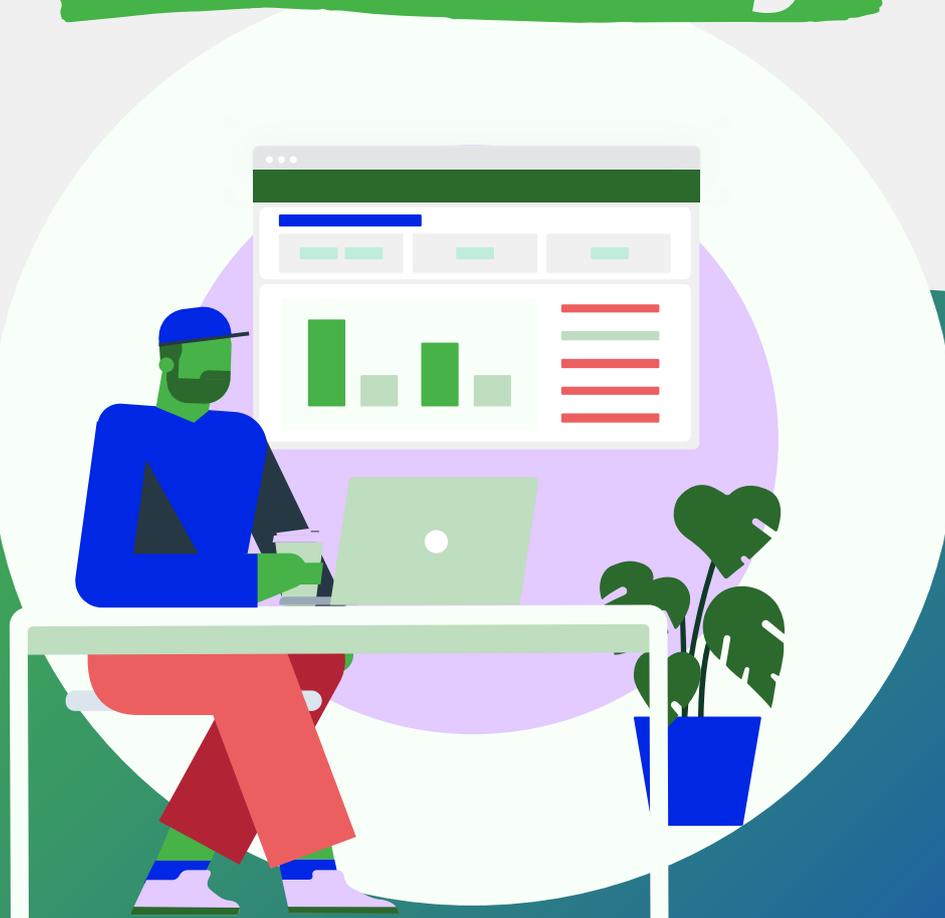




Migration made easy



Version 4 - 27 February 2024

Key additions to this guide include:

[Who in the business can initiate the migration](#)

[Do a test migration first as part of your trial period](#)

[What happens if a part of your migration returns an error](#)

[How to transfer the account holder after migration](#)

[How to reconfigure custom reports](#)

[How to reconfigure custom print templates](#)

