Zap

Automated Data Migration Guide

Important Reminders

- **>** This guide is meant to help you through the process of migrating the core contact related data from your current Zap account into your new MoxiEngage account.

- **>** The data migration process will not only migrate all of your contacts from your Zap account into MoxiEngage, but since MoxiEngage also syncs with your chosen email account, **ALL** of your 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*:

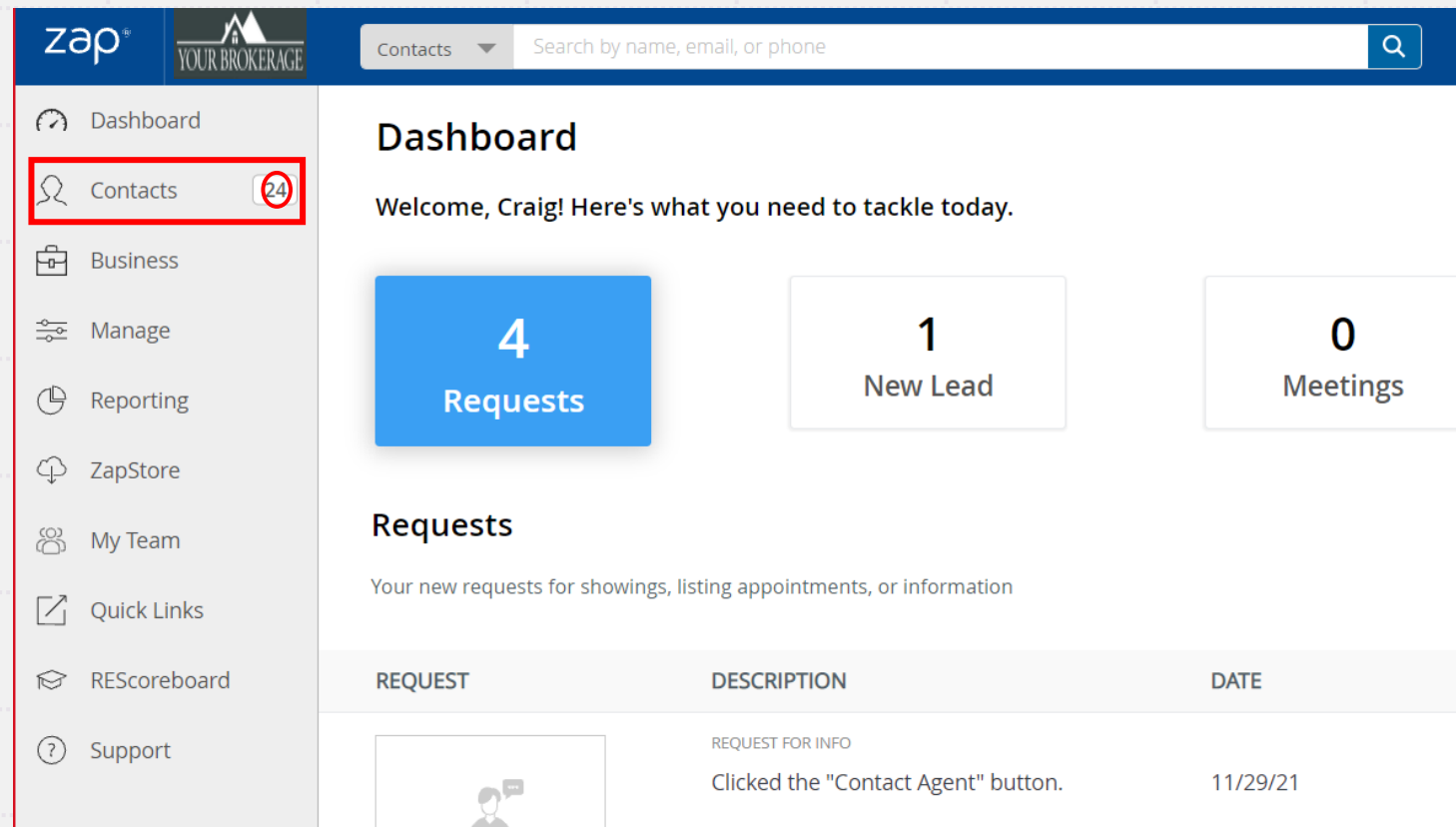*Remove/delete any contacts that you do not want to migrate to MoxiEngage

*Correct/clean-up any erroneous/extraneous data

*Make sure your contacts are in the correct contact groups to ensure your contacts remain organized.

