



Mapping Objects and Related Fields in CRM Data Migration

Nailing Down the Most Confusing Part



**Before you go any further, let's just
make one thing clear:**

**We can do the entire
mapping portion of CRM
data migration for you.**

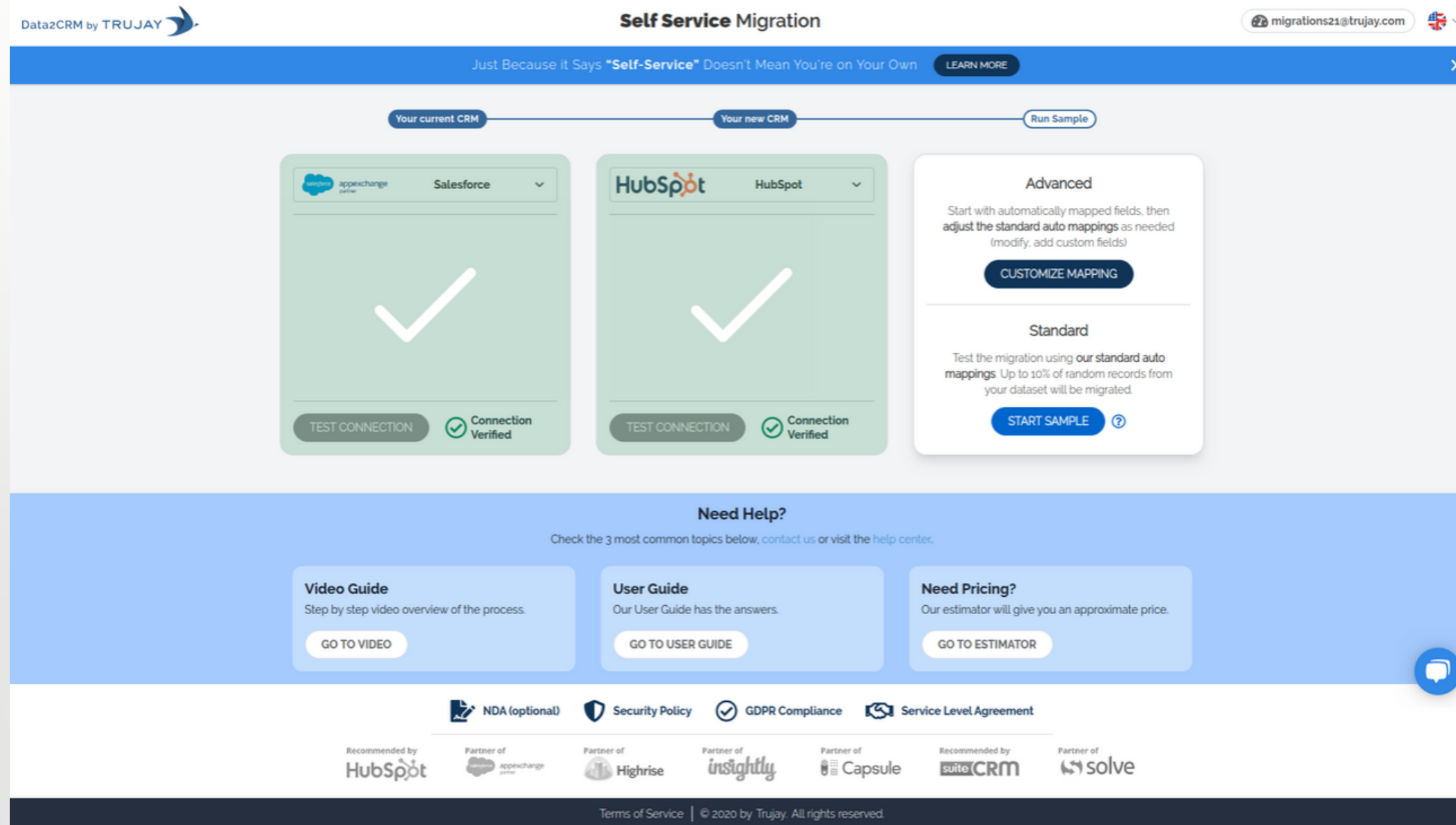
In fact, we can do the ENTIRE migration project for you from start to finish. So, before you invest in absorbing the following information on object and fields mapping, think about whether or not you even want to do it!

