



# MIGRATION WIZARD PROCESS



## CONNECT SYSTEMS →

- URL, user, and password for source system (migrating from)
- URL, user, and password for the target system (migrating to)
- If you don't have a unique URL, you can enter the CRM home page URL

## START SAMPLE →

- 10% random records from each object (not-related/linked are present in complete migration).
- Run multiple samples; Wizard will wipe the previous sample from the target and import.
- Auto-mapping on, but requires mapping to get complete accuracy.

## MAPPING →

- Choose which objects, fields to fields mapping, user ownership, etc.
- Keep running free samples to ensure you have the mapping accurate.
- Once happy with the sample/ mapping, you can move forward.



## FULL MIGRATION



- The migration duration can vary from 30 minutes to 72 hours, depending on API calls allowed.
- Integrations, workflows should be paused in destination CRM for smooth data flow.
- Every user can continue to use the source/target system.

## QA



- Just because it says, self-service doesn't mean you're on your own.
- Our chat/support is accessible during regular business hours, or reach out via email: [support@trujay.com](mailto:support@trujay.com).

## LICENSE



- A license is leveraged for re-migrations, in case changes are required post-migration;
- Delta migrations, or updates of data to migrate;
- You are importing another system or as insurance.



## **ALL MIGRATION SERVICES**

<https://trujay.com/migration-services/>

## **MEET THE MIGRATION WIZARD**

<https://trujay.com/migration-wizard/>

## **MIGRATION WIZARD: CONNECT**

<https://app.trujay.com/migration/wizard/>

## **HOW TO CHECK RESULTS**

<https://www.loom.com/share/>

## **KNOWLEDGE BASE**

<https://help.trujay.com/>

## **SUPPORT**

[support@trujay.com](mailto:support@trujay.com)



# IMPORTANT LINKS





Meet The Wizard