

MISSION

Our innovations help growing companies and implementation partners strategically focus by transitioning data and settings between software systems.

VISION

We are committed to leading an industry that is unified, connected, effective and responsible.



Platform Transition

HINDSIGHT. INSIGHT. FORESIGHT.

Major Problems with Historical Data Migration

- ❖ Time Consuming
- ❖ Complicated
- ❖ Tactical Use of Staff Time
- ❖ Distraction from Daily Business Focus
- ❖ Error Prone
- ❖ Lack of Conversion Experience from Legacy to Target System

How These Problems Affect Most Customers

- ❖ Limited Historical Reporting Capabilities
- ❖ Non-dimensionalization of Data
- ❖ Requirement to Maintain Legacy System
- ❖ Non-contiguous Multi-period Financial Reporting
- ❖ Significant Loss of Time
- ❖ Limited Resources

Avoid Hassle with Platform Transition Unique Solutions



- **Fast:** Migrate your detailed GL, AP, & AR legacy data in weeks or months, not years
- **Flexible:** Multi-entity data migration from any legacy system
- **Easy:** 80% reduction in the customer time spent focused on data migration activities
- **Turnkey:** Includes auto-templating of vendor, customer, employee, class, and project import lists and auto-completed data maps
- **ROI:** Apply future Sage Intacct® dimensions to historical detailed data, instantly populating dashboards* of key metrics and thereby increasing ROI

**requires configuration by the Implementation Manager*

What systems have we migrated from?

- QuickBooks (Premier / Pro / Enterprise)
- QuickBooks Online / Online Accountant
- Abila MIP – *Formerly Sage*
- AccountingWare
- AMS360
- ChargeOver
- ComputerEase
- Creative Solutions
- Epicor
- Financial Edge – *Formerly Blackbaud*
- Foundations
- FreshBooks
- Fund E-Z
- Iris
- Lawson
- Marks Systems
- Microsoft Dynamics SL – *Formerly Solomon*
- Microsoft Dynamics GP – *Formerly Great Plains*
- MRI
- MYOB
- NetSuite
- Passport
- ProContractor
- Reckon
- RSI
- SaaSOptics
- Sage 50 – *CA, UK, USA*
- Sage 100 – *Formerly MAS 90*
- Sage 100 Cloud – *Formerly MAS 200*
- Sage 300 – *Formerly Sage Accpac*
- Sage 300 CRE – *Formerly Timberline*
- Sage 500
- Sage Intacct
- Sage Intacct Archive
- SAP
- Serenec Navigator
- Shelby
- Spectra
- Thomas Reuters
- Traverse
- TrueERP
- Xero
- Yardi
- Zoho Books
- Zuora
- And More...

Unique Solutions & Their Acronyms

- ❖ ASAP: The Affordable Subledger Archive Process™
- ❖ AES: Attachment Extraction Service
- ❖ TAM: Transaction Attachment Migration
- ❖ MAM: Master Data Attachment Migration
- ❖ CDMS: The Construction Data Migration Solution™
- ❖ DAP: The Data Analysis Process™
- ❖ DEAP: The Data Extraction and Analysis Process™
- ❖ DDSP: The Demo Data Support Process™
- ❖ DEP: The Dimensional Enrichment Protocol™
- ❖ DSS: The Duplicate Suppression System™
- ❖ FPCS: The First Pass Concierge Mapping Solution™
- ❖ MDCS: The Multi-Dimensional Data Conversion Solution™
- ❖ MDMS: The Monthly Data Migration Solution™
- ❖ RDMS: The Rapid Data Migration Solution™
- ❖ SSCP: The Simplified Subledger Conversion Process™
- ❖ TBMS: The Trial Balance Migration Solution™

Data Migration Solution Offerings Include:

- ❖ The Multi-Dimensional Data Conversion Solution™
 - ❖ Detailed GL Historical Migrations (V,C,E Templates Included)
 - ❖ Offers an opportunity to apply Sage Intacct dimensions to previously unreportable legacy tags/headers
- ❖ The Demo Data Support Process™
 - ❖ Enable customer to see their legacy data in a Sage Intacct demo environment
- ❖ The Monthly Data Migration Solution™
 - ❖ All entities not ready to implement Sage Intacct yet, no problem.
 - ❖ Bring segments of data to Sage Intacct monthly for reporting purposes.
- ❖ The Duplicate Suppression System™ (Master Data Cleanup)
 - ❖ Create clean non-duplicated master vendor, customer, employee and item lists
- ❖ The Affordable Subledger Archive Process™
 - ❖ Microsoft Access repository solution for subledger transaction detail and attachments *(if applicable)*

Add-on Options Include:

- ❖ Secondary Basis Migrations
- ❖ Modular Open AP / AR
- ❖ Foreign Currency Approaches
- ❖ Non-Supported Legacy Systems Extractions
- ❖ Custom Templating beyond standard scope
- ❖ Project Templating
- ❖ Extended Extraction Scopes

Additional Processes

- ❖ Budget Migrations
- ❖ 1099 Vendor Balance Migration
- ❖ Additional Module Template Support
- ❖ Acquisition Operational Reporting Conversions
- ❖ Open Bank Items
- ❖ Attachment Migrations *(for select systems)* – Transaction Attachment and Master Data Attachment Migrations
- ❖ And More...

The Multi-Dimensional Data Conversion Solution™ (MDCS)



What is the Multi-Dimensional Data Conversion Solution™?

The process migrates your detailed 'dimensionalized' historical transactions from any legacy system and imports them into Sage Intacct®.

Value

Any or All Desired Historical Data

Migrated with 100% Accuracy

Historical Data is Enhanced by Sage Intacct Dimensions

Little Time or Resources Required

Focus on Critical Tasks

Go Legacy Free

Eliminate Cost of Maintaining Legacy System

Meet Go-Live Date

The Monthly Data Migration Solution™ (MDMS)

A monthly version of the MDCS

This service is a great interim solution for you to move detailed transactions from a variety of legacy systems into Sage Intacct® to meet your reporting and reconciliation requirements.

The process works by having our internal team scope and assess the legacy data source and determine the data transfer schedule and format. Then for a flat setup fee and a standard reoccurring monthly fee, we will process your monthly data submissions and import them into Sage Intacct®. We will work with you to ensure ongoing maintenance of the mapping lists and required data elements to maintain and accuracy of the imported data.

When is it appropriate to do an MDMS Migration?

- 1) If you have a multi-entity migration project but not all your entities are ready or able to make the transition by your Go-Live date
- 2) If you have acquisitions or portfolio companies that you wish to get their data regularly in Sage Intacct® but don't have the time, resources, or interest in having them operate in Sage Intacct

The Rapid Data Migration Solution™ (RDMS)

What is The Rapid Data Migration Solution™?

The process migrates your historical GL 'nondimensionalized' transactions from any legacy system and quickly imports them into Sage Intacct®.

Value

Begin Operating in Sage Intacct Quickly

Any or All Desired Historical Data

Migrated with 100% Accuracy

Little Time or Resources Required

Focus on Critical Tasks

Meet Go-Live Date

The Trial Balance Migration Solution™ (TBMS)

What is The Trial Balance Migration Solution™?

The process migrates your historical trial balances by year or by month from any legacy system and imports them into Sage Intacct®.

Value

Begin operating in Sage Intacct Quickly

Migrated with 100% Accuracy

Little Time or Resources Required

Focus on Critical Tasks

Meet Go-Live Date

Solution Offerings Continued:

❖ The Simplified Subledger Conversion Process™ (SSCP) – *Subledger Rebuild*

- ❖ All historical AP and AR data is populated on subledger modules and General ledger, allowing for better reporting across multiple modules in Sage Intacct.
- ❖ Retire legacy system with confidence; no need to keep access to legacy system for reference.
- ❖ Process designed for client company to interact with its accounting data as if it has been operating on Sage Intacct for the entire active migration period.
 - Available for select systems

When is it appropriate to do an SSCP Migration?

- 1) When going public
- 2) When raising capital
- 3) When subjected to an audit
- 4) When running a regulatory environment
- 5) When there is a requirement from a rating board or government agency
- 6) Customer Service needs to answer payment questions
- 7) When an aging report is required

The Simplified Subledger Conversion Process™ (SSCP)

Recreates the Legacy Subledger in Sage Intacct

What is the Simplified Subledger Conversion Process™?