If you do, please enjoy this free handbook. If not, use our [Guided Service Migration](#) to let us do the work for you.

If you're still here, we're excited to help you understand the mapping process.

Let's Begin

Mapping and The Self-Service Tool



Our Self-Service tool serves any level of technical knowledge. It's an easy way to get data migrated from point A to B. No complexities, no customization, just a simple method of transferring data at a fair price and with a quick turnaround.

The process of using the Self-Service tool is easy and automated. **The mapping process is typically where people get stuck, either because they don't know how to match their objects and related fields, or they're intimidated by the migration process.**

Luckily, automation is included in the mapping portion. Our system will map your fields by linking the fields based on the closest name match. **However, if the auto-mapping isn't sufficient, you'll have to remap them on your own. We're here to teach you how.**

FILTERS

You can filter records according to these 4 filters

Mapped



The source CRM fields that were successfully mapped

Unmapped



The source CRM fields that are still unmapped

Custom



All custom fields that were added by CRM members

Native



All native fields that existed in source CRM from scratch

Choose Which Objects You Want to Migrate

Data2CRM by TRUJAY

Self Service Migration

migrations21@trujay.com

Just Because it Says "Self-Service" Doesn't Mean You're on Your Own

LEARN MORE

Confirm CRMsSelect ObjectsMatch UsersMap FieldsRun SampleStart Migration

Below are the objects available on your current system, and the name they will have in the new CRM. Please select the objects that you want to migrate.

Accounts

Attachments

Calls (Tasks)

Cases

Contacts

Email Messages

Leads

Meetings (Events)

Notes

Opportunities

Tasks

Users

Campaigns

Companies

Attachments

Calls

Tickets

Contacts

Emails

Contacts

Meetings

Notes

Deals

Tasks

Users

Campaign

UP TO 100 RECORDS WITH RELATED DATA

UP TO 100

UP TO 300

UP TO 100

UP TO 100 OBJECT RECORDS RELATED TO ACCOUNTS

UP TO 300

UP TO 100

UP TO 300

UP TO 300

UP TO 100

UP TO 100

-

UP TO 100

BACK

During the next steps, we will walk you through the user's matching and fields mapping from your old CRM to your new one. Click Next to begin Field Mapping for your first object.

NEXT

Having questions or faced with trouble? Visit our [help center](#) or [contact us](#)

Users Mapping

Match users to organize
employee CRM management

Self Service Migration

Just Because it Says "Self-Service" Doesn't Mean You're on Your Own [LEARN MORE](#)

[Connect CRMs](#) [Select Objects](#) [Match Users](#) [Map Fields](#) [Run Sample](#) [Start Migration](#)

Trujay has already mapped as many fields as possible for you. Please review the mapping to be sure all important fields have a match.

[HubSpot](#) Migration id: #362070

[Accounts \(Companies\)](#) [Attachments](#) [Calls \(Tasks\) \(Calls\)](#) [Cases \(Tickets\)](#) [Contacts](#) [Email Messages \(Emails\)](#) [Leads](#)

Filter by: [Select filter](#) [Native](#) [?](#)

Start typing to find...

