New Client Implementation Guide

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1. WELCOME

Welcome to the SofterWare Family!

We're excited that you've chosen EZ-CARE for your childcare database needs and know that you are eager to get started using this powerful software. This document details the implementation process and time frame for each step. The implementation process is an ongoing collaboration between you and our Implementation Team. The success and timely completion of this process is based on this partnership. We look forward to working together to create a system that will be the foundation of your successful center for many years to come!

To ensure a smooth and successful implementation, your **Implementation Coordinator (IC)** will be your main contact. The IC will

- Serve as your contact to address any questions you have during the process.
- Assign a system architect to work with you to customize your screens that meet your needs.
- Communicate with the appropriate specialist(s) for your data conversion, WebLink form(s), and/or payment processing and discuss any specific needs and expectations.
- Handle the invoice/delivery process to ensure that your system meets the desired specifications before delivery.
- Verify during system delivery that all items sold have been delivered.
- Contact you throughout the entire process and be available to answer questions, which may need to be redirected or escalated to the appropriate specialist.

Please contact your Implementation Coordinator if you have any questions along the way.

Our Goal:
To provide you with a professional and timely implementation experience allowing for full use of the EZ-CARE2 system.

2. SYSTEM DELIVERY

Estimated Time: 5-7 Business Days

After we receive your payment, an Implementation Coordinator (IC) will be assigned to your center/school. The IC will assign a system architect and as soon as we receive your logo, we will prepare your system for delivery. Please complete the *New Client Setup Form* in preparation for your screen appointment.

Activation and Delivery Email
Your IC will send you an email with one or more attachments and instructions on how to download and install your system, including the following:

- A link to your personalized download page (for our installed version)
- A link to a video that will prepare you for your screen appointment
- A link to schedule your appointment with your system architect
- A link for the Network Administrator's Guide and EZ-CARE manual
- Additional information about modules you have purchased

In addition, learn how to get up and running right away by reading our *Getting Started Guide* and watching our *Setting Up Your New EZ-CARE Program* video. Our Support staff is also available to answer your questions and provide any help you need.

A. Email Attachments

The first attachment is a **Welcome Letter**, which provides:

- Your Client ID
- Information about your Support plan, including:
  – Important EZ-CARE contact information (Support, Training, etc.)
  – How to call the President's Hotline
  – How to access the Clients Only website
  – Support service descriptions

The second attachment is a **Quick Start Checklist** to help you keep track of the steps you'll want to follow through the implementation process.

B. How to Access Your Customized System

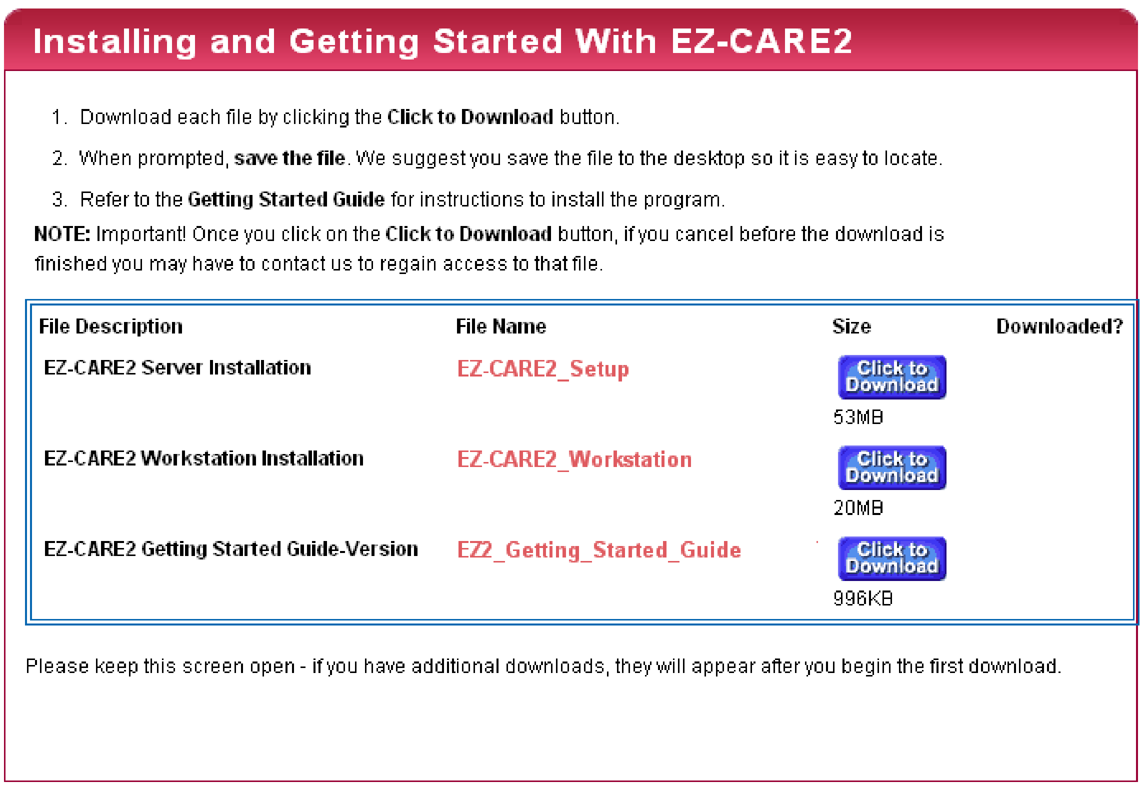
Hosted Solutions for EZ-CARE2 Clients
The delivery email will provide you information on how to access your customized system.

