



Express Data Conversion for SugarCRM

Adopting a CRM solution for your business can be a complicated proposition, more so if you also need to transition data into it from an already existing solution, such as GoldMine.

Designed and developed by Acts Automation, Inc., the Express Data Conversion (EDC) tool aims at alleviating the complexities involved in getting your GoldMine data into SugarCRM to get you up and running quickly. To accomplish this task, EDC automatically handles many of the data massaging needs required to successfully make the transition, all within an easy to use, wizard driven interface.

Data massaging and cleansing however, are only part of the challenges faced in these scenarios. Differences between the applications and other technical factors should be analyzed before converting your data.

This document will help you understand the results you should expect from using EDC as well as some important limitations that should be considered and factored into your planning.

Features:

The Express Data Converter is designed to work exclusively with Microsoft SQL (MS-SQL) GoldMine databases. GoldMine users utilizing dBase databases should contact Acts Automation for further assistance.

Although only MS-SQL GoldMine database are supported, the SugarCRM database can be any of the supported platforms (Oracle, MS-SQL and MySQL). Important features include:

- Supports GoldMine 4.0 – 8.0
- Supports SugarCRM Community Edition, Professional Edition and Enterprise Edition
- OnDemand/Hosted and On Premise versions of SugarCRM are both supported
- No limits on the amount of data that can be converted
- Ability to import data from custom fields, email and web site address entries, notes, history, calendar, opportunities, forecasted sales and email messages
- Simple and fast, able to process thousands of records per hour

Wondering about the results? Here is a synopsis on what you should expect to see in your SugarCRM system after the process completes.

- GoldMine contact records split into Account and Contact records, and linked to each other
- An Account record for each GoldMine record with a valid¹ company value
- Contacts with their respective custom fields data
- Related data such as notes, calendar, etc., linked to corresponding Account/Contact
- User references in calendar, history and other related data are retained²

¹ Valid infers that the company field in GoldMine contains a value, i.e. not blank.



In short, your SugarCRM system should be rather complete and reflect your most important information from GoldMine. Although quite comprehensive, there are some limits to be aware of. Let us review some of those.

Limitations:

Due to differences between the applications and other technical factors, such as limits of the Application Programming Interface (API) for SugarCRM, certain restrictions exist within EDC. Some can be addressed through some additional programming, but it is strongly suggested you discuss this need with Acts Automation in advance so you may fully understand the challenges they present.

Known limits include:

- GoldMine includes additional activity types beyond those available in SugarCRM. Items that do not have a direct equivalent are imported as SugarCRM Tasks
- A contact's last name value is assumed to be everything after the first word in GoldMine's contact field³
- Contacts must have value in the contact field in GoldMine or they are ignored
- Contacts without a company field value in GoldMine are not linked to an Account record in SugarCRM
- Mappings and custom fields apply to Contacts only, all other mappings are static
- Notes tab information from GoldMine is mapped to its equivalent in SugarCRM, the Description field on a Contact entry
- Emails are imported into SugarCRM as Archived messages regardless of their state in GoldMine. Email folders, rules, distribution lists and all other GoldMine email center features are NOT imported.
- Extension values are automatically appended to phone numbers
- GoldMine's Address 1, 2 and 3 are automatically combined into single street field in SugarCRM
- Only 2 email addresses are imported per contact, the primary email address plus one other
- EDC requires a full GoldMine database and will not function with only the Contact tables.
- Attachments to GoldMine entries, such as those associated with linked documents, emails, InfoCenter/KnowledgeBase entries and all others, are not imported
- GoldMine data such as Details tab information does not have a direct equivalent in SugarCRM by default and thus, is ignored by the import process.

As indicated above, there are certain bits of GoldMine data that are not imported. As a general rule of thumb, if the data you want to import is not specifically mentioned in the Features section of this document, it means it does not get imported. If you have a need to import data beyond that mentioned in the Features list, please contact Acts Automation to discuss its feasibility.

² Assumes SugarCRM system already contains a list of user names that match those in GoldMine. Must be an exact match.

³ Example contact name in GoldMine: "John James Doe." In SugarCRM, the first name would be "John" and the last name would be "James Doe."



Warnings

Now that you have an understanding of what to expect, here are some important points to bear in mind:

- While EDC does its best to handle data massaging and validation needs, it is impossible for it to compensate for every scenario, especially corrupted data. The resulting success of your import will depend on how clean your data is!
- Email messages can take substantially longer to process than other data. If you have a lot of emails to import, plan accordingly. Testing has shown that a best case scenario can handle approximately 15% the volume of other data⁴ on an hourly basis.

Custom import routines are available upon request. Please do not hesitate to contact us to further discuss how we may be to assist you in making your CRM transition a smoother process!

⁴ On average, testing indicates it is able to import approximately 1,200 – 1,500 email records per hour. Factors that slow it down include: lengthy messages, long list of "To", "CC" and/or "BCC" recipients.