

MigrateAdmin™

MigrateAdmin™ by KEYSTROKE

User's Guide

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Table Of Contents

Contents

Welcome To MigrateAdmin	4
System Requirements	5
ACT! Minimum System Requirements	5
MigrateAdmin Requirements	5
Getting Started	6
How To Start MigrateAdmin.....	6
MigrateAdmin Setup	7
1. Using The Getting Started Wizard	7
2. Setting Up MigrateAdmin	10
3. Creating Your GoldMine Configuration File	11
4. Field Mapping Information	14
Migrating Your Data	17
1. Starting The Migration Process.....	17
2. During The Migration	19
3. After Migration	20
Where Did My Data Go?	21
Post Conversion Information.....	21
Where Do I Map My Notes, Histories, etc.?	23
Where Do My Extra Email Addresses Go?	24
Trialware Information.....	25
Registration	26
Activation.....	27
Technical Support	29
Contact Us.....	29

Welcome to MigrateAdmin by Keystroke

Convert GoldMine® data directly into ACT! without leaving valuable data behind!

Now you can convert your GoldMine data directly into ACT! without leaving valuable data behind. MigrateAdmin will completely convert unlimited contacts, companies, activities, histories, notes, sales, e-mails, groups, custom fields, attachments and more! Your important data and data relationships are maintained so you don't miss a beat.

System Requirements

MigrateAdmin adheres to the same requirements as the ACT! Minimum System Requirements for your version.

MigrateAdmin Requirements

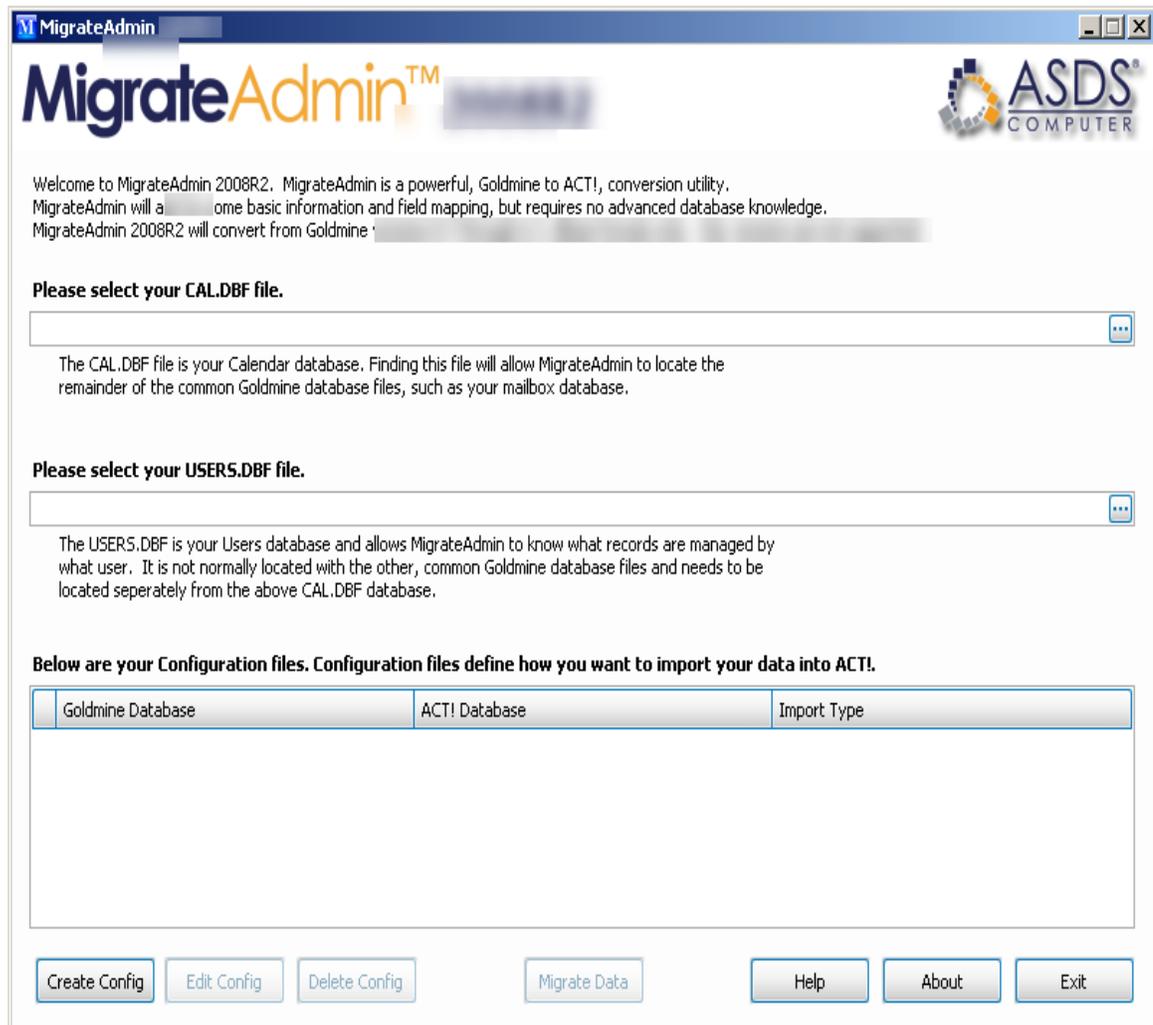
- ◆ ACT! Pro or Premium
- ◆ GoldMine database must be in dBase format,

Getting Started

How to start MigrateAdmin



Or you can go to Windows start menu, **Start > Program > KEYSTROKE > MigrateAdmin** and click on the MigrateAdmin program icon. Upon starting the MigrateAdmin product you will see the main program window shown below.