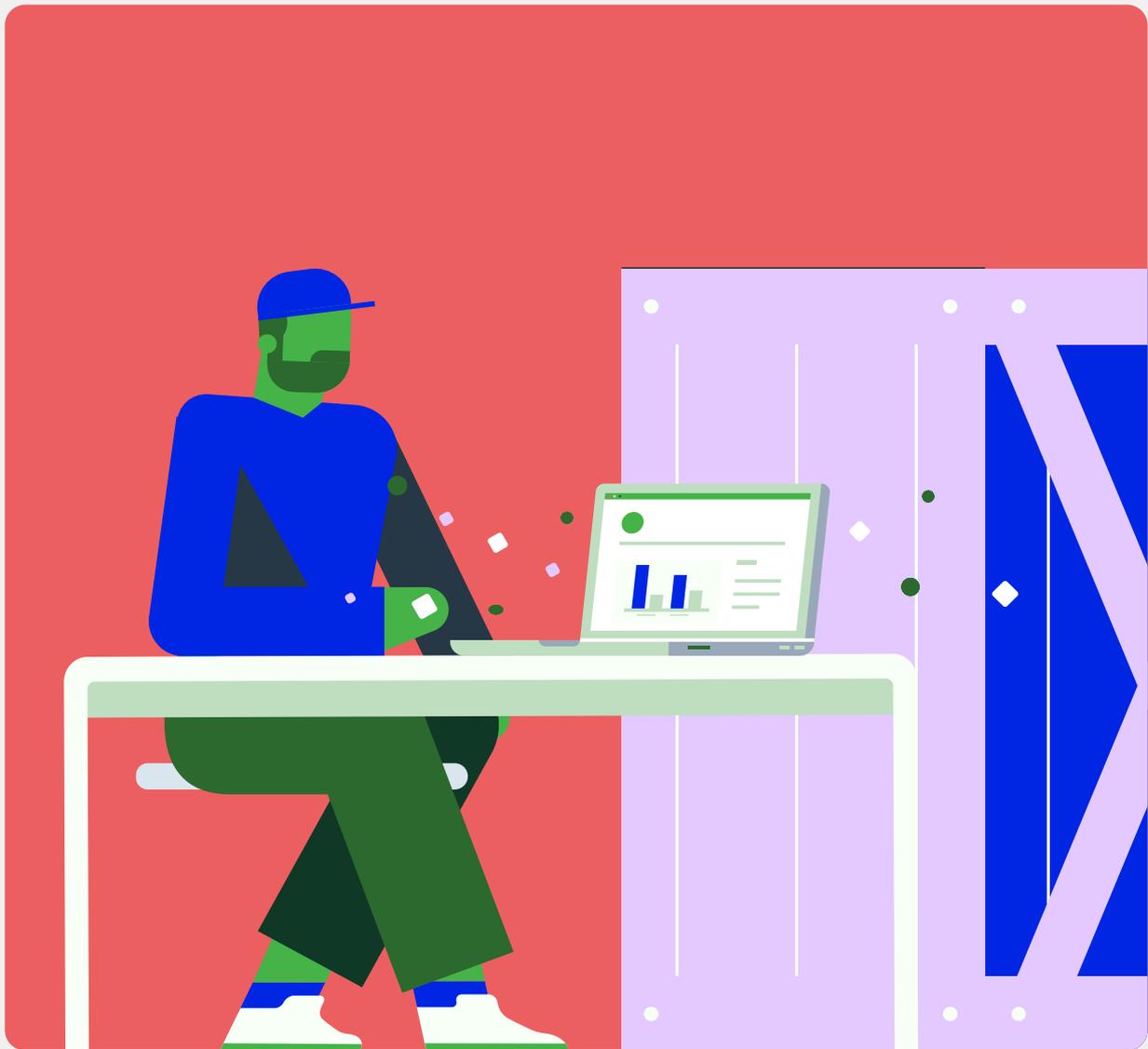
[How to enable MFA for you and your team](#)

[Book a 1:1 migration session](#)

[Getting support](#)

[Training and resources](#)

[Do the migration course](#)



Welcome WorkflowMax by Xero customers, soon-to-be WorkflowMax^{!!!} by BlueRock customers!

This guide is your go-to resource for understanding and successfully navigating the migration process from WorkflowMax by Xero to WorkflowMax by BlueRock. We're here to make sure your transition is as smooth as possible, so you can continue managing your business with minimal disruption.

Starting from February 2024 until 26 June 2024, all WorkflowMax by Xero customers can transition to the enhanced WorkflowMax by BlueRock product. This updated product retains all the features, functionality, and benefits you're familiar with, while also introducing a user-friendly interface and a roadmap brimming with new and exciting improvements.

Follow these steps and it'll be smooth sailing as you embark on a new journey with us.♥

What's in this guide

Here are the steps for planning, preparing and executing a software migration:



Prepare for migration

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Migrate to WorkflowMax by BlueRock

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STEP 1

Understand how the migration will work

Make sure to read over and watch all the resources in relation to the migration before you build your plan. This will give you a very good overview of what's involved and how the migration will work.

