

Feature Overview

FactorSoft™ Merge Assistance

It's true – the mere thought of merging databases or transferring partial datasets can strike fear into the hearts of the most seasoned database administrators. But consolidation in the factoring industry means this need arises more and more often.

That's why we're offering FactorSoft Merge Assistance, a guided service that helps FactorSoft customers undergoing an acquisition or consolidation to transfer their client, debtor, and invoice data between FactorSoft systems.



Efficient Data Transfers

Using a structured set of files and our team's expert support, you can complete a full or partial portfolio transfer between FactorSoft instances.



Consultative Assistance

No need to go it alone! With guided assistance and consulting, our team will help you work through the data migration process.



Test for Success

Using Merge Assistance unlocks the ability to perform a test run of your data transfer in a non-production environment to preview the results ahead of time.

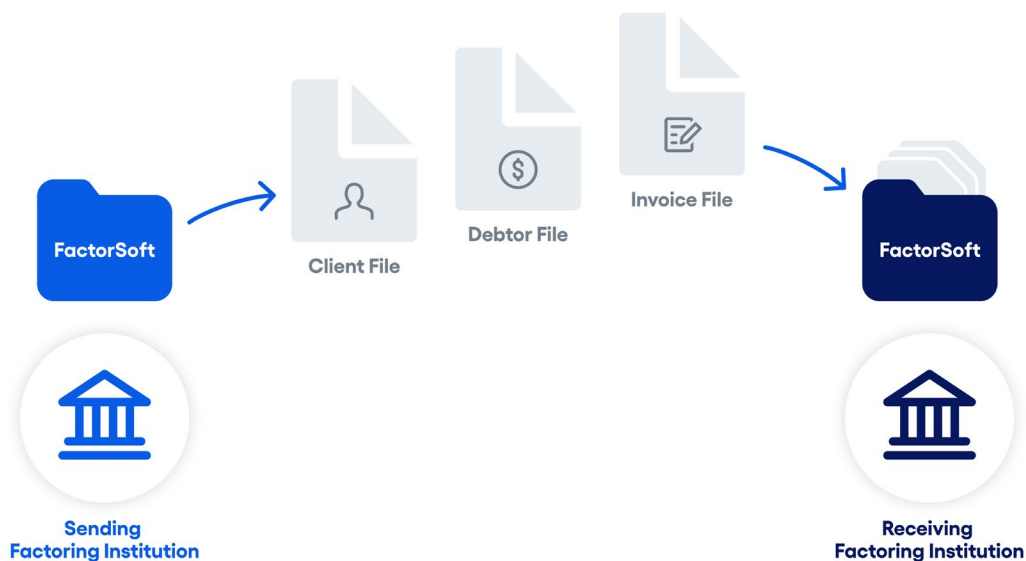


transfer data without fear

When you're undergoing a merger, consolidation, or acquisition, there's already a lot on your plate. Fortunately, FactorSoft Merge Assistance is there to help you transfer full or partial datasets from one FactorSoft instance to another, easing your load.

Flexible Support

Whether you're folding one complete instance into another or just transferring a portion of your factoring portfolio, Merge Assistance helps you generate and import three key outputs: a client file, a debtor file, and an invoice file. After performing a test run in a non-production environment, these files will help you transfer the relevant data into the target system for a no-sweat day-of cutover.



Stay in the Know

Merge Assistance is an active, collaborative process. You won't just hand over your files, cross your fingers, and hope for the best. Instead, FactorSoft customers remain actively involved throughout the process. We'll look to your team to perform data review, enable file cleanup to prevent duplicate or unwanted data, and make crucial decisions during the import. With Merge Assistance, data migration is a team sport.

The Right Fit

FactorSoft Merge Assistance isn't a catch-all solution for every conversion or migration scenario. It's specifically for data migrations or conversions between two FactorSoft instances – not between FactorSoft and another factoring solution. Merge Assistance focuses on transferring active data; it doesn't include the transfer of historical data, images, or other data elements like client terms. It's truly a targeted service to help transfer the data you'll need the most during and after a conversion or migration: client, debtor, and invoice files.

Engaging Expertise

Merge Assistance engagements include a kickoff call and guided support throughout the lifecycle of the project. Our experienced team will help guide you through the process, giving you the confidence and know-how to successfully complete your data migration.

migrate your data without fear

Let's talk about how we can help. [Reach out to our team](#) today!

For more information about Jack Henry, visit jackhenry.com.