



1. To create the training mode, all users have to be off the system. If you want to create a training mode - say at noon - or early one night - use T.M - Messages and send a message to ask that everyone signoff when they go to lunch - or be off the system early.
2. Re-Index (if you see the message – do it)
3. System Control Dates
4. Review the Office List E.3
  - All active offices in DPN will be brought over to the brokerWOLF platform
    - If the DPN Office is A (Admin), it becomes an Administrative Office
    - If the DPN Office has active agents, the office is set to allow agents
  - DPN Departments without a corresponding real estate office become an office set to no agents to accommodate the GL detail
  - If your DPN General Ledger contained entries/balances in Temporary GL Accounts - with a .001 extension - AND YOU DID NOT have a GL Department 1, Office 1 was created during the migration to facilitate these GL entries/balances.
  - To maintain unique office names, the migration used the first 12 positions of the DPN office name and appended the office number (3 positions) - this can be cleaned up after the final data migration. A migration parameter is available defining whether the office number should precede or follow the office name - it is recommended the office number precede to better facilitate reporting order on offices.
  - Offices are required to have an address in brokerWOLF - DPN did not force an address, migration defaulted the company address if blank in DPN - this can be cleaned up after the final data migration
  - Broker ID# fields can be completed after the final data migration
  - If you are a franchise company and report to either CREST or PREA, after the final migration you will need to complete the affiliate office ID's - and check the option Non-Reporting Office where applicable
  - Set the office groupings and the next transaction numbers for each office E.3 after the final data migration.
5. Review Bank Accounts
  - Bank Accounts must be unique in brokerWOLF - migration is appending DPN GL Acct # to the name - this needs to be cleaned up after the final data migration
  - Review defaults (Setting Trust Bank Default will open up the Trust Tab on the Transactions)
  - Confirm/Correct/Add Account Information
  - Test Check Formats I.C
    - If formats need to be added for other accounts, refer to Transitioning into brokerWOLF – Setting Up Check Formats & Deposit Slips
      - This Tip Sheet includes the field settings to mirror your DPN blank check stock format
      - E.1.6 - Check Signature - use this option to add check signatures if needed
  - Setup Deposit Slip Formats 4.6 Deposit Ticket
    - Refer to DPN Tip Sheet - Transitioning into brokerWOLF - Setting Up Check Formats and Deposit Slips
  - Set Default Check Printers E.4
  - Positive Pay, EFT, Setup - will need to be done on live - recommend testing format on training
6. No edits - storing the entries is the equivalent of updating in DPN
7. Common functions
  - Accounts Payable
    - Vendor Search 5.8.1
      - DPN Vendors set to be 1099'd by invoice will be split into two vendors during the migration - the vendor created for 1099 invoices will have a vendor number ending in Y
      - Review any vendors who are DBA's - there are view options to view by Vendor Name or DBA Name - and options as to which name(s) to print on checks
      - Payment Terms on Vendors migrated as follows:
        - If Blank in DPN - Blank in brokerWOLF
        - If Due Date Type = T in DPN
          - AND Term = 30 - brokerWOLF N3
          - AND Term = 15 - brokerWOLF N5
          - AND Term = 21 - brokerWOLF N2
          - AND Term = 10 - brokerWOLF N1
          - AND Term = 60 - brokerWOLF N6

