

Coldwell Banker MoxiEngage Data Migration FAQs

Planning for Migration

1. Will data from my current CRM be migrated to MoxiEngage?

- a. Yes, you will have the opportunity to migrate some of your core data from either Market Leader (Intouch) or Zap into your new MoxiEngage account via an in-product migration tool. You will not be able to automatically migrate data from any other CRM system that you might be using. See question **#13** for details on what will be migrated.
- b. It's strongly recommended that you spend time cleaning up your contact database in your current CRM in advance of your company's launch date for MoxiEngage. This will help avoid bringing over any outdated or extraneous data to your new CRM database.

2. When and how will the data migration occur?

- a. You will first need to make sure that you have onboarded yourself onto MoxiEngage (including completion of your email sync). Leverage the **First Time – MoxiEngage Guide** to walk through this process. Please also read the entirety of this FAQ before executing the **Automated Data Migration Guide**.
- b. After your onboarding is complete, the CRM automated data migration dialog window will appear within MoxiEngage upon first login and completion of email sync. Agents will have four options to choose from:

Migrate your CRM data to MoxiEngage

To enable migration to MoxiEngage, please select your CRM. Data can only be migrated from your CRM once. Any data added to your CRM post-migration will not appear in MoxiEngage.

Please note that data to be migrated from Market Leader is only refreshed periodically (mainly timed around agent training of MoxiEngage). If you aren't migrating your Market Leader CRM data soon after your MoxiEngage training date, you may want to wait for the next date on our data extract schedule - which can be found at this link: [MoxiEngage Data Migration – Data Extract 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).

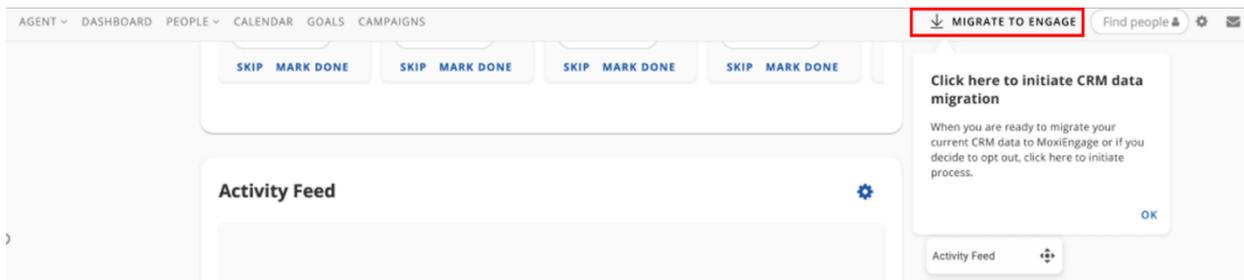
You can also "SKIP FOR NOW" if you would like to continue working in your old CRM and migrate your data at a later date.

Select your current CRM or opt out migration

- ① Market Leader (Intouch, Business Builder)
- ② Zap
- ③ Please don't bring any of my CRM data over to MoxiEngage (opt out of migration)

④ SKIP FOR NOW

- 1) Migrate your data from Market Leader (InTouch, Business Builder) to MoxiEngage *right now*.
- 2) Migrate your data from Zap to MoxiEngage *right now*.
- 3) *Opt out* of any CRM data migration for good.
 - **NOTE:** Once this selection is confirmed, you will not be given the option to systematically migrate your data ever again. You would have to do a manual export/import in order to have access to your data in your new CRM.
- 4) **SKIP FOR NOW.** Agents should use this option if they want to continue working in Market Leader (InTouch, Business Builder) or Zap and migrate their data at a future date. If this option is selected, agents will continue to see an option to Migrate to Engage in their MoxiEngage menu bar (see below).



3. Can I migrate both Zap and Market Leader (InTouch) data?

- a. No, you can select one or the other, but not both. You should choose the CRM which you use the most and has the most comprehensive and current information about your real estate contacts.

