# KingswaySoft Customer Case Study – SMS Management & Technology

## Overview:

For over 25 years, SMS Management & Technology has been providing businesses with more than just solutions. SMS has worked with a range of Australian businesses and government departments to deliver solutions for today and tomorrow.

SMS worked with Mental Health Commission WA to develop a case management solution to assist community case workers, thus improving real-time visibility and user access to data and records. This solution was built on the Dynamics CRM platform with KingswaySoft SSIS technology used to manage, migrate and merge data records.

## The Challenge:

Mental Health Commission WA wanted to reduce the number of platforms they were working with and combine their data into one case management system. They needed to provide access to a cleaner, clearer database for patients and clients. The main challenge was to de-dupe patient and facility records from the two systems and create only one record in Dynamics CRM. Other data that needed to be transferred included historic and current patient case records, facility visit data and review board meeting schedules. Migration also included bringing together the review boards' external members so they could all access one system and have point of entry to log and allocate their time.

## The Solution:

SMS considered using the out-of-the-box Excel import tool available in Dynamics CRM but found this would be too slow and data quality was poor in the legacy systems. Other alternatives were considered, but SMS's lack of knowledge on those products deterred them from using it. KingswaySoft was chosen due to reasonable pricing and the ability to use the product and demo to the client within Visual Studio at no cost. Another major consideration was the ability to utilize existing Microsoft Technologies (SSIS), which SMS has considerable knowledge of.

## The Results:

SMS was able to complete three migrations- DEV, TEST and UAT- and have found KingswaySoft along with SSIS to be ideal for this project. With the use of KingswaySoft's tool, SMS was able to clean up the data from both existing databases, merge records appropriately according to set rules, and migrate the two databases into one, ensuring one contact could become part of several groups and that all files and documentation were appropriately stored against each record.

*We have completed three migrations - DEV, TEST and UAT and have found Kingsway along with SSIS to be ideal for this project.*

*We found KingswaySoft to be very receptive to questions and comments in the past. We were very happy with KingswaySoft SSIS and would definitely use the product again!*

*~ Bharat Premji, CRM Developer*

### KINGSWAYSOFT BENEFITS

- One single solution that works for CRM online, 2013, 2011, CRM4, and CRM3, and all deployment options including CRM Online, on-premise, or IFD
- The toolkit helps manage all intricate details involved in working with CRM web service interfaces
- Easy learning curve, consistent application interface, familiar development experience within Visual Studio (SSDT or BIDS)
- Codeless data integration

### ABOUT KINGSWAYSOFT

KingswaySoft is a leading provider of data integration solutions for Microsoft Dynamics software. Organizations from more than 40 countries rely on our solutions to drive their business data efficiency.

Our primary mission is to help our customers to be successful in their business by providing them with quality software products and innovative integration solutions at a competitive price.

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