

Cloud Fax Migration Checklist

TRITON TELEPHONE

How to change fax providers without losing numbers, devices or workflows

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1 DISCOVERY

- ☐ Inventory every fax number, user, mailbox and routing destination.
- ☐ Inventory fax machines, multifunction printers and ATAs by location.
- ☐ Document monthly volume, large jobs and peak simultaneous activity.
- ☐ Identify privacy, retention, audit or regulated workflow requirements.

2 PORTING & DESIGN

- ☐ Gather current billing records, account details and port authorizations.
- ☐ Decide which numbers will be ported, forwarded where available, or retired.
- ☐ Map email-to-fax and fax-to-email users, mailboxes and addressing changes.
- ☐ Identify API, EHR, document-management and application integrations.

3 PARALLEL TESTING & CUTOVER

- ☐ Create test owners, success criteria, escalation contacts and rollback steps.
- ☐ Test inbound, outbound, multi-page and representative failure scenarios.
- ☐ Test every required API/application workflow and every fax ATA / MFP.
- ☐ If special or international destinations are required, verify and test them.

4 POST-MIGRATION

- ☐ Validate number ownership, inbound routing and outbound completion after cutover.
- ☐ Train users and document the new email-to-fax addressing format.
- ☐ Monitor delivery failures, retries and user issues closely during week one.
- ☐ Compare usage with the pre-migration baseline to find missed workflows.

Need help reviewing a fax migration?

Schedule a fax migration review: tritontelephone.com/contact.html | 844.329.8329