4. If I already have contacts in MoxiEngage, will the data migration process create any duplicates?

- a. If you already have a contact in MoxiEngage that matches First Name, Last Name and Primary Email of a contact being migrated from your old CRM, then a new contact will not be created and the data for that contact will be merged with the data you may already have in MoxiEngage. If the contact from your old CRM doesn't exactly match First Name, Last Name and Primary Email with any of the contacts in MoxiEngage, then a new contact will be created.

5. What impact will the data migration have on my linked O365 or Google contacts?

- a. As part of your account setup, either your brokerage O365, Google Workspace or your personal Google email account will have been linked to your new MoxiEngage account and contact syncing will be done automatically.

The sync is real-time and continuous and cannot be shut off. Therefore, **ALL of the contacts that you migrate from your legacy CRM system will be added to your email contacts (e.g., if you have 2K contacts in Market Leader (InTouch) or Zap and migrate them, they will all be added into your email account).** For this reason, you should make sure to clean up your contacts in your email account prior to using MoxiEngage. Also make sure that you are certain that you want to migrate your data from your legacy CRM and if so clean up your contacts (within your legacy CRM) that you would want to migrate.

- b. **It's important to note that once you execute your data migration from your existing CRM, there will be no way to systematically undo the changes to your MoxiEngage or email accounts.**

6. How current will the data be that is migrated to MoxiEngage?

- a. It's important to understand that your data is not migrated directly from your current CRM to MoxiEngage. The data is first extracted from Market Leader (InTouch) or Zap and stored by Realogy where it is available to be mapped and loaded into your MoxiEngage account upon your initiation.

The schedules for the data extracts from Market Leader (InTouch) and Zap are independent of each other:

- 1) **Market Leader (InTouch)** – as a 3rd party vendor, Market Leader is charging us for each data extract performed. Therefore, we will be limiting our data requests to be aligned with the company launch schedule of MoxiEngage.

Due to the high volume of data, the extract and load process can take a few days. Our goal is to complete this process so that the latest data is available to agents as close to their MoxiEngage agent training date as possible

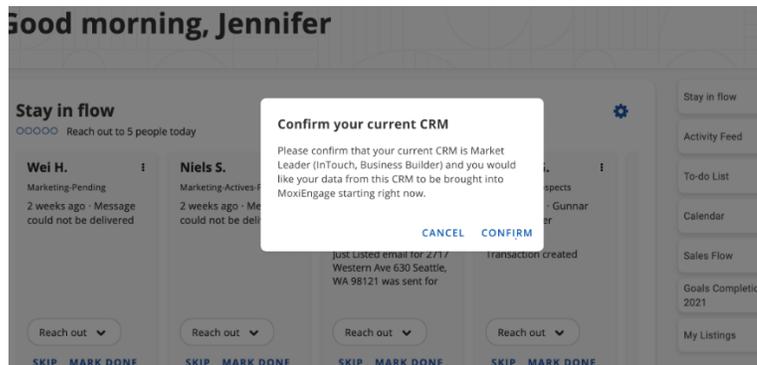
- Please note that any data that is entered into Market Leader after the data is extracted, will not be part of the data migration.

IMPORTANT: if you choose to SKIP FOR NOW and postpone your data migration from Market Leader to a later date, it is recommended that you wait until one of the future data extracts so that your data is as complete as possible. Please review the [current Market Leader data extract schedule](#) to choose a date which is suitable for you.

