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Technical Writing Sample  
Data Import Process (Internal Documentation)

#### About this writing sample

The following documentation was created for Implementation Specialists and Data Engineers.

This is an excerpt from a 275 page Implementation Manual. I planned, wrote, and maintained the entire manual by interviewing dozens of Implementation Specialists and data engineers. I also created the process flow graphs using MS Visio.

When I began this project, the data import process was not documented or defined. Each engineer approached the data import process differently. I began by identifying the major data import scenarios (see chart below). I then worked closely with the lead data engineer to outline the entire data import process.

## Reference: Data Import

### Data Import Scenarios

The following chart provides an overview of import scenarios.

Type of Import	Type of Data Imported	Main Party Involved
QuickBooks (Desktop)	Accounting: Invoice, Customer, Location	Onboarder
QuickBooks (Online)	Accounting: Invoice, Customer, Location	Onboarder
Accounting Import into QuickBooks (accounting in other software)	Accounting: Invoice, Customer, Location (data is imported into QuickBooks for QuickBooks import)	Third-party consultant (in some cases, the customer may choose to convert data without the help of a consultant). Contact information for third-party consultants is available below.

Software Other Than QuickBooks - Scripted	Depends on software: Refer to data commitment form for the specific software (possible items include Jobs, Techs, etc.)	Onboarder, Data Import Team
Software Other Than QuickBooks - Unscripted	ServiceTitan guarantees import of core data only (customer list and job/invoice history). The software will be evaluated, but there is no guarantee that any additional data will be imported.	Onboarder, Data Import Team
Double Import Scenarios	To be strongly discouraged, as double import scenarios may cause duplicate entries and other data issues. Use as a last resort only if the customer persists.	Data Import Team

### **QuickBooks - Desktop or Online:**

QuickBooks imports are the most straightforward and easiest to implement, and are handled solely by the Onboarder. Currently, QuickBooks is the only accounting software that integrates with ServiceTitan.

Once the customer's account goes live, the Onboarder will help the customer set up web connectors to allow QuickBooks and ServiceTitan integration. This is part of the [Pre-Launch](#) process.

### **Accounting Import Into QuickBooks:**

If the customer keeps accounting data in software other than QuickBooks, the customer will first import their accounting data into QuickBooks.

Currently, we work with the following third-party consulting firms to handle migrations from other accounting software to QuickBooks. It should be made clear to the customer that these third-party consultants do not work for ServiceTitan:

- Robert Keuroglian (Sentrien). Email: [rkeuroglian@sentrien.com](mailto:rkeuroglian@sentrien.com).
- Denise Leach, CPA. Phone: 941.993.2261. Email: [dleach@accountingandadvisory.com](mailto:dleach@accountingandadvisory.com). Address: 7353 Curlew Street, Sarasota, FL 34241.

The customer may choose to migrate data to QuickBooks without the help of a consultant. This will be determined during the Onboarding process.

Once accounting data is imported into QuickBooks, the Onboarder will proceed with the QuickBooks data import process.

### **Software Other Than QuickBooks - Scripted:**

If the customer is currently using a commonly software (SuccessWare, ESC, Wintac, etc.) it is likely that the import has been scripted. The script will automate the data migration process, minimizing the level of effort for data engineers. Before proceeding with scripted software make sure the customer has received the data commitment form for that type of import. The data commitment form outlines how the customer's data will be mapped from their previous software to ServiceTitan.

### **Software Other Than QuickBooks - Unscripted:**

If the software has not been scripted, this means that this is not a common type of data import. ServiceTitan guarantees import of core data only (customer list and job/invoice history). The software will be evaluated by data engineers. There is no guarantee that any additional data will be imported.

### **Double Import Scenarios:**

Customers should be strongly discouraged from importing data from more than one source. Double imports should be pursued only as a last resort.

If the customer insists on a double import, the Onboarder should inform the customer that there may be an additional charge. The Data Import Team will provide a proposed plan and an estimate for additional charges.

# Data Review Account and Main Account (Applies to All Import Scenarios)

Up until the customer goes live, the customer's data is imported into the data review account. The customer's data is imported into the main account (live account) only during the final data import, which takes place 2 days prior to the customer's go live date. This applies to all data import scenarios.

