Salesforce Data Migration to Mria CRM

Get Started · https://mriacrm.com/docs/salesforce-data-migration/

A successful Salesforce data migration should preserve the business processes, customer relationships, and active sales workflows your team needs while giving you an opportunity to simplify legacy CRM configurations and redesign your workflows around Jira.

Whether you need to migrate data from Salesforce to Mria CRM, we recommend starting with your business processes rather than the data export itself. Before importing data, document your existing processes, decide how they will work in Mria CRM, configure your new CRM environment, prepare and test your data, and only then complete the final migration.

This guide provides a **practical Salesforce data migration plan** that can also be adapted to HubSpot and other CRM platforms.

Salesforce CRM Migration Process Overview

A typical Salesforce CRM migration to Mria CRM consists of the following stages:

1. Define your migration goals and scope.
2. Document your existing CRM processes and workflows.
3. Design how those processes will work in Mria CRM.
4. Build a migration matrix.
5. Define user roles and access.
6. Configure Mria CRM.
7. Export, clean, and prepare your Salesforce data.
8. Run a test migration.
9. Import or recreate the required records and activities.
10. Link CRM records with relevant Jira, JSM, CSM, and Confluence context.
11. Complete individual user configuration.

12. Validate the migration and perform the final cutover.

Migration Project Manager Scope

Step 1: Define Your Salesforce Data Migration Scope

For teams already working in Jira, one of the main reasons to migrate is to bring customer and sales processes closer to the work already happening across Jira.

We recommend starting with defining **what your Salesforce data migration should include**. To do this, review the information stored in your existing CRM, including:

- Leads;
- Contacts;
- Companies / Salesforce Accounts;
- Deals / Salesforce Opportunities;
- Products;
- Tasks;
- Meetings / Events;
- Notes;
- email history;
- files and attachments;
- custom objects;
- custom fields.

For each category, decide whether you want to:

- migrate all records / active records only / records from a particular period;
- migrate only records relevant to current operations;
- keep historical information in an external archive;
- retain temporary read-only access to the old CRM;
- exclude the information from the migration.

Recommendation: Do not automatically migrate everything simply because it exists in Salesforce.

Step 2: Document Your Existing Salesforce Processes and Workflows

Before deciding how to migrate data from Salesforce to Mria CRM, **document how Salesforce is actually being used by your team**. Focus on business processes rather than Salesforce objects alone.

Use the questions below to document how your current workflows are structured and managed.

Lead Management

- where Leads come from;
- how Leads are assigned;
- which Lead Sources are used;
- which statuses exist;
- what makes a Lead qualified;
- what happens when a Lead becomes qualified;
- which information must be collected before conversion.

Sales Process

- how many sales pipelines or sales processes you currently use;
- which Opportunity stages exist;
- how Opportunities move between stages;
- which information is required at each stage;
- how Opportunity owners are assigned;
- whether Products are connected to Opportunities;
- how tasks, meetings, and follow-ups are managed.

Customer Management

- how Salesforce Accounts and Contacts are maintained;

- how Contacts are linked to Accounts;
- how customers are distinguished from prospects;
- which fields are used for segmentation.

Activities and Communication

- how sales tasks are managed;
- how meetings and events are recorded;
- how emails are registered;
- which open activities must continue after migration;
- which historical activities need to remain accessible.

Jira, JSM, CSM, and Confluence Workflows

If your team already uses Atlassian tools, identify relationships that should exist between migrated CRM records and your existing work.

For example:

- customer → open JSM or CSM requests;
- Company → Jira project or space;
- Product → Jira project or board;
- Deal → delivery project;
- Contact → support requests;
- Company → Confluence space;
- Product → product documentation;
- Lead or Deal → relevant Jira tasks.

> **NOTE:** This is an important difference between simply performing a Salesforce data migration and moving to a Jira-native CRM: your migration can also connect commercial and customer data with the work already happening across Atlassian.

