KingswaySoft Partner Case Study
Genbil Software

Genbil Software uses the SSIS Integration Toolkit for Microsoft Dynamics CRM to clean up data for their customers through an automated merging process for duplicate records.

OVERVIEW

Genbil Software provides data-driven Portal, Data-deduplication, HR Management, and general CRM development/consultancy services on the Microsoft Dynamics CRM platform. Helping their clients manage their data since CRM v1.0, Genbil has seen first-hand the issues associated with duplicate leads, accounts, and contacts, as well as the limitations of the built-in duplicate detection and corresponding merge wizard. Using KingswaySoft's Toolkit, Genbil Software has developed an Azure cloud service to better identify and automatically merge duplicate records.

THE CHALLENGE

Duplicate CRM data annoys customers, increases marketing costs, and most insidiously decreases end-user confidence in CRM. Microsoft Dynamics CRM has built-in duplicate detection, but it is extremely limited in how it finds matches. It will not detect misspellings or mitigate for the various ways we humans enter data. The built-in merge wizard must be run manually and does not automatically preserve field data. Genbil saw an opportunity to build a solution to resolve these limitations. When it came to finding the best method to use for data handling, Genbil determined that KingswaySoft's SSIS Integration Toolkit was the optimal solution. The data integration components provided the time-saving features, flexibility and performance Genbil needed in order to customize and implement custom solutions for each of their clients.

THE SOLUTION

Utilizing the flexible capabilities of KingswaySoft's SSIS Integration Toolkit for Microsoft Dynamics CRM, Genbil found a way to create a more practical method to find and remove duplicate leads, accounts and contacts. Called AutoMerge, their automated solution finds matches that CRM's duplication detection engine could never find. AutoMerge finds duplicates regardless of name variations (Bob = Robert), alternate spellings or misspellings (Snider = Snyder), even punctuation and formatting differences in phone numbers and addresses are found ((503) 555-1212 = 503.555.1212 and 123 W. Main St = 123 West Main). Duplicate information found on different but equivalent fields is also found (e.g. the 3 email fields or the 11+ out-of-the-box phone number fields). AutoMerge works with the help of unique features found within the SSIS Integration Toolkit to update client's existing CRM data with the newly cleaned data. This includes employing Batch Size, Bulk API and Multi-Threading (BDD) for increased performance. AutoMerge offers more options on how to handle the merging of duplicate leads, accounts and contacts and ultimately saves customers' time and money.

THE RESULTS

Genbil's AutoMerge solution has successfully helped clients eliminate millions of duplicate leads, accounts and contacts that would have otherwise been missed with the out-of-the-box CRM duplicate detection. Genbil Software's service will detect and merge records based on customer specific rules, leaving the customer with a virtually duplicate-free system. With the help of KingswaySoft's SSIS Integration Toolkit, Genbil's AutoMerge tool seamlessly merges all duplicate leads, accounts or contacts while preserving fields from the non-Primary record, so no data is ever lost.

"The SSIS Integration Toolkit for Microsoft Dynamics CRM was the only logical solution to use to implement our AutoMerge tool. It offers the necessary features and flexibility we needed with the best performance to get the job done right and on time."

Eugene Brownell
Managing Partner of North America Operations at Genbil Software

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 100 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.

KingswaySoft
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