## Main Account:

- The main account eventually becomes a customer's live account.
- Up until the final data import, the main account serves as a demo account, populated with fake information (fake customers, fake jobs, etc.)
- Two days before the Go Live date, the Onboarder will "reset" the main account from demo to live. Once the main account is reset, the demo data is wiped from the account and the main account will be live.
- Once the main account is reset from demo to live, the customer's data is imported into the main account (this is the final data import).

## Data Review Account:

The Onboarder should set up a data review account for the customer immediately following the Discovery Call. For instructions, refer to [How To: Create a Data Review Account](#).

- The data review account allows the customer to review a rough draft or first iteration of their data.
- During the initial data import, the customer's real data is imported into the data review account (not the main account).
- During the data examination process, the customer enters the data review account to check the accuracy of their data. The customer will make notes and comments, and request any necessary edits, cleanup tasks and changes.
- The Data Import Team will complete data cleanup tasks and data edits in the data review account. The Data Import Team will keep record of all data cleanup tasks and data edits requested by the customer. During the final data import, all

data cleanup tasks and data edits will be repeated in the customer's main account.

- Once the data examination process is complete, the customer will no longer use the data review account. The customer should use the data review account only for the data examination process.

## Overview of the Data Import Process

The data import process consists of three stages:

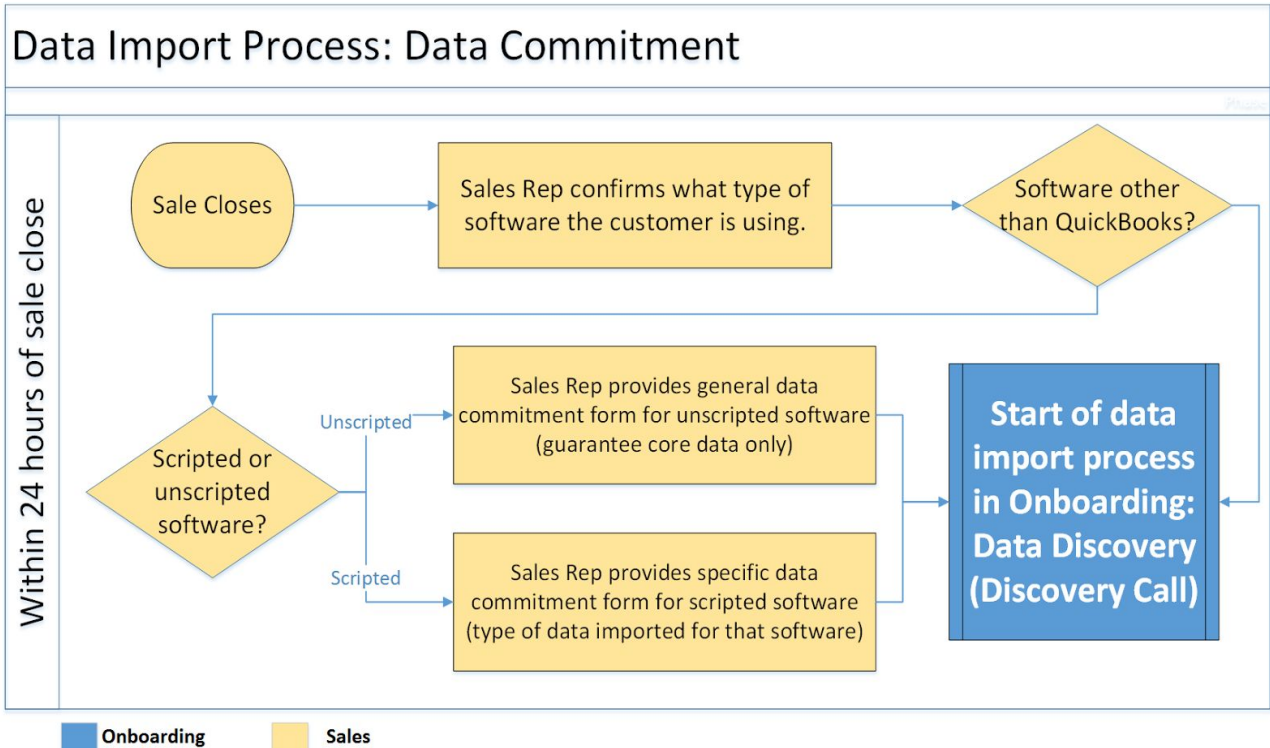
- **Stage One: Data Commitment**
- **Stage Two: Data Discovery (Discovery Call)**
- **Stage Three: Import to Data Review Account & Data Sign-off**
- **Stage Four: Final Data Import**

Below you will find a description and process flow for each of these stages.

