PREPARING TO IMPORT GOLDMINE DATA INTO REDHORSE CRM

This article will help you in preparing to import GoldMine® data into RedHorse CRM®. RedHorse CRM has a built in import wizard to bring GoldMine data into the correct places in RedHorse. There are some tasks that you can take to prepare your data before importing to make the process as seamless as possible.

GoldMine Database Backend

It is possible to import data into RedHorse CRM from a GoldMine system hosted to either dBase or SQL Server. The files that are necessary for a SQL import are the SQL database files (databasename.mdf, databasename.ldf). The files that are necessary for a dBase import are in the GMBase folder and the folder where the contact set is located. The full GoldMine folder and executable are not required for the import. Only the data files are necessary.

It is possible to import from a GoldMine system version 5 through 9.

Data Areas that may be Imported

The following data areas may be imported from GoldMine. The import will transfer the data into the correct table and structure in RedHorse.

- Contacts (Contact1 table)

    - Contact records will be created in RedHorse for every contact record in GoldMine. Included are addresses, phone numbers and key fields, if selected during the import. Records in GoldMine where the contact name field is blank will have "No Contact Name" inserted for the contact name.

    - Account records will be created in RedHorse for every contact record in GoldMine that has a company name.

    - The Key fields in GoldMine (Key1, Key2, Key3, Key4, Key5) can be mapped to fields in the Contacts table in RedHorse or you can specify not to map one or more of the key fields. The Key fields are added to the Contact_Custom to prevent data loss if they are not mapped.

- o Several fields that are available in GoldMine but are not found in RedHorse will be added to the Contact_Custom table structure in RedHorse and the data will be imported into those fields. The following fields will be imported into the Contact_Custom table rather than the Contacts table.

    - Lastname

    - Secr

    - Dear

  - o HTML characters will be stripped from the notes field and it will be imported into a single history record for the user MASTER and a date time as of the import.

  - o Curtaining is not imported and will need to be set in RedHorse after importing.

- User defined fields (Contact2 table)

  - o All Contact2 fields will be added to the Contact_Custom table structure in RedHorse (dBase and SQL) and all data will be imported into those fields (SQL only).

  - o User-defined field views will not be imported and will need to be recreated in RedHorse.

- Supplemental Records (Contsupp table)

  - o The following Contsupp record types in GoldMine will be imported into RedHorse

    - Additional Contacts with addresses and phone numbers

    - Detail Records, including email addresses and website as well as any other detail types

    - Referrals

    - Linked Documents. The path does not get modified. It is imported with the existing GM path.

- Pending Activities (Cal table)

  - o All Cal records will be imported into RedHorse with the exception of the following record types:

    - M - Message

    - S - Forecasted Sale

  - o HTML code will be stripped from the notes field.

- o Cal records that are not linked to a contact will be imported and linked to a new contact record that will be added called "Unlinked Activities".

- o Cal records that are recurring will be imported as individual records but not linked together as a group.

- History (Conthist table)

  - o All Conthist records will be imported into RedHorse with the exception of the following record types:

    - M - Message

    - S - Forecasted Sale

    - R

  - o HTML code will be stripped from the notes field.

  - o The import will attempt to convert the duration field to an integer. If it cannot, the field will be set to a value of 0 for the records that cannot be converted.

- Lookup Lists (Lookup table)

- Email Messages (Mailbox table)

  - o Email folders will be imported for each user.

  - o Email messages will be parsed into their components and imported into RedHorse in the style that RedHorse saves emails.

  - o The following mailbox records will not be imported:

    - Templates

    - Trash

Data Areas that may not be Imported

The following data areas will not be imported from GoldMine.

- User-defined Field Views

- Contact2 data in dBase GoldMine systems

- Merge Document Templates

- Report Templates

- Email Templates

- Opportunities and Projects

- Organizational Chart

- Info Center

- Users

- User Groups

- Contact Groups

- Record Alerts

- Automated Processes

- Forecasted Sales (Pending and Completed)

- Service Cases

Special Considerations Before Importing

Backup - A full backup of the RedHorse SQL database should always be made prior to importing data.

Document Management Path - One part of importing email messages is saving embedded images into files on the hard drive. It is recommended that you set up the Document Management structure prior to importing so that embedded images are saved to the correct location.

FullText Search - It is not recommended to set up FullText search prior to an import. If you have FullText search, it is recommended to turn it off before importing. It will cause a significant delay in the time it takes to import the data from GoldMine.

Importing in Stages - When you have a large database, particularly with a large number of email messages, the import can take several hours or even overnight depending on the quantity of data and specifications of the SQL server and the machine you are running the import on. For a very large database, it is recommended to follow these steps:

1. Make a full backup of the RedHorse SQL database

2. Run the GoldMine import, choosing to Exclude Email Messages on import

3. Make a second full backup of the RedHorse SQL database

4. Run the GoldMine import a second time, choosing to import only email messages

One SQL Server - When importing from GoldMine hosted to a SQL database, it is not required that the source GoldMine SQL database and the target RedHorse SQL database be on the same physical server or same SQL server. However, running across servers can cause performance to drop and the import will take longer. To improve performance, you can restore a copy of the GoldMine SQL database onto the SQL server where the RedHorse database is located prior to importing and then point to that copy database during the import.

No Modifications to GoldMine - No modifications of any kind are made to any of the GoldMine data, whether that be dBase data, SQL data, or files in the GoldMine folder.

dBase Corruption - It is recommended to reindex, pack and rebuild dbase tables before importing. And in the event that there is dBase data corruption that is not repaired by the rebuild process in GoldMine, it is recommended to use the data tool BR7 created by RedStone Softbase (makers of GoldBox) and using the MIRROR function in BR7 to repair and copy the tables to a new location. Use the new location when importing the data.

Special Considerations After Importing

Duplicate Account Records - If there are contact records in GoldMine with duplicate company names, they may be merged into a single account record in RedHorse after import using the Merge Accounts function.

Document Repair - Linked documents and email attachments are imported into RedHorse using the same path that is found in the original data in GoldMine. It is recommended to perform repair functions on the data after the import to move/copy the documents into the correct document management path. Repair functions are found in the Admin Center in RedHorse.

Removing Temporary Import Data - The import creates temporary tables in the RedHorse database to hold and modify the GoldMine data during the import. These tables all begin with the prefix "tmp_", ie. tmp_contact1, tmp_conthist, etc. They can be large and can add to the size of the RedHorse SQL database. The tables are left in place after the import to allow for troubleshooting data issues after the import and allows for importing of email messages after importing contact data. Delete the tables after importing to reduce database size if desired.

Please contact support if you experience any issues during the import process.

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