



Automated Data Migration Guide

from Market Leader
(Business Builder)
and Zap



Important Reminders

- > This guide is meant to help you through the process of migrating the core contact related data from your current Market Leader (Business Builder) account or Zap account into your new MoxiEngage account.
- > The data migration process will not only migrate all of your contacts from your Market Leader (Business Builder) account or Zap account into MoxiEngage, but since MoxiEngage also syncs with your chosen email account, **ALL** of your Market Leader (Business Builder) or Zap contacts will also be added to your email platform contact list.
- > **The data migration process can only be executed once and cannot be undone.**

Before you begin...

- > If this is your first time using MoxiEngage we strongly recommend going through the **First time - MoxiEngage Guide**.
- > We also highly recommend that you go through the **MoxiEngage Data Migration FAQs** document before starting your automated data migration for MoxiEngage.

Before you begin...

Log into your current CRM

➤ Clean up your contacts in your current CRM*:

- *Remove/delete any contacts that you do not want to migrate to MoxiEngage
- *Correct/clean-up any erroneous/extraneous data
- *Make sure your contacts are in the correct contact groups to ensure your contacts remain organized.

*IMPORTANT:

Market Leader (Business Builder) data is extracted based on a specific schedule. **Please review the Market Leader Data Extract Schedule; you must complete any data clean-up prior to the Business Builder Data Extract Start Date you are choosing to use - and then run the data migration on or after the Actual Availability Date.**

Zap data is only extracted once per day, **you must complete any data clean-up at least one day prior to performing your data migration.**

Before you begin...

> **If migrating from Market Leader:** Once you are done cleaning/organizing your contacts, take **note of the number of contacts** you have in your current CRM.

Steps to follow:

- Navigate to Contacts/All Contacts
- Make sure to clear any filters
- Click on the check box in the column title row
- Capture the number from the "# Selected" message displayed

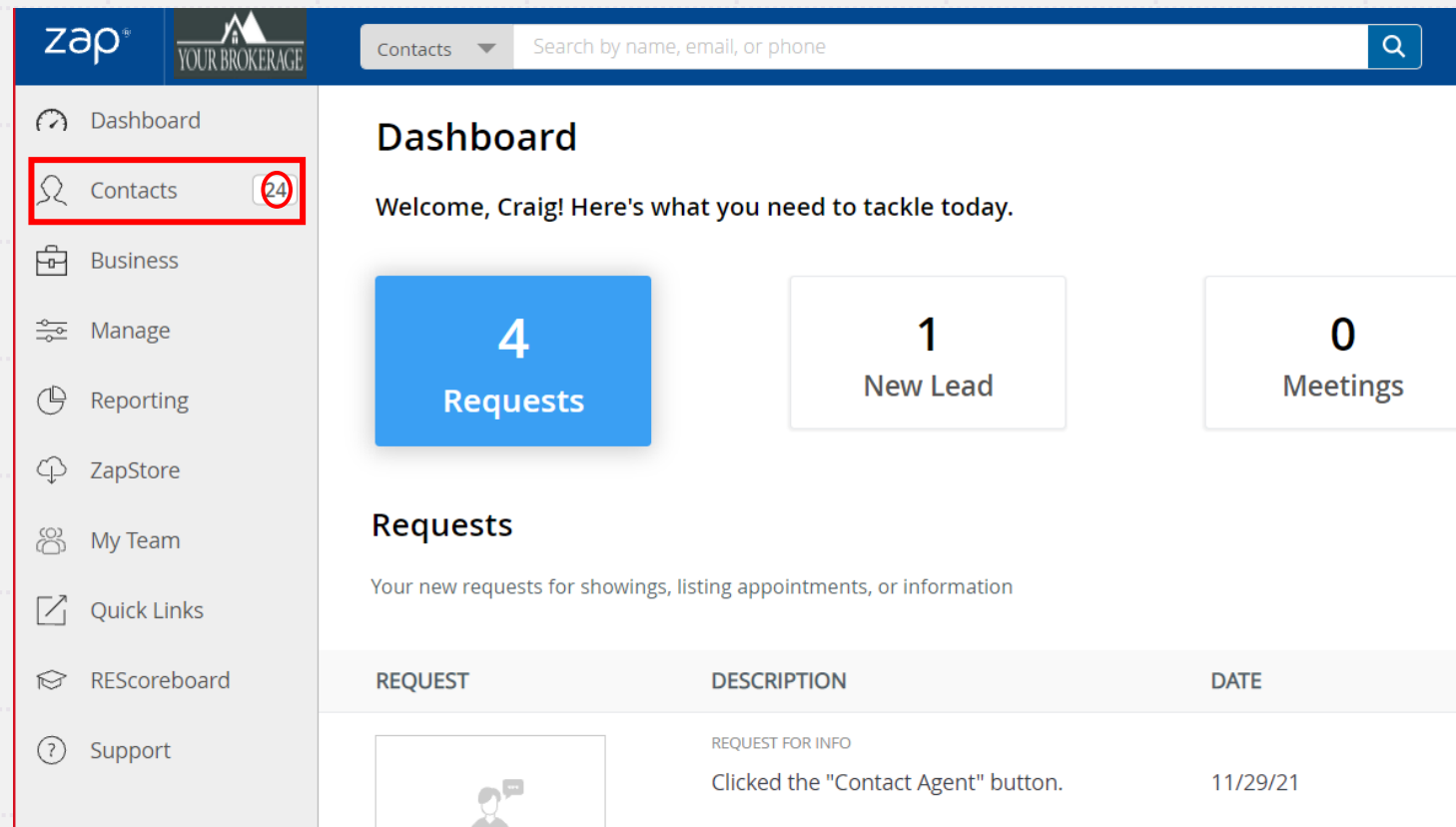
The screenshot shows the CRM interface with the 'All Contacts' dropdown menu open. The menu options are: All Contacts, Recently Active, Create Contact, Manage Groups, Import Contacts, and Export Contacts. A red arrow points from the 'All Contacts' option to the main contact list below.