### **Stage One: Data Commitment**

If the customer uses software other than QuickBooks, the sales rep will determine whether or not the software is scripted or unscripted. The sales rep will provide the customer with the appropriate data commitment form.

The data commitment form states what type of data we import from the customer's current software. To access data commitment forms, refer to the Resources section (Appendix "A").



## Stage Two: Data Discovery (Discovery Call)

During the Discovery Call, the Onboarder will conduct the Data Discovery. The Onboarder will confirm what software the customer is using and determine the import scenario. The Onboarder will ask for data files, according to the import scenario that applies.

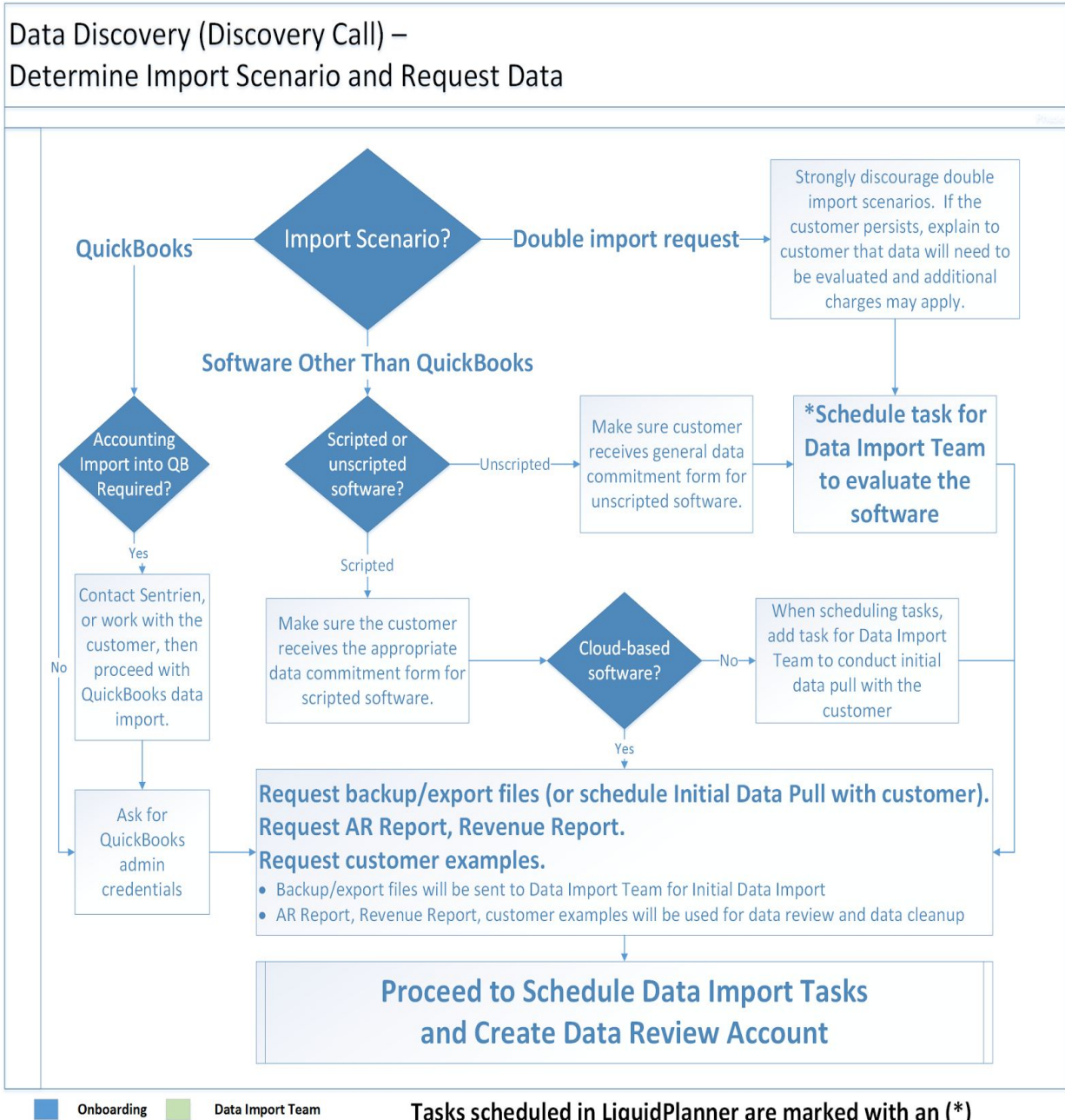
If the customer is not using QuickBooks or a cloud-based software, a data engineer will be invited to join the Discovery Call for the last 30 minutes. This will be handled by the Onboarding Manager, but the Onboarder should make sure that the Data Engineer is joining the call. If a data engineer is joining the call, the customer should be informed that the Discovery Call will include a data pull and consultation.

