

KingswaySoft Client Case Study

CRMPlus+

CRMPlus+, a Dutch-based consultancy and a KingswaySoft Authorized Implementation Partner, is working with a client that provides customers with point-to-point fiber-optic services.

CRMPLUS+

COMPANY

Founded in 2010, CRMPlus+ is a Dutch-based consultancy and a KingswaySoft Authorized Implementation Partner specializing in Microsoft Dynamics 365, Microsoft SharePoint and Microsoft Office 365. The client, a fiber-optic service provider, is looking to complete four ETL projects with the help of CRMPlus+ and KingswaySoft's Integration Toolkits.

PROJECTS

Project 1

Back up of **Dynamics 365 CDS/CRM**
Online to CRM Version On-Premise.

Project 2

Split Data from one **Dynamics 365 CDS/CRM**
Online environment to three **Business Central** instances.

Project 3

Integrate **CRM Accounts, Contacts & Sales**
Contracts with a geo-information system (Cocon).

Project 4

Date Integration between
Dynamics 365 CDS/CRM and HubSpot.

THE CHALLENGE

Project 1: The client has recently migrated from a CRM2015 On-Premise system to Dynamics 365 CDS/CRM Online with the help of KingswaySoft's Migration Starter Pack for CRM Online and CRM On-Premise. The migration pack is a free sample CRM migration package built on top of the SSIS Integration Toolkit for Microsoft Dynamics 365. It can be used or customized to fit specific migration needs. The client requires a local back-up of their online data as Microsoft's guaranteed uptime and planned downtime may hinder their business.

Project 2: In addition to the back-up system, the client requires integration from one Dynamics 365 CDS/CRM Online environment to three different Dynamics 365 BC instances.

Project 3: The client must integrate fiber-optics connection data from an industry-specific geo-information system (Cocon) with CRM Accounts, Contacts and Sales Contracts. In the case of disruptions, generally caused by severed fiber-optic cables due to road works, the client needs to identify and notify customers affected by the disconnection immediately.

Project 4: The final project planned involves data integration between Dynamics 365 CDS/CRM and HubSpot to help integrate their marketing data with their primary customer-engagement system.



Required SSIS Integration Toolkit for Projects 1 - 3:

1. SSIS Integration Toolkit for Microsoft Dynamics 365
2. SSIS Productivity Pack



Challenge. The Chosen Solution Must:

1. Work with custom entities and multiple applications.
2. Be simple to implement and easy to maintain.
3. Work with the industry-specific geo-information software.

KingswaySoft Client Case Study

CRMPlus+

THE SOLUTION

Project 1: As mentioned previously, the client had already used a major Dynamics integration vendor with limited success to integrate data between CDS/CRM and NAV. For this project, CRMPlus+ suggested KingswaySoft thanks to the flexibility, ease-of-use, and cost-effectiveness of its SSIS Integration Toolkits. With the Ultimate Edition, the client has access to every SSIS integration component produced by KingswaySoft, all through one single license. Utilizing the SSIS Integration Toolkit for Microsoft Dynamics 365 (for CDS/CRM and NAV/BC), the client successfully implemented the Microsoft Dynamics CDS/CRM integration in just a few weeks. In contrast, their previous attempt took months to set up and was challenging to maintain. Unique features within KingswaySoft's SSIS Integration Toolkits have translated into cost-effective and time-saving solutions for the client.

Project 2: With the SSIS Integration Toolkit for Microsoft Dynamics 365 and component in KingswaySoft's SSIS Productivity Pack, CRMPlus+ split the data from one source to three destinations by first filtering the owning business unit and then filtering the relationship type (customer or supplier). Using KingswaySoft's Diff Detector, used to facilitate incremental writing, CRMPlus+ checked whether the records processed are new or changed and deployed a similar procedure for the purchase and sales contracts. Success on this project required close collaboration between NAV/BC and CRM consultants.

Project 3: Working with a system that utilizes XML as the data store or service endpoint has created some significant challenges since there isn't an easy way to consume or write complex XML messages within an ETL process. Using KingswaySoft's XML Extract component, the response from Cocon is received and converted into required rows and columns. Using the Pivot transformation and KingswaySoft's CRM/CDS Destination component, the data is written to Dynamics CDS/CRM. KingswaySoft's XML Processing components provide developers with unique capabilities to load or extract data from applications or database systems regardless if they are custom-built or specialized. Thanks to the flexibility of KingswaySoft's XML components, developers are empowered to create integration packages that easily work with virtually any other application or database system.

THE RESULTS

Setting up the integration project (involving unique complexities in the client's Business Central instances) with Dynamics 365 CDS/CRM Online began on October 25, 2019. It took only 120 hours to complete versus the months spent achieving a similar goal with the other Dynamics integration vendor back in 2016. This achievement meant that the client could focus time and resources on the business rather than on the implementation work. The integration with their geo-information system began in April 2020 and required 95 hours to complete. Its successful completion means that customers receive notifications of possible disruptions as soon as the event occurs, a vital milestone in the client's overall "Pro-Active Maintenance Project". During the project, CRMPlus+ reached out to the KingswaySoft Support team on several occasions for questions and guidance with the software. The KingswaySoft team provided responsive support throughout the project and suggested best practices to achieve efficient outcomes with the components.

With the three ETL projects' successes, the client is now looking to use KingswaySoft solutions to integrate Dynamics 365 CDS/CRM Online with HubSpot. The client has planned to use the SSIS Integration Toolkit for HubSpot along with the SSIS Integration Toolkit for Microsoft Dynamics 365 to achieve their integration goal. As of November 2020, work has started on this project and is progressing well.

Integrated:



**60,000+ emails
with attachments**



**5000+
quotes**



**6500+
contacts**



**3000+
accounts**