The main contact list shows 1049 contacts selected. The table has columns: Name, Due Now, Contact, Group, Marketing, Looking For, Listing Search, Properties, and Source. The first two rows are highlighted with blue checkmarks in the selection column.


	Name	Due Now	Contact	Group	Marketing	Looking For	Listing Search	Properties	Source
<input checked="" type="checkbox"/>									
<input checked="" type="checkbox"/>	laura -	Add		Add	Add	\$0	Add	0 views 0 favs	Imported 5/5/16
<input checked="" type="checkbox"/>	lori.ramirez@camoves.com .	Add		Add	Add	\$0	Add	0 views 0 favs	Imported 5/5/16

Before you begin...

> **If migrating from Zap:** Once you are done cleaning/organizing your contacts, take **note of the number of contacts** you have in your current CRM.

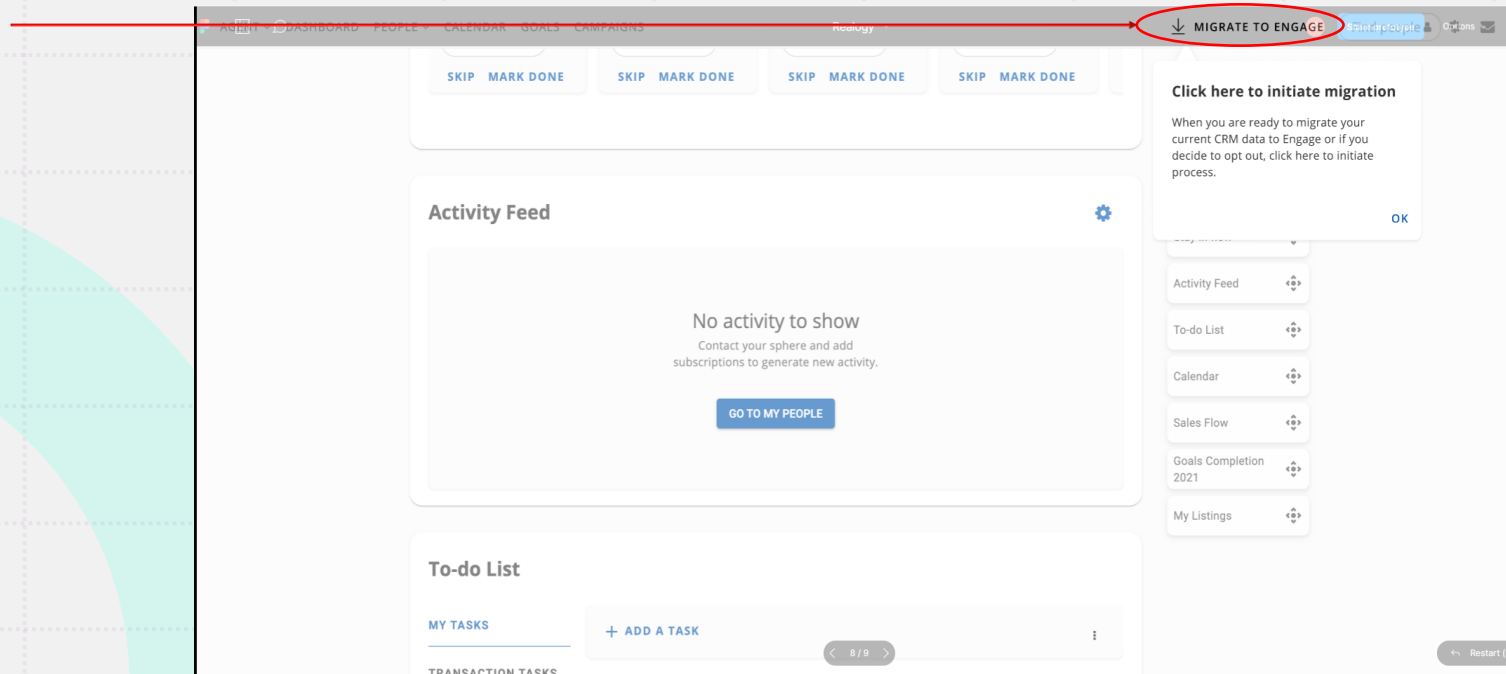


The screenshot shows the Zap CRM interface. The left sidebar contains navigation links: Dashboard, Contacts (highlighted with a red box and a badge showing 24), Business, Manage, Reporting, ZapStore, My Team, Quick Links, REScoreboard, and Support. The main content area displays a 'Dashboard' with a welcome message for Craig. It features three summary cards: '4 Requests' (in a blue box), '1 New Lead', and '0 Meetings'. Below these is a 'Requests' section with a table of new requests.