MigrateAdmin Setup

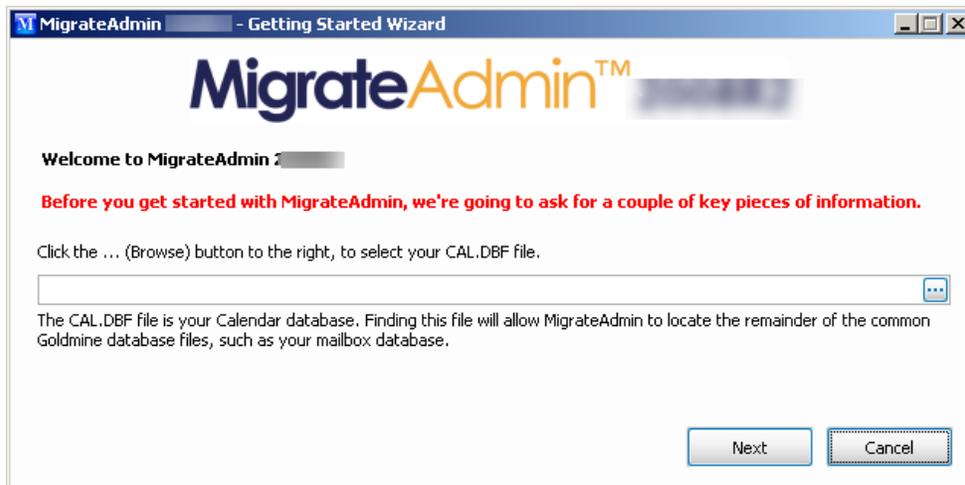
1. Using The Getting Started Wizard

The first time you run MigrateAdmin, you'll see the Getting Started Wizard. If you'd prefer to go straight to the main MigrateAdmin screen, simply click the Cancel button on any Wizard screen.

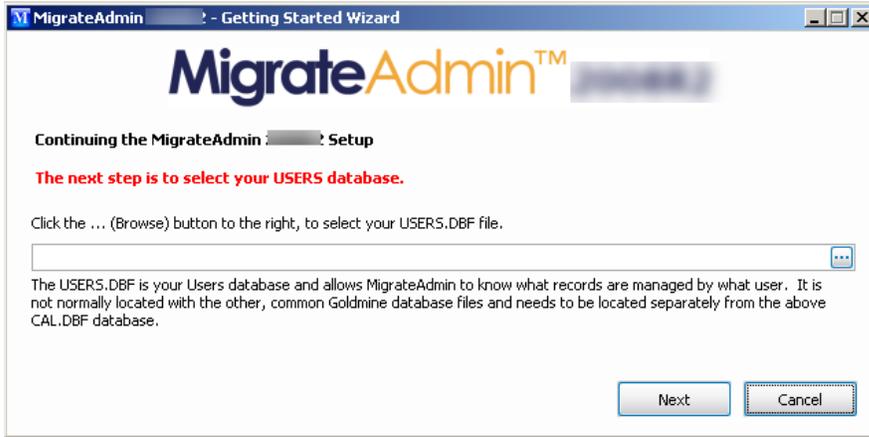


The wizard will attempt to place your file open dialog in the normal folder for CAL.DBF.

If CAL.DBF is not in the default folder, you will have to manually locate the file.



The next step in the wizard is to locate your USERS.DBF file. This is similar to the previous step. **If USERS.DBF is not in the default folder, you will have to manually locate the file.**



After selecting the USERS.DBF file, you'll then be prompted to create your first Configuration File.



Configuration Screen.



After creating your Configuration File, the final step is to begin the migration process.

Migrate Data



After the migration has completed, you'll be taken to the normal MigrateAdmin screen. The Getting Started Wizard will no longer be displayed.

2. Setting Up MigrateAdmin

The first step in migrating data into ACT! 2008/2009 is to tell MigrateAdmin a little bit of information to aid in finding your GoldMine databases.

If this is the first time you've run MigrateAdmin, you should have walked through the [Getting Started Wizard](#).



The screen below shows the main MigrateAdmin screen where you will choose these files as well as create a new configuration file for your GoldMine database. All information such as which GoldMine database to migrate, migration options, and field mappings, are all saved as part of a configuration file.

In addition you can go back and Edit configurations, if needed, before performing the final step of pressing the "Migrate Data" button.

The example below shows that the "Cal.dbf" and the "Users.dbf" files have already been located.



3. Creating Your GoldMine Configuration File

The next step in migrating your GoldMine database into ACT! is to create a configuration file. A configuration file will store information such as the GoldMine database to migrate, the ACT! database in which the GoldMine database will be brought into, migration options, and field mappings.

Create Config

GoldMine Database: Click the drop down to see a list of your GoldMine databases. Select the database you will be migrating into ACT!.

ACT! Database: Press the browse button to select the ACT! database you will be migrating the GoldMine database into.

ACT! Username and Password: You will need to enter the credentials for the ACT! database in order for MigrateAdmin to log in and migrate the data.



NOTE: To logon to the ACT! database and start mapping your fields, click the ACT! Destination Field column in the mapping grid. See Section 3 - Field Mapping Information for more details. MigrateAdmin will also attempt to login after having at least the ACT! database and username. If it can't login, it will just simply wait until a password has been entered. Once a password has been entered, it will inform you of any bad logins.

