Migration Process for Legacy Clients

> Underlined, bold, & italicized steps are automated. All others are manual steps.

1. Client Requests to migrate to Rubex from CSM/CAE
2. CSM/CAE creates amendment/renewal that includes migration from their legacy product to Rubex
3. CSM/CAE close wins an opportunity to migrate to Rubex.
4. ***<u>A migration order is created on the client's account</u>***
5. ***<u>The client shows on the Professional Services team "to be migrated" report</u>***
6. PS team starts testing the migration
7. ***<u>Upon complete and successful test, the Account Owner receives an automated chatter in SFDC informing them of the completed test and prompts to set up a migration date with client</u>***
8. EFCO Client: On the migration order, the Account Owner (usually CAE) enters a date into the "Scheduled Date" field and informs the client of that date. Usually, no coordination is necessary as the migration is done in the background without the client present.
9. Growth CAE Manager will follow up with their team regarding scheduling EFCO migrations
10. Desktop/RPC Client: Professional Services team coordinates with the client for a migration date. They enter that date into the "Scheduled Date" field
11. Revenue Operations see the scheduled date on their "daily task" dashboard and provisions a Rubex account
12. ***<u>Client receives an email to set up their Rubex password from the Hub</u>***
13. Professional Services team starts the migration process per the scheduled date/time
14. Professional Services team informs the CAE/CSM and client of the completed migration

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