DATA IMPORT PROCESS

New GoodX Clients

Client | Consultant | Admin/Management

STEP 1
The client requests a data import

STEP 2
Discuss data import with the client
Highlight the risks and benefits

STEP 3
Create data ticket & data channel
Inform either the Implementation Team Leaders or the Marketing Admin to create the channel on data transfers server

STEP 4
Send data info email
Documents to attach:
GoodX Data Template
Data Import T&Cs Agreement

STEP 5
The client signs and returns the Data Import T&Cs agreement and submits the data set

STEP 6
Management analyses the data

STEP 7
Send the quotation and Client Approval for Required Fields document to the client
Customised for the client's data set

STEP 8
The client accepts the quotation and sends the proof of payment

STEP 9
FINAL Data Transfer Approval Confirmation
Send email to the Implementation Team management and attach the required documentation

STEP 10
The data import ticket is allocated to the installation team and the import is done

STEP 11
Data check is done
Imported data on GoodX is compared to the original data set

STEP 12
Onboarding and go-live of the client

STEP 13
Send data report to the client

STEP 14
Discuss the report with the client

STEP 15
The client sends an email confirming the data sign-off

EXCEPTION

The client rejects the data sign-off
Refer back to the Discord channel and involve your Team Leader

Please refer to Data Transfer SOP for more detail