



DATASHEET

# FAQ: Migrating from SFDC to Maximizer

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# MIGRATING FROM SFDC TO MAXIMIZER

## **CAN I TRANSFER MY DATA FROM MY SFDC TO MAXIMIZER CRM?**

Yes!

## **HOW LONG DOES IT TAKE?**

The process takes as little as a few days to 2 weeks to complete the stages of data migration, depending on how quickly you can review the results trial migration.

## **HOW LONG WILL I BE UNABLE TO USE MY SYSTEM?**

Generally, you will be unable to enter data for 1 to 3 days while the production data conversion is being performed. During the initial trial migration phase, you will be able to use your current system normally.

## **WILL I BE ABLE TO FIND MY SFDC DATA IN MAXIMIZER?**

Yes! However, Maximizer and the SFDC data do have similar but different concepts and data structures for the same type of data.

To help you understand the differences, our Solution Consultant will schedule a session to walk you through your data after it has been moved into Maximizer.

In many cases, setting up Key Fields and Column views to visualize your data in Maximizer is quick, but depending on the amount of fields and data manipulation required post-migration, the solution consultant can provide you with either an estimate or “how-to” steps on accomplishing this going forward.

## **DO YOU WARRANTY YOUR DATA MIGRATION?**

Yes, Maximizer will provide a 30-day warranty that the data has been migrated as reviewed with you following Stage 2 prior to performing the production migration.

Once you begin changing data, the ability to make updates and corrections to the imported data becomes limited. Therefore, we encourage a thorough review of your data prior to Go Live.

## **DOES THE MIGRATION INCLUDE DATA CLEANSING?**

No, you as the client are responsible for providing a clean source of data for both the test run and again for the production migration. Further data cleanup can be provided by your Maximizer Solution Consultant for an additional charge.

## **ARE THERE ANY CAVEATS?**

Due to database and application differences, some fields are converted on a “best efforts” basis, this means some fields may appear differently in Maximizer vs your old SFDC system.

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All conversions require the Database Backup/Export generated by SFDC.

## **I AM READY, WHAT IS THE NEXT STEP?**

Notify your Account Manager or send an email to [services@maximizer.com](mailto:services@maximizer.com) and we will contact you within 2 business days to schedule the Technical Assessment.

## WHAT IS THE GENERAL PROCESS TO MIGRATE DATA TO MAXIMIZER CRM?

### STAGE 1 TECHNICAL CONSULTATION

30-minute call between you and the solution consultant to ensure you understand the migration process and limitations, and to provide you with an opportunity to ask questions about the process.

### STAGE 2 DATA MAPPING AND TEST RUN

This is the most important step of the migration. It involves a full trial run of the conversion process.

Your solution consultant will work with you to perform the following steps:

The Consultant will arrange a review call with you to demonstrate your usage of SFDC in order to establish appropriate field data mappings from SFDC to Maximizer.

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Once completed, you will provide a copy of your SFDC database to the Consultant

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Setup the SFDC data base and prepare for migration

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Runs the migration tools to convert the SFDC database to Maximizer

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Tests and Reviews the results with you (Repeats the steps as needed)

You will have 30 days to review the data for correctness, and to request changes prior to the production migration. Following this period, the client will be asked to sign-off prior to the production migration.

### STAGE 2A MIGRATION “DATA ADJUSTMENTS”

The reality of data conversions is that although we can successfully copy data from one CRM application to another, it doesn't mean that the data from the source system always makes the best use of the Maximizer data structure until the data can be moved to newly identified fields.

For example, you may have created your own “Birthdate” field and this data will be moved correctly; however, you can improve the usage of the system by moving the data to a corresponding Maximizer System Field. The consultant will work with you to determine the best approach to handle these scenarios.

### STAGE 3 PRODUCTION MIGRATION

Once you have signed off on the test data and review, the Production Migration will be scheduled. The actual migration on the go-live date should be the easiest part of the conversion process. You send a fresh copy of the database to the Solution Consultant, who will migrate data to Maximizer along with any changes agreed to in Stage 2. The migrated database is either deployed to your Maximizer server or CRM Live.

### STAGE 4 GO LIVE! REVIEW AND ORIENTATION ON USING YOUR DATA IN MAXIMIZER

One on one review of your migrated data with orientation to Maximizer as needed. If you have purchased additional consulting time, the consultant will work with you to complete the remaining deliverables.

## WHAT ITEMS ARE SPECIFICALLY CONVERTED FOR SFDC?

(If an item is not specifically listed here, it is NOT converted.)

FROM SFDC	TO MAXIMIZER	ADDITIONAL INFORMATION
<b>Accounts</b>	Address Book (Company or Individual)	
<b>Contacts</b>	Contacts attached to a parent Company or Individual Record	
<b>Leads</b>	Individual	Will be converted to Maximizer as Individuals with the "Sales Lead" flag set.
<b>Custom Fields</b>	<i>User-Defined Fields</i>	Custom Fields are migrated for SFDC Accounts, Contacts and Leads only.
<b>Addresses</b>	Addresses	If more than one address is present, the additional addresses are sent to Maximizer as Alternate Addresses at the Individual level.
<b>Email Addresses</b>	Email Address (1-3)	If more than 3 email addresses are present, additional addresses are logged against the Maximizer record as a special Note for reference purposes.
<b>Phone Numbers</b>	Phone Number (1-4)	If more than 4 phone numbers are present, additional numbers are logged against the Maximizer record as a special Note for reference purposes.
<b>Opportunities</b>	Opportunity	Opportunities, including several Basic and User-Defined Fields are converted.
<b>Notes</b>	Note	The Maximizer "Note Type" and "Category" fields will be used to identify historical SFDC notes.
<b>Attachments</b>	Document	Attachments provided with the SFDC backup will be converted to Maximizer as Embedded documents.
<b>Event</b>	Appointments	Uncompleted items will be converted to Maximizer as Calendar Appointments.
	Notes	Completed items will be converted to Maximizer as historical notes - Extended data stored with the SFDC Task will be written into the body of the Maximizer Note.  SFDC User-Defined Fields attached to Events will NOT be migrated.
<b>Tasks</b>	Hotlist Task	Uncompleted items will be converted as Maximizer Hotlist Tasks
	Notes	Completed items will be converted to Maximizer as historical notes - Extended data stored with the SFDC Task will be written into the body of the Maximizer Note  SFDC User-Defined Fields attached to Tasks will NOT be migrated.
<b>User IDs</b>	User IDs	

## About Maximizer

### Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/any-time mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



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