- Read this guide in full.
- Watch the migration tutorial.
- Understand what data comes across through the migration wizard and what will need to be recreated and configured in the new software.
- Reach out to an advisor or implementation partner if you need additional support.
- Read over the FAQs.
- Talk to us!

WHAT DATA COMES ACROSS?

Rest assured, close to 90% of your data will be migrated to the new system so there are no inadvertent omissions. Plus, the new WorkflowMax by BlueRock offers powerful bulk actions for managing your data post migration.

WHAT DOESN'T COME ACROSS?

- Custom reports.
- Custom print templates.
- Integrations will need to be reconnected.
- The personalised logo that appears on top of your report documents and standard templates will not come across. You will need to re-import in WorkflowMax by BlueRock.

IMPORTANT NOTES TO REMEMBER FOR YOUR PLANNING PROCESS:

Allow at least a day for migration processing -

Migration could take anywhere from two to 24 hours depending on the amount of data coming across.

Complete any critical tasks in your old account -

We recommend that you complete any business-critical processes in your old WorkflowMax by Xero account, such as staff time entry if you rely on this for payroll, creating invoices for completed jobs, receipting purchase orders so you can pay suppliers, and completing any urgent quotes.

Handing over from old to new account - Plan to stop using your WorkflowMax by Xero account once you initiate the final data migration to your new WorkflowMax by BlueRock account (this is often called a downtime period or cutover where you and your team can't access either software).

Only use your new WorkflowMax by BlueRock account going forward. Any changes you make to data in your WorkflowMax by Xero account after commencing the migration won't be transferred.

Please note: The person initiating the migration will become the Account holder in the new trial account. You can change this at a later date by going to Settings>Staff>choose person that you want to transfer to.

Avoid double-handling if possible - If you need to access your WorkflowMax by Xero account while the migration is in progress, any data entered or edited will then also need to be entered or edited in your new WorkflowMax by BlueRock account once the migration is completed.

Use WIP lock to avoid changing financial data - To prevent staff from entering or editing financial data in your WorkflowMax by Xero account during the migration, we recommend setting your WIP lock and period lock dates in Business > Settings > Organisation Settings.

Administrator and API access required - Be sure that the user initiating the migration has both administrator and API access privileges selected in your WorkflowMax by Xero account. You won't be able to complete the migration without this. If there is no one in your business with these privileges, you will need to [raise a case](#) with Xero to resolve. For information on administrator and API Access privileges please read this [help article](#).

Reconnecting third-party apps after migration - You will need to reconnect your WorkflowMax by BlueRock account to any third-party apps you're using such as Xero or Google Drive. Make sure you have the login details ready to reconnect once the migration is completed and users have the correct permissions in the other apps.

STEP 2

Define the scope and goals for your migration

Establishing clear goals gives you a roadmap for the migration process. It ensures that all stakeholders understand the desired outcome and can work cohesively towards it. And, by understanding the scope, you can better allocate resources such as time, people, and budget, and get alignment across your business.

TIP

- Define the outcomes you wish to achieve when migrating data and staff.
- Establish a clear scope of what data needs to be migrated and who is responsible.
- Define any process improvements you want to make to streamline your operations.

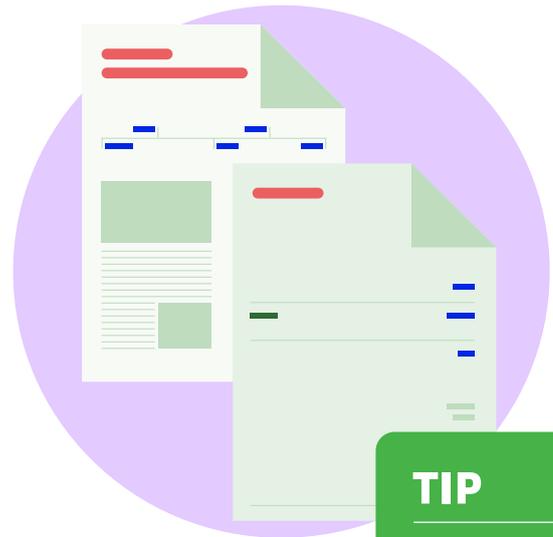


STEP 3

Develop a migration project plan

It's a great idea to plan out the steps you need to take for a successful migration.