Step 3: Map Salesforce Data and Business Logic to Mria CRM

Once your existing processes are documented, determine how each business concept should work in Mria CRM. A typical **Salesforce to Mria CRM migration mapping** may look like this:

Salesforce	Mria CRM
Lead	Lead
Contact	Contact
Account	Company
Opportunity	Deal
Product	Product
Opportunity Stage	Deal Pipeline Stage
Task	Task
Event	Meeting
Customer classification	Custom Field / Tag
Email communication	Gmail / Outlook integration

Recommendation: Do not assume that every Salesforce object, custom field, status, or workflow needs an identical equivalent in Mria CRM. A Salesforce CRM migration is also a good opportunity to simplify your CRM structure and clean up your customer base before moving the data.

Consider:

- removing obsolete custom fields;
- eliminating unused statuses;
- consolidating duplicate classifications;
- removing outdated pipelines;
- reviewing unnecessary automations;
- identifying and merging duplicate Contacts and Companies;

- removing outdated or irrelevant customer and prospect records;
- correcting incomplete or inaccurate contact information;
- excluding legacy data that no longer supports an active business process.

The goal is not necessarily to recreate your existing CRM in Mria CRM, but to migrate the data and processes your team actually needs going forward.

Expected Result: Design the simplest Mria CRM structure that supports how your team needs to work going forward.

Step 4: Build a Salesforce Data Migration Matrix

A **migration matrix** is one of the most important parts of your Salesforce data migration plan. Instead of mapping fields alone, map each important business process, the data behind it, and the way it will work after migration.

Here is an example to help you get started:

Business process	Current Salesforce setup	Mria CRM setup	Data / relationship	Migration approach	Validation
New inbound Lead	Salesforce Lead	Lead	Active Leads	Import	Correct Source, Status and Owner
Sales Opportunity	Salesforce Opportunity	Deal	Open Opportunities	Import / API / manual creation where applicable	Correct Pipeline, Stage, Amount and Owner
Customer organization	Salesforce Account	Company	Active Accounts	Import	Company data correct
Customer Contact	Salesforce Contact	Contact	Active Contacts	Import	Linked to correct Company
Product catalog	Salesforce Product	Product	Active Products	Import	Product information correct

Business process	Current Salesforce setup	Mria CRM setup	Data / relationship	Migration approach	Validation
Open sales follow-up	Salesforce Task	Task	Open Tasks	Manually recreate	Owner and due date correct
Upcoming meeting	Salesforce Event	Meeting	Upcoming Meetings	Manually recreate	Date and related CRM record correct
Historical activities	Tasks, Events, emails	Historical reference	Historical activity data	Retain/archive	Required history remains accessible
Customer support context	Account + support data	Company / Contact + JSM/CSM	Open service requests	Manually link	Relevant tickets linked
Customer delivery	Account + project	Company + Jira work	Active Jira work	Manually link	Correct Jira context available
Documentation	Account/Product documentation	CRM record + Confluence	Relevant spaces	Manually link	Documentation accessible

Step 5: Create a Salesforce-to-Mria CRM Field Mapping

When you migrate data from Salesforce to Mria CRM, create a **detailed mapping** between Salesforce fields and their destinations. For example:

Salesforce Object	Salesforce Field	Mria CRM Object	Mria CRM Field	Action
Lead	Lead Source	Lead	Lead Source	Create/Map values
Lead	Industry	Lead	Industry	Create custom field
Contact	Account Name	Contact / Company	Company	Import records
Account	Account Tier	Company	Account Tier	Create custom field

Salesforce Object	Salesforce Field	Mria CRM Object	Mria CRM Field	Action
Opportunity	Stage	Deal	Pipeline Stage	Customize values
Opportunity	Legacy Score	—	—	Do not migrate

For every field, decide whether to:

- map it to an existing Mria CRM field;
- create a custom field;
- transform its values;
- replace it with a Tag;
- retain it only in your Salesforce (or exported) archive;
- exclude it from the migration.