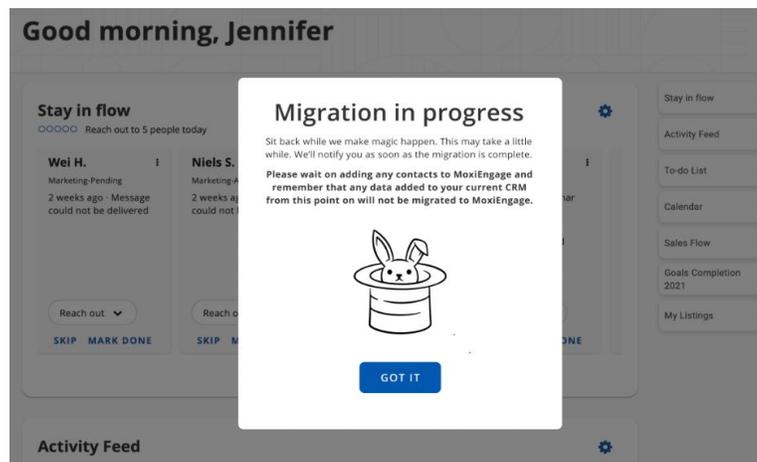
2) **Zap** – data is extracted once a day so the data that you load into MoxiEngage should never be more than one to two days old.

7. How long will the data migration take once I initiate it?

- a. The time for loading your data into MoxiEngage will vary depending on numerous factors including the number of contacts you have in your current CRM and the current processing load that is running on the data servers. We anticipate the migration to take no longer than 30-60 minutes for most agents. **Note:** This may vary significantly based on how many contacts you have in your legacy CRM.
- b. Once you make your selection (Market Leader or Zap) to migrate your data and click “GO” you will need to Confirm your selection:

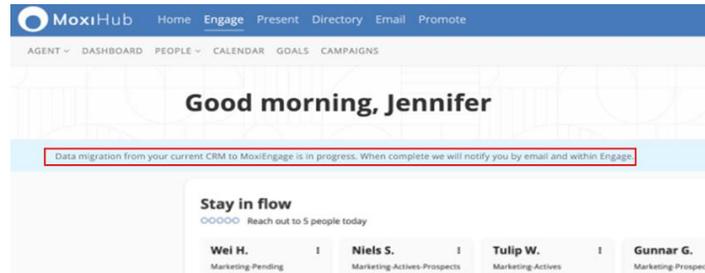


- c. After confirming your selection, you will see a “Migration in Progress” message:



- d. Please note that your data migration will continue to run whether or not you stay on this page, navigate away within the product or close the browser all

together. You will see a migration status note if/when you return at a later date/time:

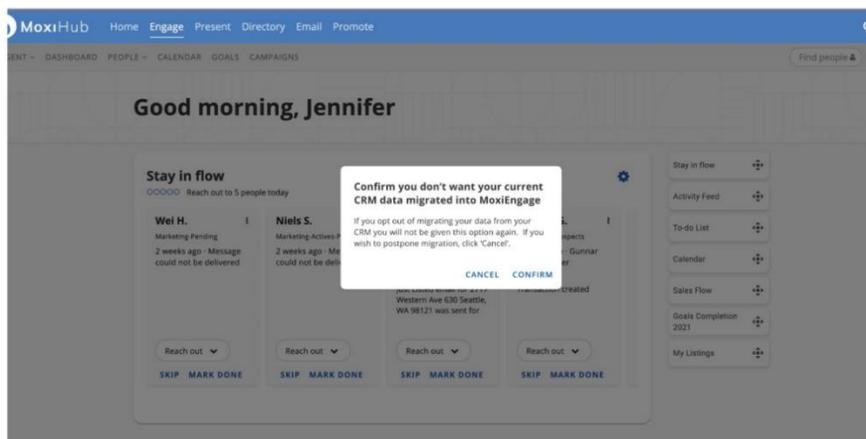


8. Will I be able to migrate my data from Market Leader (InTouch) or Zap multiple times?

- a. No – data migration is a one-time event. Once you complete the automated data migration of your data, you will not be given the option to migrate again. Therefore, any data you enter into Market Leader (InTouch) or Zap after the migration has occurred will never be systematically migrated to MoxiEngage.