*IMPORTANT: Since 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...

> Once you are done cleaning/organizing your contacts, take **note of the number of contacts** you have in your current CRM.
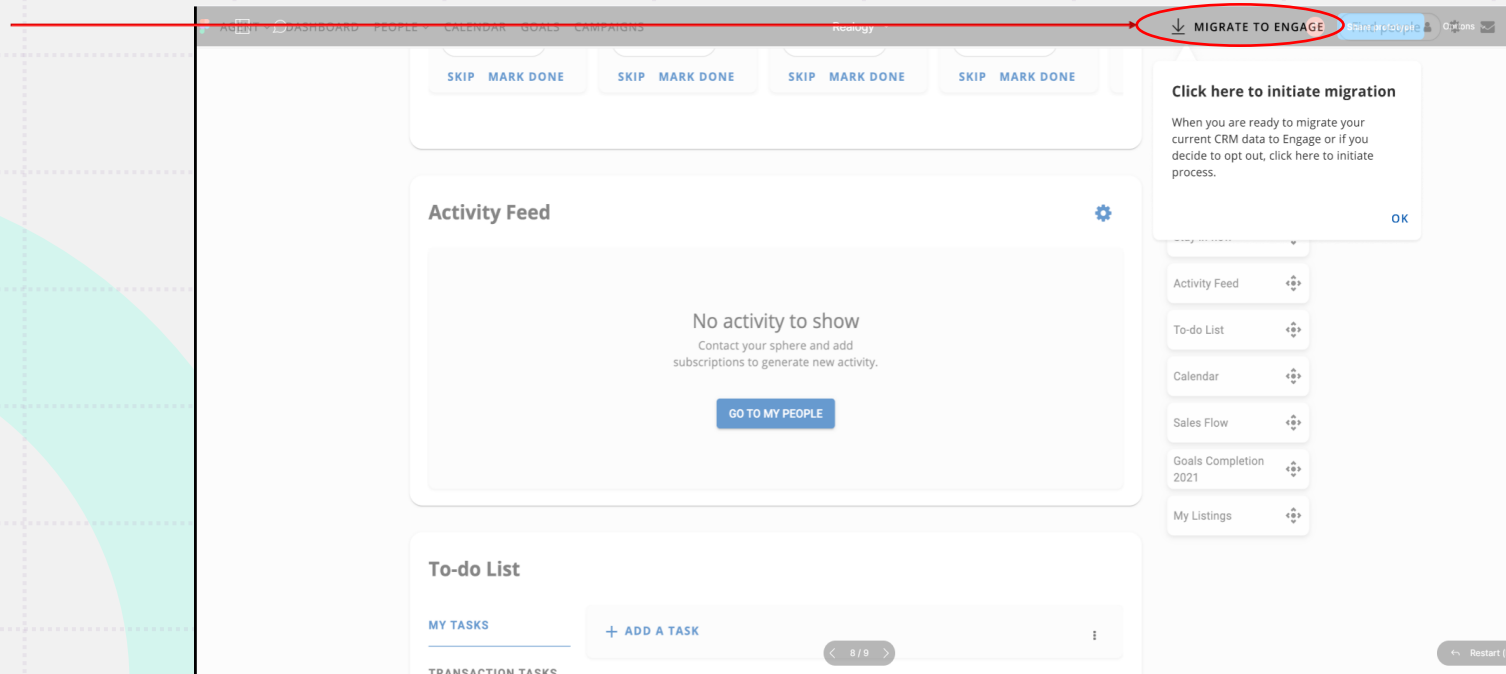
Automated data migration: If you selected "SKIP FOR NOW"