Recommendation: Avoid recreating every Salesforce custom field automatically.

Step 6: Build a Roles and Access Matrix

Before onboarding users, determine who should administer, edit, or view Mria CRM information.

Note: Mria CRM pricing is based on your Jira user tier, so there is no need to limit Mria CRM access to a small number of seats as you might in Salesforce. You can provide access to all relevant Jira users based on their roles and needs.

Mria CRM provides three main access roles:

- **Administrator** – can manage records, settings, and users;
- **User** – can create and edit CRM records but cannot manage CRM users and administrative settings;
- **Viewer** – read-only CRM access.

Create an access matrix based on your organization. Also create a mapping between Salesforce owners and Atlassian users before importing data.

Note: Salesforce users are not automatically created in Atlassian, so make sure the required users have access to your Atlassian site before assigning migrated CRM records to them.

Jira Administrator Scope

Step 7: Configure Mria CRM Before Salesforce Data Migration

Mria CRM configuration includes two levels: **organization-level settings**, which should be configured by an Administrator and apply across the CRM workspace, and **user-level settings**, which individual users can configure for their own workflows.

Before importing your CRM data, complete the organization-level configuration to ensure that the required structure, permissions, fields, and values are in place.

The Mria CRM Administrator should:

1. **Configure Roles and Permissions** — Add the appropriate Jira users or groups and assign Administrator, User, or Viewer access.
2. **Select the Global Currency** — Select your organization's currency before importing Products or Deals.
3. **Create Custom Fields** — Create the required custom fields for Leads, Deals, Contacts, Companies, and Products based on your field-mapping matrix.
4. **Customize Lead Sources** — Map Salesforce Lead Sources to the Lead Sources you want to use going forward.
5. **Customize Lead Statuses** — Configure the Lead qualification process rather than automatically reproducing every Salesforce status.
6. **Create Tags** — Decide which legacy classifications should become Tags and which should become structured custom fields.
7. **Configure Deal Pipelines** — Modify the default pipeline or create multiple pipelines and map Salesforce Opportunity stages to the corresponding Mria CRM Deal stages.

Complete these configuration steps before generating your final migration files.

Watch the video tutorial below for practical overview.

Step 8: Export and Prepare Salesforce Data for Migration

When you are ready to migrate data from Salesforce to Mria CRM, **export the datasets** included in your migration scope.

Recommendation: Keep an unchanged copy of every original Salesforce export and perform cleaning or transformations in separate working files.

Before preparing your final import files, **download the sample CSV or XLSX files** directly from the relevant Mria CRM import screen.

NOTE: The sample files reflect the fields currently available for each record type, including the custom fields you have already configured. Use them as a reference when preparing and mapping the data exported from Salesforce

Depending on your scope, prepare separate datasets for:

1. Products
2. Companies / Accounts
3. Leads
4. Contacts
5. Deals / Opportunities

Before importing:

- remove records outside the migration scope;
- remove unused fields;
- resolve duplicates;
- map Salesforce owners to Atlassian users;
- standartize Company and Product names;
- preserve Salesforce Record IDs where useful for validation.

Recommendation: For more complex Salesforce data migrations, consider creating a custom Salesforce Record ID field in Mria CRM. This can make troubleshooting, validation, and comparison with the original Salesforce dataset easier.

Step 9: Run a Test Salesforce Migration

Do not begin your Salesforce CRM migration with the complete production dataset. Instead, we recommend to prepare a representative test sample containing:

- Leads with different Sources and Statuses;
- Contacts;
- Companies;
- Products;
- Custom field values;
- Tags;
- Duplicates;
- Contacts belonging to the same Company.

Run the test migration and compare the resulting records with Salesforce. Verify field mapping, value mapping, assignees, relationships, custom fields, Tags, dates, numeric values, and duplicate handling.

Correct your configuration or migration files before proceeding with the full migration.