Once you have filled out all of the information and mapped your fields, you will click the "Save" button. This will save the current configuration with the GoldMine database name that you have chosen to migrate data from. You can always go back and edit this configuration from the main MigrateAdmin screen by highlighting the configuration name and pressing the "Edit Config" button.

Here is an example of a blank configuration screen.

MigrateAdmin - New Configuration

Goldmine Database:

ACT! Database:

ACT! Username: ACT! Password:

Import Type:

Import E-mails as:

MigrateAdmin™
2008R2

Map your Goldmine to ACT! database fields below.
Activities, Histories, Notes, Opportunities, E-mail Addresses and Websites are mapped automatically and are not shown below.

Goldmine Source Field	Goldmine Source Description	ACT! Destination Field

Here is the configuration screen filled out with our example information and field mapping:

MigrateAdmin - Edit Configuration

Goldmine Database: Demo File (c:\documents and settings\all users\application ...)

ACT! Database: Demo

ACT! Username: Chris Huffman ACT! Password: []

Import Type: Contact

Import E-mails as: Entire E-mail as an Attachment

MigrateAdmin™ 2008R2

Map your Goldmine to ACT! database fields below.
Activities, Histories, Notes, Opportunities, E-mail Addresses and Websites are mapped automatically and are not shown below.

Goldmine Source Field	Goldmine Source Description	ACT! Destination Field
ACTIONON	Next Action Date	ACTIONON
ADDRESS1	Address 1	Address 1
ADDRESS2	Address 2	Address 2
ADDRESS3	Address 3	Address 3
CALLBACKAT	Call Back Time	CALLBACKAT
CALLBACKON	Call Back Date	CALLBACKON
CALLBKREQ	Call Back Frequency	CALLBKREQ
CITY	City	City
CLOSEDATE	Expected Close Date	CLOSEDATE
COMMENTS	Comments	COMMENTS
COMPANY	Company Name	Company
CONTACT	Contact Name	Contact
COUNTRY	Country	Country
CREATEBY	Created By	CREATEBY
DEAR	Dear Salutation	Salutation
DEPARTMENT	Department	Department
EVT1	Phone Extension 1	Extension

Buttons on the right:

- Create New Field
- Create Remaining Fields
- Show Created Fields
- Remove Mapped Field
- Remove All Mapped Fields
- Auto Map Fields
- Load Predefined Map
- Save
- Cancel

4. Field Mapping Information

▼

Goldmine Source Field	Goldmine Source Description	ACT! Destination Field
USERDEF01	Platform	
USERDEF02	User Role	ACTIONON
USERDEF03	Key Interest	Address 1
USERDEF04	Account Size	Address 2
USERDEF05	Purchase Status	Address 3
USERDEF06	Competitor	Alternate Extension
USERDEF07	Referred	Alternate Phone
USERDEF08	Account Type	Birth Date

NOTE: When first logging on, MigrateAdmin will automatically map fields that have the same name to assist in mapping the most basic field information.

Create New Field: This button will create a New Field in ACT! based on the name of the field in GoldMine. This action is for only the current row.

Create New Field

Create Remaining Fields: This button will create all remaining fields that have not been mapped.

CAUTION: If you are using ACT! 9.x (2007) or ACT! 10.1 (2008) or below and you have a large number of fields in the GoldMine database, you may hit a field creation limit in ACT! If you reach this limit, you'll need to create the remaining fields using the ACT! program itself. This limitation was fixed in ACT! 10.2 and later.

Create Remaining Fields

NOTE: Once the fields are created in the ACT! database, you will need to use the ACT! Layout designer to place these fields on your layout or "Screen" as it is sometimes referred to. The fields must be added to the layout in ACT! in order to see the data that was brought over into these fields.

Show Created Fields: This button will display a list of all the fields that were created in ACT! by MigrateAdmin. This list can be useful for assisting in editing your layouts.

Show Created Fields

Remove Mapped Field: This button will erase the current mapping you may have created for a selected field. Use this if you made a mistake and chose the wrong ACT! field to map the GoldMine data into.

Remove Mapped Field

Remove All Mapped Fields: This button will erase ALL the current mapping in the event you would like to start mapping over again.

Remove All Mapped Fields

Auto Map Fields: This button will automatically map any GoldMine field to any ACT! field that has a matching name.

Auto Map Fields

Load Predefined Maps: This button will eventually give you a list of maps for some of the common financial or real estate packages that are sometimes used in GoldMine. These will be added to the MigrateAdmin installer as we get them from various vendors.

Load Predefined Map

Save: This button will save your current configuration.

Save

Cancel: This button will cancel the configuration editor.

Cancel

Here is an example of the field mapping screen while selecting a field in ACT! to map "USERDEF01 (Platform)" from GoldMine into.

The screenshot shows the 'MigrateAdmin - New Configuration' window. At the top, there are configuration fields for Goldmine Database (Demo File), ACT! Database (ACT9Demo), ACT! Username (Chris Huffman), and ACT! Password. Below these are 'Import Type' (Contact) and 'Import E-mails as' (Entire E-mail as an Attachment). The central area is a table for mapping Goldmine source fields to ACT! destination fields. The 'USERDEF01' row is selected, and a dropdown menu is open showing a list of ACT! destination fields, with 'ACTIONON' selected. To the right of the table are several control buttons: 'Create New Field', 'Create Remaining Fields', 'Show Created Fields', 'Remove Mapped Field', 'Remove All Mapped Fields', 'Auto Map Fields', 'Load Predefined Map', 'Save', and 'Cancel'. The MigrateAdmin 2008R2 logo is visible in the upper right of the window.