Website / Address string 1	Website URL / Address string 1	✗
Phone / Number string 1	Phone Number / Number string 1	✗
Address / Street string 1	Street Address / Street Address string 1	✗
Address / City string 1	Street Address / City string 1	✗
Address / State string 1	Street Address / State/Region string 1	✗
Address / Country string 1	Street Address / Country string 1	✗
Address / Zip string 1	Street Address / Postal Code string 1	✗
Relation / User string 1	Relation / User string 1	✗

Showing 1-8 of 49 [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [Go to 1](#)

[RESET MAPPING OF CURRENT MODULE](#) [UNMAPPED FIELDS](#) [CUSTOM FIELDS](#)

[BACK](#) [SELECT RECORDS FOR SAMPLE MIGRATION](#) [START FREE SAMPLE MIGRATION](#)

Self Service Migration

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[Accounts \(Companies\)](#) [Attachments](#) [Calls \(Tasks\) \(Calls\)](#) [Cases \(Tickets\)](#) [Contacts](#) [Email Messages \(Emails\)](#) [Leads](#)

Filter by: [Select filter](#) [Native](#) [?](#)

Start typing to find...

Type string drop-down 1	Type string 1	✗
Account Name string 1	Name string 1	✗
Employees string 1	Number of Employees string 1	✗
Industry string drop-down 1	Industry string 1	✗
Description string 1	Description string 1	✗
Annual Revenue string 1	Annual Revenue string 1	✗
Year Started string 1	Year Founded string 1	✗
Account Source string drop-down 1	Target Account Recommendation State string 1	✗

Showing 9-16 of 41 [1](#) [2](#) [3](#) [4](#) [5](#) [Go to 2](#)

[RESET MAPPING OF CURRENT MODULE](#) [UNMAPPED FIELDS](#) [CUSTOM FIELDS](#)

[BACK](#) [SELECT RECORDS FOR SAMPLE MIGRATION](#) [START FREE SAMPLE MIGRATION](#)

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DROP-DOWN FIELDS

Drop-down field mapping allows you to map dropdown fields between the source and target CRM. You will have to match the dropdown values/picklist options in order to populate dropdowns in the target CRM with the correct values. If there is no matching value in the target CRM dropdown field, you can create one or select the most appropriate existing one.

Drop-down field values are usually mapped by our system automatically, based on the best name match. You can also make any changes manually by picking up a corresponding value from the list, or just click '**Map Drop-downs Automatically**' if you want our tool to do the matching for you based on the closest name match.

Migration id: #360455



Calls (Activities (Calls))

Contacts (People)

Meetings (Activities (Meetings))

Notes (Activities (Notes))

Deals (Opportunities)

Tasks



Filter by:

Select filter



Q Start typing to find

Relation / Contact



Relation / Contact

required



Relation / Account

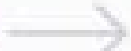


Relation / Account

required



Deal Name



Opportunity Name

required



Default

Pipeline With Stage



Milestone

required



Relation / User



Relation / User



Total 78



1

2

3

4

5

6



16



RESET MAPPING OF CURRENT MODULE

SHOW VERSIONS

SAVE MAPPING

COMPLEX FIELDS

A block containing a mapping of multiple fields with a similar context. **As an example**, the “phone number” complex field may include multiple fields such as home phone number, work phone number, and mobile phone number, each one mapped to one or several phone number fields.

The screenshot displays a form editor interface with a search bar at the top. Below the search bar, there are several form fields, each with a label, a data type, and a value. The fields are:

- Relation / User (string, relation.user)
- Email / Address (string, email.address)
- Phone / Number (string, phone.number) - 28823 of 40021 (72%)
- Website / Address (string, website.address)

The 'Phone / Number' field is highlighted with a red arrow. A dropdown menu is open for this field, showing a list of options with their respective counts and percentages:

- Office - 25863 of 28823 (90%)
 - 1 - 23178 of 25863 (90%)
 - 2 - 2320 of 25863 (9%)
 - 3 - 317 of 25863 (1%)
 - 4 - 42 of 25863 (0%)
 - 5 - 3 of 25863 (0%)
 - 6 - 2 of 25863 (0%)
 - 7 (max) - 1 of 25863 (0%)
- Mobile - 881 of 28823 (3%)
 - 1 - 874 of 881 (99%)
 - 2 (max) - 7 of 881 (1%)
- Home - 9 of 28823 (0%)
 - 1 (max) - 9 of 9 (100%)
- Direct - 381 of 28823 (1%)
 - 1 - 375 of 381 (98%)
 - 2 (max) - 6 of 381 (2%)
- Fax - 1 of 28823 (0%)
 - 1 (max) - 1 of 1 (100%)

Red arrows point from the 'Phone / Number' field to the dropdown menu. The right side of the image shows a partial view of the form, including the 'Relation / User' and 'Email / Address' fields.