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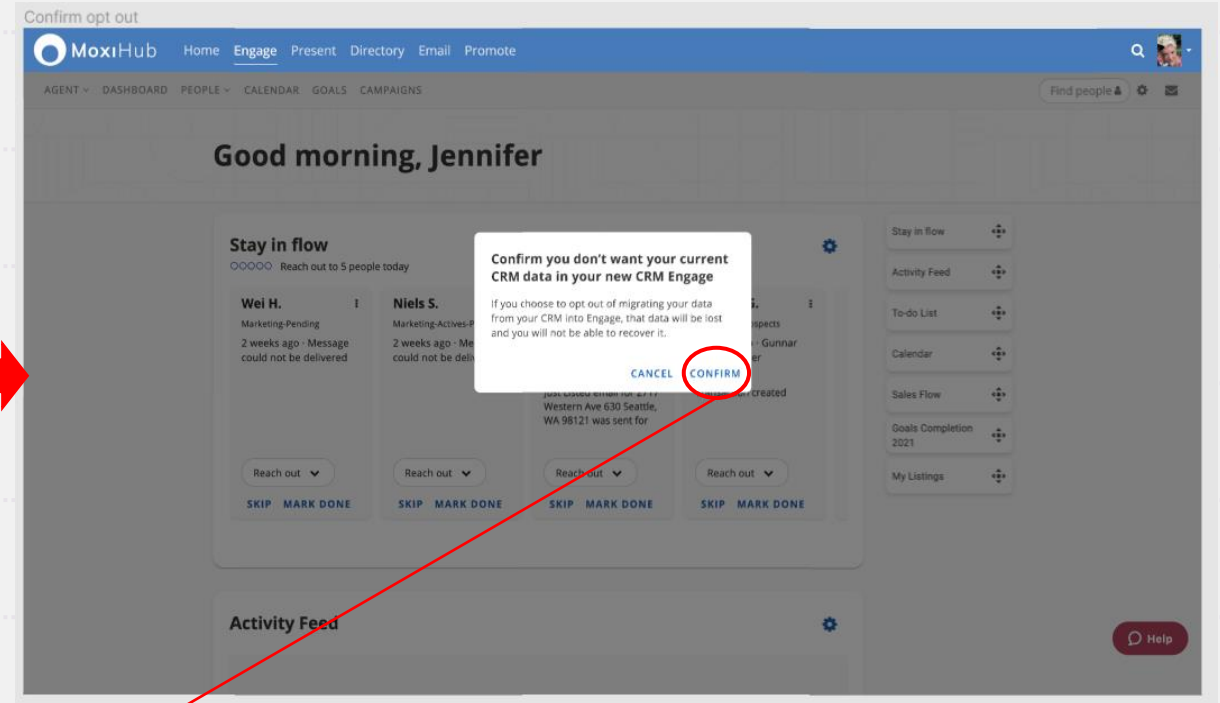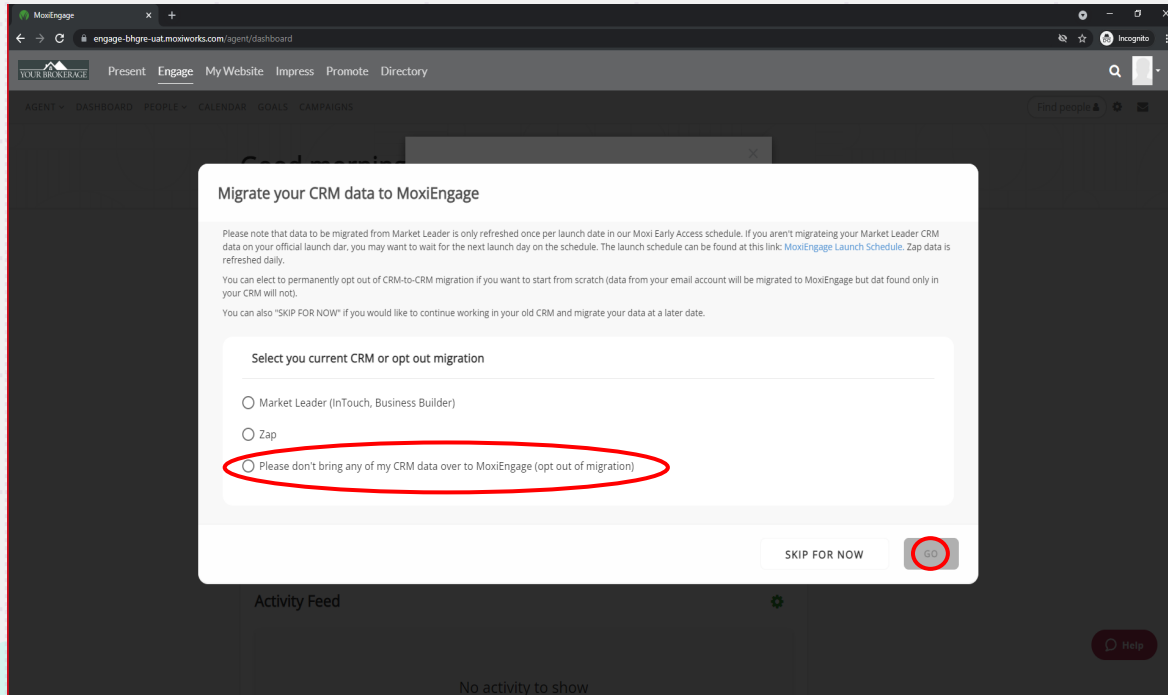
If you confirm to opt out of migrating your data from your CRM you will not be given this option again. If you just want to postpone the data migration until a later date, click "CANCEL" and then select "SKIP FOR NOW" on the prior screen.

