



DATASHEET

# FAQ: Migrating from Goldmine (v8 and up / Microsoft SQL) to Maximizer

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 **MAXIMIZER**CRM

# MIGRATING FROM GOLDMINE (V8 AND UP / MICROSOFT SQL) TO MAXIMIZER CRM

## **CAN I TRANSFER MY DATA FROM GOLDMINE 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 we receive feedback from you on 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 GOLDMINE DATA IN MAXIMIZER?**

The Goldmine data that is reviewed with you prior to migration will be visible in Maximizer. Maximizer and Goldmine 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 imported 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 Goldmine system.
- All conversions require the Database Backup/Export generated by Goldmine.

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

Contact your Maximizer Account Manager or send an email to [services@maximizer.com](mailto: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 DATA MAPPING AND TEST RUN

*This is the most important step of the migration, involving 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 Goldmine and establish appropriate field data mappings from Goldmine to Maximizer.
- You provide a copy of your Goldmine database to the Consultant
- The Consultant sets up a fresh Maximizer database and prepares for migration.
- The Consultant imports your Goldmine database into Maximizer CRM.
- The Consultant tests and reviews the results with you (repeats steps above 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*

*in 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. After consultation with you, some data may need to be moved to more appropriate system-level fields in Maximizer.*

*For example, you may have created a “birthdate” field in your existing CRM solution. This data will be moved to a complementary field in Maximizer; 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 purchased additional consulting time, the Consultant will work with you to complete any remaining deliverables.*

## WHAT ITEMS ARE SPECIFICALLY CONVERTED FOR GOLDMINE?

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

FROM GOLDMINE (V8+/SQL)	TO MAXIMIZER	ADDITIONAL INFORMATION
<b>Primary Contacts</b>	Address Book – Individuals/Household	Additional Custom work is required to convert data to Household / Contact pairs for Wealth Management editions.  This is available for an additional charge.
<b>Additional Contacts</b>	Individual Contacts	Mapped to Maximizer as Contacts related to Parent Individuals.
<b>Custom/User-Defined Fields</b>	User-Defined Fields	For Maximizer Individuals 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>Internet Addresses</b>	Email Address (1-3) Website Address (1)	If a Goldmine Contact has more than 3 email addresses or 1 website address, additional addresses are logged against the Maximizer record as a special Note for reference purposes.
<b>Phone Numbers</b>	Phone Number (1-4)	If a Goldmine Contact has more than 4 phone numbers, additional numbers are logged against the Maximizer record as a special Note for reference purposes.
<b>History</b>	Note	Converted to Maximizer as Note data. There is not an exact match in functionality here, so the key data elements from the completed Activities are mapped into the body of the Maximizer Note. Provided for historical reference purposes only.
<b>Linked Documents</b>	Document*	By default, all Goldmine documents are stored as linked documents. When using the Dbase version of Goldmine, it is not possible to convert these to embedded documents in Maximizer.  The data displayed in Maximizer is provided for historical reference only.  The documents will still physically reside in the original folder paths where they were linked in Goldmine.
<b>Emails</b>	Document*	We have often seen Goldmine act as the client's email program. Because of this, Goldmine may contain disproportionately high numbers of emails relative to the number of contacts in the database. It may take several conversion attempts to bring over all of the data.  Email attachments are not reattached to the converted email message because Goldmine stores these as linked files, and these links are replicated in Maximizer for historical reference purposes.
<b>Activities</b>	Calendar	Only incomplete/un-completed GM Activities are converted to Maximizer Calendar Appointments. Completed Activities are included with the History data and will be mapped to Maximizer as Notes.
<b>User IDs</b>	User IDs	Goldmine 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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