

SSIS Integration Toolkit for Microsoft Dynamics CRM

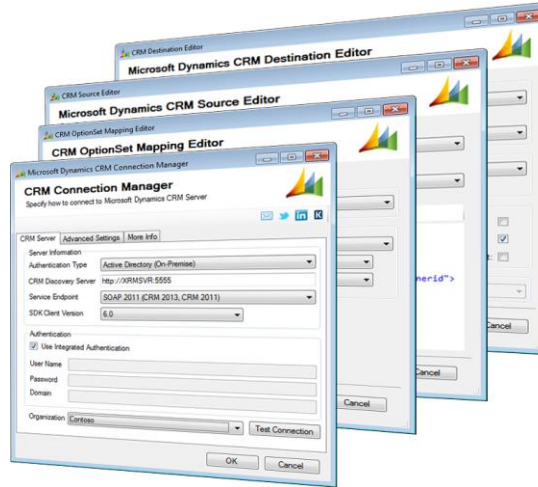
KingswaySoft SSIS Integration Toolkit for Microsoft Dynamics CRM is a cost-effective, easy-to-use and high-performance data integration solution for Microsoft Dynamics CRM, utilizing Microsoft SQL Server Integration Services (SSIS) capabilities as the ETL platform and data load engine.

KEY FEATURES

- Support for Microsoft Dynamics CRM Online, 2015, 2013, 2011, 4.0, and 3.0
- Support for all deployment options including CRM Online, On-premise, and IFD (Federated)
- Support for using CRM Entity or FetchXML query to read data from CRM
- Support for various write actions in CRM destination component, including Create, Update, Delete, Upsert, Merge, Convert and ExecuteWorkflow.
- Support for CRM Bulk Data Load API
- CRM OptionSet Mapping Component helps manage the translation and mapping of CRM OptionSet values, and provides capability to create new options when no-match is found

INCLUDED COMPONENTS

- Dynamics CRM Connection Manager
- Dynamics CRM Source Component
- Dynamics CRM Destination Component
- Dynamics CRM OptionSet Mapping Component



WHAT'S MORE

SSIS Integration Toolkit is designed to simplify your data integration development while offering the maximum performance. Our software handles all the intricate details involved in working with Microsoft Dynamics CRM web service interfaces so that you can focus on your data and the business requirements.

- Upsert (Update/Insert) action offers a robust solution that helps manage ongoing changes through its support of update or insert action depending on whether a match can be found. Three Upsert matching options are available for matching purpose, including primary key, CRM duplicate detection, or any manually selected matching fields.
- createdby and modifiedby fields are both supported when writing to CRM.
- Working with CRM lookup fields is painlessly easy when Text Lookup feature is utilized.
- CRM many-to-many relationship support is one of our out-of-box capabilities. You don't have to write a single line of code to associate or disassociate CRM records for a many-to-many relationship.
- Writing to the principleobjectaccess (POA) entity is supported through Create, Update or Delete action, which corresponds to Share, Update Share, or Unshare action in CRM application.
- Support of impersonation in CRM source component enables you to read data from CRM entities that require impersonation, such as userquery, userform, etc.
- ExecuteWorkflow action makes it easy to run CRM workflow against a large number of CRM records, accompanied by the capability to schedule the execution of CRM workflows.
- Convert action can be used to drive the entire sales lifecycle, converting leads all the way to invoices.
- Merge action takes a pair of CRM records and perform a CRM merge operation by retiring one record while retaining the other one.
- We offer the most sophisticated support for FetchXML queries (CRM source component).
- We support using either integer value or label value as the input for optionset/picklist fields.
- "Ignore Null-Valued Fields" option can be used to ignore any null-valued fields when writing to CRM.
- "Ignore Unchanged Fields" option can be used to ignore any unchanged fields when writing to CRM, so that it can avoid firing unnecessary plugins, workflows or auditing.
- It takes one single click to update SSIS components to the latest CRM metadata when using "Refresh CRM Metadata" button, which otherwise requires deleting and re-creating the components.
- Various options are available when working with CRM datetime values, including UTC, connection user's local time, or impersonated user's local time.



LEARN MORE

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BENEFITS

- One single solution that works for CRM Online, 2015, 2013, 2011, 4.0, and 3.0, and all deployment options
- 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-BI or BIDS)
- Codeless data integration
- Free developer license is available for any interactive use without limitations, including data migration, and any ad-hoc data processing

SYSTEM REQUIREMENTS

- Microsoft Dynamics CRM
 - Microsoft Dynamics CRM Online
 - Microsoft Dynamics CRM Server 2015, 2013, 2011, 4.0, or 3.0
- Microsoft SQL Server
 - Microsoft SQL Server 2014
 - Microsoft SQL Server 2012
 - Microsoft SQL Server 2008 R2
 - Microsoft SQL Server 2008
 - Microsoft SQL Server 2005

ABOUT KINGSWAYSOFT

KingswaySoft is a leading provider of data integration solutions for Microsoft Dynamics software. Organizations from more than 45 countries rely on our solutions to drive their business data efficiency.

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