STEPS TO CREATE YOUR OWN CUSTOM FIELDS

For some CRMs, you can easily create custom data fields using our mapping system (Yes, you can create your own!)

1. On the Advanced Mapping Mode page, click **Unmapped Fields**.

Self-Service Migration

Advanced Mapping Mode ? ☒

Migration id: #360426

Organizations (Accounts) | Contacts | Events | Notes | Opportunities (Potentials) | Tags | Tasks

Filter by: ?

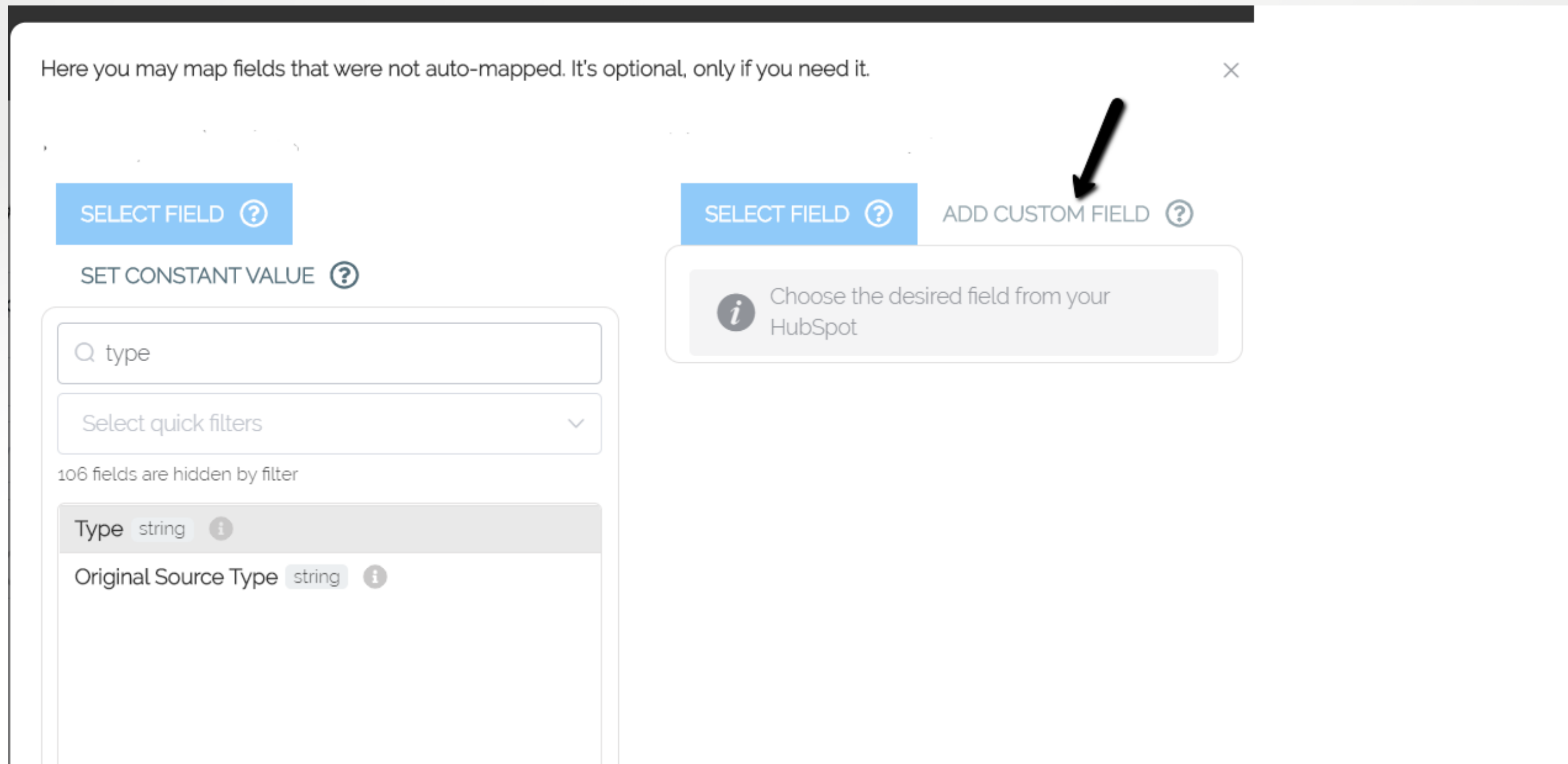
Q Start typing to find...