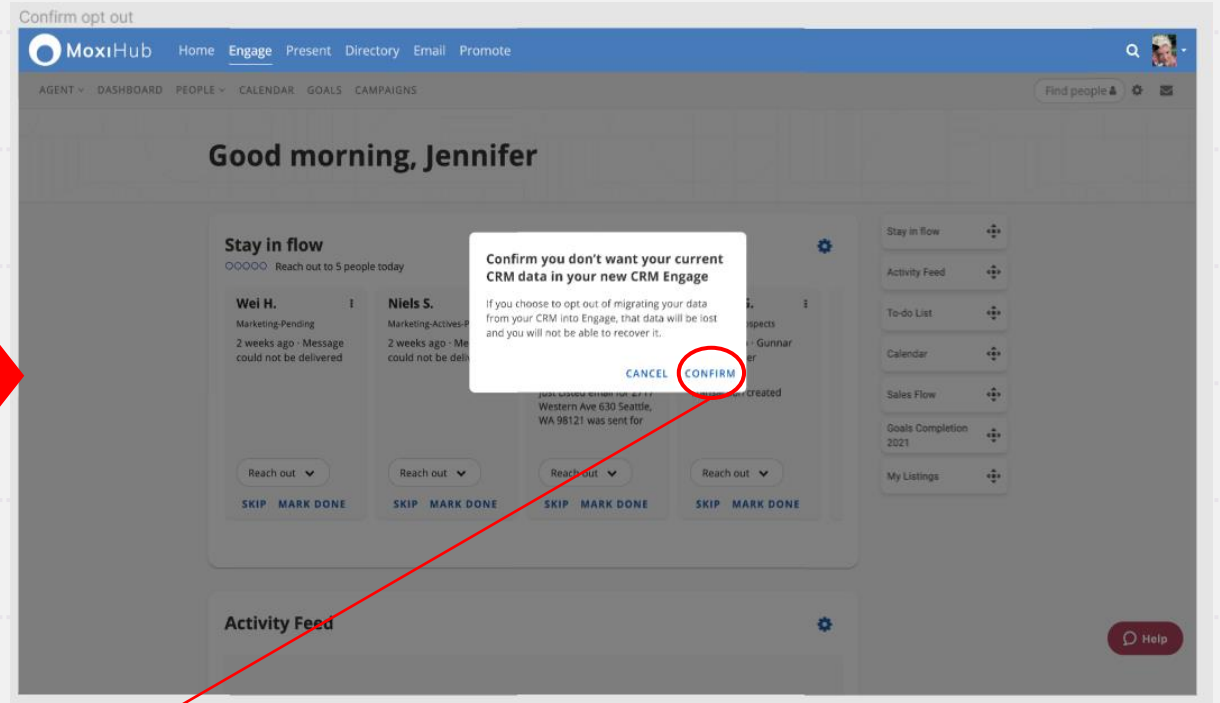
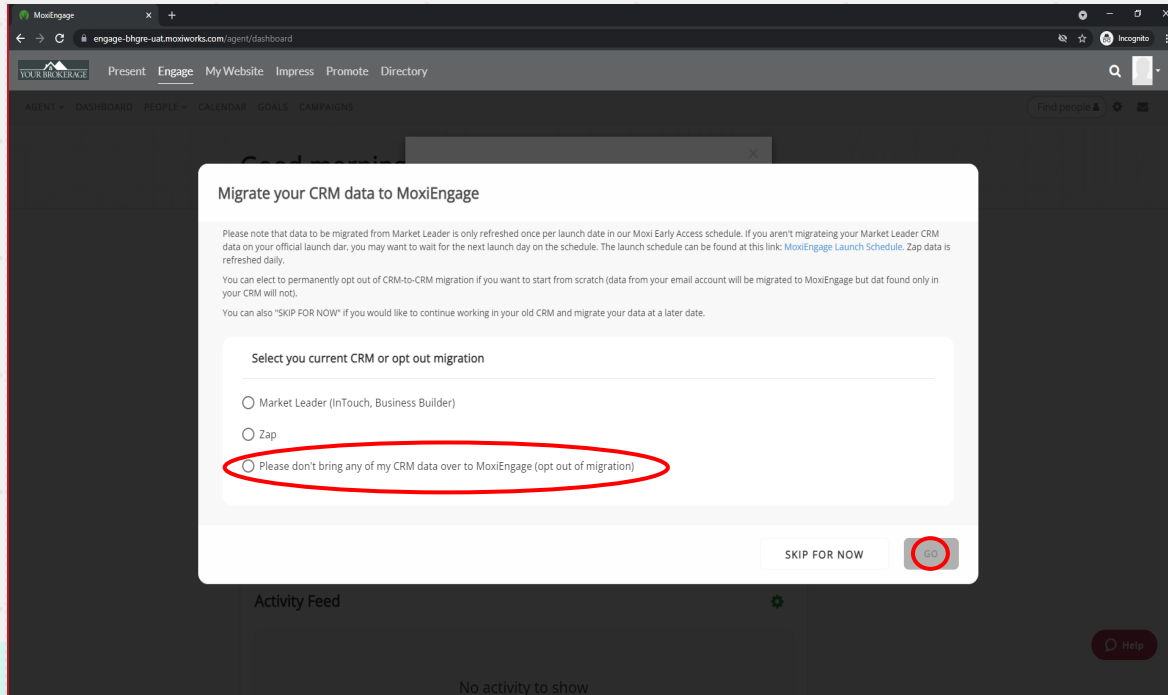
REQUEST	DESCRIPTION	DATE
	REQUEST FOR INFO Clicked the "Contact Agent" button.	11/29/21

Automated data migration: If you selected “SKIP FOR NOW”

- > If you previously selected “SKIP FOR NOW” and now want to either perform your data migration or permanently opt-out of data migration:
- > Go ahead and open MoxiEngage. Then click the “MIGRATE TO ENGAGE” button. (Top right)



If you want to “Opt Out” of automated data migration:



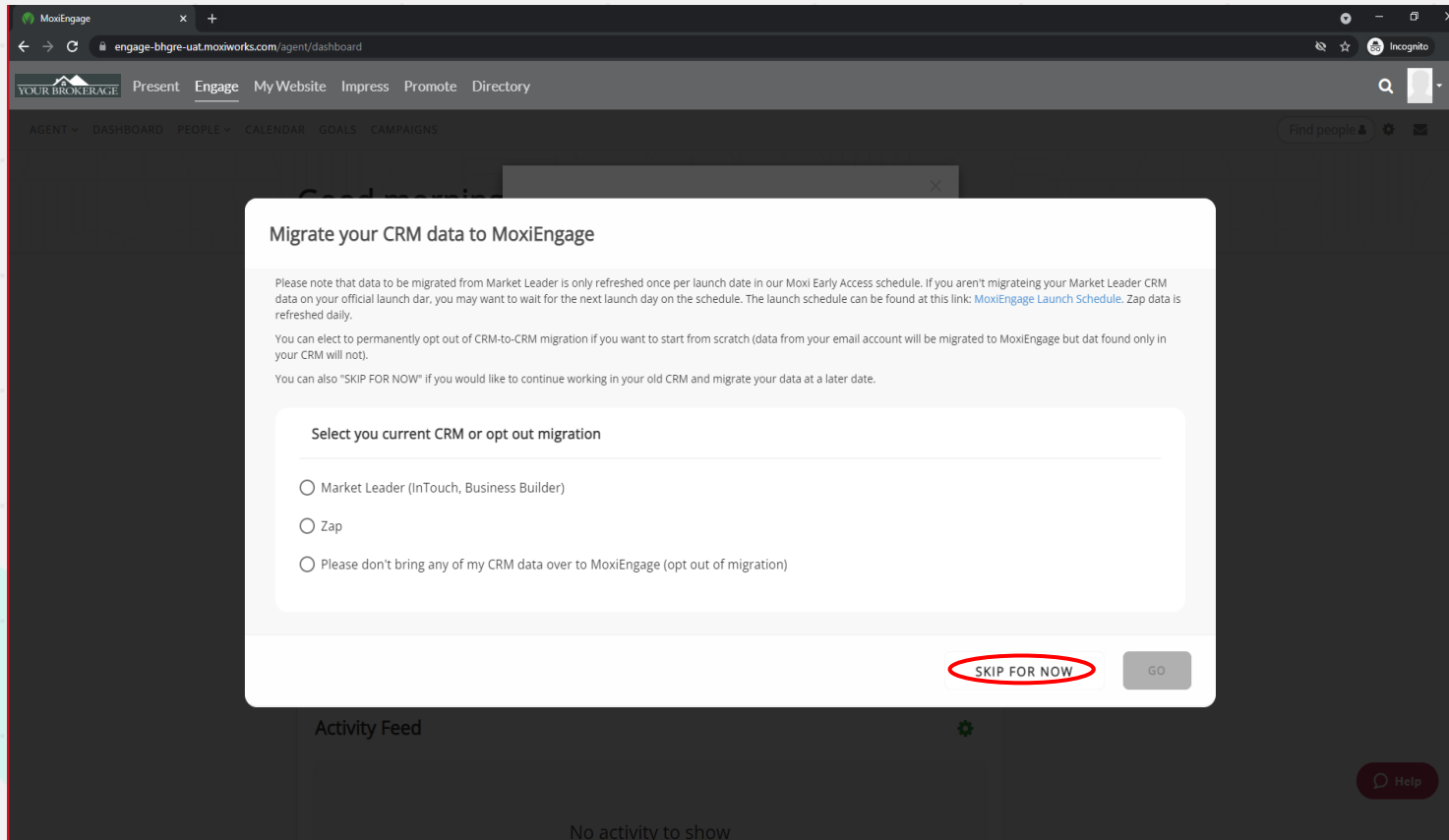
If you confirm to opt out of migrating your data from your CRM you will not be given this option again. If you just want to postpone the data migration until a later date, click “CANCEL” and then select “SKIP FOR NOW” on the prior screen.

If you choose to OPT OUT, you can close this guide now.

If you clicked “cancel” and would like to start automated data migration, continue to the next page.

If you want to “SKIP FOR NOW”

> If you don't want to migrate your data right now, but you would like to at some future date (i.e., when you are ready to begin using MoxiEngage as your CRM) simply click “SKIP FOR NOW”:



If you choose to SKIP FOR NOW, you can close this guide now and revisit when you are ready to perform your data migration.

Migrating Your Contact data from Market Leader (Business Builder) OR Zap to MoxiEngage

Migration Modal

The screenshot shows a web browser window with the MoxiEngage dashboard. A modal titled "Migrate your CRM data to MoxiEngage" is open. The modal contains a paragraph of text, three radio button options, and two buttons at the bottom. Red arrows and a box highlight specific elements: the "Market Leader" and "Zap" options, and the "GO" button. A text box at the bottom right explains the one-time nature of the migration.

Migrate your CRM data to MoxiEngage

Please note that data to be migrated from Market Leader is only refreshed once per launch date in our Moxi Early Access schedule. If you aren't migrating your Market Leader CRM data on your official launch day, you may want to wait for the next launch day on the schedule. The launch schedule can be found at this link: [MoxiEngage Launch Schedule](#). Zap data is refreshed daily.

You can elect to permanently opt out of CRM-to-CRM migration if you want to start from scratch (data from your email account will be migrated to MoxiEngage but data found only in your CRM will not).

You can also "SKIP FOR NOW" if you would like to continue working in your old CRM and migrate your data at a later date.

