How to migrate from MaidPad to Crewstro (on your own)

This guide brings all of your company's data from MaidPad to Crewstro: clients, addresses and home access, notes, accepted terms, text conversations, every photo, every cleaning (past ones, with start and end times, and scheduled ones), recurring series, invoices with payments, payments received at the cleaning, reviews, your team (active and inactive), each person's payroll and your expenses.

Total time: 1 to 2 hours, mostly waiting for the computer to work.

You need: a computer with Google Chrome, your MaidPad login (owner or Master) and your Crewstro login (administrator).

Before you start

1. **Don't cancel MaidPad yet.** It keeps working during the whole migration and nothing is deleted there. Cancel only after checking everything in Crewstro (step 6).
2. **Pick your switch-over day.** That is the day your team starts using Crewstro and reminders start going out from it. Until then, Crewstro sends no message to your clients.
3. **Write down your MaidPad numbers** to check later:
    - **Clients** screen: Total Clients, Client Base and Closed;
    - **Accounting** screen: unpaid invoices and client balances;
    - **Schedule** screen: how many cleanings this month and next;
    - **Team**: how many active and inactive people.

Step 1. Download the MaidPad client report (recommended)

The report has information the screen doesn't show together, such as second phone, birthday, payment method and home type.

1. In MaidPad, open **Preferences** (≡ menu in the top right corner).
2. Scroll down to **Reports** and, next to **Clients**, click the download button.
3. The file **Client Report (date).xlsx** goes to your Downloads folder.

Step 2. Run the Crewstro collector inside MaidPad

MaidPad has no button that exports your history, invoices, notes and conversations. The collector is a ready-made Crewstro code that reads that information straight from the MaidPad screens, with your login, and puts it all in one file. **It only reads: it changes and deletes nothing in MaidPad.**

1. In Crewstro, go to **Settings > Import** and find the **Migrate from MaidPad** card.
2. Click **Copy the collection code**.
3. In another Chrome tab, open MaidPad and sign in. Stay on the home screen (Dashboard).
4. Press **F12** (on a Mac: **Cmd + Option + J**). A panel opens; click the **Console** tab.
5. Click inside the Console, paste the code (**Ctrl + V**, on a Mac **Cmd + V**) and press **Enter**.
    - If Chrome shows a warning telling you not to paste code you don't understand, type **allow pasting**, press Enter and paste again. It is a normal Chrome protection.
6. The collector writes its progress in green: clients, calendar, cleanings, conversations, invoices, team. **Don't close the tab or turn off the computer.** For an account with 500 clients it takes 20 to 60 minutes.
7. At the end you see "Done" and Chrome downloads the file **maidpad-export.json**.
    - If Chrome asks whether maidpad.com may download files, click **Allow**.

> Keep the file safe: it has your clients' data. After checking the migration, delete it.

Step 3. Bring the file into Crewstro

1. Go back to Crewstro, in **Settings > Import > Migrate from MaidPad**.
2. Click **Choose files** and select **maidpad-export.json** and the **Client Report .xlsx** from step 1 (you can pick both at once).
3. **What will come in** shows the numbers: clients, former clients, recurring, addresses, cleanings, upcoming cleanings, invoices, payments, paid at the cleaning, cleanings with clock times, photos, notes, messages, expenses, team members and payroll payments.
4. Compare them with the numbers you wrote down from MaidPad.
5. Click **Migrate now** and follow each step until all have a ✓. The **Photos** step copies every MaidPad photo and takes a few minutes. If a photo or a team member doesn't come in, the card lists them with the reason at the end: click Migrate now again.

Nobody on your team gets an email during the migration. People join your team without a password; you give each one a password when they are ready to start (step 5).

If it stops halfway (internet dropped, computer went to sleep), just click **Migrate now** again: it picks up where it stopped and **nothing is duplicated**.

Step 4. Check

In MaidPad	Where to check in Crewstro
Clients (Total, Base, Closed)	**Clients**: active and former clients
This month's and upcoming schedule	**Schedule**
Recurring clients	**Clients**, **Recurring** tag; the profile shows the recurring series
Unpaid invoices and client balances	**Invoices**, open filter
Payments received at the cleaning (cash, Venmo, check)	**Payments** (no invoice, with the cleaning date)
Home, note and cleaning photos	Client profile > home photos; visit photos in the service history
A client's notes and conversations	Client profile, history tab
Team (active and inactive)	**Team**: inactive people show as deactivated
Each person's payroll	The person's profile in **Team** ("Payroll paid") and **Expenses** (Payroll category)
Expenses	**Expenses**

Open 3 or 4 clients you know well and check address, home access, price and upcoming cleanings.

Four things to decide before turning on payment reminders:

1. **Old open invoices.** They come in open and past due, just like in MaidPad. Pick a cut-off date and settle each one: **Mark as paid** (paid outside the system), **Mark as bad debt** (the client will never pay) or **Cancel** (should never have existed). You can do many at once: select the invoices in the list and use the bar at the bottom. Do this before turning on the payment reminder, or clients get reminders for old invoices.
2. **Cleanings paid without an amount.** When MaidPad marked a cleaning as paid without saving how much, it comes into Payments with the cleaning price, and the description says so. Check that this is right.
3. **Cleanings done with no invoice and no payment.** MaidPad's Client Balance adds these cleanings; Crewstro only shows what is on an invoice. If the client still owes, create the invoice in Crewstro (or ask support to create this year's all at once).
4. **"Pending" expenses.** MaidPad marks many already-paid expenses as pending, and a pending expense doesn't go into Bookkeeping. In Expenses, mark as paid the ones that were paid.