Organization Name <small>string</small> <small>i</small>	→	Account Name <small>string</small> <small>required</small> <small>i</small>	
Relation / User <small>string</small> <small>i</small>	↔	Relation / User <small>string</small> <small>i</small>	×
Phone / Number <small>string</small> <small>i</small>	↔	Phone / Number <small>string</small> <small>i</small>	×
Relation / Tag <small>string</small> <small>i</small>	↔	Relation / Tag <small>string</small> <small>i</small>	×
Relation / Account <small>string</small> <small>i</small>	↔	Relation / Account <small>string</small> <small>i</small>	×
Website / Number <small>string</small> <small>i</small>	↔	Website / Address <small>string</small> <small>i</small>	×
Address / Postal Code <small>string</small> <small>i</small>	↔	Address / Zip <small>string</small> <small>i</small>	×
Address / Address (# and Street) <small>string</small> <small>i</small>	↔	Address / Street <small>string</small> <small>i</small>	×

Total 22 < 1 2 3 >

The changes are not saved yet.

2. A window will open where you can map fields that weren't automated. On the target CRM side, click **Add Custom Field**.



3. Choose a field type for your target CRM from the dropdown list. The custom field will appear in the list on the right-hand side so you can match it.

****Please note that this option is available only for Accounts, Contacts, Opportunities, and Cases.****



The screenshot shows a dialog box titled "Add custom field" with a close button (X) in the top right corner. Below the title is a dropdown menu currently displaying "Single-line text". A red arrow points to the dropdown arrow icon on the right side of this menu. Below the dropdown is a list of field type options: "Single checkbox", "Multiple checkboxes", "Date picker", "Number", "Dropdown select", and "Single-line text". This entire list of options is enclosed in a red rectangular box.

4. Set the desired field name and description and click **Add Custom Field**.

The image shows a 'Add custom field' dialog box. At the top, there is a title bar with the text 'Add custom field' and a close button (X). Below the title bar, there is a dropdown menu for 'Single-line text'. Below this, there are two input fields: 'Label' with the value 'Title' and 'Name' with the value 'title'. At the bottom right, there is a blue button labeled 'ADD CUSTOM FIELD'. Three red arrows are overlaid on the image: one pointing to the 'Single-line text' dropdown, one pointing to the 'Label' input field, and one pointing to the 'ADD CUSTOM FIELD' button.

MAPPED OUT

Mapping is a crucial part of CRM data migration. **At its core, it is the very foundation of the import and transfer of data.** A map takes objects and fields where they need to go. A proper road for each field is paramount to find its corresponding location. If you find that the mapping process isn't for you but you need it customized and tailored to your business' structure, we can do the entire mapping process for you (re the rude awakening at the start of this article).



Questions?

Feel free to [contact our experts](#). Our [Guided Self-Service Migration](#) aims to do the entire project for you, but we can also just jump in on the mapping portion.

To understand more about how our Guided Service works, download our [free handbook](#).

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TRUJAY 