



**Case Study: Dynamics CRM 2011 Customization and Data Migration**

**Company: Geospatial Information Provider**

**Client Profile:**

Company helps businesses and government organizations empower mobile users with geospatial information. Our software solutions deliver complex maps and images from the desks of a few technical experts to the hands of many field operators in a simple, easy-to-use way. Through greater access to rich data and the ability to collaborate with spatially aware information at all levels of operation, our customers enhance decision-making, improve response times and increase productivity.

**Business Need:**

Client currently runs their CRM application on Salesforce.com (SF). As a result of the complexities and scale of current business operations, Client requires a CRM system that better manages and formalizes sales, marketing, and service operations, as well as provides controls, workflows, and integration capabilities to achieve higher productivity through efficient processes. Therefore and inherently, will require system and process configurations to support visibility of business performance and operations of which are supported within the Dynamics CRM 2011 configuration options, integrations and extended programming capabilities.

**Solution:**

- **Assessment of the current state**
  - Assess current business applications
  - Assess current business processes
  - Assess current information systems
  - Assess current infrastructure environments
- **Target the future environments**
  - Define target business applications
  - Define target business processes
  - Define target information systems
  - Define target infrastructure environments



### **CRM Infrastructure Setup**

- Dynamics CRM 2011
- SQL Server 2008 with Reporting Services
- Dynamics CRM Reporting Services Extensions

### **Data Migration into CRM**

The data will be loaded in the following sequence:

- Account Data, Relationships, and Activity History
- Contact Data and Activity History
- Product Data
- Product Version Data
- Core Product Data
- Core Product Version Data
- Lead Data, History and Loop Fuse Data
- Opportunity Data, and Activity History
- Case Data and Activity History

As scribe will be utilized to bring over the history data, administrative access to Salesforce.com will be required to connect to SF to get the Loop Fuse activity and activity history data.



**Screenshots:**

The screenshot displays the Microsoft Dynamics CRM interface for an account named '22WOK'. The top ribbon includes 'File', 'Account', 'Add', and 'Customize' tabs. The ribbon contains several groups of icons: 'Save' (Save, Save & Close, Deactivate), 'Collaborate' (Add to Marketing List, Connect, Assign), 'Process' (Run Workflow, Start Dialog), and 'Data' (E-mail a Link, Run Report). The left-hand navigation pane is expanded to 'Information' > 'General'. The main area shows the account details for '22WOK', including the primary contact 'Stanislaw DZIAK', preferred method of contact 'Any', and owner information. Below this, there are fields for 'Account Type' (Prospect), 'Account Name' (22WOK), 'Parent Account', 'Reseller', 'Primary Contact' (Stanislaw DZIAK), 'Industry', 'Secondary Industry', 'E-mail', 'Sync to GP' (No/Yes), and 'Comments' (terrigo.com order). The status is 'Active'. The bottom of the screen shows the Windows taskbar with the Internet Explorer browser open.