9. If I opt out of data migration, will I have the ability to migrate my data in the future?

- a. No, if you select the “Please don’t bring any of my CRM data over to MoxiEngage (opt out of migration)” option, you will see a confirmation screen and if you click “CONFIRM” you will not be able to systematically migrate your data:



- b. **NOTE:** To postpone migration of your data to a later date, make sure to click the “SKIP FOR NOW” button on the initial data migration screen.

During Migration

NOTE: It is recommended that agents don't add/update any contacts within MoxiEngage while data migration is In Progress as this could cause data inconsistencies.

10. Will I be able to access my old CRM during the data migration?

- a. Yes, your old CRM will continue to be accessible for the time being.

NOTE: Once migration has taken place, data you add to your old CRM will not appear in MoxiEngage.

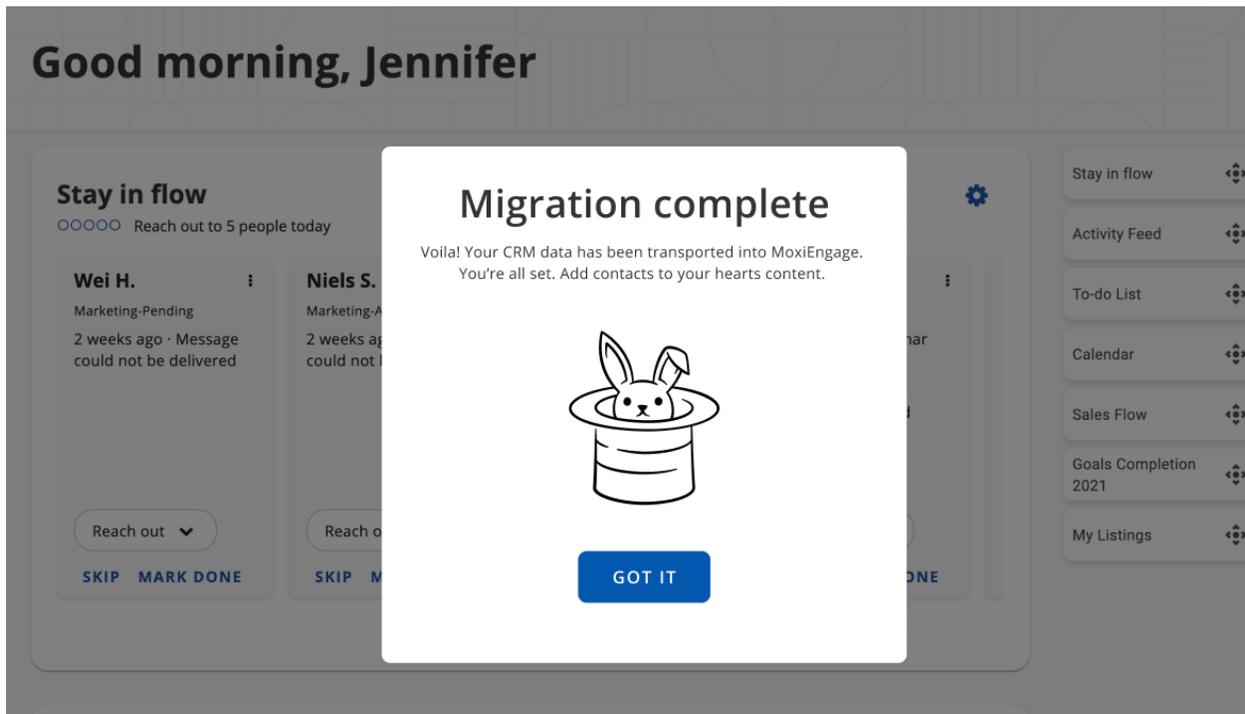
11. Will I be able to access MoxiEngage while data is being migrated?

- a. Yes, you will have access to MoxiEngage during the migration.

NOTE: Refrain from making any changes to contacts during the migration to avoid issues.

