



Migration from BCM to eWay-CRM

eWay-Book

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Migration from BCM to eWay-CRM

Introduction

Thank you for selecting eWay-CRM as the solution for your business needs. The purpose of this document is to serve as a guide to help you, the client, understand the work involved, the responsibilities on both eWay System as a provider, and you as the client. Please read through this document carefully and if you have any questions, contact your account/sales manager immediately for clarification.

The BCM Migration process is to serve you, by allowing you to take your existing database and move it to eWay-CRM for continued use, without having to begin anew. With that in mind, eWay-CRM is a completely different product, which means that the modules, interface and over-all way of working with the data will have its differences from Microsoft Business Contact Manager. This article is to serve as a reference and outline of the process. Our IT staff assess and estimate timelines on a case by case basis.

Data Migration

What is Migrated?

A migration script is generated for the client to take the data directly from the SQL file and convert it to a format that is compatible with eWay-CRM.

BCM Module		eWay-CRM Module
Contacts	→	Contacts
Accounts	→	Companies*
Business Notes	→	Journal
E-mails	→	Journal (as plain text**)
Opportunities	→	Deals
Projects	→	Projects

* BCM contacts contain fields "Account" and "Company Name". We migrate values from "Account" to eWay-CRM Companies. Values listed in the field "Company Name" are saved to eWay-CRM into a special custom field "Company Name" (plain text).

** Emails imported into eWay will be converted into a plain text. Attachments and text formatting will not carry over. Emails stored in your Outlook can be relinked to their contacts, provided the email address already is attached to a contact or company record in eWay-CRM. Please speak to one of our reps if you would like further details.

We can transfer up to 10 GB BCM databases.

As regards to the fields Notes, we can only migrate them as plain text. Any text formatting along with includes images, hyperlinks, etc. inside notes will be lost.

We are also able to migrate workflows, custom fields, categories, relationships between entries, profile pictures, some documents, tasks and users. We are unable to import email attachments.

Timeline

The migration process is the import from the structured database and converting it to a format compatible with eWay-CRM and is a complex process broken in to three distinct phases:



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1. Review & Transfer
2. Conversion
3. Verification

Please note that all the times listed below are estimations, based on the average periods from previous clients. Tasks related to data movement, transfers and conversions are subject to varying periods depending on, but not limited to, the database size, state and number of records – the larger the database, the long the process can take.

Review & Transfer

Analyze the data and confirm what agendas we are going to transfer – 1 Hour

- We will review your BCM data with you and confirm what is to be moved – i.e.: accounts, contacts, emails, business notes, projects, opportunities, etc.
- This will be conducted via remote screen sharing.
- Based on this review, we will be able to map the data transfer between BCM and eWay-CRM.

Access the BCM SQL Backup – 1-2 Hours

- We will need to download a copy of the SQL backup of your BCM database to be able to prepare, test and run the migration scripts for all contacts in BCM.

SQL Database Upload/Download – Varies

- Once the database is downloaded, we recommend not to use BCM until the migration is complete. If this is unavoidable, please inform us and we will provide instruction.
- This step will likely require the assistance from your IT department, or someone who can provide the backup BCM database for us.

Conversion

Prepare scripts for data migration from BCM into eWay – 5-8 Hours

- Once we have the SQL data, the scripts are prepared for migration and tested on the database to ensure they are correct. The data is processed according to review.

Run the scripts and migrate data – 1-4 Hours

- When the scripts are tested and ready, they are run on all contacts in your BCM database to transfer them into eWay-CRM.
- This step will be done here, on our development server, in order to control the migration.

Server Component (eWay Web Service/Cloud or On Premise) – Minimum of 2 Days

- When the migration is done, we will need to move the eWay SQL with all other components to our server or yours, in order to give you access to the account.

Verification

Install eWay on your computers and review data – Minimum 1 Hour

- When eWay-CRM SQL is placed the server, we will install eWay client on your computers and conduct initial synchronization.
- After eWay-CRM is installed, the data is to be reviewed with the project manager, to look for any missing information and make sure that everything in eWay-CRM is working properly.

Start using eWay

- Once everything is completed, you can start using the system.
- We will email an Acceptance Protocol that needs to be returned within a week of being received.



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Conditions

The migration of your database is restricted to the following conditions. Please read them carefully to ensure an understanding of what it entails and what is not included with the service.

Migration Exclusions

Our migration service of your database to eWay-CRM will be taking your records in their current state and migrating them to our system. Our migration service does not include the following:

- Updating/Linking Existing Records
- Combining Databases between eWay-CRM and BCM data, unless otherwise agreed upon in advance.
- Customizing the system beyond its current state in BCM i.e.: New Custom Fields, Workflows, etc.
- Setting up user permissions within eWay-CRM
- Fixing corrupt databases
- Integrating eWay-CRM with other systems/software
- Installing eWay-CRM on user workstations
- Training

Should you need assistance with these areas, please speak to your sales/account manager or the project manager. Customizations, training and other such services that fall within eWay-CRM as a system can be provided as an additional service. For more details and a quote, please contact us.

Any work related to integrations with other systems are outside of our purview and are the sole responsibility of the client. If there is any material we have on hand, we can provide it to be forwarded to your IT professional(s).

Timeline and Scheduling

The estimated hours provided are based on the evaluation of our staff. Hours worked will be billed upon the completion the completion on the migration. Migrations that exceed a month of work may have a portion on the charges invoiced for the time spent. The remaining balance is charged upon completion and due within 2 weeks.

Delays

The timeline provided by our team is an estimate, based on what has been shown to our Sales Managers or IT staff. Any records/matters that were not discussed or reviewed prior to the estimate being given will not be factored in. If you wish to renegotiate these terms, your project will be put on hold until a new agreement is made, which will affect the delivery time and costs.

Our schedule includes times to upload, import and review the database. If we do not get responses for, but not limited to:

- Appointments
- Reviews
- Computer access or
- Updated costs

Your project may be put on hold until these matters are resolved. This will result in a delay for estimated completion date of your migration. eWay-CRM will also not adjust our schedule to complete your migration if you have not been responding to our methods of contract to complete your migration.



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Responsibility

eWay Systems LLC will not assume any damages or additional costs incurred by the client, should delays occur and will not expedite your migration, unless agreed to in advance. eWay Systems LLC will also not be responsible for migrations not completed by the estimated end, if the client fails to respond or meet for scheduled appointments.