The process migrates all historical data (AP / AR / GL) transactions from any legacy system and imports them into Sage Intacct®.

Value

Little Time or Resources Required

Robust Multi-Module Reporting

Retire Legacy System

Operate As-If You've Always
Relied on Sage Intacct for the active migration period

Assure 100% Accuracy

Dimensionalize Historical Data

Our Revolutionary Benefits...

The Simplified Subledger Conversion Process™



- All of a company's historical data is populated on the AP and AR subledgers and General Ledger, allowing for better reporting across multiple modules in Sage Intacct®
- The company can now retire its legacy system with more confidence; no longer needing to keep access to the legacy software for reference
- The process is designed for the client company to interact with its accounting data as if it has been operating in Sage Intacct® for the entire migration period

MDCS vs SSCP Comparison

Features Comparison	The Multi-Dimensional Data Conversion Solution (MDCS)	The Simplified Subledger Conversion Process (SSCP)
AP & AR Aging Reports	☹️	😊
AP & AR Ledger Reports	☹️	😊
Trial Balance Report	😊	😊
Profit & Loss Report	😊	😊
Balance Sheet Report	😊	😊
Cash Flow Report	😊	😊
Drill Down into GL Details from Financial Reports	😊	😊
Drill Down into Subledger Details from GL Details	☹️	😊
Project Balance Reports (e.g., Cost to Date)	Construction Scope - 😊	Construction Scope - 😊
Project Detail Reports (e.g., AP Bills by Project)	Construction Scope - ☹️	Construction Scope - 😊

The Duplicate Suppression System™ (DSS)

Clean master records imported into Sage Intacct

What is the Duplicate Suppression System™?

This process allows you to remove duplicate master records (E.g., Vendors, Customers, Employees) from your data prior to migrating information into Sage Intacct®.

Value

- Cleaner Master Records across a single entity
- Cleaner Master Records across multiple entities
- Tens/Hundreds of hours saved
- Clear up years of errors during the migration
- Hard-to-detect duplicates identified instantly

The Affordable Subledger Archive Process™ (ASAP)

Recreates the Legacy Subledgers in Microsoft Access

What is The Affordable Subledger Archive Process™?

The process migrates all historical data (AP / AR / GL) transactions from any legacy system and imports them into a portable Microsoft Access database.

Value

Little Time or Resources Required

Customizable Reporting

One-time Fee

Cost-effective alternative to SSCP
(when used with an MDCS option)

Portable file that can be stored
anywhere in your network

Value of Outsourced Data Migration Solution

Sage Intacct Client Alone



Multiple team members



Tens - 100's of hours



Inaccuracies



Invalid data



Removed from critical tasks

With Platform Transition MPP Support

❖ Supplement your resources

❖ Reduces client involvement by 80%+

❖ Any inaccuracies isolated & corrected

❖ 100% data accuracy

❖ Allows you to focus on critical tasks

Bonus Benefits of Historical Detailed Data Migration

-  Immediate ROI
-  Significantly Reduces Sage Intacct Learning Curve
-  Eliminates Cost of Maintaining Legacy System
-  Consolidated Reporting
-  Provides Sage Intacct Insight Into Their Business

Customer Responsibilities

❖ Responsibilities of the customer

- ❖ Provide standard extraction reports from legacy system
- ❖ Complete and return the maps/templates we provide
- ❖ Check and validate our work
- ❖ Stay in communication
- ❖ Repeat for each segment of the migration

Important Note:

Bringing Platform Transition into the conversation earlier supports mutual success. The more runway you have, the more peaceful the migration experience, the more time to make mapping choices, and give space for Murphy, should she show up.

