KingswaySoft
www.kingswaysoft.com

CRMPlus⁺, a Dutch-based consultancy and 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 and a KingswaySoft Authorized Implementation Partner specializing in Microsoft Dynamics CRM, 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. The fourth project began in November 2020.

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 and 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 and CRM On-Premise, a sample CRM migration package that is built on top of the SSIS Integration Toolkit for Microsoft Dynamics 365 and can be used, or customized to fit specific migration needs. The client now requires a local back-up of the 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 distinct Dynamics 365 BC administrations.

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 case of disruptions, generally caused by severed fiber-optic cables due to road works, the client will need to immediately identify and notify customers affected by the disconnection.

Project 4: The final project planned involves data integration between Dynamics 365 CDS/CRM and HubSpot.

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.

The Challenges

Project 1: The challenges with the first migration project and subsequent back-up operation centers on the numerous custom entities involved while maintain the *ModifiedBy* and *ModifiedOn* information as it is not always possible to create a record with a closed status.

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 and Holding Company). It requires returning invoice and purchase data from two Business Central instances back to Dynamics 365 CDS/CRM in order to provide users with near real-time integration on outstanding sales amounts versus budgeted sales for projects. In a previous implementation, another major Dynamics integration vendor system had been used for data integration between CDS/CRM and NAV. However, the project solution proved too complicated and expensive to maintain and 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 and make changes to the ETL work with ease.

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

The Solutions

SSIS Integration Toolkit for Microsoft Dynamics 365 AX|CRM|NAV

SSIS Productivity Pack KingswaySoft

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 a single license. Utilizing the SSIS Integration Toolkit for Microsoft Dynamics 365 (for both 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 the Diff Detector 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 *relationshiptype* (customer or supplier). The Diff Detector is used within the data flow to check whether the records processed are new or changed with a similar procedure deployed for the purchase and sales contracts. Success on this project required close cooperation 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 row 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. As long as data can be imported or exported in XML format, developers can integrate their software 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 and took only 120 hours to complete versus the months spent with achieving the 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. It's successful completion means that customers will receive notifications of possible disruptions as soon as the information becomes available, a vital milestone in the client's overall "Pro-Active Maintenance Project". CRMPlus+ reached out to the KingswaySoft Support team on several occasions for questions and guidance with the software. The KingswaySoft team provided general advice 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 will use the SSIS Integration Toolkit for HubSpot 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
3000+ Accounts
5000+ Quotes
6500+ Contacts