Immediately following the Discovery Call, the Onboarder will schedule data import tasks using LiquidPlanner. These data import tasks will be included in the customer's overall [Implementation Plan](#).

Depending on the import scenario, each data import task will be assigned either to the Onboarder or Data Import Team.

See Stage Three below for a description of each data import task. You will also find information on how to assign each task depending on the import scenario.

Before data import can begin, the Onboarder must create a data review account for the customer. For instructions, refer to [How To: Create a Data Review Account](#).



## Data Discovery (Discovery Call) – Schedule Tasks and Create Data Review Account



Tasks scheduled in LiquidPlanner are marked with an (\*)



## Stage Three: Import to Data Review Account & Data Sign-off

Once you have completed the Discovery Call and scheduled tasks in LiquidPlanner, the import process will begin.

- Import-Phase 1: Initial data pull/import
- Import-Phase 2: Data review and cleanup
- Import-Phase 3: Data sign-off with the customer.

Remember: Up until the customer goes live, the entire data import process takes place in the customer's data review account.

All of the following data import tasks will be scheduled in [Liquidplanner](#) immediately following the Discovery Call (see Stage Two of the data import process above). Note: For some import phases, more than one LiquidPlanner task will be required. See below for more information.

### **LiquidPlanner Task (Import-Phase 1): Initial Data Pull**

Log into the customer's server and obtain a backup, copy or export of their data. This may or may not need to be scheduled with the customer. When scheduling a data pull in LiquidPlanner, make sure to fill in the previous software field and include the customer's contact name. Depending on the complexity of the data extraction, the Initial Data Pull and Initial Data Import may be merged.

#### *Import scenario*

- QuickBooks - Performed by Onboarder.
- Software Other Than QuickBooks - Task is necessary only if the software is not cloud-based.

### **LiquidPlanner Task (Import-Phase 1): Initial Data Import**

Import a backup copy or export of customer data into a ServiceTitan data review account. Depending on the complexity of the data extraction, the Initial Data Pull and Initial Data Import may be merged.

- QuickBooks - Performed by Onboarder.
- Software Other Than QuickBooks - Performed by Data Import Team.

### **LiquidPlanner Task (Import-Phase 2): Data Review**

Review the data account and find problems. May or may not be scheduled as a call with the customer, depending on the import scenario and complexity.

- QuickBooks - Performed by Onboarder or Data Import Team, depending on complexity. Scheduled with the customer, or may involve communication with the customer.
- Software Other Than QuickBooks - Performed by Onboarder. The Onboarder will use the Data Review Checklist. Not scheduled with the customer.

### **LiquidPlanner Task (Import-Phase 2): Data Cleanup**

Address issues exposed during Data Review, and make updates to the ServiceTitan data review account.

- QuickBooks - Performed by Data Import Team. Onboarder may assist as needed.
- Software Other Than QuickBooks - Performed by Data Import Team. Onboarder may assist as needed.

### **LiquidPlanner Task (Import-Phase 3): Data Sign-Off Call**

Call with the customer to review and sign off on data in the data review account. Any remaining issues will be assigned as additional data cleanup tasks.