- Start with defining a timeline with clear milestones and lock it into the calendar.
- Allocate necessary resources to support this project (team members, budget, time and capacity).
- Establish roles and responsibilities.
- List out all the tasks you need to complete pre, during and post migration so you can keep track of everything.

**TIP**

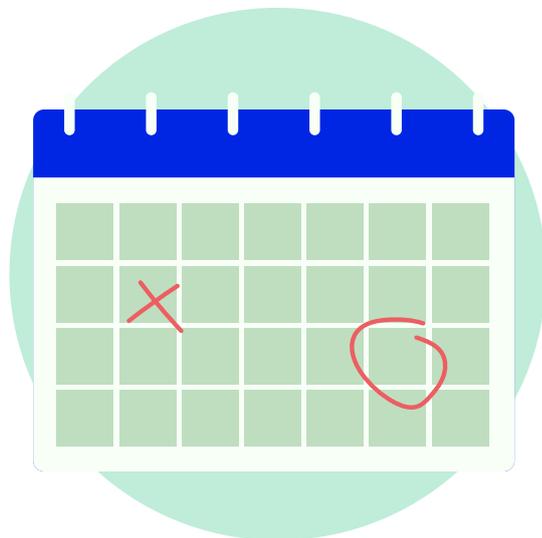
Asana has some easy templates that you can use to map out your project timeline.

STEP 4

Do a test migration first to make migration smooth

Think about any key dates or project deliverables that need to be completed when choosing your preferred date.

- If you don't have a clear timeline in place, and don't plan for downtime, you might have to duplicate data entry.
- Plan to do a test migration at least a week before you do your final one.
- Plan to migrate at non-peak hours and have a rollback plan in place in case the timeline shifts. Rather than trying to duplicate large amounts of data, it may be easier to re-schedule and re-run the migration with up-to-date data.
- There's no need to worry about doing an extensive cleanup or spring clean because the new WorkflowMax by BlueRock solution offers robust bulk actions for data management post migration.



**STEP 5**

Trial and test out the new software

(you'll have from 21 February until 26 June 2024 to test and migrate)

As part of the migration process, we recommend that you set up a trial account and take time to test out the new product.

- We strongly recommend you perform a test migration first to see how the data migrates and fits into the new system. You may decide to run the two systems in parallel for a few projects to make sure everything is working as planned.
- There will be in-product prompts that will show you around the new software and point out the things that have changed.
- We encourage you to make a test plan or checklist to ensure your workflows are operating as intended. One way you might consider is to test with a live job you've recently completed to ensure both your business processes and functional requirements are supported.
- You can contact us for a demo or connect with an advisor or implementation partner for additional support.

Handling migration errors

If your migration returns an error, don't be alarmed.

Errors during migration can be caused by various small issues, like unique characters in your data or mismatches in data mapping. They're generally quick to diagnose and fix, with minor adjustments from us or tweaks to the data export code settings from the Xero side. Your data in WorkflowMax by Xero is unaffected by this migration hiccup.

We'll email you if this happens with instructions to raise a ticket with our support team to resolve the error. Please note: this could take a few days if development teams on Xero's side need to be involved, so have a plan, in case you have to move your final migration out by a week.



STEP 6

Communicate with your team

Effectively communicating with your team about a migration and downtime period is crucial for smooth operations and to manage expectations. Depending on the size of your business, here are some tactics you could employ:

Advanced notice - After trialing and you have confidence in the system, inform the team well in advance about the planned migration and the expected downtime period. The more lead time they have, the better they can prepare.

Detailed email communications - Send out emails explaining the reason for the migration, benefits, specific details about the downtime period and what people will need to consider. Include key dates and times.