- PT requests 60 days notice to Go-Live for MDCS (*however ideal, 60 days is not mandatory*)
- PT requests 90 days notice to Go-Live for SSCP (*however ideal, 90 days is not mandatory*)
- PT will work with you to meet your Go-Live timeline - however thin 😊

Note: PT extracts data from the following systems:

For a GL detail migration

- QuickBooks (US)
- NetSuite
- Abila/MIP
- Xero

For a SL migration

- QuickBooks (US)
- Sage Intacct

Sage Intacct Consultant Responsibilities

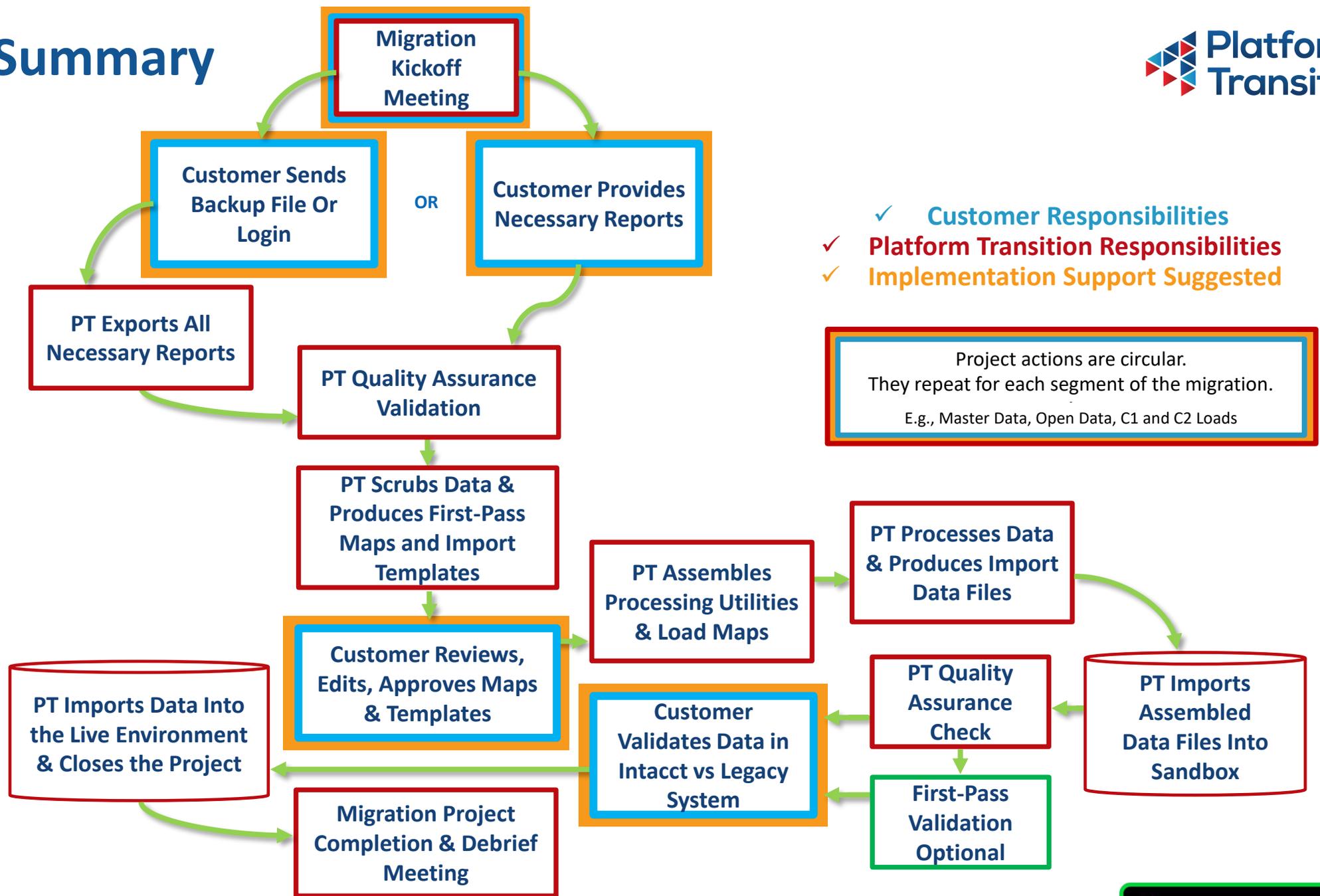
- ❖ Responsibilities of the Implementation Team (Consultant, Project Manager and/or Customer Success Manager)
 - ❖ Attend the data migration Kickoff call – we work at your direction
 - ❖ Attend the mapping training meeting
 - ❖ Assist the client throughout the data migration
 - Support client reporting requirements to validate the data (*Finance team to validate – Not the IT Department*)
 - Support client efforts to validate the data once it's loaded to Sage Intacct during each segment of the migration
 - Guide your clients with their mapping choices – this directly impacts their experience of moving to Sage Intacct
 - ❖ Attend the data migration closing call