12. How do I know my data migration is complete?

- a. Once the data migration is complete, you will receive an email letting you know, and you will see an in-product message within MoxiEngage:



- b. Remember, after the migration is complete, no additional data entered in your current CRM will be systematically migrated to MoxiEngage. As you will now be using MoxiEngage as your new CRM, please confirm with your broker that MoxiEngage is your selected CRM for routing leads from Leads Engine.

What Will Be Migrated

13. What data will be migrated from my Market Leader (InTouch) or Zap account to MoxiEngage?

Contacts will be migrated to the **My People tab** in MoxiEngage. These are the contact fields that will be migrated:

- 1) First Name
 - 2) Last Name
 - 3) Address if available, multiple addresses will be migrated for Zap and for Market Leader (InTouch) only a single address will be migrated.
 - 4) Phone Numbers (Mobile, Home, Work). Cell # will be tagged as Primary if no Primary tag.
 - 5) Emails (up to 3 – will be labeled as Primary, Secondary, and Other)
 - 6) Job Title
 - 7) Company
 - 8) Anniversary
 - 9) Birthday
 - 10) Notes
- b. **Contact Groups** will be migrated as **Contact Groups** in MoxiEngage.
 - c. **Contact Statuses** (e.g., Hot, Cold, Unassigned, etc.) will be added as **Contact Groups** in MoxiEngage and will include all the contacts with that status from your old CRM.
 - d. **Reminders** will show up as a **Task** in MoxiEngage.
 - e. **Activities** will show up in the **Activity tab** of a contact in MoxiEngage.
 - f. **Lead Sources** Primary Sources will be mapped to **Lead Source tags** in MoxiEngage.

Specific to InTouch: If the Primary Source contains “Company Lead” then the Secondary Source from Intouch will be mapped to the Lead Source tag instead.

There are 25k+ primary lead sources across Market Leader (InTouch) and Zap. These have all been mapped to the 42 lead tags you see below.

These tags are how you will be able to search in MoxiEngage for contacts from these lead sources. The original primary lead source can also be found in an Activity event in MoxiEngage that provides a bit more detail, such as the specific lead location from within originating lead app/service and the date they were received.

Example: Primary lead source for a contact in your current CRM (Market Leader or Zap) was "Zillow listing lead form from search ad". The primary source for this is Zillow and will be mapped to the Zillow lead source tag. The details of "Zillow listing lead form from search ad" and the date added will appear in the Activity event found on this contact's profile.

g. Values for Lead Source Tags:

Apartments.com	Craigslist	Homes & Land	Offrs
Buyside	Direct Mail	Homes Connect	Real Estate Book
Call In	Email	Homes Guide	Realtor.com
Career	ERA.com	Homes.com	Relocation
Cartus	Estatly	Homescape	Sotheby's International Realty
Century21.com	Facebook	Homespotter	Trulia
Coldwell Banker	FLIPT	iHouseHunt.com	Walk In
ColdwellBanker.com	Google	Insurance	Wall Street Journal
ColdwellBankerHomes.com	Homefinder	Land.com	Yahoo
ColdwellBankerOnline.com	HomeGain	Lending Tree	Zillow
Corp	Homensnap	Miscellaneous	

h. **Miscellaneous:** several contact related fields from Market Leader (InTouch) and Zap do not map to an existing field in MoxiEngage. Therefore, when populated, the following fields can be found as a contact Activity in MoxiEngage:

- 1) Agent Lead or Broker Lead
- 2) Email Messages (Zap only)
- 3) Contact Notes
- 4) Property Features
- 5) Metro

- 6) Contact Type (e.g., Buyer, Seller, Investor, etc.) and will also map to a respective MoxiEngage Type (see below)
- 7) Category
- 8) Primary Agent
- 9) Primary Source
- 10) Secondary Source

