



ACT! – Microsoft Dynamics CRM Migration Utility

Why ACT! – Microsoft Dynamics CRM Utility?

Act! though the **largest selling** contact manager, is not truly a “CRM”. A large number of organizations grow out of this particular contact manager as they grow up and start looking to a full fledged CRM system like Microsoft Dynamics CRM.

The entire problem of growing out of the ACT system and getting upgraded to a new CRM is the inability to read data and properly migrate to the new CRM. Data is power and organizations which has been using ACT since a long time and they would not like to lose the history of their entire contact relationship which is stored in ACT when they move to Dynamics CRM.

Aim:

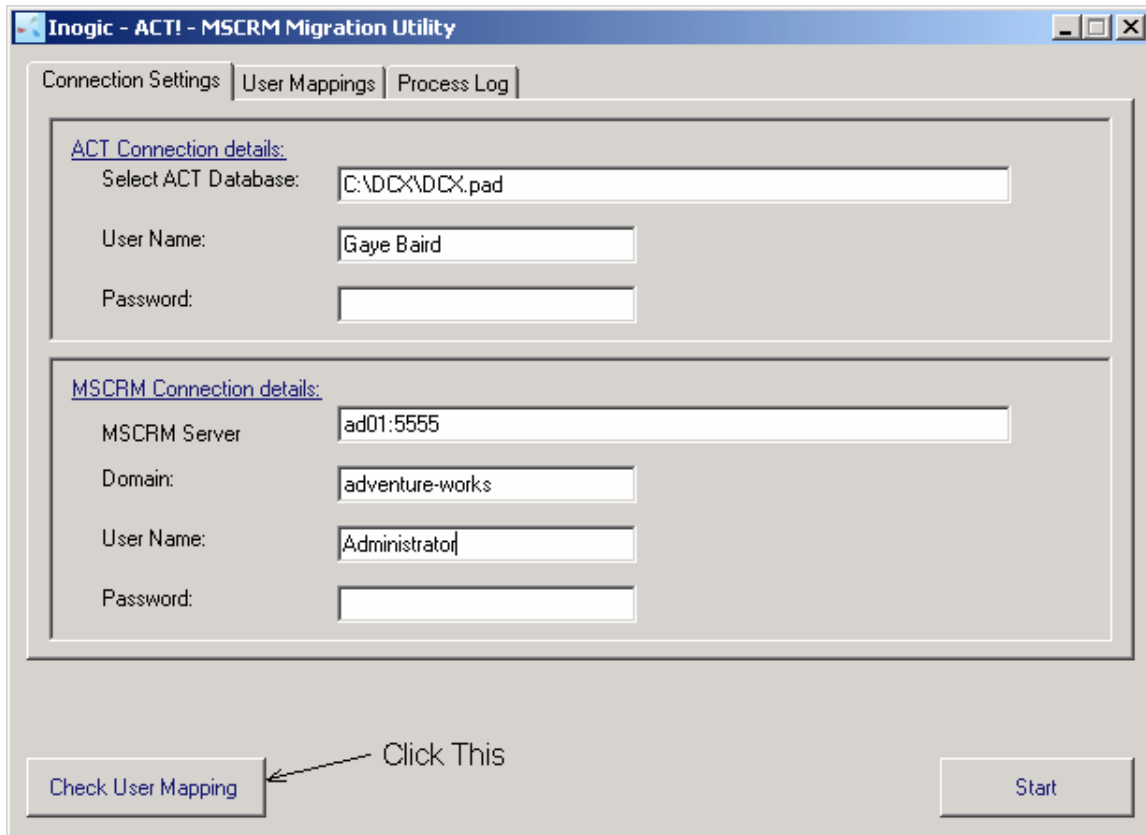
This utility allows the user to migrate data from ACT! to Dynamics CRM.

Data that can be migrated:

- Accounts
- Contacts
- Notes
- Attachments
- History
- Pending
- Custom fields.

