

Conversion Portal

Conversions fail in the gaps. This closes them.

AVAILABLE NOW

Conversion Portal turns a data conversion from a pile of emails and a shared spreadsheet into a real project with a spine: milestones with owners and dates, file exchange with an audit trail, validation checkpoints that gate progress, and a cutover checklist everyone can see. Every stakeholder — bank, vendor, consultant — reads the same status from the same place, and every file that changes hands is on the record.

WHAT IT DOES

Every conversion a project

Phases, milestones, owners, and dates — the shape of the work made visible, so slippage shows up in days instead of weeks.

File exchange on the record

Extracts, mappings, and test files move through the portal with timestamps and hashes — no more 'which version did we send' archaeology.

Validation checkpoints

Progress gates on evidence: row counts reconciled, samples approved, test loads verified. A checkpoint isn't done because someone said so.

Status anyone can read

Executives, examiners, and project teams see the same truth at the same time — one link, current state, no translation meeting required.

Cutover checklists

The most dangerous weekend of the project, scripted in advance — every step owned, ordered, and checked off as it lands.

Post-conversion reconciliation

The project isn't over at cutover. Closing reconciliation and sign-off live in the same record as everything that led to them.

WHY CONVERSION PORTAL

The gaps are the risk

Conversions rarely fail on the hard parts — they fail on the handoffs nobody wrote down. A shared spine leaves nowhere for the work to hide.

Evidence over vibes

When the examiner asks how the conversion was controlled, the answer is a record, not a recollection.

Pairs with the toolchain

Built by the same house as DataShift and SchemaShift — the portal tracks the project while the tools do the moving, and they speak the same discipline.

WHO IT'S FOR

BANKS MID-CONVERSION

Core changes, acquisitions, and system sunsets with too many parties and too much at stake for email-thread project management.

VENDORS RUNNING CONVERSIONS

Give every client the same disciplined experience — and keep the evidence that you did.

FIRMS SWITCHING SYSTEMS

Practice management and billing migrations where the history has to arrive intact.

Run the next one on rails.

Request a demo and see a conversion laid out end to end — milestones, files, checkpoints, and cutover in one place.

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