Case Study

MIGRATION FROM DYNAMICS CRM 2011 TO DYNAMICS 365 ONLINE

OVERVIEW

As technology advances, it is vital to secure the data. It is also very common that many companies have a disparate system that helps the business, but it is also very common that most companies end up with a pile of duplicate data. With so much data around, cloud migration is the only ideal solution. And, with the help of functional tools such as Scribe, it is even easy and flexible.

For more than 25 years, they are serving clients and solving challenges for 1000 Fortune customers nearly in every industry. They are the world's most experienced value-added providers of cloud-based solutions for voice, fax, and data.

Industry	**Client Location**	**Employees**	**Solution Offered**
IT	Ahmedabad, Gujarat	Over 100 employees	- Dynamics 365 for Customer Engagement - Third party tool - Scribe

CHALLENGES

The foremost challenge faced by the company was, to collect and migrate old as well as historic data which was over 1 million without losing from Dynamics CRM on-premise to Dynamics 365 on-line.

Major challenges also include:

1. Complex report structure
2. Old and outdated User Interface design
3. No access to the system from anywhere and from any device
4. Redundant developments in the system
5. Migration of activity entity data with historical date

SOLUTION

Based on the requirement and the challenges faced by the business, it was necessary to purchase a third-party tool to migrate the data from their source organization to the Dynamics 365 (online) organization.

To migrate an on-premises Microsoft Dynamics CRM organization, the organization first needs to be made compatible with the version of Dynamics 365 (online). For that, the on-premises organization must be upgraded before it can be migrated.

Once, the upgrade was done to the compatible system, replication of data was created to protect the lose of historic
data. As depletion is not supported by Dynamics 365, little changes in code and some customization was offered.
Fetch XML based reports were generated as complex report structure was not possible via SQL.

ABOUT INTECH SYSTEMS

Intech Systems is a boutique IT services company focused on providing world-class implementation and support services for Microsoft Business Applications. Our whole range of services helps companies in their digital transformation by providing technology solutions, including – Microsoft Dynamics 365, Microsoft Dynamics F&O/AX & BC/NAV, Microsoft Dynamics CRM, Microsoft Azure, Power BI, Power Apps and more. In addition, Intech also offers a range of complementary business.