Select your current CRM or opt out migration

- ☐ Market Leader (InTouch, Business Builder)
- ☐ Zap
- ☐ Please don't bring any of my CRM data over to MoxiEngage (opt out of migration)

Activity Feed

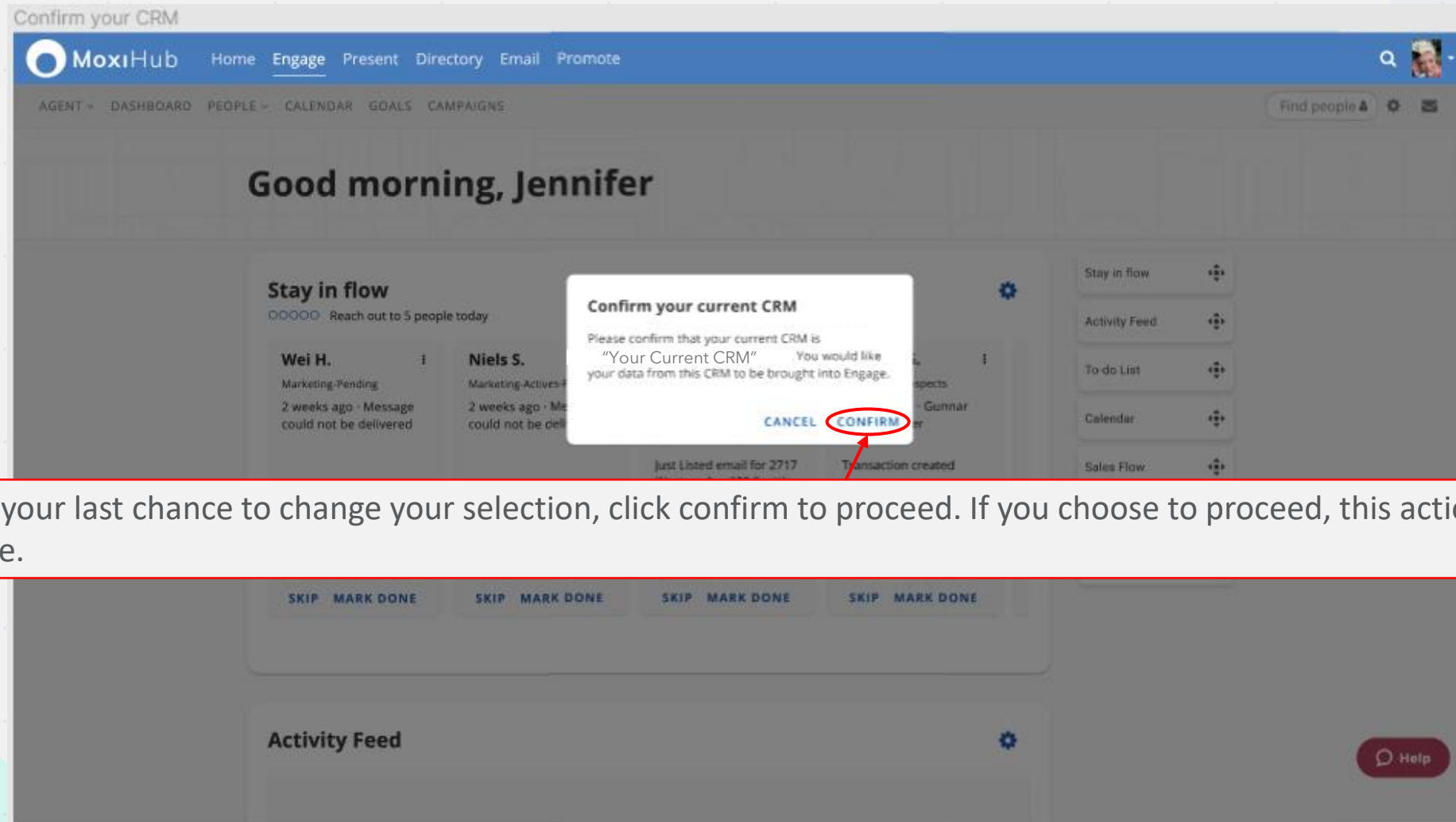
No activity to show

SKIP FOR NOW GO

Make sure to select the CRM (Market Leader or Zap) you want to transfer data from.