Calendar reminder - This will be helpful for your team to see the migration date or downtime period and can help people plan their tasks around it, making sure that critical work is completed before the downtime or postponed until after.

Regular updates - Send periodic reminders as the downtime period approaches and during the migration process, to update people on progress and on any timeline changes.

Point of contact - Designate a point of contact or migration champion who can answer questions, guide the team, and liaise with IT or your partner (if you have one).

Feedback channels - Create channels (dedicated email, chat group) for team members to ask questions, report issues, or provide feedback during and after migration.

Stakeholder meetings - Engage with functional leaders or team leads in separate meetings to ensure they understand the migration's implications for their specific areas and can cascade information effectively.

Cross-functional coordination - Ensure coordination between teams. If one team depends on another during the downtime, establish temporary procedures or workflows.

Contingency plans - Communicate backup plans in case of unexpected issues during the downtime period. Issues can be minimised by having test migrations before a parallel running period.

Post migration debrief - After the migration, hold a meeting to debrief the team about the migration's success, any pending issues, and the next steps.

Internal announcements - Use your internal Slack or Teams channels, or intranet to announce updates.

Feedback collection - After the migration, solicit feedback from the team about the process and downtime period. This can provide insights for future improvements.

Regular check-ins - Conduct regular check-ins or stand-up meetings to keep everyone aligned.

Thank you note - After a successful migration, acknowledge the team's patience and cooperation with a thank you note or token of appreciation.

Training sessions - Once you have tested out the new system and are confident with your workflows, conduct training or informational sessions to familiarise the team with the new software and address any questions or concerns.

By employing a mix of these tactics tailored to your business culture and needs, you can ensure clear, effective communication and minimise disruptions during the migration and downtime period.

STEP 7

Back up existing data

- Although WorkflowMax by BlueRock will retain your account export data in its raw format until after migration, it is good practice to take your own export as a backup. Before you begin the migration do a full csv [export of your account data and documents](#) out of WorkflowMax by Xero. Ensure that all data is backed up securely and is password protected.
- Validate the integrity of the backups.

STEP 8

Migration execution and downtime period

The day before your planned final migration, remind your team it's happening and that there is a downtime plan in place. Reinforce with your team that no changes are to be made in the old system during the migration.

TIP

Don't forget to set the WIP lock and period lock dates in your old WorkflowMax by Xero account to today's date (i.e. the date that you initiate the final migration).

Then go into your Xero connection settings and take a screen shot of the configuration. Before your final migration, we recommend disconnecting your WorkflowMax by Xero account from any Xero accounts it is attached to. This is so you can continue using Xero with no worries about any data syncing in either direction affecting the migration. **Make sure to click the disconnect option and not the disconnect and delete data option.** This means that if you want to connect again, all your settings are still there if you need to reference them.

Then you're ready to hit the **Migrate button** in WorkflowMax by BlueRock.



STEP 9

Go live with your final migration and cutover

Let the migration wizard do the heavy lifting!

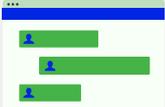
Planning and preparing for a software migration can take anywhere between one week to 3 months. Follow the steps in this guide to make your migration a breeze.



Reconnect your integrations, set up your templates and reports, then invite your team to your new account.



Plan and prepare your team and WorkflowMax by Xero data for migration.



Explore the new product and test out the features.



Start a new trial with WorkflowMax by BlueRock.



Watch a demo, talk to Customer Success or a partner. Learn about the migration steps.



Hit the migrate button. Relax for up to 24 hours while the migration wizard takes care of it all!