Step 10: Migrate Data from Salesforce to Mria CRM in the Correct Order

Importing records in the correct order helps preserve relationships between the migrated entities.

A recommended order is:

1. **Products**
2. **Companies**
3. **Contacts**
4. **Leads**
5. **Deals**

For example, importing Salesforce Accounts as Companies before importing Contacts allows Contacts to be connected to Companies that already exist in Mria CRM.

Similarly, Products should exist before importing or creating CRM records that need to reference them.

Automating Salesforce Data Migration with the Mria CRM REST API

For larger or more complex migrations, the Mria CRM REST API can be used to automate parts of your Salesforce data migration.

The API can be useful when you need to:

- migrate large datasets programmatically;
- transform Salesforce data before creating records;
- automate record creation;
- recreate relationships between records;
- migrate data in multiple batches;
- automate repetitive migration operations;
- temporarily synchronize Salesforce and Mria CRM during the transition;
- build a custom Salesforce-to-Mria CRM migration script.

Depending on the scope, your migration can therefore combine standard file import, API-based migration, and manual migration.

Step 11: Recreate Open Tasks and Meetings

Salesforce CRM activities cannot be migrated to Mria CRM through the standard file import process.

They can be migrated through the Mria CRM REST API instead, as notes, meetings and tasks on the records they belonged to. See Migrating Activity History from Salesforce, which includes a sample script.

Historical activities

Before completing your Salesforce migration, decide how your organization will retain historical Tasks, Events, emails, and other activity information.

Options may include:

- keeping a secure Salesforce export;
- retaining Salesforce temporarily in read-only mode;
- retaining selected documents separately.

Open activities

For activities that still require action, manually recreate the relevant **open Tasks and upcoming Meetings** in Mria CRM.

For example:

Open Salesforce Task → Related Lead / Deal / Contact / Company → Mria CRM Task → Correct Assignee → Due Date

Step 12: Link Migrated Salesforce Data with Jira, JSM, CSM, and Confluence

Your Salesforce CRM migration does not have to end with moving CRM records. After importing Contacts, Companies, Products, Leads, and Deals, connect them with the active work already happening in your Atlassian environment.

Where applicable, manually link migrated Mria CRM records with:

- open Jira tasks and issues;
- open JSM or CSM requests;
- Jira projects or spaces;
- Jira boards;
- Confluence spaces;
- other relevant Jira work.

For example, after migrating a Salesforce Opportunity to a Mria CRM Deal, you can link that Deal to its open JSM requests and relevant Jira work.

Similarly, a Product migrated from Salesforce can be connected with the Jira project, board, or issues where that Product is being developed, as well as product documentation in Confluence.

Recommendation: As there is no automated linking at the moment, prioritize active relationships rather than trying to reproduce every historical Salesforce-to-project relationship.

This step turns a Salesforce data migration into something more valuable than a database transfer: customer and sales context becomes connected with the delivery, support, and product work already managed in Jira.

NOTE: Steps 11 and 12 do not need to be completed by Jira administrators. They can be handled by members of the migration team who have been assigned the appropriate roles and permissions in Mria CRM.

Step 13: Install & Configure Gmail and/or Outlook integration

If your team uses email communication as part of the sales process, you need to install and configure the Gmail and/or Outlook integration before users start working in Mria CRM.

1. Install the required integration for your Atlassian site: Mria CRM Gmail Connector and/or Mria Outlook Connector;
2. Complete the organization-level configuration and permissions for Gmail integration and/or Outlook integration;
3. Verify that the integration is available to the Jira users who will work with email in Mria CRM: Gmail and/or Outlook
4. Test the integration with a migration team member before rolling it out to all users.

NOTE: The organization-level setup does not automatically connect individual users' mailboxes. After the integration has been installed and configured, each user who needs email functionality should complete the user-level connection and authorization described later in this guide.

Jira User Scope

Once the global CRM configuration and data migration are complete, individual users should configure their own working environment in Mria CRM.

