

Sage Migrator - ACT! and GoldMine migration to SalesLogix, Sage CRM, Sage CRM.com

Developed in conjunction with Sage, Sage Migrator is designed to provide a complete and effective solution to the challenge of migrating one CRM system to another.

Sage Migrator provides a nearly complete migration of the source system to the target; generally, this includes:

- company and contact information
- notes, history, and activities
- attached documents
- email, with attachments
- opportunities

In addition, it is possible to customise Sage Migrator to move customised data, or to exclude data that should not be brought across. When performing a migration, record ownership can be correctly mapped from the source to the target ensuring that account security and visibility rules are maintained in the new system.

It has two components:

- The engine provides the core functionality for connecting to a data source, transforming the data, and mapping and matching to target. The engine is based on Inaport.
- A **Migration Pack** consists of a set of profiles that implement the complete migration process.

The Sage Migrator engine has extensive functionality for implementing migrations:

- Profile Editor guides the building of the desired data transformations and source target mappings.
- Expression Editor offers almost unlimited potential for data manipulation and correction.
- Connector Manager provides extensive links to multiple sources.

At June 2007, the following Migration Packs are available:

Source	Possible Targets
ACT! Version 6	Sage CRM, Sage CRM.com, Sage SalesLogix
ACT! Version 7(2006) / 8(2006) / 9(2007)	Sage CRM, Sage CRM.com, Sage SalesLogix
GoldMine Versions 5.x and 6.x	Sage CRM, Sage CRM.com, Sage SalesLogix, ACT! by Sage

There are some restrictions:

- ACT! groups are not currently replicated
- Recurring activities are currently ignored
- Opportunity migration, particularly from GoldMine, may be only partially successful

The profiles are designed for standard systems. If the source or target system contains customisations, the profiles will need to be modified to include the customised data.

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