



DATASHEET

FAQ: Migrating from Act! (v12+) to Maximizer

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MIGRATING FROM ACT! (V12+) TO MAXIMIZER CRM

CAN I TRANSFER MY DATA FROM ACT! 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 of the trial migration.

HOW LONG WILL I BE UNABLE TO USE MY SYSTEM?

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

WILL I BE ABLE TO FIND MY ACT! DATA IN MAXIMIZER?

The Act! data that is reviewed with you prior to migration will be visible in Maximizer. Maximizer and Act! data 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 where your data appears 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 for post-migration data cleansing or merging, or simple “how-to” steps on accomplishing this going forward.

IS YOUR DATA MIGRATION SERVICE GUARANTEED?

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

Once you begin working with the migrated data, the ability to do updates and corrections becomes limited. Therefore, we encourage you to thoroughly review your data prior to Go Live, to ensure it meets your expectations.

DOES THE MIGRATION INCLUDE DATA CLEANSING OR MERGING?

No. You are responsible for providing a clean source of data for the test run and the production migration. Further data cleanup or merging 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 that some fields will appear differently in Maximizer vs your old Act! system.
 - For example, Act! Opportunities feature the ability to link to multiple “Product” entities (with each Product containing data like Name, Description, Price, SKU, etc.) – but the Maximizer “Products/Services” feature supports a name only. In cases like this, the “spirit” of the source data is brought over to Maximizer as there is not a data type in Maximize that stores the extra data from Act!
- All conversions require the Database Backup/Export generated by Act!

I AM READY, WHAT IS THE NEXT STEP?

Contact your Maximizer Account Manager or send an email to services@maximizer.com. We will contact you to schedule your Technical Assessment.

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

STAGE 1 TECHNICAL CONSULTATION

A 30-minute call between you and the Solution Consultant to review the migration process and limitations, and provide you with an opportunity to ask questions.

STAGE 2 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 schedule a call to review your usage of Act! and establish appropriate field data mappings from Act! to Maximizer.
- You provide a copy of your Act! database to the Consultant.
- The Consultant sets up a fresh Maximizer Database and prepares for migration.
- The Consultant imports your Act! database into Maximizer CRM.
- The Consultant tests and reviews the results with you
(Repeats steps as needed)

NOTE: You have 30 days to review the migrated data for accuracy, and request changes prior to the final production migration. Following your review, you will be asked to sign-off on the accuracy of the test run prior to the production migration

STAGE 2A MIGRATION “DATA ADJUSTMENTS”

Data conversions are complex, and although we can successfully bring and transform data from one CRM application to another, it doesn't always mean that the data from the source system makes the best use of the Maximizer data structure. Some may need data moved to a more appropriate system-level field in Maximizer.

For example, you may have created a “birthdate” field in your existing CRM solution. This data will be moved correctly; however, you can improve the usage of Maximizer CRM by moving the data to a corresponding Maximizer System Field. The Consultant will work with you to determine the best approach to manage these data adjustments during the migration process.

STAGE 3 PRODUCTION MIGRATION

After you sign off on the test data migration and review, the Production Migration will be scheduled, and a Go-Live date agreed upon. The production migration is typically the easiest part of the conversion process. You send a fresh copy of your database to the Solution Consultant, who migrates the data into Maximizer along with any data adjustments agreed to in Stage 2. The migrated database is either deployed to your in-house (on premise) server or to your Maximizer CRM Live database hosted in our cloud.

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

Your Solution Consultant will conduct a one-on-one review of your migrated data within Maximizer.

If you have purchased additional consulting time, the Consultant will work with you to complete the remaining deliverables.

WHAT ITEMS ARE SPECIFICALLY CONVERTED FOR ACT! V12?

(If an item is not listed here, it will NOT be converted, unless additional consulting time is purchased.)

FROM ACT! V12	TO MAXIMIZER	ADDITIONAL INFORMATION
Primary Contacts	Address Book	Mapped to Maximizer as Individuals.
Secondary Contacts	Individual Contacts	Mapped to Maximizer as Contacts related to parent Individuals.
Custom/User-Defined Fields	User-Defined Fields	Address Book and Opportunity Only
Groups	Special UDF*	Act! supports the ability to group records together. Maximizer does not have an equivalent "Group" concept, so any data stored against the Act! Group record is not migrated to Maximizer. *If a given Act! record belongs to an Act! Group, a special UDF is tagged in Maximizer to indicate its group membership.
Addresses	Addresses	If more than one address is present, the additional addresses are sent to Maximizer as Alternate Addresses at the Individual level.
Email Addresses	Email Address (1-3)	If an Act! contact has more than 3 email addresses, additional addresses are logged against the Maximizer record as a special Note for reference purposes.
Phone Numbers	Phone Number (1-4)	If an Act! contact has more than 4 phone numbers, additional numbers are logged against the Maximizer record as a special Note for reference purposes.
History	Note	Converted to Maximizer as Note data. As there is not an exact match in functionality; the key data elements from the completed activities are mapped into the body of the Maximizer Note. Provided for historical reference purposes only.
Notes	Note	Act! Notes are migrated to Maximizer.
Attachments	Document	Act! stores all documents as linked documents – however, the linked documents should be included in the complete Act! backup set. When processing the data, Maximizer will locate the linked file within the Act! backup set and will convert it to an embedded document in Maximizer.
Activities	Hotlist Task/Calendar	"Timeless" Act! Activities are converted to Maximizer as Hotlist Tasks. Act! Activity with a defined time period are converted to Maximizer as a Calendar Appointment.
Related Entries	Related Entries	
Opportunities	Opportunities	Opportunity History, Notes, Attachments and Activities have the same restrictions as listed for the Address Book.
Opportunity Products	Products/Services	Product Name Only – Description, Price, SKU, and other extended data from the Product Catalog do not get stored in Maximizer.
User IDs	User IDs	User IDs will be recreated in Maximizer.

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/anytime 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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