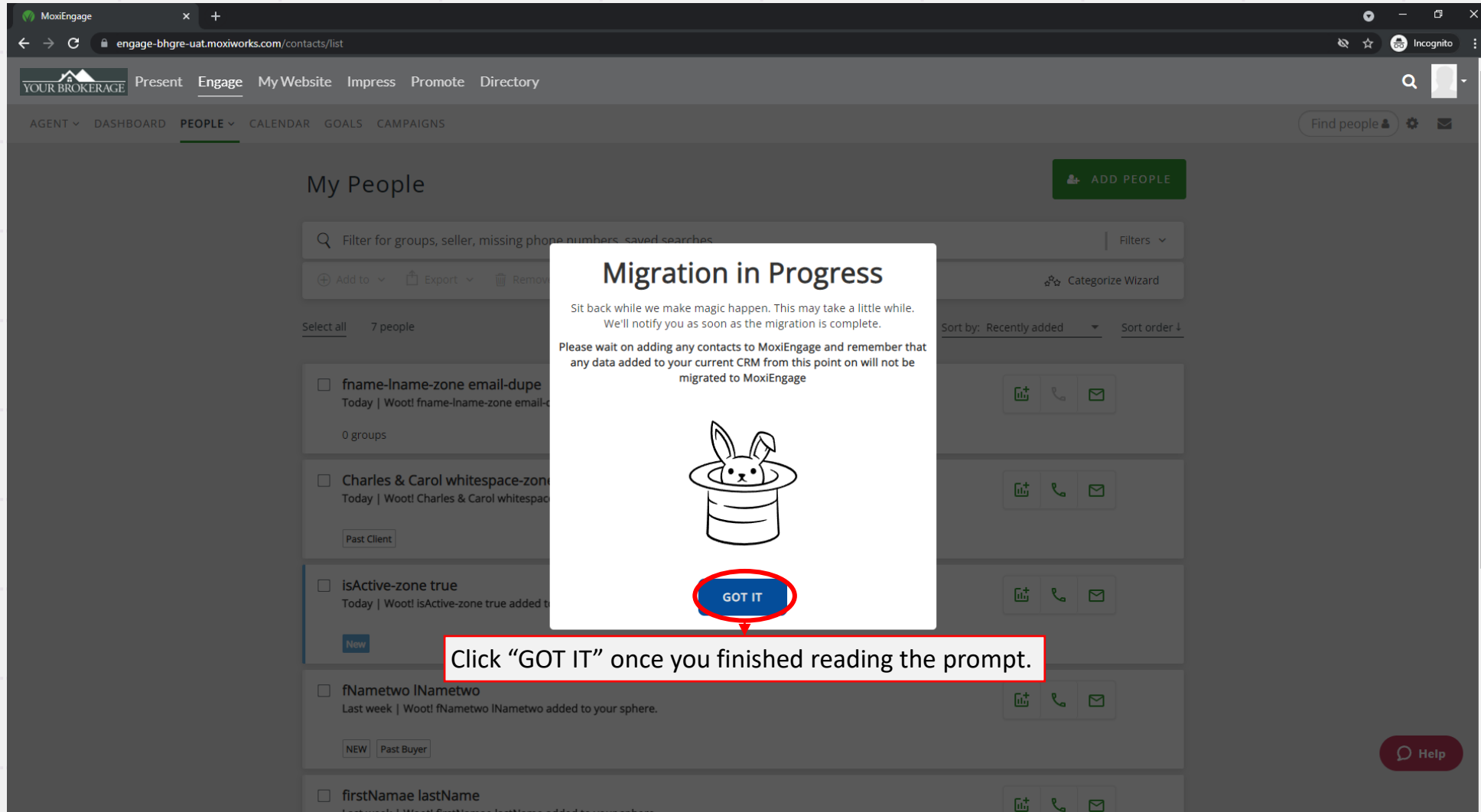
Select your previous CRM to migrate your data from. **Data can only be migrated from your previous CRM (Market Leader or Zap) ONCE** – any data you add after the migration will not make it into MoxiEngage.

Confirm CRM Modal

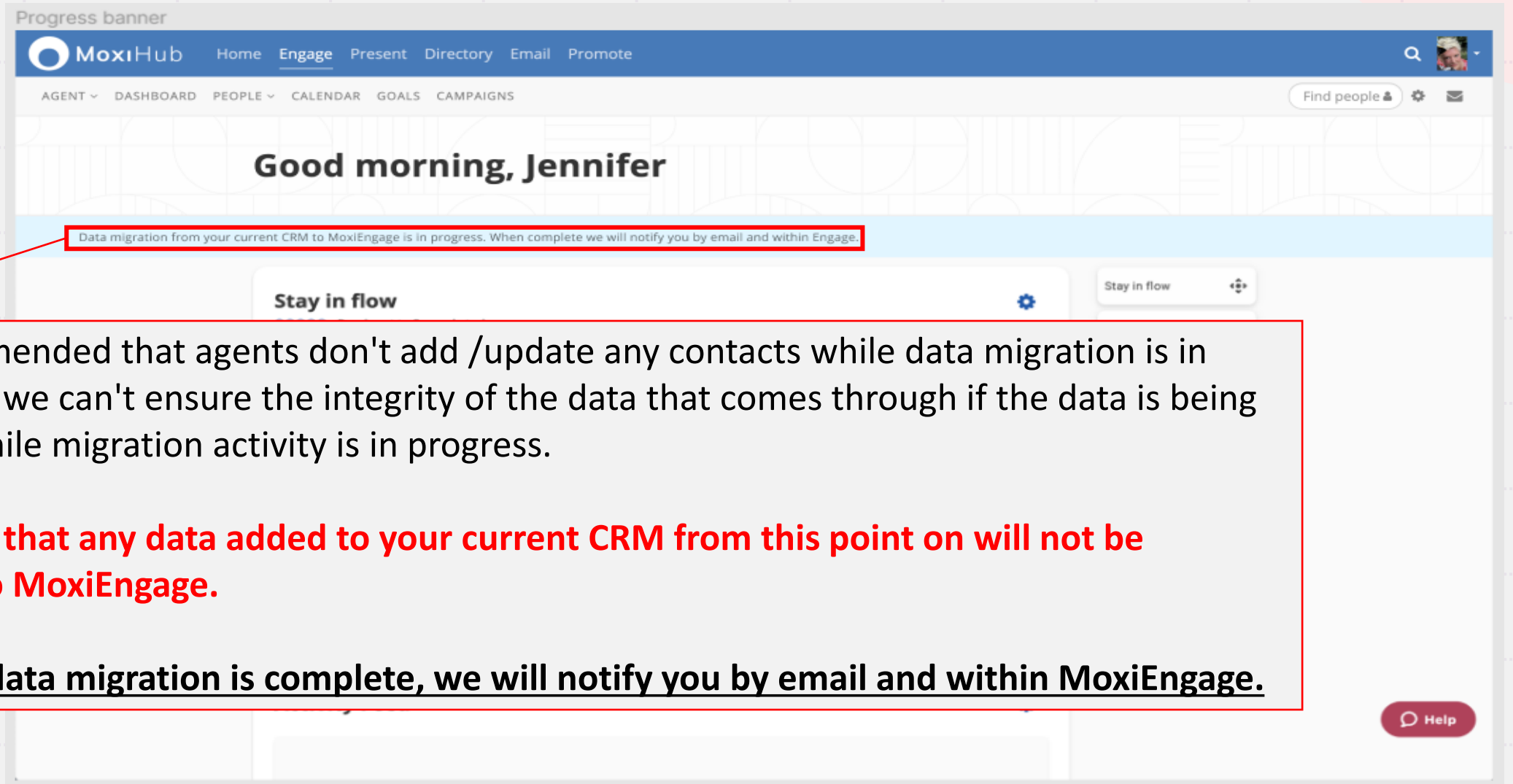


This is your last chance to change your selection, click confirm to proceed. If you choose to proceed, this action cannot be undone.

