

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

CRMPlus+

CRMPLUS+

The Company

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

PROJECT 1	PROJECT 2	PROJECT 3	PROJECT 4
Back up of Dynamics 365 CDS/CRM Online to CRM Version On-Premise	Split Data from one Dynamics 365 CDS/CRM Online environment to three Business Central instances	Integrate CRM Accounts, Contacts & Sales Contracts with a geo-information system (Cocon)	Date Integration between Dynamics 365 CDS/CRM & HubSpot

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 & 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 & 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 & Sales Contracts. In the case of disruptions, generally caused by severed fiber-optic cables due to road works, the client needs to identify & notify customers affected by the disconnection immediately.

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



Required SSIS Integration Toolkit for Projects 1 - 4

- SSIS Integration Toolkit for [Microsoft Dynamics 365](#)
- SSIS Integration Toolkit for [HubSpot](#)
- SSIS [Productivity Pack](#)



Challenge - The chosen solution must:

- Work with [custom entities & multiple applications](#).
- Be [simple to implement & easy to maintain](#).
- Work with the [industry-specific geo-information software](#).

The Challenges

Project 1: The challenges with the first migration project & subsequent back-up operation center on the numerous custom entities involved while retaining the *ModifiedBy* & *ModifiedOn* information which is not commonly available in other integration & migration tools. In addition, there has been challenges in migrating closed records as the Dynamics platform does not allow updating closed records.

Project 2: The project to integrate Dynamics 365 CDS/CRM with Business Central involves extracting data from a single Dynamics 365 CDS/CRM Online system to three Business Central instances (Customers, Suppliers & Holding Company). It requires returning invoice & purchase data from two Business Central instances back to Dynamics 365 CDS/CRM to provide users with near real-time integration on outstanding sales amounts versus budgeted sales for projects. In a previous data integration implementation between CDS/CRM & NAV, another major Dynamics integration vendor system had been used. However, the project solution proved too complicated & expensive to maintain & took a significant amount of time to set up initially. The client requires a more straightforward solution that allows data integration without sacrificing performance while allowing developers to adjust & make changes to their ETL work with ease.

Project 3: Working with an industry-specific application (Cocon) meant that research into how data can be added, updated & retrieved from the geo-information system is required. This challenge was compounded by the fact that the application has inadequate & unreliable documentation that can be used.

Project 4: Because HubSpot does not create the records immediately, the HubSpot IDs of newly created records could not be added directly into CRM. Therefore the integration has a slight delay when retrieving the HubSpot IDs from newly created records & in turn, updating CRM. Additionally in CRM, a hyperlink to the HubSpot record is created.

The Solutions

SSIS Integration Toolkit for



Project 1: As mentioned previously, the client had already used a major Dynamics integration vendor with limited success to integrate data between CDS/CRM & NAV. For this project, CRMPPlus⁺ suggested KingswaySoft thanks to the flexibility, ease-of-use & 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 & 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 & was challenging to maintain. Unique features within KingswaySoft's SSIS Integration Toolkits have translated into cost-effective & time-saving solutions for the client.



Project 2: With the SSIS Integration Toolkit for Microsoft Dynamics 365 & components in KingswaySoft's [SSIS Productivity Pack](#), CRMPPlus⁺ split the data from one source to three destinations by first filtering the owning business unit & then filtering the *relationshiptype* (customer or supplier). Using KingswaySoft's [Diff Detector](#), used to facilitate incremental writing, CRMPPlus⁺ checked whether the records processed are new or changed & deployed a similar procedure for the purchase & sales contracts. Success on this project required close collaboration between NAV/BC & 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 & converted into required rows & columns. Using the Pivot transformation & 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 & other applications or database systems.

Project 4: Using KingswaySoft's [Premium Derived Column](#) & [Timer Task](#), CRMPPlus⁺ team can easily convert DataTypes (DT_WSTR to DT_GUID), add pre-defined variables & wait merely 10 seconds to retrieve HubSpot IDs from newly created records & to update CRM. Both CRM data & HubSpot data are joined on the CRM AccountID attribute — both have been added in the Creation process in KingswaySoft's [HubSpot](#) solution with a few clicks, streamlining the client's process in a very efficient manner.

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 & resources on the business rather than on the implementation work. The integration with their geo-information system began in April 2020 & 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". The final integration began on November 2020 & required 30 hours to complete; the client was able to synchronize CRM Accounts & Contacts to HubSpot in an coherent fashion. Their integration shows that with a minimal amount of effort, an integration between Dynamics CRM & HubSpot can be obtained with KingswaySoft solutions.

During all four ETL projects, CRMPPlus⁺ reached out to the KingswaySoft Support team on several occasions for questions & guidance with the software. The KingswaySoft team provided responsive support throughout the project & suggested best practices to achieve efficient outcomes with the components. KingswaySoft's intuitive solutions, coupled with their team's collaborations, paved the way for a smooth & painless integration from start to finish.