Note: Bringing Platform Transition into client conversations early supports group success. It empowers the Implementation Specialist to have powerful conversations with the client regarding their go-forward architecture and provides the ability to reimagine and dimensionalize their history by providing an umbrella view of everything that exists within it. The more runway the client has, the more peaceful the migration experience, the more time to make mapping choices, and to give space for 'Murphy' should she show up.

- PT requires a minimum 60 days notice to Go-Live for MDCS
- PT requires a minimum 90 days notice to Go-Live for SSCP

The more complex the environment,
the longer the migration timeline.

Workflow Summary



- ✓ **Customer Responsibilities**
- ✓ **Platform Transition Responsibilities**
- ✓ **Implementation Support Suggested**

Project actions are circular. They repeat for each segment of the migration. E.g., Master Data, Open Data, C1 and C2 Loads

Sample of Mapping Template

	A	B	C	D	E	F	G	H	I	J
1	QB Scrubbed Name	V	C	E	Intacct Vendor ID	Intacct Vendor Name	Intacct Customer ID	Intacct Customer Name	Intacct Employee ID	Intacct Employee Name
2	Adam's Candy Shop	C	x				C-00001	Adam's Candy Shop	x	
3	Andres, Cristina	C	x				C-00002	Andres, Cristina	x	
4	Balak, Mike:330 Main St	C	x				C-00003	Balak, Mike:330 Main St	x	
5	Balak, Mike:Residential	C	x				C-00004	Balak, Mike:Residential	x	
6	Bank of Anycity	V			V-00001	Bank of Anycity	x		x	
7	Bayshore CalOil Service	V			V-00002	Bayshore CalOil Service	x		x	
8	Bayshore Water	V			V-00003	Bayshore Water	x		x	
9	Blackwell, Edward	C	x				C-00005	Blackwell, Edward	x	
10	Brown Equipment Rental	V			V-00004	Brown Equipment Rental	x		x	
11	Cal Gas & Electric	V			V-00005	Cal Gas & Electric	x		x	
12	Cal Telephone	V			V-00006	Cal Telephone	x		x	
13	Chapman, Natalie	C	x				C-00006	Chapman, Natalie	x	
14	Cheknis, Benjamin	C	x				C-00007	Cheknis, Benjamin	x	
15	City of Bayshore	V			V-00007	City of Bayshore	x		x	
16	City of Middlefield	V			V-00008	City of Middlefield	x		x	
17	Computer Services by DJ	V			V-00009	Computer Services by DJ	x		x	
18	Conner Garden Supplies	V			V-00010	Conner Garden Supplies	x		x	
19	Corcoran, Carol	C	x				C-00008	Corcoran, Carol	x	
20	Crenshaw, Bob	C	x				C-00009	Crenshaw, Bob	x	
21	Crider, Craig	C	x				C-00010	Crider, Craig	x	
22	DJ's Computers	C	x				C-00011	DJ's Computers	x	
23	Duncan Fisher			E	x		x		E-00001	Duncan Fisher
24	Ecker Design	C	x				C-00012	Ecker Design	x	
25	Employment Development Department	V			V-00011	Employment Development Department	x		x	
26	Golliday Sporting Goods:155 Wilks Blvd.	C	x				C-00013	Golliday Sporting Goods:155 Wilks Blvd.	x	
27	Golliday Sporting Goods:75 Sunset Rd.	C	x				C-00014	Golliday Sporting Goods:75 Sunset Rd.	x	
28	Great Statewide Bank	V			V-00012	Great Statewide Bank	x		x	
29	Gregory, Dru	C	x				C-00015	Gregory, Dru	x	
30	Gussman's Nursery	V			V-00013	Gussman's Nursery	x		x	
31	Heldt, Bob	C	x				C-00016	Heldt, Bob	x	
32	Hermann, Jennifer:Residential Maintenance	C	x				C-00017	Hermann, Jennifer:Residential Maintenance	x	
33	Hughes, David	C	x				C-00018	Hughes, David	x	
34	Jasmine Park	C	x				C-00019	Jasmine Park	x	
35	Jenny Miller			E	x		x		E-00002	Jenny Miller
36	Jim's Family Store	C	x				C-00020	Jim's Family Store	x	
37	Julie's Doll House	C	x				C-00021	Julie's Doll House	x	
38	Lee, Laurel:Lee Advertising	C	x				C-00022	Lee, Laurel:Lee Advertising	x	
39	Lee, Laurel:Lee Residence	C	x				C-00023	Lee, Laurel:Lee Residence	x	
40	Leon, Richard	C	x				C-00024	Leon, Richard	x	
41	Lo, David:4631 W Indian Trail	C	x				C-00025	Lo, David:4631 W Indian Trail	x	
42	Lo, David:Landscaping	C	x				C-00026	Lo, David:Landscaping	x	
43	Lochrie, Steven	C	x				C-00027	Lochrie, Steven	x	