Migration in Progress Modal



In Product Progress Banner



The screenshot shows the MoxiHub web application interface. At the top, there is a navigation bar with the MoxiHub logo and links for Home, Engage, Present, Directory, Email, and Promote. Below this is a secondary navigation bar with links for AGENT, DASHBOARD, PEOPLE, CALENDAR, GOALS, and CAMPAIGNS. A search bar labeled 'Find people' is on the right. The main content area displays a greeting 'Good morning, Jennifer' and a light blue progress banner with the text: 'Data migration from your current CRM to MoxiEngage is in progress. When complete we will notify you by email and within Engage.' Below the banner is a 'Stay in flow' button. A red arrow points from the banner text to a text box containing instructions.

Data migration from your current CRM to MoxiEngage is in progress. When complete we will notify you by email and within Engage.

Stay in flow

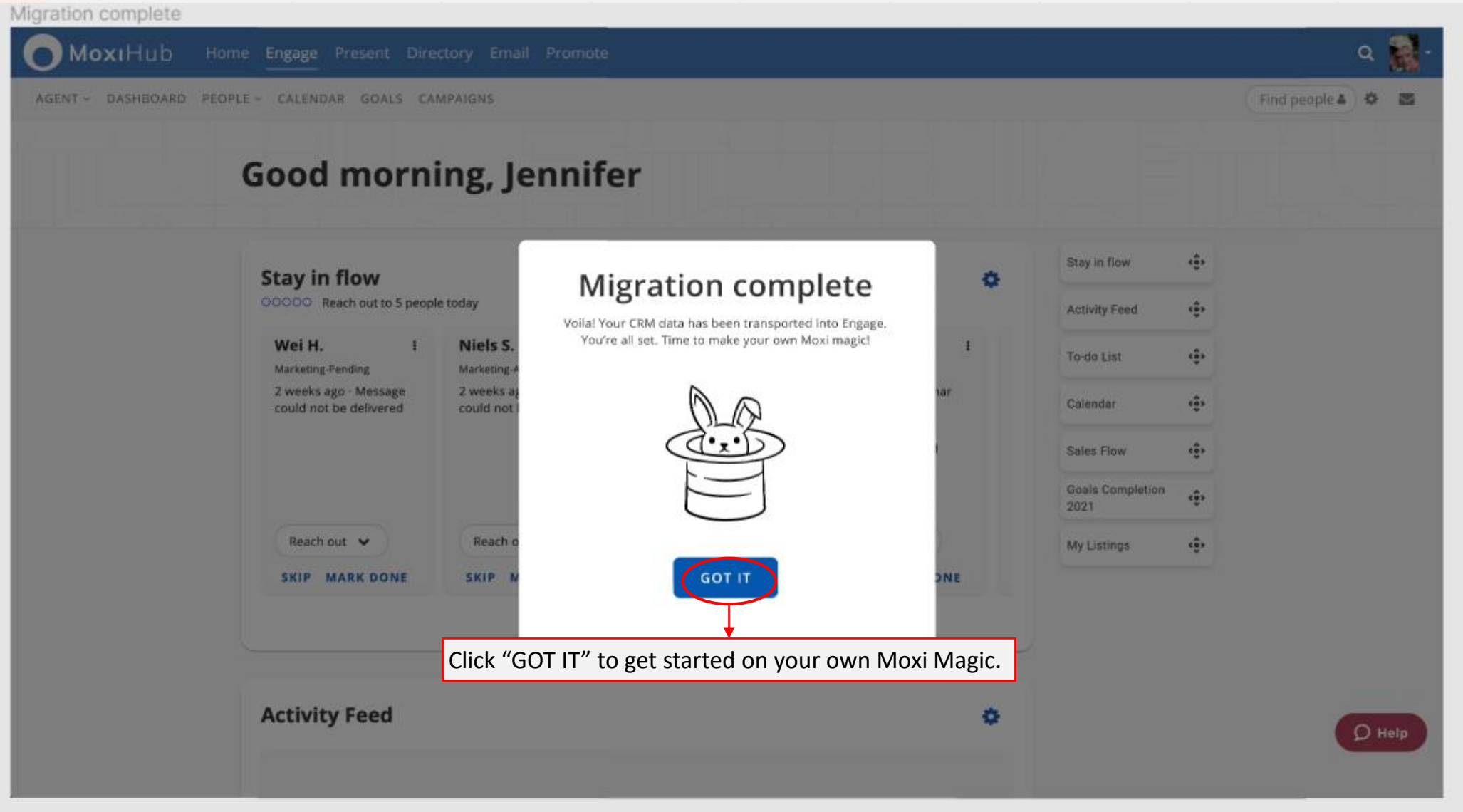
It is recommended that agents don't add /update any contacts while data migration is in progress as we can't ensure the integrity of the data that comes through if the data is being updated while migration activity is in progress.

Remember that any data added to your current CRM from this point on will not be migrated to MoxiEngage.

