

# SSIS INTEGRATION TOOLKIT FOR MICROSOFT DYNAMICS 365/CRM

KingswaySoft SSIS Integration Toolkit for Microsoft Dynamics 365/CRM is a cost-effective, easy-to-use and high-performance data integration solution, utilizing Microsoft SQL Server Integration Services (SSIS) capabilities.

## KEY BENEFITS

- Complimented by SSIS capabilities, we offer the most feature-rich data integration solution for Microsoft Dynamics 365/CRM, which enables data integration between Microsoft Dynamics 365/CRM and virtually any other database or application systems.
- Utilizing the codeless data integration approach enabled by SSIS and our software, you can forget all intricate details involved in working with 365/CRM web service interfaces when developing data integration solutions.
- Easy learning curve, consistent application user interface, familiar development experience, all adds up to improve your development productivity.
- Our solution offers many specifically designed features that help you achieve the best possible performance without having to hijack your IT budget.
- Starting with the Free Developer License for any interactive use, we offer the most flexible licensing model.

## MAIN COMPONENTS

### CRM CONNECTION MANAGER

- Supports connections to Microsoft Dynamics 365 for Sales/Customer Service/Field Service/Project Service Automation, as well as Microsoft Dynamics CRM 2016, 2015, 2013, 2011, 4.0, 3.0 and all deployment options.
- Option to work around intermittent errors by making retry service calls.

### CRM SOURCE COMPONENT

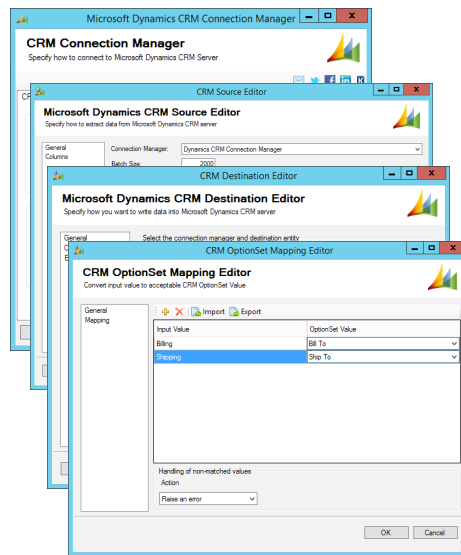
- Facilitates reading data from Microsoft Dynamics 365/CRM using either Entity, FetchXML query, EntityChanges or AuditLog option.
- The most sophisticated support of any complex FetchXML queries.
- Impersonation support.
- Output timezone support.

### CRM DESTINATION COMPONENT

- Facilitates writing data into Microsoft Dynamics 365/CRM using various actions such as Create, Update, Delete, Upsert, Merge, Convert and ExecuteWorkflow.
- 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.
- Four different criteria for matching purposes when performing Upsert action: primary key, CRM duplicate detection, manually selected matching fields, & CRM alternate key
- Support of utilizing CRM Bulk Data API.
- Support for createdby and modifiedby fields.
- Support using either integer value or label value as the input for optionset/picklist fields.
- Equipped with many configurable options, Text Lookup feature makes CRM lookup references painlessly easy.
- Support for CRM many-to-many relationship without requiring writing a single line of code.
- Support for a transparent handling of special CRM fields (statecode, statuscode, ownerid, etc.).
- Many advanced options are offered for special integration scenarios:
  - Remove Unresolvable References
  - Ignore Unchanged Fields
  - Enable CRM Duplicate Detection
  - Ignore Null-Valued Fields
  - Remove Invalid Characters
  - Change Flag Field(s)
  - Send datetime values in UTC format

### CRM OPTIONSET MAPPING COMPONENT

- Provides a consistent way to manage the translation and mapping of CRM OptionSet values.
- Capability to create new option when no match is found.



## BENEFITS

- One single solution that works for all CRM versions (365/CRM, CRM 2016, 2015, 2013, 2011, 4.0, and 3.0), and all deployment options.
- Our software manages all intricate details involved in working with CRM web service interfaces, so you don't have to.
- Easy learning curve, consistent application interface, familiar development experience using Visual Studio.
- A codeless data integration approach.
- Free developer license is available for any interactive use without limitations, such as the use of data migration, and any ad-hoc data processing within Visual Studio (SSDT-BI or BIDS).

## SYSTEM REQUIREMENTS

- Microsoft Dynamics 365/CRM
  - Dynamics 365/CRM Online
    - (Requires SQL Server 2012 or above)
  - Dynamics 365/CRM Server
- Microsoft SQL Server
  - Microsoft SQL Server 2016
  - 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 70 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.