

Balance was designed from the ground up to ensure accurate, timely data is available to our partners faster and with less effort than any past technology integrations they've experienced. With seamless integration with any school finance system, your districts' finances can finally find Balance in five steps and 45 days!



Steps to Implement Balance

1. Data Discussion & Access

10 Days

Allvue and the relevant technology and finance staff at the district will review the different data integration methods, and will discuss the merits of each. Next steps for establishing a data connection, via VPN or SSH and read-only database access, or via SFTP, will be clear and actionable.

2. Kickoff: Goals & Financial Research

2 Days

The kickoff meeting, which brings together Allvue and the district staff, includes a conversation about district goals, financial challenges, and a clear timeline for staging review and for launch training.

3. Configuration & Integration

25 Days

The Allvue Data Team will spend 3-4 weeks developing queries, applying appropriate business rules, and creating a unique Balance environment that accurately reflects the district's chart of accounts and specific circumstances.

4. Staging & Review

7 Days

Allvue will provide the appropriate district staff with training and access to their Balance environment to continue reviewing the data, ensuring that the data is accurate, complete, and ready for launch!

5. Launch

Once the project sponsors complete their review of data, we will be ready to launch and train district administrators, principals, and all other users!

6. Ongoing Maintenance & Support

The Allvue team is here to guarantee 99.99% uptime throughout the life of our partnership. You can reach a member of our team anytime between 7 am and 8 pm EST for technical support.

Integration Timeline