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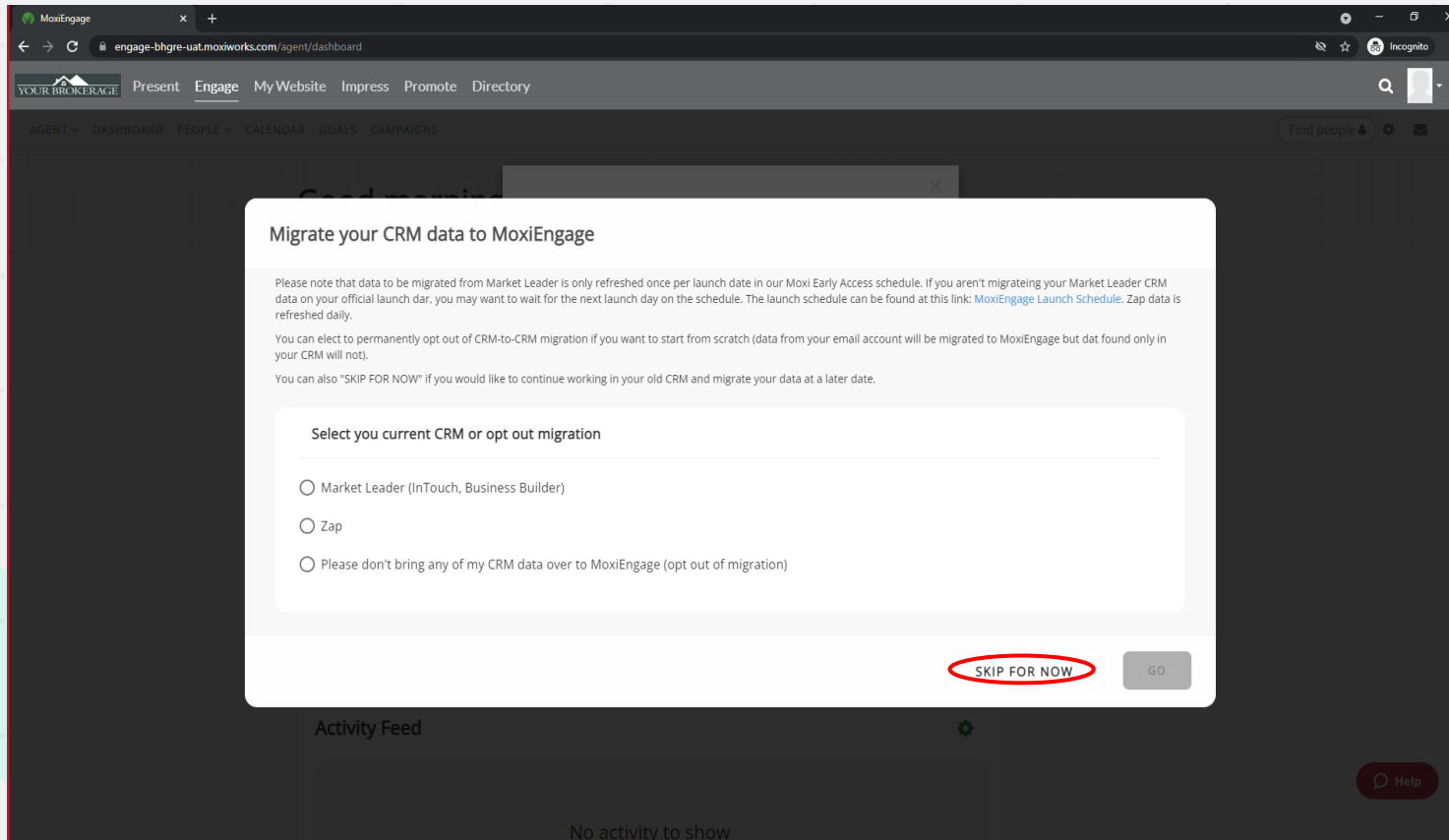
If you choose to SKIP FOR NOW, you can close this guide now and revisit when you are ready to perform your data migration.