EZ-CARE2 Installed Clients

The delivery email will include a link to your **personal** software download page. Here, you'll be able to download:

1. EZ-CARE2 Software
2. Your Customized Cabinet
3. Getting Started Guide
4. TimeClock*
5. EZ2-Post QuickBooks Interface*
6. Logos Accounting Software*

** if purchased*



Installing and Getting Started With EZ-CARE2

1. Download each file by clicking the **Click to Download** button.
2. When prompted, **save the file**. We suggest you save the file to the desktop so it is easy to locate.
3. Refer to the **Getting Started Guide** for instructions to install the program.

NOTE: Important! Once you click on the **Click to Download** button, if you cancel before the download is finished you may have to contact us to regain access to that file.

File Description	File Name	Size	Downloaded?
EZ-CARE2 Server Installation	EZ-CARE2_Setup	Click to Download 53MB	
EZ-CARE2 Workstation Installation	EZ-CARE2_Workstation	Click to Download 20MB	
EZ-CARE2 Getting Started Guide-Version	EZ2_Getting_Started_Guide	Click to Download 996KB	

Please keep this screen open - if you have additional downloads, they will appear after you begin the first download.

Just follow the on-screen instructions on how to download these items. Once downloaded, each item will automatically be checked off so you can be sure you've completed all the necessary steps. You'll want to read our *Getting Started Guide* to help you get up and running right away. Lastly, our professional Support Department is readily available to answer your questions and provide any help you need.

3. SCREEN APPOINTMENT/LAYOUT APPROVAL

Step 1 – Estimated Time: Up to 1 ½ hours
In your scheduled screen appointment, you and your system architect will discuss the following:

- Custom fields to be added
- Fees to be billed to the families (if applicable)

Depending upon the complexity of your tuition and other fees, a second screen appointment may be necessary.

Step 2 *(Applicable if you have purchased a **Data Conversion**)*
Once your screens have been approved, your data will be imported at a date and time agreed upon by you and your system architect.

If you did not purchase a **Data Conversion**, please skip the following section.

4. DATA CONVERSION OVERVIEW

Our data conversion process addresses the migration of your data from a text file to EZ-CARE2. More than just simply importing your information, our data conversion professional considers the possible ramifications of how your data is used by your center/school. Our staff thoroughly reviews all the data you provide and works with you to gain an understanding of how the data was maintained in your former database and how best to map and transfer your data into EZ-CARE2. In the end, our staff strives to ensure that you will be able to continue to use this data as effectively as possible for analysis, reporting, and management. To achieve this desired outcome, your staff may need to research how data is used.

Furthermore, our staff will take the time to look for any inconsistencies or problems that may exist in your original data, explain them to you, and inform you of options available during the conversion process to address these issues.

This conversion process may include, but is not limited to:

- Analysis of how you used your original data
- Review of proper date formats
- Discussion of fields you do not wish to convert
- Discussion of records you would like imported (i.e., Active and/or Inactive families and children or staff)
- Comparison of possible differences between the functionality of your current system and EZ-CARE2
- Addition of any fields and their placement on the correct screen

Things to Consider in the Data Conversion Process:

- A main point of contact must be designated for any questions pertaining to importing.
- If an additional import is required, additional costs may be incurred.
- Multiple mappings may require additional costs.
- The following fields have a limit on the number of characters allowed and may be modified to fit that limit: Class (15), A/R Category (25), Picklist items (30)
- EZ-CARE2 uses a key field to group and identify families. If your current system does not use an ID field, we generally use the home phone # or main address. Please inform us if there is another field that should be used. Please note this key field must be exactly the same for all families.

