**MIGRATION PROCESS - DOCUMENT**

**For Extsing Customers to Migrate from Classic to NextGen**

The information below in this document is only a process document that specifies various tasks and activities that involved as part of migration that takes care all the manual procedures and validations involved apart from the automated data migration through the scripts for any individual account.

**Considerations Before Migration**

For every element ID that is in NextGen for Contacts, Forms, Campaigns, Groups, LeadSources, we will have a referance look-up to Classic Contact ID that will be migrationg to in NextGen.

**Step1 :**

Identify –the active services and their dates on activities for validating and defining the benchmark date for history data migration.

**Step2 :**

Identify the list of elements from the below modules that needs to be created manually under NextGen – With their expected end dates or durations to upgrage them for providing the services via NextGen.

**Forms** – Forms that has active form submissions

**Campaigns** - Active Campaigns that are being sent

**Automation** – Workflows that has the contacts in the queue to complete the current on going drip series.

**Step3:**

For all the identified elements from the above modules – Create the required elements in the NextGen and have their referance ID’s documented as drafted below.

**Forms Creation & Validation:**

For every form that has Response campaign, Response Series, Leadscore, Notify user/group, Add Tag – There will be aequivalent automation workflow that needs to be created in NextGen before enabling the connector for the form, Since once the connector is enabled for the form – All the activities associated with the form will be stopped under classic.

This below scenario is ignored since only active forms will have submissions and needs not be controlled at each form level for Connector Status.

~~25 Forms~~

~~10 Forms – used Externally~~

~~15 Forms - Created and Are being internally tested or Used / Scraped~~

**Campaigns Creation & Validation:**

For Already sent Campaigns and need only creative as part of migration from classic – Those creative’s will be migrated as Sent templates for NextGen.

For Already sent Campaigns that needs the historical data (Clicks, Views) will be aggregated to a single campiagn based on Classic Campaign ID’s – Excluding Series sent.

For Scheduled Campaigns – Those will be stopped in the classic and will be recreated and scheduled in NextGen.

**Automation Creation & Validation:**

Classic had MAP ( Marketing Automation Process) , Campaigns Series as 2different process under marketing automation – While NextGen will handle both under one roof as Automation Workflows.

**Marketing Automation Process**

Should we need to handle the confugred Actions – Needs to be identified for Migration - Business Decision

**Approach: If Incase of Ignoring the Actions**

We will create the Automation Workflow similar to MAP in Classic and Set the Workflow to active.

Disable the MAP in Classic

Identify the completed contacts for the MAP and Handle them while performaing actions in the workflow.

**Approach: If Incase if we need to handle the Actions**

We will create the Automation Workflow similar to MAP in Classic and Set the Workflow to active.

We will create a Link referance ID for Classic to NextGen and have the notifications sent by Classic on each link click identified to Nextgen to perform associated action on the click (DEV)

Disable the MAP in Classic

**Campaign Series**

We will create all the identified campaign series in the NextGen for the account.

Series can triggers from following areas - Below items that can be handled will be configured in NextGen.

1. Direct Send - N/A - POST BETA
2. Form Response - Will be handeled by Automation Workflow
3. MAP Response - N/A - POST BETA
4. Saved Search - Will be handeled by Automation Workflow
5. Customizations - @ Account level - N/A - POST BETA

Once the Series Workflows are created and set to Active - Those referanced series in classic will be stopped in classi.

All the contact referances for whome the series are sent will be maintained to moniter for re-sends to handle.

***Example :*** *Tracker report for all the migrated Items for each account.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Module** | **Classic ID** | **NextGen ID** | **Name / Title** | **Remarks** | **Status** |
| Form | #12 | #26 | Contact Us Form | Remarks while creating form in NextGen – Limitations or any other Exceptions |  |

**Note:** As part of the Migration as soon as all the elements that identified and created – post validation of the elements – we will disable to logins to the classic for the account users in order to avoid new element creations under classic.

**Step4:**

Based on the above report status on each elements

**Forms -** Enable Forms Connector for the Account in Classic for Forms.

**Automation -** for any Automation series that does not have any contacts in the queue then we will create the automation workflow Under nextGen and delete in classic. Else we will wait till the serires completes to mograte the automation workflow.

Any new marketing automation workflows will be created dircetly under NextGen.

**Note:** We will disable the creation capabilities for new series creations under classic.