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WorkflowMax Migration
Tips & Checklist

Purpose

Smooth Transition from WorkflowMax by Xero to WorkflowMax by Bluerock

Anita Gisch
Digital Tranformation / Project Systems Specialist

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Objective

To provide a step-by-step guide for a smooth migration from WorkflowMax by Xero to WorkflowMax by Bluerock, ensuring data integrity and leveraging new features.

Step 1
Preparation

- **Establish Clear Goals:** Define desired outcomes for data andstaff migration.
- **Scope Definition:** Identify data to be migrated and responsible personnel.
- **Process Improvements:** Plan for streamlining operations.
- **Update Information:** Ensure all data is current and accurate.
- **Remove Duplicates:** Merge duplicate client records.
- **Review Custom Fields:** Check and update as needed.
- **User Roles:** Set up roles and permissions for staff.
- **Enable MFA:** Ensure multi-factor authentication is enabled for all users.

Step 2
Data Migration

- **Timeline and Milestones:** Define a timeline with clear milestones.
- **Resource Allocation:** Assign team members, budget, and time.
- **Roles and Responsibilities:** Establish clear roles and task lists.
- **Migration Tool:** Use provided tools for data transfer.
- **Verify Data:** Ensure job details, client addresses, and documents are included.

Step 3
Testing

- **Confirm Functionality:** Ensure WorkflowMax by Bluerock supports all business processes.
- **Cancel Subscription:** Cancel the old WorkflowMax by Xero account to avoid confusion and save costs.
- **Test Migration**: Perform a test migration to identify potential issues.
- **Non-Peak Hours:** Plan migrations during non-peak hours.
- **Parallel Testing:** Run the old and new systems in parallel for a few projects
- **Functionality Checks:** Test job management, invoicing, and custom fields.
- **New Features:** Try new features like job financial summaries.

Step 4
Configuration

- **Audit Data:** Ensure data integrity by checking clients, jobs, invoices, and WIP.
- **Reconnect Integrations:** Reconnect Xero and other third-party apps.
- **Customisation:** Use built-in features to customise and integrate with other apps.
- **Custom Templates:** Set up and customise print templates.
- **Custom Reports:** Verify and adjust custom reports and templates.
- **Automation:** Set up automation rules to save time and reduce errors.
- **Regular Reviews:** Schedule periodic reviews for continuous improvement.
- **Xero Integration:** Set up and verify integration with Xero.
- **New Job Setup:** Create jobs and add tasks.

Step 5
Training

Key Points:

- **Training:** Provide comprehensive training for your team.
- **Support Channels:** Offer channels for reporting issues and getting assistance.
- **Feedback Loop:** Gather feedback to make continuous improvements.
- **Communication:** Inform the team about migration and downtime periods.
- **Regular Updates:** Provide updates on progress and timeline changes.
- **Feedback Channels:** Set up channels for questions and feedback.
- **Training Sessions:** Conduct group or individual training.
- **Support Resources:** Provide access to documentation and support

Step 6
Go-Live

- **System Update:** Ensure WIP and final data are up-to-date.
- **Communication:** Inform key users of go-live process and their responsibilities.

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Post-Migration Support:

Performance Monitoring

Keep an eye on system performance and address any issues promptly.

Ongoing Support

Plan for post-migration support, including regular updates and improvements.

Custom Print Templates Setup

Xero Integration

Migration Assistance:

Service Overview

Describe your migration assistance services, including planning, execution, and support.

Custom Packages

Offer tailored packages based on business size and complexity.

Pricing

Suggest competitive pricing, highlighting value and expertise.