Sample of Mapping Template

Require Mapping	QB Acct Name	Intacct Account ID	Intacct Account Name	Department ID	Department Name
Y	Checking				
Y	Cash Expenditures				
Y	Savings				
Y	Barter Account				
Y	1200 - Accounts Receivable				
Y	Prepaid Insurance				
Y	Employee advances				
Y	1300 - Inventory Asset				
Y	1400 - Undeposited Funds				
	1500 - Truck				
Y	1500 - Truck:1520 - Accumulated Depreciation				
Y	1500 - Truck:1510 - Original Purchase				
Y	2000 - Accounts Payable				
Y	2100 - CalOil Card				
	QuickBooks Credit Card				
Y	QuickBooks Credit Card:QBCC Field Office				
Y	QuickBooks Credit Card:QBCC Home Office				
	QuickBooks Credit Card:QBCC Sales Dept				
Y	2102 - Payroll Liabilities				
	2111 - Direct Deposit Liabilities				
Y	Payments on Account				
Y	2300 - Sales Tax Payable				
Y	Bank of Anycity Loan				
Y	Equipment Loan				
Y	2400 - Bank Loan				
Y	3200 - Opening Bal Equity				
	3000 - Owner's Equity				
	3000 - Owner's Equity:3020 - Owner's Contributions				
Y	3000 - Owner's Equity:3010 - Owner's Draw				
Y	3100 - Retained Earnings				
Y	4200 - Discounts				
	4100 - Landscaping Services				
Y	4100 - Landscaping Services:4000 - Design Services	4000	Revenue - General	Revenue	Marketing
	4100 - Landscaping Services:4130 - Equipment Rental				
	4100 - Landscaping Services:4110 - Job Materials				
Y	4100 - Landscaping Services:4110 - Job Materials:Misc Materials				
Y	4100 - Landscaping Services:4110 - Job Materials:4111 - Decks & Patios				Administration
Y	4100 - Landscaping Services:4110 - Job Materials:4112 - Fountains & Garden Lighting				
Y	4100 - Landscaping Services:4110 - Job Materials:4113 - Plants and Sod				
Y	4100 - Landscaping Services:4110 - Job Materials:4114 - Sprinklers & Drip systems				
	4100 - Landscaping Services:4120 - Labor				
Y	4100 - Landscaping Services:4120 - Labor:4121 - Installation				
Y	4100 - Landscaping Services:4120 - Labor:4122 - Maintenance & Repairs				
Y	4400 - Markup Income				
	4300 - Other Income				
Y	Retail Sales				
Y	Service				
	4999 - Uncategorized Income				

Who We Serve

- ❖ Sage Intacct
- ❖ Sage Intacct VAR's / Channel Partners
- ❖ Sage Intacct SIAP's
- ❖ Sage Intacct Customers

