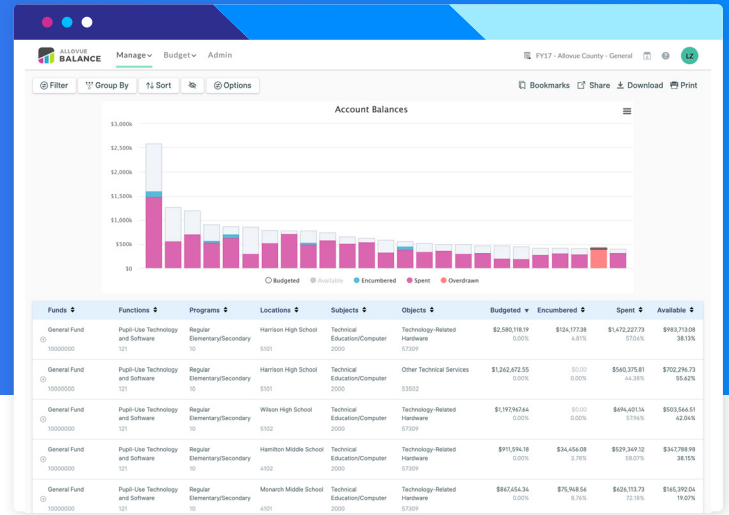


# Integrating *Balance* With Your ERP



*Balance* was designed from the ground up to ensure accurate, timely data is available to our partners faster and with less effort than any past technology integrations they've experienced. With seamless integration with any school finance system, your districts' finances can finally find *Balance* in six steps and 60 days!

## Steps to Implement *Balance*

### 1. Meet Your District Partner

2 Days

To begin your partnership with Allvue, the Account Executive introduces the district to their District Partner within 48 hours of signing the contract. The District Partner serves as a strategic guide as your district utilizes the *Balance* software, while your Allvue Implementation Specialist ensures seamless integration with our software.

### 2. Introductory Call and Data Review

9 Days

Allvue meets with the district's Executive Sponsor as well as relevant technology and finance staff at the district to: (1) provide an overview of the implementation timeline and process, and (2) review the available data integration methods. The kickoff meeting will also be scheduled during this time.

### 3. Kickoff

10 Days

The kickoff meeting, which brings together Allvue and key district staff, includes a conversation about district goals, financial challenges, and a clear timeline for quality assurance on the data as well as plans for training. A successful kickoff meeting includes an agreed upon project overview summarizing these elements.

### 4. Data Integration and Internal QA

28 Days

The Allvue Data Team spends 3-4 weeks establishing a data connection, setting up and reviewing the district environment, and creating a unique *Balance* environment that accurately reflects the district's chart of accounts and specific circumstances.

### 5. External Data QA and Sign Off

11 Days

Allvue provides the appropriate district staff with access to their *Balance* environment to continue reviewing the data, ensuring that the data is accurate, complete, and ready for launch. Training will commence once the district signs off on the *Balance* environment.

### 6. Training and Ongoing Support

Allvue conducts one-day training for district administrators, principals, and other users. Additional customer support is provided anytime between 7am and 8pm EST Monday - Friday.

## Integration Timeline