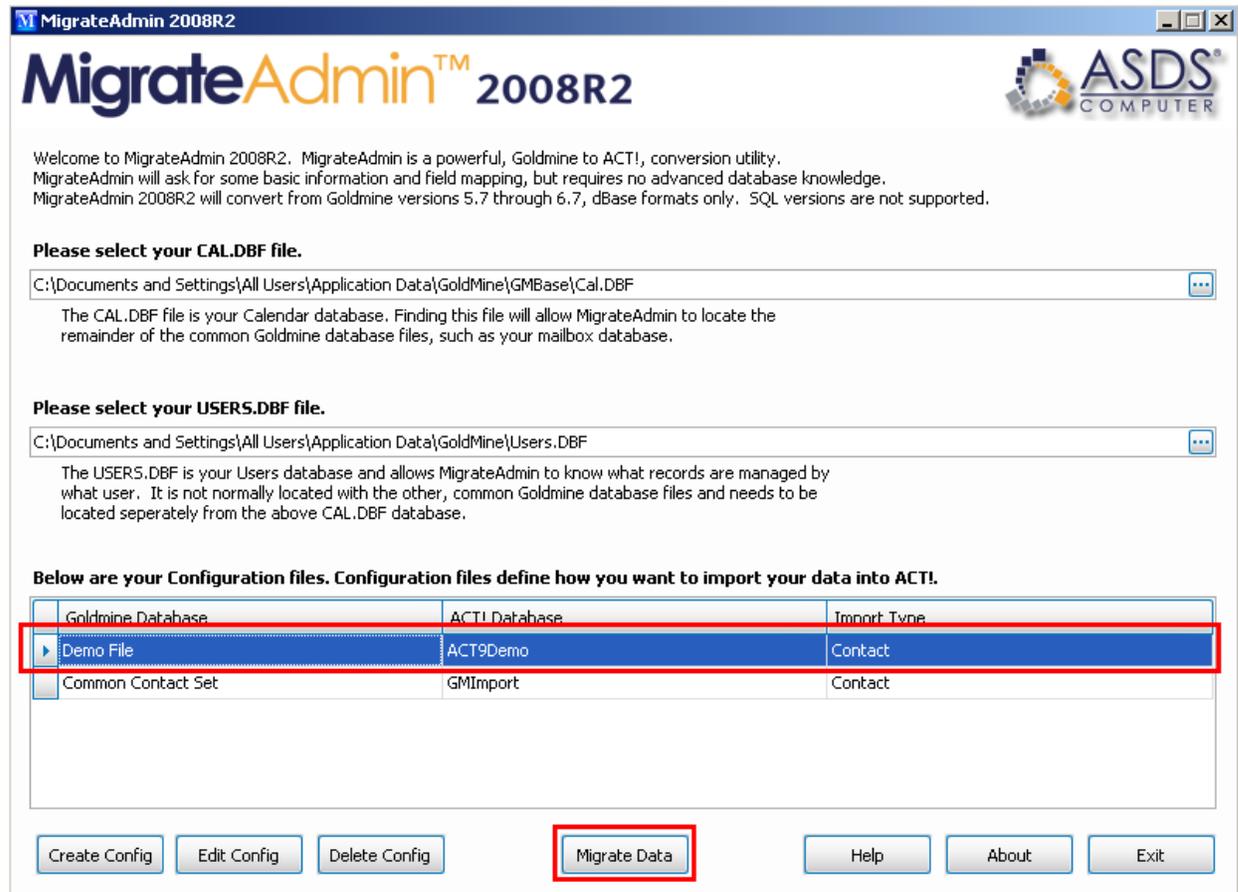
Goldmine Source Field	Goldmine Source Description	ACT! Destination Field
PREVRESULT	Previous Results	
SECR	Secretary	
SOURCE	Source (Lead)	
STATE	State	State
STATUS	Internal Status	
TITLE	Contact Title	Title
USERDEF01	Platform	
USERDEF02	User Role	ACTIONON
USERDEF03	Key Interest	Address 1
USERDEF04	Account Size	Address 2
USERDEF05	Purchase Status	Address 3
USERDEF06	Competitor	Alternate Extension
USERDEF07	Referred	Alternate Phone
USERDEF08	Account Type	Birth Date
USERDEF09	Account Licensed Users	
USERDEF10	User Defined 10	
USERDEF11	Network OS	

Migrating Your Data

1. Starting The Migration Process

With the config file completed and all field mappings finalized, you are ready to migrate your GoldMine data into the ACT! database.