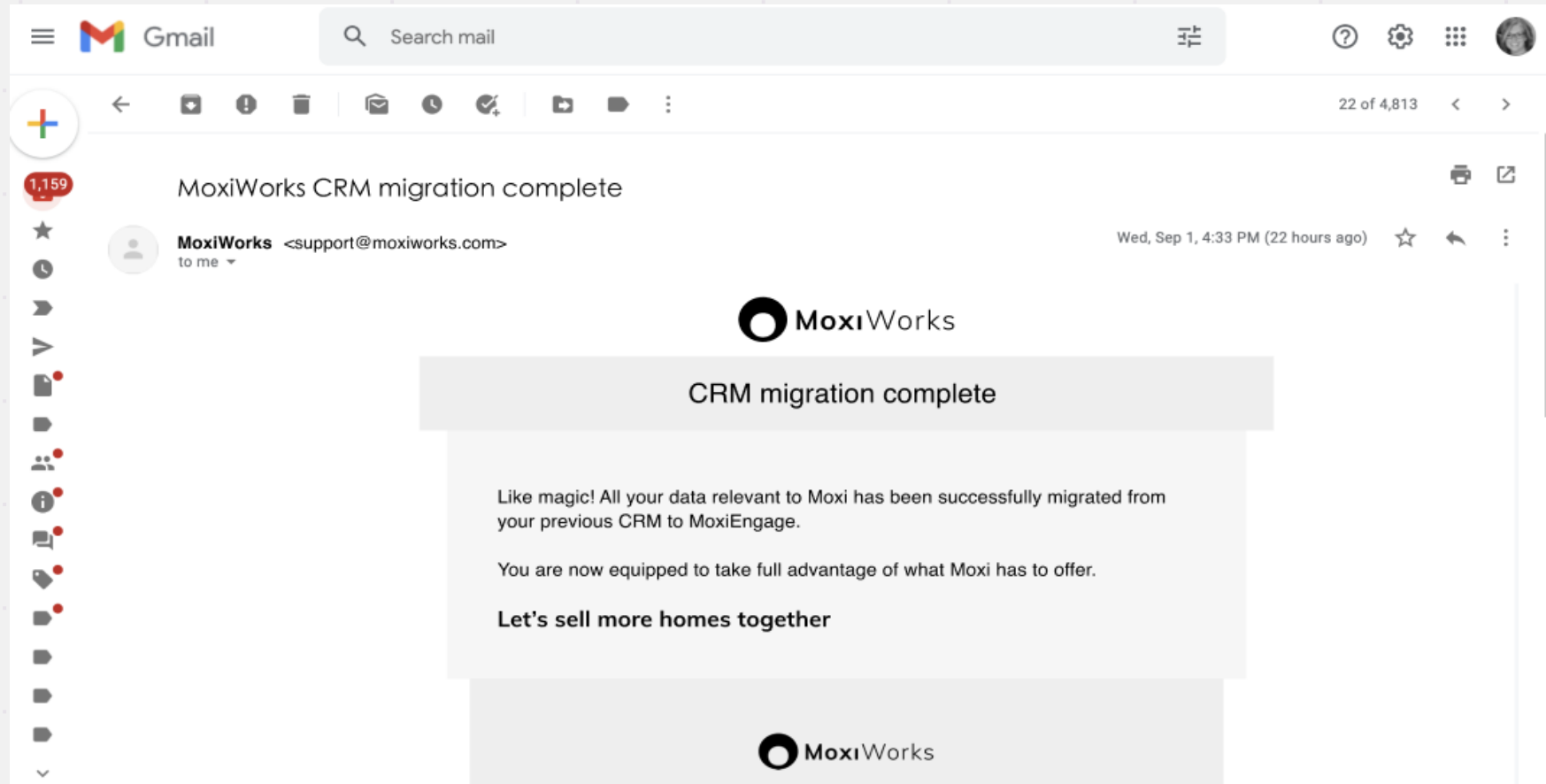
When the data migration is complete, we will notify you by email and within MoxiEngage.

Help

Migration Complete Modal



CRM Migration Complete Email



Once all your data relevant to MoxiEngage has been successfully migrated from your previous CRM to MoxiEngage, you should receive an email like this.

Remember that the migration is a one-time action, and anything added into your old CRM will NOT be migrated into MoxiEngage going forward.

After you are done with Automated Data Migration:

> After the migration completes, verify the contacts from your current CRM are accounted for in MoxiEngage, along with the contacts from your email client.

***Note:** If the number of contacts in Engage decreases after the migration, contact Realogy/Moxi support immediately.

> Return to your email client, review any duplicate contacts that were identified in the migration process, and merge where necessary.

Support:

Moxi can provide you with support in the following three ways:

1. Start a Live Chat: Available via the Help icon located at the bottom of every Moxi product page. After you've opened the chat window, click the "Get in touch" button and then "Live chat" to speak to a live representative.

2. Submit a Request Online: Accessible via the Moxi Support page. Fill out a quick form with your question and the Moxi customer service team will answer via email.

- <https://support.moxiworks.com/hc/en-us/requests/new>

3. Schedule a call with Moxi Support: Accessible via the Moxi Support page. Schedule a call with the Moxi customer support team, ensuring the call fits into your busy schedule.

- <https://calendly.com/moxiworkssupport/>

Additional support links (learning provided by MoxiWorks)

MoxiEngage Support :

- Understanding the basics of MoxiEngage:
 - **Link:** <https://support.moxiworks.com/hc/en-us/articles/205467585-Getting-Started-with-Moxi-Engage>

MoxiEngage Educational resource :

- There are tutorial video guides under courses for MoxiEngage. There are 2 courses, “Getting started with MoxiEngage” and Taking a “Deeper Look at MoxiEngage”.
 - **Link:** <https://education.moxiworks.com/bundles/moxiengage>