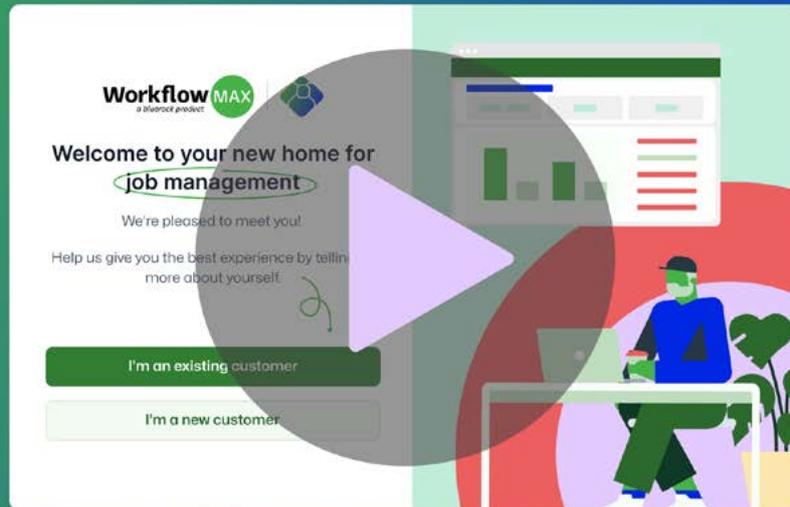
Celebrate - your data transfer is complete!



Don't worry, you have five months to prepare and complete the migration to WorkflowMax by BlueRock

The WorkflowMax by BlueRock migration wizard will be available from February 2024. This tool ensures a seamless transfer of your data, such as jobs, tasks, and costs, so you can start using WorkflowMax by BlueRock immediately. Remember these tips and review Step 1 in this guide before hitting the migrate button!

Migration tutorial



[Watch this video to see a demo of how migration will work.](#)

- Remember, you'll find the migration wizard button in the banner on the top of the screen in your new WorkflowMax by BlueRock trial account.
- During the data migration process, you don't need to stay logged in as it will continue until it's finished. You can check the progress updates from the migration tab in settings, but please be aware that you won't be able to use your new WorkflowMax by BlueRock account while the migration is in progress. If you choose to cancel it mid way no data will be migrated. We'll notify you by email once the migration is complete.
- Keep in mind that any information, test data or settings that are in your new WorkflowMax by BlueRock account will be removed and reset to default values to avoid conflicts during the migration.
- If you cancel the migration, no data will be transferred from your old WorkflowMax by Xero account.

STEP 10

Post migration configuration and testing

After the migration, you'll land back in your trial account dashboard and be guided around the product to reconfigure some key settings.

- Firstly, do some checks and balances (a quick audit) to make sure your data has come across into the right places. Check clients/jobs/invoices/WIP numbers match to your old account.
- You'll be guided to **reconnect your Xero integration** and other third-party integrations you have been using.
- **Import custom print templates** for more instructions on how to do this [visit the help centre](#).
- **Rebuild custom reports** for more instructions on how to do this [visit the help centre](#).
- The **personalised logo** that appears on top of your report documents and standard templates will not come across. You will need to re-import in WorkflowMax by BlueRock.

- Your **collaboration manager** email will also be automatically updated to "mycompany@emailworkflowmax.com" but remember to check this and then update your team and customers (or anyone who sends emails to this email address) that your collaboration email address has changed.
- In old WorkflowMax, delete the email in your collaboration manager email settings so that any further emails which are sent accidentally will bounce back to the sender and they won't be unknowingly added to jobs in your old account.

We recommend conducting thorough testing to ensure data integrity and functionality is as expected. If there are any issues or discrepancies, contact our support team or [visit the help centre](#).



STEP 11

Invite your team to the new account

Once migration is complete and you're ready to invite your team to the new account, you can do this from the staff list one-by-one or in bulk. You'll be able to see which staff have accepted their invites and which are still pending.

In the new product we've added a user roles feature, where you'll be able to create a role label and select permissions for that role. You can save a role template to apply to future staff with a single click.

MANDATORY MFA

Remember, to help make sure your WorkflowMax by BlueRock account data is secure, you and your staff will need to have multi-factor authentication (MFA) enabled to log in. To find out more about setting up MFA [visit the help centre](#).