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VARs with Notable Projects Completed

- ❖ Armanino
- ❖ Accordant Company
- ❖ Alliance Solutions
- ❖ BAASS
- ❖ Baker Tilly *(formerly AcctTwo)*
- ❖ BKD Technologies
- ❖ BT Partners
- ❖ CliftonLarsonAllen (CLA)
- ❖ Cargas
- ❖ Clark Nuber
- ❖ EAG Gulf Coast *(formerly Postlethwaite &Netterville)*
- ❖ Frank Rimerman
- ❖ Incubator Finance / Catalyst 180
- ❖ JMT Consulting
- ❖ RKL eSolutions
- ❖ Sage Intacct
- ❖ SWK Technologies
- ❖ Trusted CFO Solutions
- ❖ Vision33
- ❖ Wipfli/Brittenford

SIAPs with Notable Projects Completed

- ❖ Accumulus Advisors
- ❖ Armanino
- ❖ Baker Tilly – *formerly AcctTwo*
- ❖ BridgeView CFO Solutions
- ❖ Brinker
- ❖ Chazin & Company
- ❖ CliftonLarsonAllen (CLA)
- ❖ Consero
- ❖ Incubator Finance
- ❖ James Moore & Company
- ❖ Kiwi Partners / Arabella Advisors
- ❖ Leap Access
- ❖ Lescault & Walderman
- ❖ Marcum
- ❖ MedBook Solutions
- ❖ Trusted CFO Solutions
- ❖ Ostrow Reisin Berk & Abrams
- ❖ Wipfli

For Customer Testimonials Visit <http://bit.ly/PTSICT>

Who We Are and How We Got Started

- ❖ CFO of a Real Estate development company transitioning from 13 instances of QBO
- ❖ Found Sage Intacct as the right solution for the company
- ❖ Could not migrate detailed data with 3 weeks to Go-Live, thus created solution
- ❖ Sage Intacct saw and liked our solution and asked us to make it available to others
- ❖ Path from Customer to IAP to MPP

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How to Work with Us

❖ Request a quote on a project

- ❖ Submit responses to questionnaire: [Data Migration Quote Request Form](#) (Step 1)
- ❖ [Schedule a Scoping Call](#) to verify the scope (Step 2)
- ❖ Or submit a form through the Sage Intacct Marketplace

❖ Flat fee pricing for most of our services

❖ Pricing based on configuration with data volume as a secondary consideration



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Why Platform Transition

- Hear what our customers are saying:

Synergy 

“Platform Transition enabled us to retain our data with enormous granularity.”

Sunshine Sachs

“They took the headache away from us.”

FairVote

“The knowledge, the helpfulness; it really was amazing.”

Client Quote

iWired: "From a bandwidth perspective, there was no feasibility in us migrating the data from QuickBooks to Sage Intacct ourselves whereas the financial investment warranted my time so I engaged Platform Transition for a fraction of the cost.

It was a steal as compared to the 300 hours of my time it would have taken."

"Time is our most valuable asset. I think people may be inclined to assume it could be cheaper to do it themselves. I'd suggest before you taking on the task yourself, realize the time that you're sacrificing and actually reach out and have the conversation with PT. I can tell you firsthand, by having that conversation and finding out the costs associated with it, the quote I received had made the decision a no-brainer because of the time savings."

William Brewer | Controller | Sage Intacct Referred Customer



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Client Quote

BroadPath Healthcare Solutions: "Without Hugh and Platform Transition, I can't say that I'd be as excited about Sage Intacct as we are. We don't have to focus on the data. We get to focus on the software.

Hugh did such a great job that we don't have to worry about journal entries and data and reconciling.

All the balance sheets balanced the first month, and that is unheard of in a transition!"

Cathi Stevens | Controller | VAR Referred Customer



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Client Quote

Leap Access: "I really like the way information was presented on the imported journal entries. I have used it already to find transactions.

I am really glad we brought over the detail and not monthly summaries. We are getting great reports with the historical data that we could never get before. Our client is thrilled.

Your suggestions have been instrumental in making our process better."

Betty Van Dyck | President and Founder | Intacct Specialist



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THANK YOU



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