

Onboarding Data Conversion

As a trusted business partner, the Aristotle team welcomes the opportunity to guide clients through the onboarding process. Among other tasks, converting data from your previous vendor or internal source of records will provide important historic information and legally required records retention for your organization.

If you have questions during the onboarding process, contact Mike Young at mike.young@aristotle.com.



REQUEST

- Request a full data export from your current vendor or internal source of records* (HR, payroll) to include all data points housed in your database. This information should include all receipts and disbursements
- The vendor will export a .CSV file for you
- Contact Aristotle for a link to transfer your data privately and securely

**While some vendors only request six years of data, Aristotle requests an export of all historical data.*



IMPORT

- Aristotle will import all data into the AI360 database for your organization
- All data points will be tied to a specific location within the system
- Aristotle will perform an audit to ensure financial records are accurate for ongoing FEC reporting



CONNECT

- Connect Aristotle with your Human Resources department to discuss automated transfers of PAC eligible class and/or grassroots data
- Connect Aristotle with your Payroll department to automate transferring recurring payroll deduction data



UTILIZE

- Engage with Aristotle to use the AI360 technology platform to enroll new donors, disburse checks, run reports, and more
- Contact your Aristotle Account Manager for any questions along the way