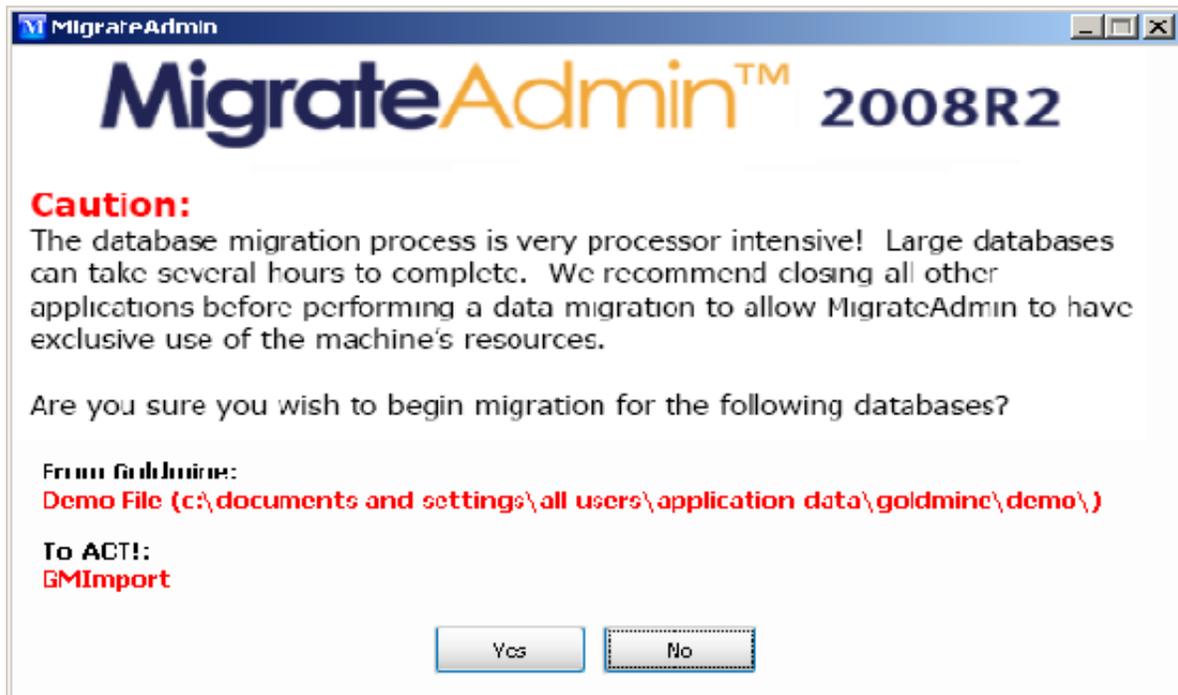
To start the migration, you will select the GoldMine configuration file you created in the previous step and then press the "Migrate Data" button.



Upon pressing the button, you will be prompted with the box shown below to verify the two databases you are about to migrate together.

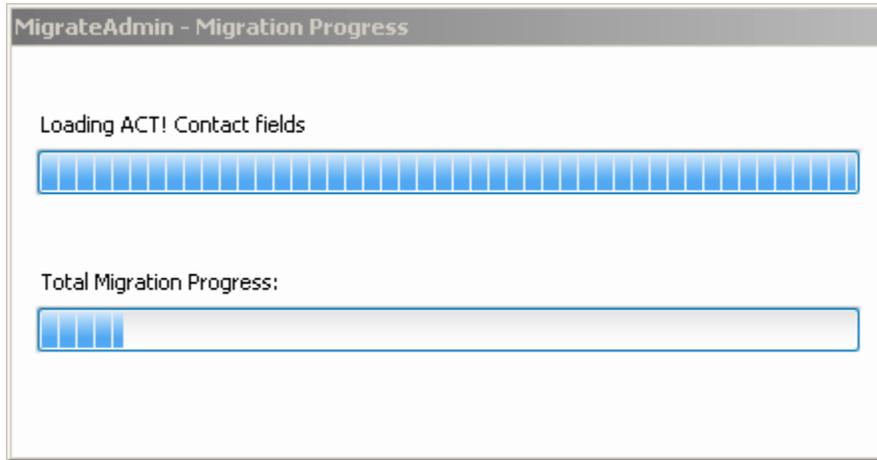
Please read the Caution message carefully.

Once you click "Yes" the migration process will start.



2. During The Migration

During the migration process, you'll see a progress meter showing the current process and that of the overall progress.

