**Welcome to Inn-Flow! We are excited to have you on board!**

To make this transition as smooth as possible, we listed seven best practices below to help with the transition. These are also described in detail following this agreement.

1. **One Accounting System: This is one of the most important items to ensure success!**
2. Supplies: Order blank check stock and envelopes before going live.
3. Technology: Test your current printer, scanner and browser settings.
4. Schedule: Once the trainings have been scheduled, make every effort to stick to the schedule. Review the list of who should be on the call to ensure all necessary attendees are aware and available for the trainings.
5. Budget: Create or Import an Operational Budget to allow for actual to budget comparisons.
6. Reconciliation: Complete your first reconciliation by the 20th of the following month.
7. Be Involved: Make sure that your entire team is involved in the Implementation process.

Our Implementation process lasts 90 days – 30 days before the live date and 60 days after the live date. This will be plenty of time for you to effectively migrate to the Inn-Flow system. If you have any questions regarding these points please let your Implementation Specialist know.

Please sign below to acknowledge that you’ve read and understand these items in detail to ensure a successful migration to Inn-Flow.

|  |
| --- |
| CLIENT: |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Signature |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Date |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Name |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Title |

**Transition Best Practices (in detail)**

1. **One Accounting System**

Commit to using only Inn-Flow for your accounting needs. We find that keeping your books on two systems creates confusion, duplication, and takes double the time. Start entering all transactions for the FIRST Month into Inn-Flow. DO NOT enter any FIRST Month transactions into your Old Accounting application. Commit to closing the previous month within 30 days so that historical data can be imported and seamlessly mapped. Please refer to the AC-11 Accounting Transition Guide for more details.

1. **Supplies**
2. Purchase check printer and magnetic ink.

Purchase a new or dedicate an existing printer for printing checks. Inn-Flow does not recommend using HP Officejet printers as these printers require customized configuration to print checks properly. Inn-Flow does recommend using any other type inkjet or laser printer. Inn-Flow recommends following standard banking practices and using magnetic ink cartridges. These can be purchased from any office supply store, but the best pricing is found through online retailers.

1. Purchase Check Stock and Envelopes.
2. Blank, 3-part checks. Heights of each check section are: top=4”, middle=3.5”, bottom=3.5”. There are two options:
   1. We recommend the following from Costco: <https://www.costcochecks.com/p/blank-laser-check-bottom-no-sig/96363/q/x?from_rec=true>
      * Check must be on the bottom section of the check stock.
      * You cannot use pre-printed checks with Inn-Flow. All check information is printed by Inn-Flow onto blank check stock.
   2. However, you can order from any of the 7 styles types available on Nelco’s using this link:

<https://www.nelcosolutions.com/category/products/business+checks/blank+checks.do?c=209869.210418.210427.210457&chkpl=4%22+%26+7+1%2F2%22&pp=30&sortby=ourPicksAscend&cx=0>

* + - **Here’s the path:**(<https://www.nelcosolutions.com/home.do> > Products > Business Checks > Blank Checks > Bottom Blank Checks) - Feel free to choose the security level of your choice (there are 3 options) **as long as the Check Perf Locations are 4” & 7 ½”.**

1. # 8 Envelopes with double window.
   * Use this option if you plan to keep the top portion of the check.
   * Recommended product: nelcosolutions.com, reference: #8 Envelopes E9150014
2. #10 envelope with double window.
   * Use this option if you plan to send the entire check.
   * Recommended product: nelcosolutions.com, reference: #10 Envelopes 80750
3. **Technology**
4. Print a sample check for each business account. While Inn-Flow gives you the capability to print checks from any computer and printer, it’s highly recommended that you dedicate which printers and computers will be used to print checks. Printer and computer print settings, if not configured properly, can distort the image of the check when printed. Use the Print Sample Check button, located on all bank account details pages, to test a printer and a computer and confirm settings are accurate. Print a sample check from each of the business accounts. The page size should be set to “auto” or “letter”. The scaling should be set to “none” or “100%”. Confirm that all check details printed and are located in the proper position. Most importantly, confirm that the routing and bank numbers appear on the bottom of the check.
5. Purchase and configure a scanner at all locations. All Inn-Flow users should have access to a scanner. If you need to purchase a scanner we recommend the Canon P-150, P-250, or similar. This scanner is small, very easy to setup and use, and it doesn’t require dedicated power; rather it draws power through the USB port on your computer. All scanners should be configured as follows:

* 200 dpi
* Gray scale
* PDF format
* High compression

These settings are highly important, as they will drastically reduce the size of the scanned file. The smaller the file, the faster it will download.

1. Browser Recommendations - Inn-Flow actively supports all browsers, but we recommend using the Google Chrome browser for optimum performance.

* Allow pop-up windows for the Inn-Flow site. Your pop-up blocker does not need to be disabled entirely, but only disabled for Inn-Flow.
* Disable third party toolbars, like Yahoo, Bing, Google, etc. This may create issues, especially if they have their own pop-up blocker.

1. **Schedule**

Once the Kick off meeting has been completed, and the trainings have been scheduled, make every effort to stick to the schedule. Also make sure that your key players are aware and available for the training calls scheduled. You can forward the meeting invite to anyone you may think will benefit from the training calls.

1. **Budget**

Create or Import an Operational Budget to allow for actual to budget comparisons. We will train you on how to create an Operational Budget using different Factor Methods like POR, %, Salary, etc. If you already have a budget established, we’ll train you on how to copy the data into an Inn-Flow template to then easily import!

1. **Reconciliation**

Complete your first reconciliation by the 20th of the following month. To make bank reconciliation easy, review the current bank statement export formats. Being able to export the monthly data into excel or csv will save you time during reconciling!

* Anything outstanding on your last month’s bank reconciliation from the old system will need to be entered into Inn-Flow.

1. **Be Involved**

Your continued success with Inn-Flow after your 90 day Implementation is our main goal. We have found that a direct link to this success is the involvement of your entire team, from Owners to Property Level Staff. While everyone is not required to attend every training, we recommend that the Inn-Flow Implementation be a hands-on experience.