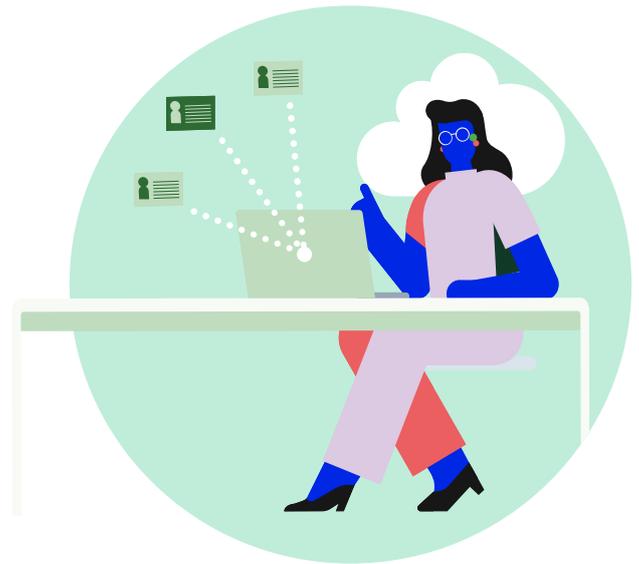


STEP 12

Training, support and feedback loops

Making sure your team has all the up-to-date information is super important.

- Train your team and IT staff on the new system.
- Point them to the new online help centre and website to read up on the changes.
- Continuously monitor the new system for any, and if necessary report them to our support team.
- Offer support channels for users to report problems or get assistance.
- Gather feedback from your team about their experience with the new system.
- Use this feedback to make continuous improvements.

**STEP 13**

Cancelling the old software

Once you are confident that WorkflowMax by BlueRock supports your business processes as you expect, cancel the subscription to your WorkflowMax by Xero account to avoid confusion and save on operational costs.

If you work with an implementation partner or advisor that currently pays for your WorkflowMax by Xero subscription and on-charges you, they will be responsible for cancelling the old account so please make sure you discuss your timings with them.



STEP 14

Optimising the new software

It's good practice to regularly optimise your use of the software to help add value, improve efficiency and achieve your business objectives.

Here are some things you can do to optimise WorkflowMax by BlueRock in the future:

Post migration review - analyse the migration process to make sure all data was transferred accurately. Identify any discrepancies or issues that might have arisen.

Gather regular user feedback - ask for feedback from the team on their initial experiences with the software. Identify areas where they face difficulties or feel the software could be more intuitive.

Customisation - use our built-in customisation features or work with an implementation partner and software developer who can design deeper custom integrations using the new open API.

Integrate with other apps - integrate seamlessly with other tools in our ecosystem like CRM, financial software or HR systems. Keep an eye on the integrations page on the WorkflowMax by BlueRock website to stay across the new apps that will be joining our community. Power up and enhance your data flow and reduce manual entry and data duplication.

Automate even more - identify those repetitive tasks and processes that can be automated within the software. Set up automation rules or workflows to save time and reduce manual errors. Upgrade to the Premium plan to unlock more automation features like recurring invoices and more reporting.

Training and product updates - as we'll be releasing improvements and new features regularly, schedule additional training sessions for your team to make the most of advanced features and best practice. There will be a release notes article in the help centre, so customers can check there for enhancements and bug fixes.

Regular reviews - set up periodic review meetings to discuss software performance, user feedback and any upcoming needs. Use these meetings to make continuous improvements and adjustments.

Share your feedback - let our WorkflowMax by BlueRock product team know what you think by raising a case or making a feature request.

Plan for the future - think about your long-term goals and how the software can be further optimised or scaled to meet these goals.



STEP 15

Get all your questions answered

We've put together answers to common questions regarding data security, downtime, data integrity, training, customisation, support, the migration timeline, data retention, legal compliance, and scalability.

We're committed to making your transition to WorkflowMax by BlueRock as smooth as possible. If you have more questions or concerns, our support team is here to assist you every step of the way.

Remember, your specific steps might vary based on the size of the migration, so proper planning, testing, and communication are the keys to successful software migration.

[Read FAQs](#)

[Get in touch with us](#)

[Work with a partner](#)

[Book a free 1:1 migration session with our team](#)

[Visit the WorkflowMax academy to see training courses](#)





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