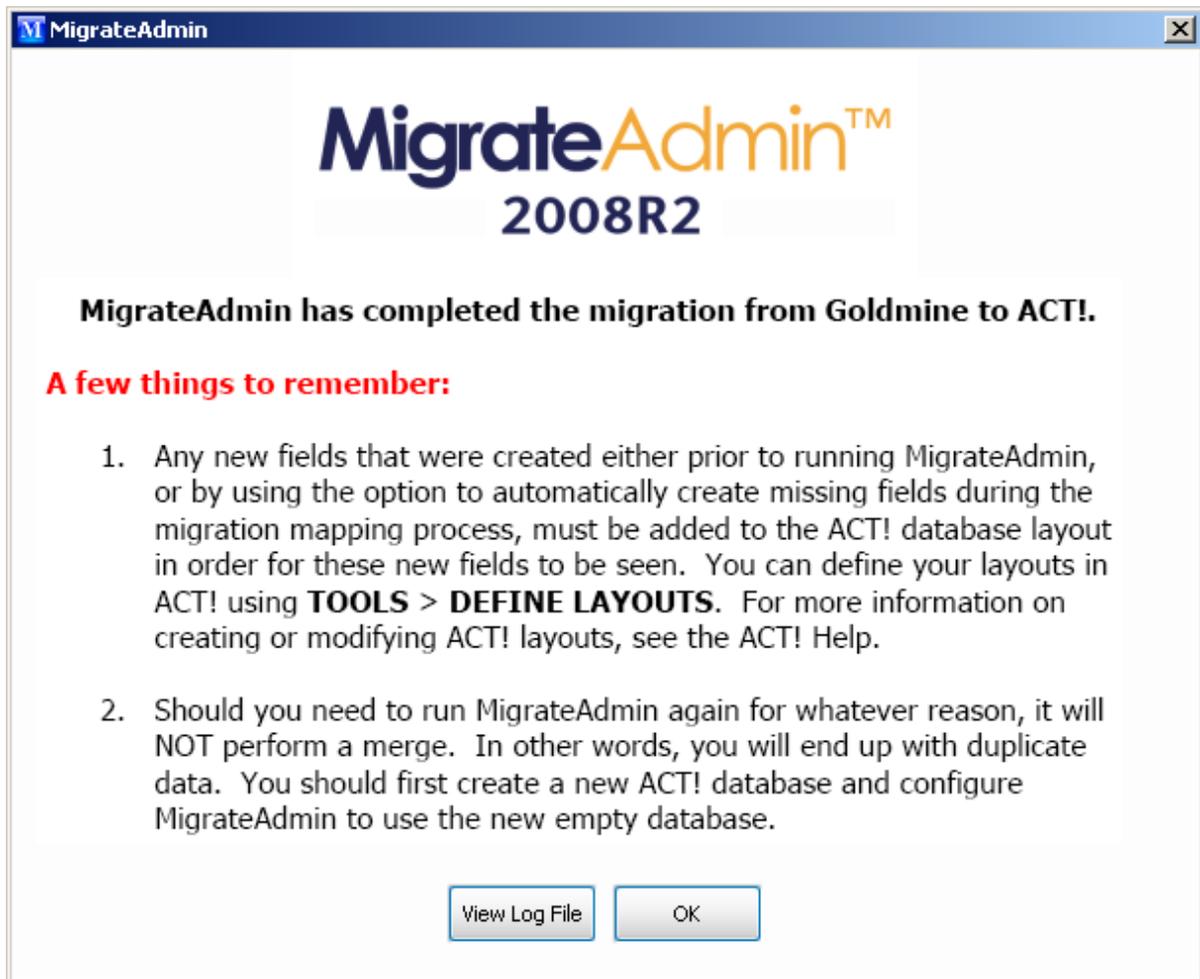


At times, the current process may seem to not be moving. Please be patient, some processes are very intensive. In the above screenshot, the current process is currently "Loading ACT! Contact fields."

NOTE: There are several factors that can alter the length it takes to migrate your GoldMine data into ACT!. The number of e-mail messages that will be migrated is the largest factor in how long the migration takes. If you have a large number of e-mails, you can count on the process taking longer than a database that does not have e-mail to migrate. Also, large amounts of history data can cause the migration to take longer.

3. After Migration

After migration has completed, you'll see the following screen:



Please read the two items in the message. They are very important.

Click **OK** to return to the main MigrateAdmin screen.

Click **View Log File** to view the log that was created during the migration process. This will also return to the main MigrateAdmin screen.

Where Did My Data Go?

Post Conversion Information

Use this guide to check the data conversion. We recommend picking 10-15 accounts that you are familiar with. Follow the below guidelines for more information on what was converted and where you will find it post conversion.

One of the fundamental differences between ACT! and GoldMine is ACT! is **CONTACT** centric and GoldMine is **ACCOUNT** centric. As a result some things may look a bit different in ACT!. We know that switching to ACT! is going to bring some confusion.

Below you will see the **GoldMine Data** in black BOLD and then where to look for it in **ACT!** in **blue BOLD**.

GoldMine Contacts: **Contacts view in ACT!**

If you selected a Contact based migration, the main contact for a GoldMine Account record is created as a contact in ACT!. Additional contacts for an account in GoldMine are added as Secondary Contacts in ACT!. If you selected a Company based migration, an ACT! company record is created with basic field information from the contact and that company is linked to the contact.

GoldMine Fields: **Contacts view in ACT!**

All fields that were mapped and/or created, are on the Contact record.

Note: Any custom fields that were converted are NOT automatically displayed on the standard layout. You must edit your layout and add the fields to it in order to view them in ACT!.

GoldMine Notes: **Contacts view in ACT!, found on the Notes tab**

Notes in GoldMine are stored as one big record, or blob. Notes in ACT! are stored as individual records. If the note entry is formatted correctly in GoldMine, i.e. having a ***** USERNAME *** Date and Time** header, we will attempt to convert it into a standard note. The date that is in the normal header will be used for the note date/time entry in ACT!. Otherwise we will use the date of the conversion.

GoldMine History: **Contacts view in ACT!, found on the History tab**

Note: We have seen "orphan" entries (i.e. corruption) that have no associated account in GoldMine.

GoldMine Pending: **Contacts view in ACT!, found on the Activity tab. Also in the ACT! Task List view.**

Activities that are not associated with a particular account are linked to a new contact record in ACT! with a company and contact name of **GoldMine Unlinked**.

Note: MigrateAdmin creates custom activities on the fly during the conversion. Pending Sales are converted to Sales Opportunities in ACT!.

GoldMine Opportunities: Contacts view in ACT!, found on the Sales Opportunity tab. Also in the ACT! Opportunities List view. Extra information such as Competitor, Influencer, etc., will be found in the **Details** of the opportunity, after the notes associated with the opportunity.