Bookkeeping right after the migration: it is normal for the dashboard to show negative **Cash on hand**. Paid expenses left the bank account, while money received sits in "Undeposited funds" until it matches the deposits on your bank statement. To fix it, in **Bookkeeping**:

- **Banking > Import statement:** this year's statement, downloaded from your bank's website (CSV, OFX or PDF);
- **New journal entry:** the bank's opening balance on the first day of the year;
- check your expense categories: payroll goes to wages, and owner draws are not an expense.

Step 5. Set up by hand what doesn't migrate

When the migration ends, the card shows the list **Set these up again in Crewstro**, with the texts you used in MaidPad. It includes:

- **Reminders and automatic messages:** cleaning reminder, invoice, receipt, payment reminder, review request. Set them up in **Settings > Notifications** and in **Automations**. You can copy your MaidPad texts from the list.
- **Payment methods and tips:** connect Stripe or Square in **Settings > Apps** and adjust the accepted methods.
- **Team passwords:** your team is already in Crewstro, but nobody has a password. When someone is ready to start, open their profile in **Team** and use **Reset password**; they create their own on first sign-in. Anyone whose email is already used in Crewstro doesn't come in through the migration: invite them in **Team > Invite**.
- **Clients' cards:** they are stored with MaidPad's payment processor and cannot be transferred. On the first charge through Crewstro, the client adds the card again through the invoice link.

Clients who pay once a month

Some clients, usually commercial ones, have a cleaning every week but pay only once, for the month. In MaidPad each cleaning becomes an invoice. In Crewstro you put it all on one invoice per month.

1. In the **Jobs** menu, click **Recurring**. On the client's row, open the three-dot menu and choose **Edit**.
2. In the **Billing** field, choose:
    - **One invoice a month, with the visits done:** each cleaning completed that month becomes a line on the same invoice. The total follows the number of cleanings.
    - **One invoice a month, fixed amount:** fill in the **Amount per month**. The invoice goes out for that amount whether the month has 4 or 5 cleanings. The per-visit price still counts for payroll and margin.
3. Save. From then on, the cleanings in that series stop creating one invoice each.
4. At the end of the month, go to **Invoices > Bill monthly series**, pick the month and the series, and click to create. The invoices are created as **drafts**: check them and send, like any invoice. The system never creates two invoices for the same series in the same month.

When to switch: on switch-over day. What was already invoiced stays as it is; the change applies to cleanings completed after it. The migration brings every series in as **Per visit**, because that is how MaidPad bills.

Step 6. Switch-over day

1. **In MaidPad:** turn off automations (Preferences > Automations) and reminders, so clients don't get double messages.
2. **In Crewstro:** turn on the reminders and automations you set up in step 5. The payment reminder only after settling the old invoices.
3. Give a password to whoever will use the app (Team > the person's profile > Reset password).
4. Show your team the Crewstro app (Help > team videos and manual).
5. After one or two weeks using Crewstro with no surprises, cancel MaidPad.

How each MaidPad item lands in Crewstro

MaidPad	Crewstro
Active or Scheduled stage	Active client
Paused stage	If they had a completed cleaning: former client (dated to the last cleaning), tagged "Pausado (MaidPad)". If never: lead.
Former Client or Lost Lead stage (with a completed cleaning)	Former client (dated to the last cleaning)
Contact with no cleaning and no invoice	Lead (in Crewstro, a lead doesn't count as a client)
Scheduled recurring cleaning	Active recurring series with the same frequency, time and price. Upcoming cleanings are exactly the ones in MaidPad (including those you moved); after the last one, Crewstro continues the sequence on its own.
"One Time" cleaning	One-off cleaning
Addresses, access method and code	The client's addresses, with access where the team reads it
Home type, Floor type, Countertop, Areas to check	Address notes
Note visible to the team	Address notes (the team sees them) and history

MaidPad	Crewstro
Internal note	Internal notes (office only) and history
Accepted terms (contracts)	Client history, with the date accepted
Text conversation	Client history (received and sent messages)
Cleaning type with a person's name	Becomes "who did it" on the cleaning; the type stays as the service
Cleaning start, end and "on the way"	The visit's clock times (same time, in the company's time zone)
Payment marked on the cleaning, no invoice	A payment in **Payments**, no invoice, with method and reference (no amount in MaidPad: the cleaning price)
Client profile photo	Home photos (office only)
Address photo and note photo	Home photos, with the note as caption (the team sees it if they did in MaidPad)
Cleaning note photo	Visit photos
Photo sent in a conversation	Inside the message itself
Review (stars)	Average on the profile; each cleaning's rating in the visit notes
Team 1, Team 2	Teams
Active employee (Master, Manager, Comercial, Cleaner)	Team member: the Master is you (account owner); Manager becomes supervisor, Comercial becomes office, Cleaner becomes cleaner
Inactive employee	Deactivated team member with access blocked (kept for history)
Payroll	On each person's profile ("Payroll paid") and in Expenses, Payroll category
Invoice, items, tax, tip, payment	Invoice with items and the recorded payment (method and date); the number stays the same and the next Crewstro invoice continues the numbering
Expenses	Expenses, with the same category
Second phone, birthday, client since, payment method and info	Client profile fields

Common problems

- **"The code does nothing" in the Console:** make sure you are on the MaidPad tab (not Crewstro's) and signed in. If Chrome asked, type "allow pasting" first.

- **The file didn't download:** look for an icon in the address bar asking to allow downloads from maidpad.com and click Allow. Then run the code again.
- **The preview said the cleaning details are missing:** the collector was interrupted. Run it again until "Done" shows.
- **A number doesn't match:** note which one and contact Crewstro support (Help > Contact support). The migration can run again without duplicating.
- **Negative "Cash on hand" in Bookkeeping:** normal right after the migration; see the end of step 4.
- **A team member didn't come in:** their email already has a Crewstro login. Invite them in Team > Invite.