



DATASHEET

FAQ: Migrating from Goldmine (dBase) to Maximizer

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MIGRATING FROM GOLDMINE (DBASE) TO MAXIMIZER CRM

CAN I TRANSFER MY DATA FROM GOLDMINE (DBASE) TO MAXIMIZER CRM?

Yes!

HOW LONG DOES IT TAKE?

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.

WHAT IF I AM ON AN OLDER VERSION OF GOLDMINE?

Maximizer may be able to provide assistance with upgrading your copy of Goldmine. Version 6.x for Goldmine was release around the year 2001, and later versions are generally on a Microsoft SQL database engine.

WILL I BE ABLE TO FIND MY GOLDMINE (DBASE) DATA IN MAXIMIZER?

The Goldmine (dBase) data that is reviewed with you prior to migration will be visible in Maximizer. Maximizer and Goldmine (dBase) 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 of 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 (dBase) system.
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ARE GOLDMINE EMAILS CONVERTED?

- Due to limitations in the Dbase database platform, emails stored in Goldmine cannot be extracted and will not be converted to Maximizer.
- Conversion of these emails is possible from Microsoft SQL Server based versions of Goldmine, but the technologies available for the older dBase platform prevent the conversion of this data.

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 Goldmine (dBase) and to establish appropriate field data mappings from Goldmine (dBase) to Maximizer.
- You provide a copy of your Goldmine (dBase) database to the Consultant.
- The Consultant sets up a fresh Maximizer database and prepares for migration.
- The Consultant imports your Goldmine (dBase) 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 this period, 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 CRM Live in Maximizer's 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 IMPORTED FOR GOLDMINE?

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

FROM GOLDMINE (DBASE)	TO MAXIMIZER	ADDITIONAL INFORMATION
Primary Contacts	Address Book – Individuals/Household	Additional Custom work is required to convert data to Household / Contact pairs for Wealth Management editions. This service is available at an additional cost.
Custom/User-Defined Fields	User-Defined Fields	For Maximizer Individuals Only.
Addresses	Addresses	If more than one address is present, the additional addresses are sent to Maximizer as Alternate Addresses at the Individual level.
Internet Addresses	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.
Phone Numbers	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.
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.
Linked Documents	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.
Activities	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
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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