14. How is Contact Type mapped and migrated to MoxiEngage?

Zap Type	Moxi Type (AND add an Activity for All)
None	None
Buyer and Seller	Past Buyer, Past Seller
Buyer	Past Buyer
Seller	Past Seller
Renter	None - just Activity
Investor	None - Just Activity
Personal Contact	Personal
Past Client	None - just Activity
Agent	None - just Activity
Vendor	Collaborator
Recruit	Recruit (if Talent product available)
Other	None - just Activity
Market Leader Type	Moxi Type (AND add an Activity for All)
Buyer	Past Buyer
Seller	Past Seller
Buyer/Seller	Past Buyer, Past Seller
Lead	None - just Activity
Renter	None - just Activity
Investor	None - just Activity
Past Client	None - just Activity
Agent	None - just Activity
Vendor	Collaborator
Personal Contact	Personal
Other	None - just Activity

Zap-specific Questions

15. Zap has a concept of a Primary and Secondary agent for leads. Where can we find that information?

- a. This data is stored in a field called IsPrimaryContact within Zap and can be found in the Agent Assigned column of the Contacts list screen. The data will be migrated into an Activity record within the agent's MoxiEngage account.

16. Will contact "tags" from Zap be migrated to MoxiEngage?

- a. Yes, since MoxiEngage does not have the concept of contact tags, we have it transferred to MoxiEngage Notes section.

17. Will contacts from Zap that have the database field "IsActive" = false be migrated to MoxiEngage?

- a. No, these contacts will not be migrated. In Zap when a contact has IsActive=false this means that the lead was returned by an agent back to the broker for whatever reason. Zap closed this lead from the agent and broker has not assigned the lead to another agent yet.

Troubleshooting Post Migration

18. Why aren't my notes syncing from my phone?

<https://support.moxiworks.com/hc/en-us/articles/204079359-Why-aren-t-my-notes-syncing-from-my-phone->

19. How can I reverse my email's contacts from syncing with my phone?

<https://support.moxiworks.com/hc/en-us/articles/360056584032-How-to-Reverse-your-Email-s-Contacts-from-Syncing-with-your-Phone->

Accessing My Old CRM

20. When/Will I lose access to Market Leader (InTouch)?

- a. It is strongly recommended that you do not migrate your data until you are ready to embrace MoxiEngage as your CRM. Once you've migrated your data, we also recommend that you begin using MoxiEngage and cease to use Market Leader (InTouch) to avoid any loss of data.

- b. Coldwell Banker agents will continue to have uninterrupted access to their InTouch accounts until June 30, 2022.
 - 1) **NOTE:** No data that is entered into Market Leader after the scheduled data extract that is used for the data migration will be systematically loaded into an agents MoxiEngage account. Review the current Market Leader Data Extract Schedule for dates of data extraction.
- c. **IMPORTANT:** All agents with Business Builder accounts will have the opportunity to continue using Market Leader Pro as part of the Open Ecosystem and retain all of their data with no interruption in service. This will be agent paid at a significant discount from the retail price.

21. When/Will I lose access to Zap?

- a. You will not lose access to Zap immediately. At some point after your company's MoxiEngage launch, Zap may become read-only, and if so, you will receive a message notifying you of that date. Zap will be retiring completely at the end of 2022.

NOTE: Keep in mind that you still need to manage/end you campaigns and other automated functions from your old CRM once you start using MoxiEngage. In order to avoid sending multiple emails to clients from multiple platforms.

Support

22. Who should I contact if I encounter a problem during the data migration process?

- a. 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/>

23. Additional Support and Educational resources for MoxiEngage:

- a. Understanding the basics of MoxiEngage:
 - <https://support.moxiworks.com/hc/en-us/articles/205467585-Getting-Started-with-Moxi-Engage>
- b. MoxiEngage Educational resource; There are tutorial video guides under courses for MoxiEngage:
 - <https://education.moxiworks.com/bundles/moxiengage>