WorkflowMax Migration Checklist

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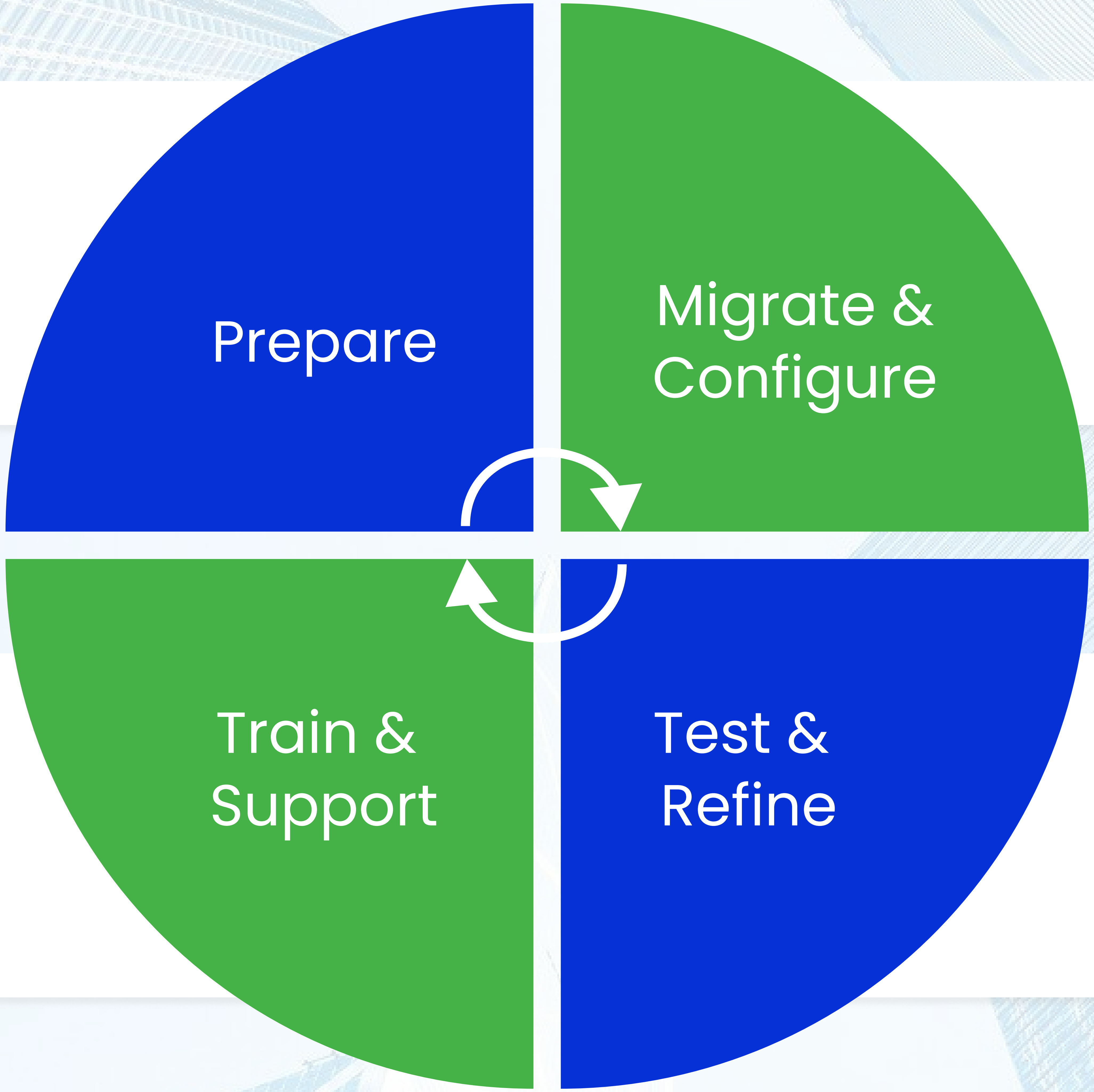
- Data
- Reports
- Staff



- Historica Data
- Clients & Suppliers
- Work in Progress
- Staff & Timesheets

- Timesheet Entry
- Quoting& Invoicing
- Improvement Opportunities

- Jobs & Timesheets
- WIP & Invoices
- Staff Roles & Access

Step 1
Prepare

1. **Establish Clear Goals:**
   - Identify positives and negatives about current ways of working.
   - Plan any process improvements to streamline operations.
2. **Scope Definition:**
   - Determine the data to be migrated and assign responsibilities.
3. **Update Information:**
   - Ensure all data is current and accurate.
   - Merge duplicate client records.
4. **Review Custom Fields and Templates:**
   - Update custom fields and set up print templates.
5. **User Roles and Security:**
   - Define Roles and set permissions for staff.
   - Enable Multi-Factor Authentication (MFA).

Step 2
Migrate & Configure

1. **Develop a Migration Project Plan:**
   - Define a timeline with clear milestones.
   - Establish roles and responsibilities.
2. **Test Migration:**
   - Perform a test migration to identify potential issues.
   - Plan migrations during non-peak hours and prepare a rollback plan.
3. **Execute Data Migration:**
   - Use provided tools to transfer data.
   - Ensure job details, client addresses, and documents are included.
4. **Reconnect Integrations:**
   - Reconnect Xero and other third-party apps.
5. **Customise Settings:**
   - Use built-in features to customise and integrate with other apps.
   - Set up and customise print templates and reports

Step 3
Test & Refine

1. **Confirm Functionality:**
   - Test job management, invoicing, and custom fields.
   - Try out new features (e.g. phases).
2. **Audit Data:**
   - Ensure data integrity by checking clients, jobs, invoices, and WIP.
3. **Regular Reviews:**
   - Schedule periodic reviews for continuous improvement.

Step 4
Train & Support

1. **Provide Training:**
   - Conduct group or individual training sessions.
   - Offer access to support resources and documentation.
2. **Communication:**
   - Inform the team about migration and downtime periods.
   - Provide regular updates on progress and set up feedback channels.

Step 5
Go-Live

1. **System Update:**
   - Ensure WIP and final data are up-to-date.
   - Inform key users of the go-live process and their responsibilities.
2. **Execute Final Migration:**
   - Complete the final migration using the provided wizard.
   - Reconnect integrations and set up templates and reports.

Step 6
Support & Improvement

1. **Performance Monitoring:**
   - Monitor system performance and address any issues promptly.
2. **Ongoing Support:**
   - Plan for post-migration support, including regular updates and improvements.
   - Conduct a post-migration review to ensure all data was transferred accurately.

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Migration Services

Self-Paced

$220 per hour

- Book sessions as needed via Calendly (subject to availability)
- Ad hic Q&A plus custom templates, reports and configuration as required
- All items in the managed, but at hourly rates and subject to availability (will be limited)

Managed

$2500 set price

- Setup Power session:
  - 2 half days online, 1-1 or groups with individual screen sharing
- Data checked for duplications, migrated and checked for consistency
- Up to 6 custom print templates and 4 reports designed, uploaded and tested
- Staff migrated and allocated to roles (up to 5 role types included, settings to be specified by client)
- Additional items can be added at a per item cost
- Subject to availability, maximum 10 clients in June.

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Book Training & Migration Services

Contact Now

anita@gischconsulting.com.au calendly.com/gischconsulting

gischconsulting.com.au Anita Gisch Anita Gisch