GoldMine Details: [Contacts View in ACT!](#), found on the Notes tab

Details in GoldMine consist of one-to-many tables of information. ACT! 2007 and 2008 (10.1 and below) do not support one-to-many tables. ACT! 2008 (10.2) and higher does support one-to-many tables, however this requires additional functionality beyond the scope of MigrateAdmin. One-to-many tables are NOT supported by the ACT! User Interface and any solution that makes use of these tables must be designed by a software solution provider. We are investigating this for the future.

GoldMine Links: [Contacts View in ACT!](#), found on the Documents tab

Links, or attachments, in GoldMine added to the Documents tab, if they are found on your system. If the attachment is not found, history entry is created specifying that the document could not be found.

GoldMine Members (or Groups): [Groups View in ACT!](#)

New groups are created in ACT! and all members of that group are automatically added to the new group in ACT!.

GoldMine Summary: [Contacts View in ACT!](#)

Some information, such as last edit date, can be found on the Contacts Info tab in ACT! Other fields in the GoldMine summary will be found on your contact layout, depending on where you added it and if you mapped that particular field.

GoldMine Tracks: [Not currently available](#)**GoldMine Referrals: [Not currently available](#)****GM + View: [Not currently available](#)**

Where Do I Map My Notes, Histories, etc.?

These items are mapped by default to the proper locations in ACT!. You may see some of these items listed in the mapping screen with nothing to map to. You **DO NOT** need to map these in order for them to convert. They are processed automatically.

Where Do My Extra Email Addresses Go?

Additional email addresses that have been added to a contact in GoldMine will get created as "Secondary Contacts" in ACT!. So when you are on a record in ACT!, click the "Secondary Contacts" tab and you will see a list of all of the additional email addresses. The reason they get placed here is that ACT! does NOT allow multiple email addresses per contact. So to preserve the ability to click an email address and send an email, you can click them from the "Secondary Contacts" tab.

This also applies to multiple websites that you may have for a contact.

Trialware Information

MigrateAdmin 2008R2 comes with a 30 day trial which includes migrating no more than 500 contacts during the trial period.

It is strongly recommended to make a small subset of your GM Database to allow for a test run of the migration prior to migrating your data into your production ACT! database.

See below for an example of the Trial screen:



NOTE: If you click the Cancel button, you will see the following message box. MigrateAdmin requires a license, either Trial or Registered in order to run.



Registration

When you choose to register your product, you will be prompted to input your information as shown below. You must fill out the fields marked with a red circle. Upon entering the required information, click the "**Register**" button to complete the registration of MigrateAdmin 2008R2.



The screenshot shows a registration dialog box titled "ASDS.MigrateAdmin2008_R2". The dialog has a blue background and a white title bar. On the left, there is an icon of two keys. The main heading is "Register Your Software". Below the heading, there is a paragraph of text: "To unlock the full capabilities of ASDS.MigrateAdmin2008_R2 you must register, otherwise you can continue in trial mode to evaluate the software." Below this text is a form with four input fields: "Name", "Organization", "Serial Number", and "Email Address". Each field has a red circle next to its label, indicating it is required. The "Serial Number" field contains a placeholder: "XXXXXX-XXXXXX-XXXXXX-XXXX-XXXX". At the bottom of the dialog, there is a legend: "• Indicates that you must fill in the field." and two buttons: "Register" and "Try".

Register Your Software

To unlock the full capabilities of ASDS.MigrateAdmin2008_R2 you must register, otherwise you can continue in trial mode to evaluate the software.

Name •

Organization

Serial Number •

XXXXXX-XXXXXX-XXXXXX-XXXX-XXXX

Email Address •

• Indicates that you must fill in the field.