Migrating Your Contact data from Zap to MoxiEngage

Migration Modal

Make sure to select Zap

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

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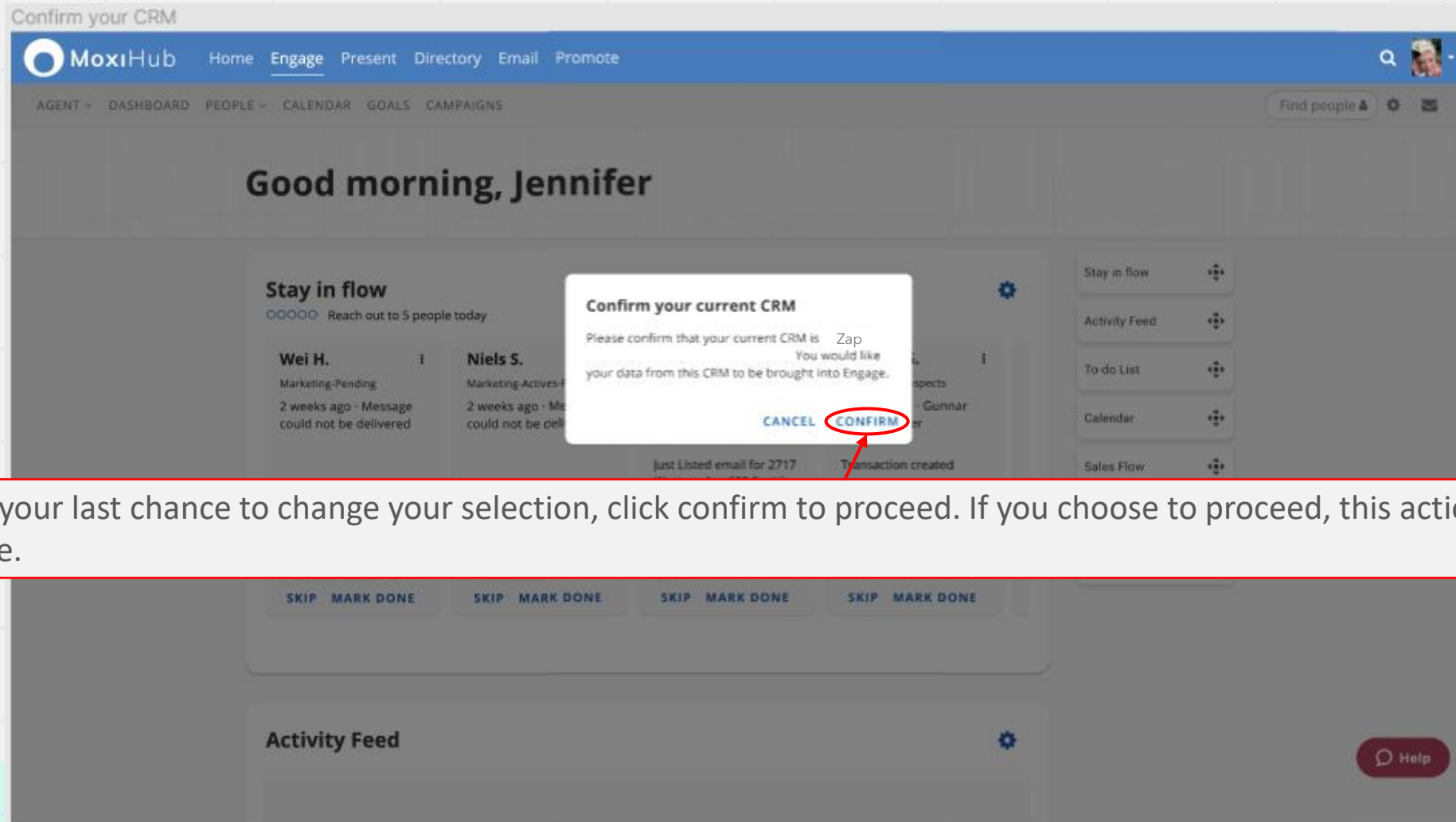
This is your last chance to change your selection, click confirm to proceed. If you choose to proceed, this action cannot be undone.

