

How to Migrate from Advantage Xi Contacts/Properties

If you currently use Advantage Xi 2.x, you can migrate most of your data to Realvolve quickly and easily in two steps. Export your information from Advantage Xi and import it into Realvolve.

Export your data from Advantage Xi

Here's how to export your data from Advantage Xi to a CSV file suitable for use with Realvolve.

1. Download and Run <http://www.AdvantageXi.com/download/RealvolveMigration.exe>
2. Click on the button labeled **Export**.
3. When the export process is complete, press **OK** and Close.

Import your Contact Data into Realvolve

Load the exported Contact file into Realvolve to transfer your data.

1. Login to Realvolve.
2. At the top right of your screen, click on the user menu and choose **Settings**.
3. On the left side of the screen, choose **Import Contacts**.
4. Go to the section labeled **CSV Import** and click the **Choose File** button.
5. Select the **C:\AdvantageXiExport.csv** file that you exported previously and click **Open**.
6. Next, click on **Upload**.
7. Once the file is uploaded, click on **Choose Existing Mappings** dropdown and select **#Advantage Xi 2.x(Shared)** to configure the importer for your file. Scroll through the list to verify that the selected fields look correct.
8. Scroll to the bottom of the mapping list and click **Import**.

Import your Property Data into Realvolve

Load the exported file into Realvolve to transfer your data.

1. Login to Realvolve.
2. At the top right of your screen, click on the user menu and choose **Settings**.
3. On the left side of the screen, choose **Import Contacts**.
4. Go to the section labeled **CSV Import** and click the **Choose File** button.
5. Select the **C:\AdvantageXiExportProperties.csv** file that you exported previously and click **Open**.
6. Next, click on **Upload**.
7. Once the file is uploaded, click on **Choose Existing Mappings** dropdown and select **#Advantage Xi 2.x Properties(Shared)** to configure the importer for your file. Scroll through the list to verify that the selected fields look correct.
8. Scroll to the bottom of the mapping list and click **Import**.

The system imports your records while you continue to work. The system notifies you when done. You can check the status of the import at any time with the CSV Import Report button in the Import Contacts screen.

Questions?

Please direct questions and comments to support@realvolve.com.

