

SMS MANAGEMENT & TECHNOLOGY KINGSWAYSOFT PARTNER CASE STUDY

SMS

SMS Management & Technology used the SSIS Integration Toolkit for their client Mental Health Commission WA. SMS used the solution to migrate data from two legacy systems into a single Microsoft Dynamics CRM system. As part of the migration SMS used the SSIS Integration Toolkit to find and merge duplicate data into one CRM record.

OVERVIEW

For over 30 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; 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 board's external members, giving them all access to one system, with one 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 KingswaySoft was ultimately chosen after price considerations, and the ability to demo its capability to the client within Visual Studio at no cost. Another major consideration was the ability to utilize existing Microsoft technologies (SSIS) as part of the suite.

THE RESULTS

SMS was able to complete three migrations - DEV, TEST and UAT - and have found KingswaySoft along with SSIS to be the perfect choice for the Mental Health Commission WA. 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. This ensured one contact could become part of several groups with all files and documentation 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

SSIS INTEGRATION TOOLKIT

- Easy learning curve, consistent application interface, familiar development experience using Visual Studio.
- A codeless data integration approach.
- Manages all intricate details involved in working with CRM web service interfaces, so you do not have to.
- Specifically designed features that help you achieve the best possible data integration performance, without jeopardizing your IT budget.

ABOUT KINGSWAYSOFT

KingswaySoft is a leading provider of data integration solutions for Microsoft Dynamics software and many other enterprise applications. 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.