Migration in Progress Modal

Click "GOT IT" once you finished reading the prompt.
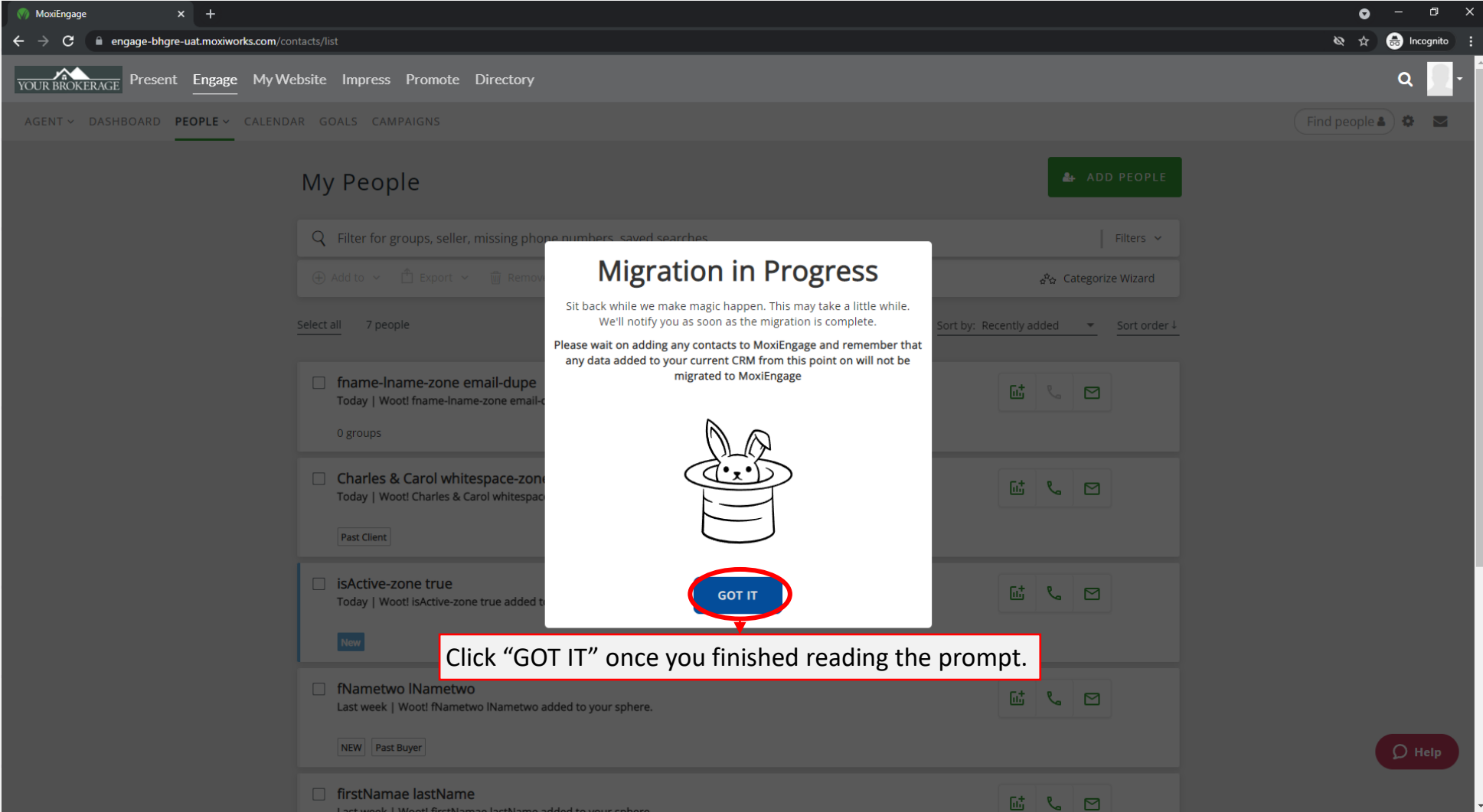
In Product Progress Banner

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.