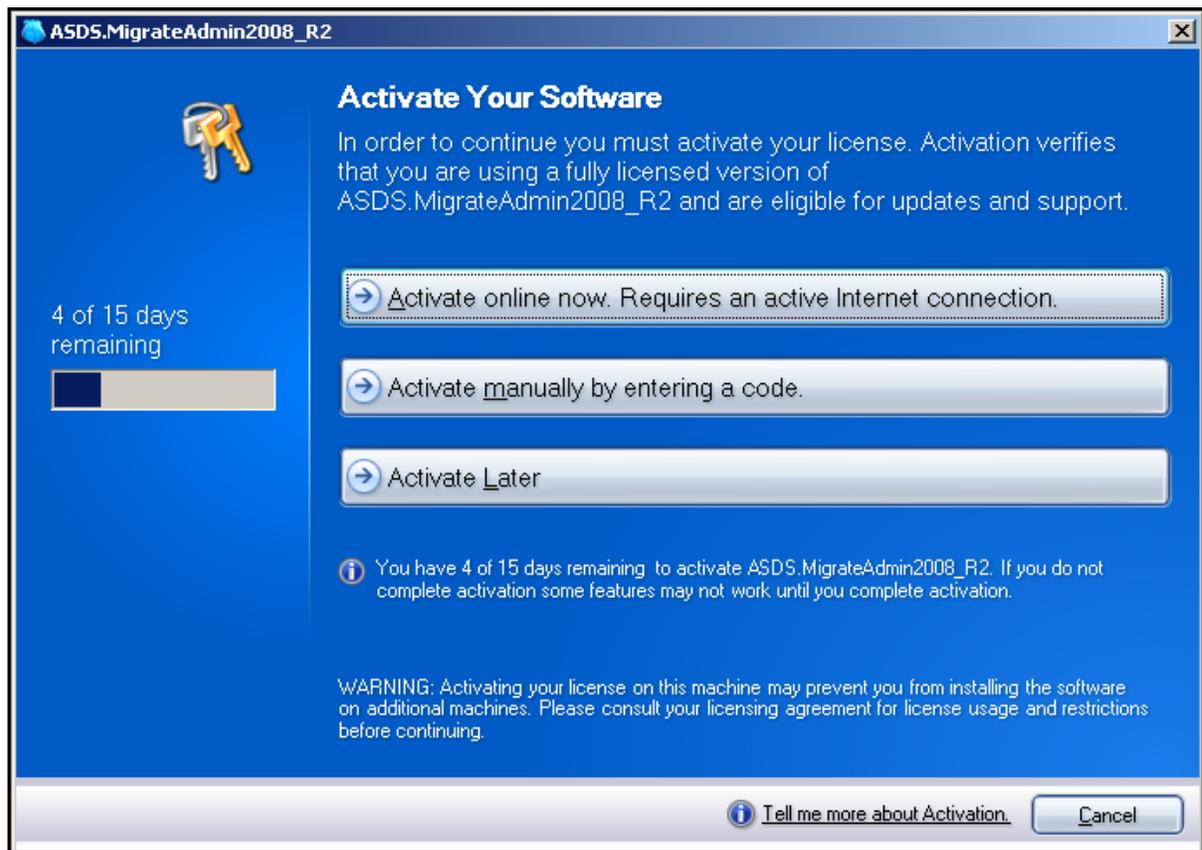
Register Try

Activation

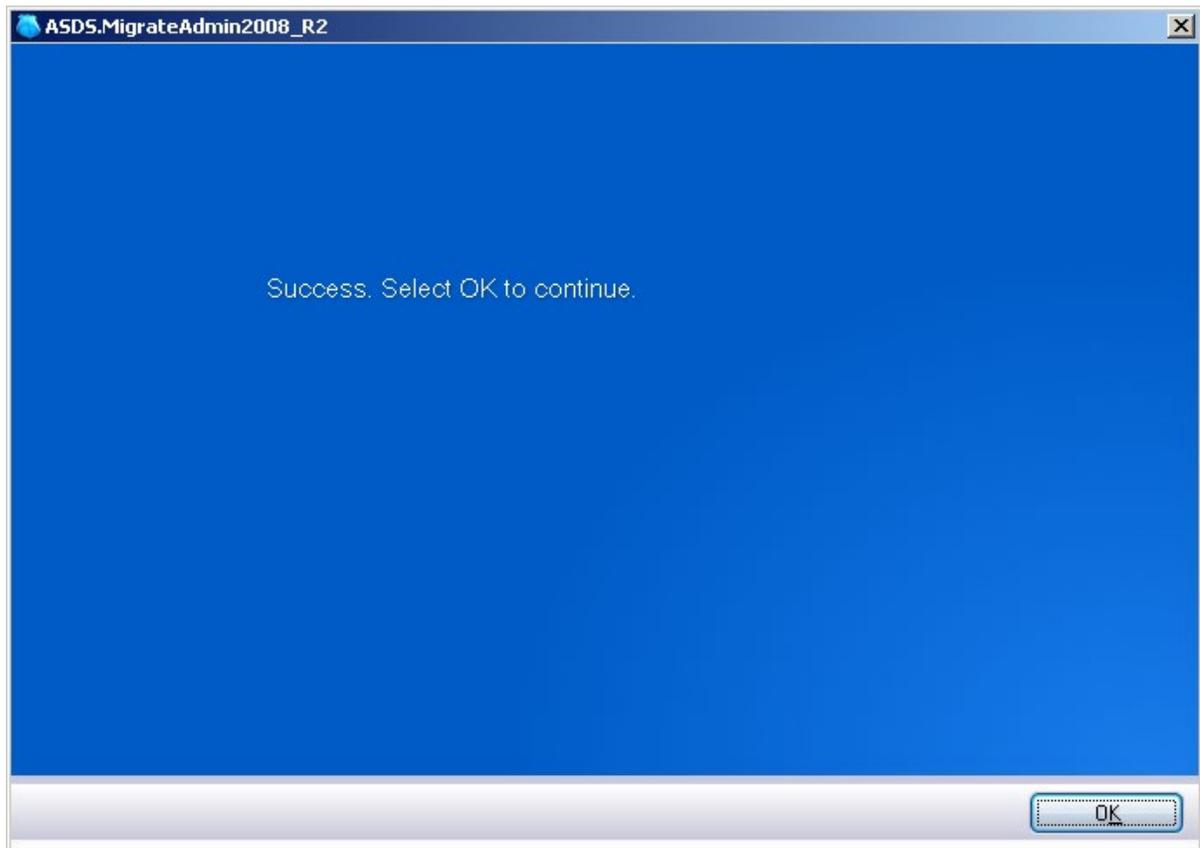
Once you have entered your information on the 'Register Your Software' window, you will be prompted to activate your software. You have 15 days to activate the software after registering it.

Click the "**Activate online now**" button to activate your software via the Internet. If you do not have an Internet connection, you may activate it by manually entering a code. However, this requires calling our Toll Free number at 1-800-857-0558. We highly recommend using the "Activate online now" function.

See the example below:



Once you choose 'Activate online now', you will see the following box to show it was successful.



Note: When you activate your software, it can ONLY be used on the machine in which it was activated on.

Technical Support

Contact Us

Technical support is available by visiting the KEYSTROKE support site:
www.Keystroke.ca/support. We offer several services to meet your technical support needs.
Please visit us today!