5. PAYMENT PROCESSING

EZ-CARE2 offers fully integrated tools for processing payments via EFT, Insta-Charge, and WebLink; to learn more about these options, please contact your regional Account Manager.

If you wish to process credit card transactions and Automated Clearing House (ACH) debits from checking and savings accounts, you will need to complete the applications with our payment processing partners to open the appropriate merchant accounts for your organization. Once completed and returned, the applications can be processed simultaneously with the other implementation steps.

Here are the steps involved in setting up your payment processing:

1. You complete the appropriate applications.
2. The merchants will notify us when your applications are approved, typically 3-5 business days.
3. Our Payment Specialists will complete the process and set up your gateway.
4. A member of the Payment Processing Support team will contact you by email to schedule an appointment to complete the setup process.
5. Watch the video to learn about the process.
   http://www.ezcare2.com/payment-processing/care_payment_processing_tools.asp#overview

6. WEBLINK

WebLink is a web-based system for collecting and managing data online. These forms are personalized to collect your desired data, which can then be quickly downloaded into EZ-CARE2 or any database you choose. You can even offer secure, online payment processing.

Please note that the WebLink implementation will not begin unless we have all the necessary applications for Payment Processing. See Payment Processing **for more details on this topic.**

The following guidelines have been prepared in order to make sure our clients understand what to expect when we prepare their WebLink form(s), whether Click-to-Pay or Specialized. Our highest priority is your satisfaction with the quality of your WebLink implementation.

WEBLINK GUIDELINES

Activation/Payment Processing – Timely activation of your form is dependent on the creation of your merchant processing account(s). We will not be able to activate your form until your payment processing account has been created. If you have any questions on the status of your account or about the applications themselves, please contact us at Processing@SofterWare.com.

Form Assignments – New WebLink orders are assigned to a WebLink Specialist on the Monday morning after your order has been processed. **For a Click-to-Pay Form**, the entire WebLink implementation typically takes **4-7 business days from the assigned date; for a Specialized Form, 4-6 weeks**.

CLICK-TO-PAY FORM DETAILS

Form Setup – Please note that the Click-to-Pay form has no customization. However, if you provide a logo, it will be added to the page headers of your form during the setup process.

Import – Our staff will create the necessary templates so the data collected on your form can be easily imported into your system. Note: A member of our Support team will be in contact to set up your cabinet for this new form.

SPECIALIZED FORM DETAILS

Introductory Call – The WebLink Specialist assigned to your form(s) will contact you to schedule an appointment to review your form and the needs of your organization. Your WebLink implementation cannot proceed until this appointment has occurred. During this appointment, the WebLink Specialist will provide an expected timeframe for the completion of the initial form design.

Draft Setup – The WebLink Specialist will attempt to create a draft of your online form with a look and feel consistent with your existing website, but our design process is limited. Please keep in mind that a WebLink form is not the same as a website.

Initial Revisions – Once your WebLink draft is completed, you will be granted an opportunity to review it and provide feedback. Your quote includes the cost of one set of form revisions.

Additional Revisions – Other than corrections of typos and small corrections to text/copy, any additional revisions will be completed for a fee of $100/hour, billable in 15 minute increments (minimum of $25). You will be informed if your request for changes will involve an extra expense, and you will be provided an estimate of the time required.

Import – After you have approved your specialized WebLink form, our staff will create the necessary templates so the data collected on your form can be easily imported into your database. Note: A member of our Support team will be in contact to set up your cabinet for this new form.

WebLink Implementation Closure (*applies to Specialized Form only*) – Your WebLink Specialist will send you an activation email that contains the link(s) to your WebLink form(s). The link(s) then can be added to your website by you or your webmaster. We also recommend that you have your web designer create a graphic or button to make the link more visible.

When your WebLink implementation is completed, it is our expectation that we will have provided you with an accurate, comprehensive form that allows you to collect the information you need from your families.

7. ADDITIONAL MODULES

These optional modules should be installed after installing EZ-CARE2.

TimeClock
The installation files are located on your personalized download page. For assistance installing and setting up the TimeClock, please contact our Support department.
Any hardware that was purchased will be delivered via UPS.

EZ2-Post QuickBooks Interface
The installation file is located on your personalized download page. Contact our Support department for assistance with installing EZ2-Post. Your EZ-CARE2 A/R categories will need to match your QuickBooks categories. It will be advantageous to have some transactions entered before you contact Support.