ACT! – Microsoft Dynamics CRM Migration Utility

Working of the utility:



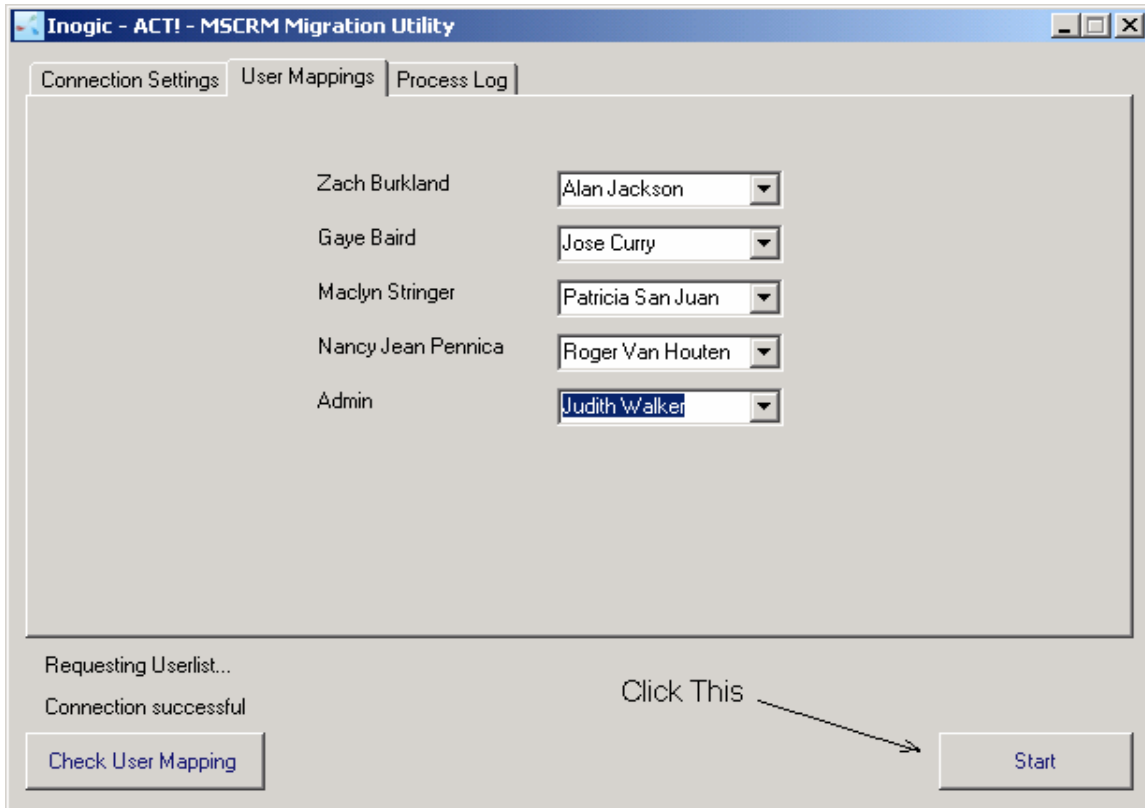
The screenshot shows a window titled "Inogic - ACT! - MSCRM Migration Utility" with three tabs: "Connection Settings", "User Mappings", and "Process Log". The "Connection Settings" tab is active and contains two sections:

- ACT Connection details:**
 - Select ACT Database: C:\DCX\DCX.pad
 - User Name: Gaye Baird
 - Password: (empty)
- MSCRM Connection details:**
 - MSCRM Server: ad01:5555
 - Domain: adventure-works
 - User Name: Administrator
 - Password: (empty)

At the bottom of the window, there are two buttons: "Check User Mapping" and "Start". An arrow points from the text "Click This" to the "Check User Mapping" button.

All that is required from the user is the Connection Details of both the ACT! as well as Dynamics CRM.

ACT! – Microsoft Dynamics CRM Migration Utility



The Utility is provided with a User-Mapping functionality by which the user can easily map ACT! users with Dynamics CRM users.

Features:

1. **One click utility:** Need to provide only the connection details of ACT! and MSCRM.
2. **Easy to use:** No cost associated with hiring a consultant to do the migration using this tool on a time and material basis. No Internal cost associated for utilizing migration tools and learning it
3. **Specialists:** Entire conversion done by a data migration specialists who knows both the systems
4. **Cost Efficient:** Fixed cost migration with no cost overrun. No cost associated with buying any migration tool.
5. **Data Transfer Control** functionality is provided with the Utility.
6. **Flexible:** The user can decide whether to transfer the entire data at a time or in different batches.
7. **Extensible:** Can be customized for user specific requirements.
8. Complete testing post migration at our end to look at loop holes

ACT! – Microsoft Dynamics CRM Migration Utility

Contact Inogic:

India (Corporate Headquarters)

Mumbai - New **Bombay**

305, Devarata Society,
Next to HDFC Bank,
Sect-17,
Vashi -400705

UK - **London**

102, Butlers and Colonial wharf,
Shad Thames,
London, SE1 2PY

US – **New Jersey**

14 Benedek Rd,
Princeton,
NJ 08540

Via email

CRM: crm@inogic.com