5 Logins are converted. However, there may be additional setup/cleanup. Please note the number of logins purchased with your subscription. The base amount is three logins.
  - Arena/ShelbyNext | Membership v.5 Logins are not converted and will need to be recreated.
Pre-Conversion Checklist

Mappings: Shelby v.5 to ShelbyNext | Membership

Below are how the fields from Shelby v.5 will convert into ShelbyNext | Membership. ShelbyNext | Membership has a 25 Configurable Fields that can be customized. Out of the 25 available configurable fields, 10 are date fields and 15 are text/list fields.

<table>
<thead>
<tr>
<th>From: Shelby v.5</th>
<th>To: ShelbyNext</th>
<th>Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Address 1</td>
<td></td>
</tr>
<tr>
<td>Attendance</td>
<td>Attendance</td>
<td></td>
</tr>
<tr>
<td>Auxiliary Number</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Batches</td>
<td>Batches</td>
<td></td>
</tr>
<tr>
<td>Birthday</td>
<td>Birthday</td>
<td></td>
</tr>
<tr>
<td>Date 1-10</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Date Received</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>2nd Email</td>
<td>Secondary Email</td>
<td></td>
</tr>
<tr>
<td>3rd Email</td>
<td>Note</td>
<td></td>
</tr>
<tr>
<td>Employer</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Envelope Number</td>
<td>Envelope Number</td>
<td></td>
</tr>
<tr>
<td>Family</td>
<td>Family</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Gives with Family</td>
<td>Gives with Family</td>
<td></td>
</tr>
<tr>
<td>Giving</td>
<td>Giving</td>
<td></td>
</tr>
<tr>
<td>How Received</td>
<td>Group</td>
<td></td>
</tr>
<tr>
<td>Individual Picture</td>
<td>Individual Picture</td>
<td></td>
</tr>
<tr>
<td>Marital Status</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Membership Memo</td>
<td>If starts with date, then Interactions. If not, then Note.</td>
<td></td>
</tr>
<tr>
<td>Life Events</td>
<td>Interactions</td>
<td></td>
</tr>
<tr>
<td>Memo</td>
<td>Note</td>
<td></td>
</tr>
<tr>
<td>MICR</td>
<td>MICR</td>
<td></td>
</tr>
<tr>
<td>Occupation</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Orgs</td>
<td>Group – (With Join Date) (and Property Assignment)</td>
<td></td>
</tr>
<tr>
<td>Phones</td>
<td>Home, Cell, or Work Phone</td>
<td></td>
</tr>
<tr>
<td>Position</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Profiles</td>
<td>Groups – (With Start Date) (Comment to Interaction) (Property Assignments) (ALLERG to Check-in Note)</td>
<td></td>
</tr>
<tr>
<td>Relationships</td>
<td>Group</td>
<td></td>
</tr>
<tr>
<td>Record Status</td>
<td>Group</td>
<td></td>
</tr>
<tr>
<td>Special Profile</td>
<td>Configurable Field</td>
<td></td>
</tr>
<tr>
<td>Statement Frequencies</td>
<td>Group</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td>Append to Last Name</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Configurable Field</td>
<td></td>
</tr>
</tbody>
</table>

If you need **custom fields** converted from Shelby v.5 to ShelbyNext | Membership, please create a discussion on Basecamp for our Conversions team. They will work with you in determining what is pulled over and how it reflects in ShelbyNext | Membership.
Data Upload (Hosted Customers Only)

☐ Uploading Your Data for Conversion

If you are converting to one of our Hosted Platforms, you will need to upload the following files to our Conversions team:

- **Pictures** – If you have Pictures in your v.5 Database and want to bring them into Arena, make a copy of the Pictures folder in the ssv5.dat Directory.
- **Scans** – If you scan checks or invoices and would like to bring over the scanned images, make a copy of the Scans folder in the ssv5.dat Directory.
- **Registers** – If you would like to have your Source Documents brought over, make a copy of the Registers folder in the ssv5.dat Directory. (Only required for ShelbyNext | Financials)
- **ASSOC** - If you would like Associated Files brought over to ShelbyNext Financials, make a copy of the ASSOC folder in the ssv5.dat Directory.
- **Backup** – Make a backup of your v.5 data. For instructions on making a backup, [click here](#) or contact our v.5 Support team at (888) 697-4352 or [support@shelbyinc.com](mailto:support@shelbyinc.com).

Once you have the necessary files from above, place them in a separate folder and compress that folder so that they are ready to be uploaded.

☐ Upload the Data

Please use this URL, [http://datatransfer.shelbyinc.com/ConvUploadForm.asp](http://datatransfer.shelbyinc.com/ConvUploadForm.asp), to upload zipped file to our conversion team.