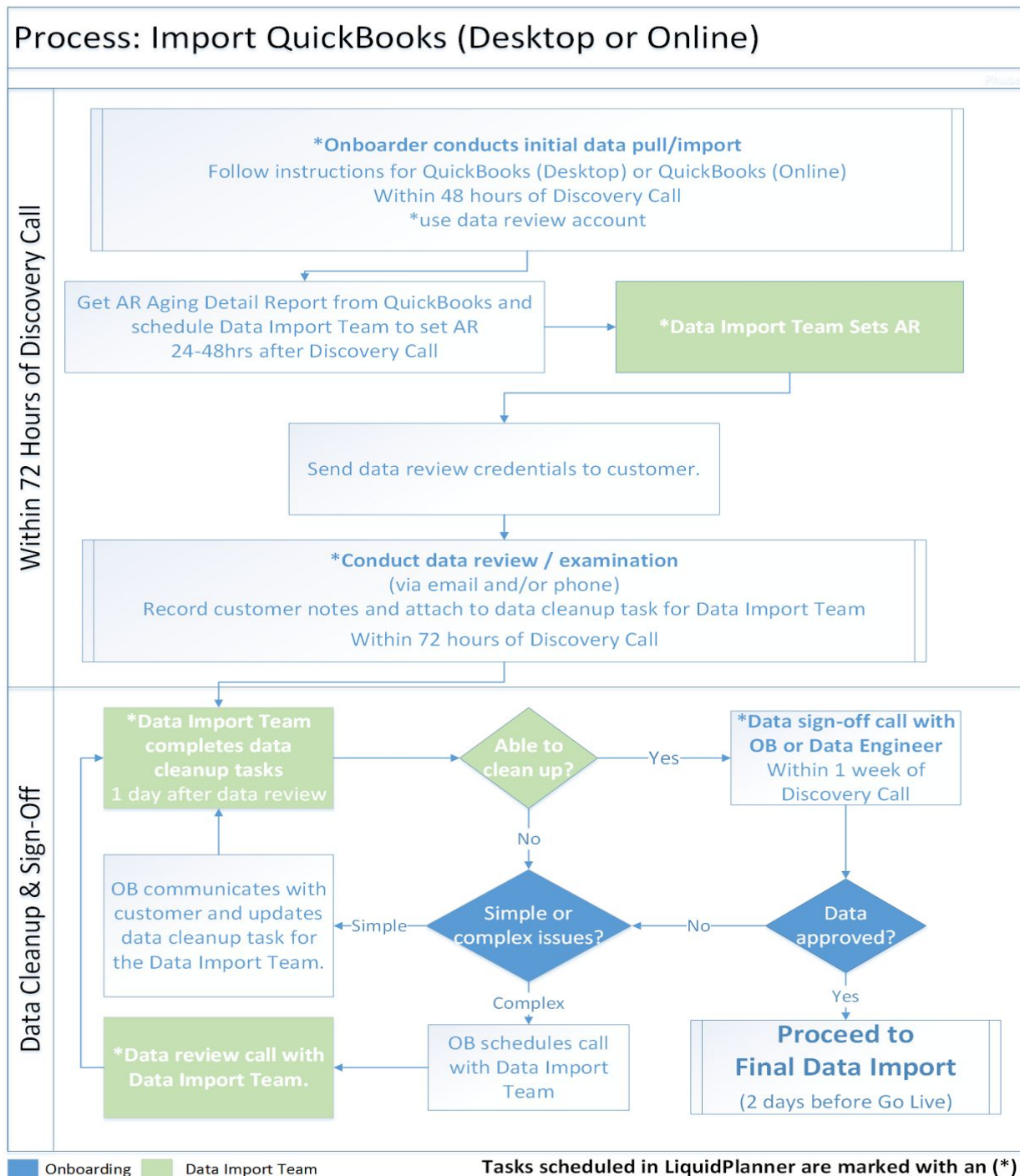
- QuickBooks - Performed by Onboarder or Data Import Team, depending on complexity. Scheduled with the customer. Use the [Data Sign-Off Checklist](#). Once you complete the Checklist, a Google Doc is automatically generated in [Completed Data Sign-Off Forms](#) (find the document for your customer, convert to PDF, and send it to the customer via email).
- Software Other Than QuickBooks - Performed by Onboarder or Data Import Team, depending on complexity. If performed by Onboarder, the Onboarder will use the Data Sign-Off Call Checklist. Scheduled with the customer.