Migration Complete Modal

Click "GOT IT" to get started on your own Moxi Magic.

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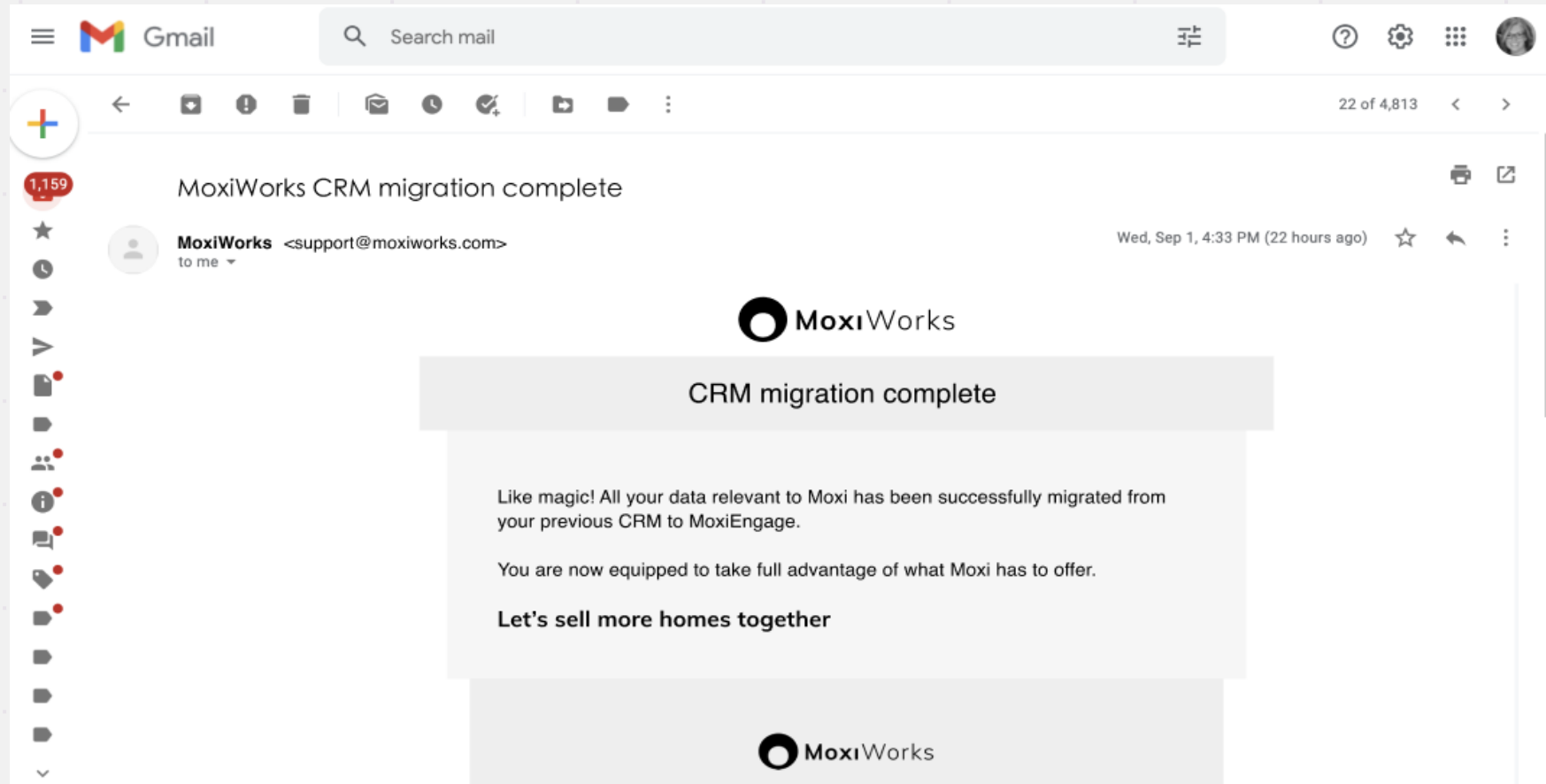
Once all your data relevant to MoxiEngage has been successfully migrated from your previous CRM to MoxiEngage, you should receive an email like this.

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.

  • **<u>*Note</u>**: If the number of contacts in Engage decreases after the migration, contact Realogy/Moxi support If 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