Step 14: Configure Mria CRM Table Views

Configure table views for:

- Contacts;
- Companies;
- Leads;
- Deals.

> **Recommendation:** Choose columns based on the information users need in everyday work. For example:
>
> **Deal → Company → Assignee → Pipeline Stage → Amount → Expected Closing Date → Next Activity**

Step 15: Complete Individual User Configuration

Connect Gmail and/or Outlook

Each relevant user should connect their corporate mailbox to Mria CRM to authorize the Gmail and/or Outlook integration used by the organization:

How to Connect Gmail Account

How to Connect Outlook Account

Create Email Templates

After connecting your Gmail or Outlook account, review the email templates for common sales and customer communication.

Mria CRM Email Templates can be created once and reused when sending emails from **Contacts, Leads, and Deals**. Templates support merge fields, allowing information such as the Contact name, Company name, Deal or Lead name, and sender name to be automatically inserted into the email.

Create frequently used email templates for different use cases:

- initial outreach;

- demo follow-up;
- proposal follow-up;
- trial follow-up;
- customer check-in;
- renewal;
- cross-sell.

Review Personal CRM Setup

Before using Mria CRM daily and confirming that a you as a user have all rights and accesses, please verify that:

- you have access to the required CRM records;
- Leads and Deals are assigned correctly;
- table views contain the information you need;
- required open Tasks and Meetings have been recreated;
- email integration works correctly.

Final Migration Team Scope

Step 16: Validate Your Salesforce Data Migration

Do not validate your Salesforce data migration based on record counts alone. The goal of migration validation is to confirm that the data is not only present in Mria CRM, but is also accurate, correctly structured, properly linked, accessible to the right users, and ready to support your day-to-day business processes.

Start with **data-level validation**. Compare the migrated data with Salesforce and review:

- the total number of records expected, created, updated, skipped, and failed;
- duplicate records and whether they were handled as expected;
- failed or partially migrated records and the reasons for failure;
- required fields and records with missing information;
- record owners and their mapping to the correct Atlassian users;

- standard and custom field values;
- Tags;
- Lead Statuses and Lead Sources;
- Deals added to the correct Pipelines and stages;
- Contacts linked to the correct Companies;
- Products linked to the appropriate CRM records;
- other relationships between migrated records.

Then, move from individual records to **end-to-end business process validation**. Use the migration matrix created earlier in this guide and test workflows from beginning to end.

For example:

New Lead → Qualification → Conversion → Deal → Follow-up activity

Existing Customer → Company → Contact → Open JSM/CSM Request → Customer context available to the service team

Deal → Product → Jira delivery work → Customer and commercial context available to the delivery team

Ask key users from sales, support, delivery, or other relevant teams to perform the workflows they normally complete in the CRM. This helps identify issues that may not be visible when checking imported records individually.

Document any discrepancies identified during validation, correct the source data or Mria CRM configuration where required, and repeat the affected validation scenarios.

The migration should be considered successfully validated only when **the required data, relationships, permissions, integrations, and key business workflows work as expected in Mria CRM**.

Step 17: Complete the Salesforce CRM Migration and Final Cutover

After the test migration has been validated:

1. Make the agreed final updates in Salesforce.
2. Define a migration window and go-live date.

3. Stop creating or editing records in Salesforce.
4. Export records created or changed since your test migration.
5. Complete the final file imports or API migration.
6. Recreate remaining open Tasks and Meetings.
7. Link active Jira, JSM, CSM, and Confluence work.
8. Review failed records and import results.
9. Compare Salesforce and Mria CRM record counts.
10. Ask key users to test their everyday workflows.
11. Confirm that Mria CRM is ready to become your primary CRM.

> Do not deactivate Salesforce until your **Salesforce CRM migration** has been fully validated and all required historical information has been retained or archived.

Once these steps are complete, your Salesforce CRM migration is finished, and your team can move forward with Mria CRM as the central place for managing customer relationships, sales activities, and their connected work across Jira.