### **Other LiquidPlanner Tasks**

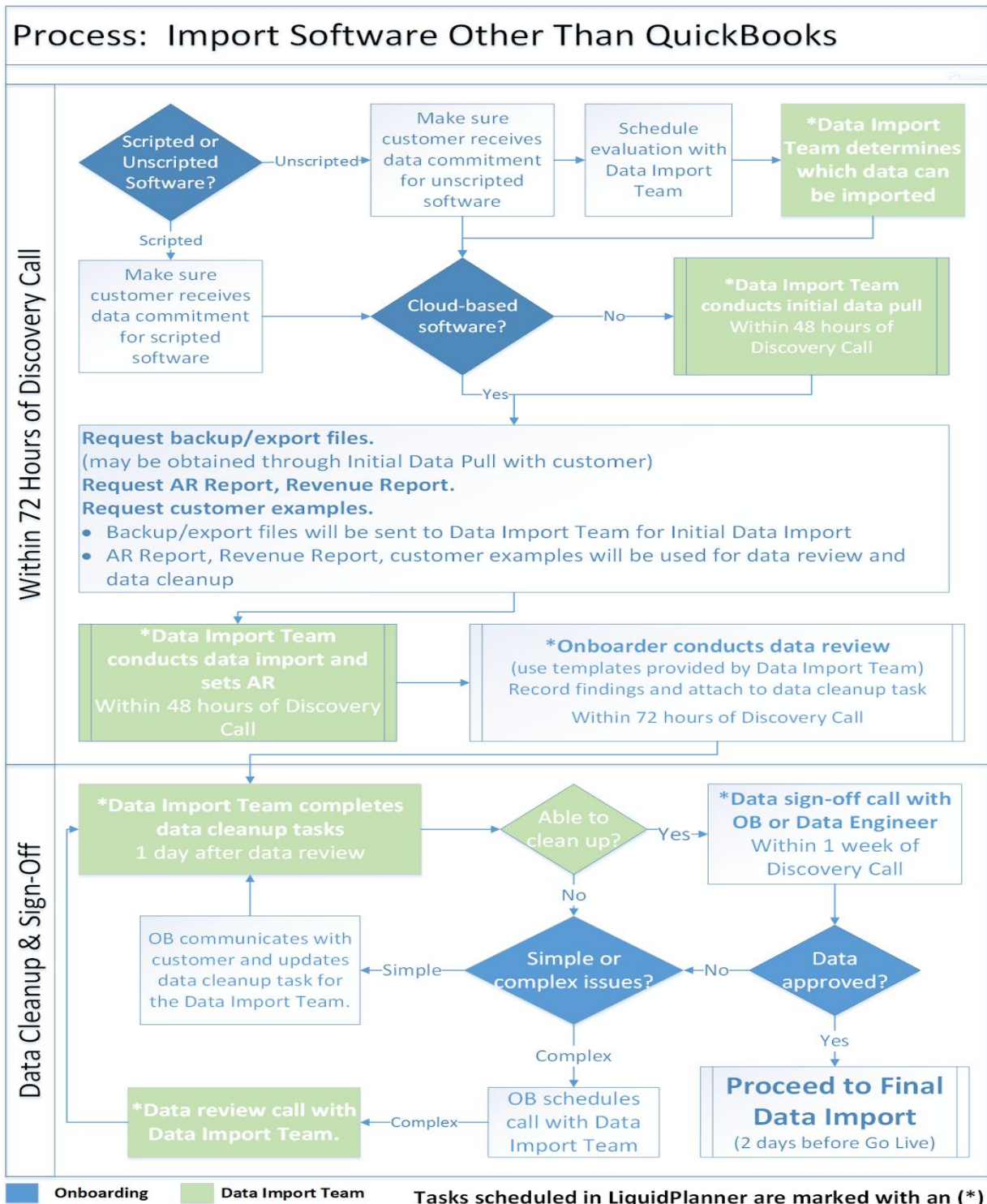
Depending on the import scenario and complexity, other tasks may need to be scheduled in LiquidPlanner, such as a software evaluation or additional data cleanup tasks. Refer to the appropriate process below for details.

## Process: Import QuickBooks to Data Review Account & Data Sign-off

The process below applies to QuickBooks Desktop and QuickBooks Online.



## Process: Import Software Other Than QuickBooks to Data Review Account & Data Sign-off



## **Stage Four: Final Data Import**

The final data import takes place **two days prior to the Go Live date**. The Onboarder will reset the main account from demo to live, and the final data pull will be conducted in the customer's live account.

Final data import tasks are scheduled in [Liquidplanner](#) as part of the customer's [Implementation Plan](#).

### **LiquidPlanner Task: Final Data Pull**

Log in to the customer's server and obtain a backup, copy or export of their data for their live account.

- QuickBooks - Performed by Onboarder.
- Software Other Than QuickBooks - Task is necessary only if the software is not cloud-based.

### **LiquidPlanner Task: Final Data Import**

Import a backup copy or export of customer data into a ServiceTitan live account, and perform any necessary cleanup tasks.

- QuickBooks - Performed by Onboarder and Data Import Team.
- Software Other Than QuickBooks - Performed by Data Import Team.

## Process: Final Data Import

