SUCCESS STORY.
Dynamics 4.0 To Dynamics CRM 2011 Migration

About the Client

The client is an international assignment tax services firm providing expatriate support services for organizations. The client's services include tax planning and preparation services related to employees on international assignment, transferring to a new country, or working temporarily outside of their home location.

Business Challenge

The client was using Microsoft Dynamics CRM 4.0 for its customer relationship management (CRM) needs. The CRM system was business critical for the client because core customer-related data – vital to understanding and making decisions regarding the business – was captured, tracked and managed from Dynamics CRM 4.0.

The on-premise version of Dynamics CRM 4.0 was hosted on a single server with the CRM application and database deployed on the same server. Sales staff accessed the CRM via an Outlook plug-in and external users accessed their data by logging into their accounts via web portals. The client was in the process of upgrading to Microsoft Office 2010, which would create compatibility issues integrating with their current CRM version. They wanted a CRM system that would fully integrate with Outlook and their web portals.

The client decided to upgrade their Microsoft Dynamics CRM system from 4.0 to the newer 2011 version, in order to take advantage of the new capabilities and integration options. Upgrading to Dynamics CRM 2011 would enable the client to leverage the following key benefits:

- Highly improved Microsoft Outlook integration

- In-line visualization of reports and graphs and dashboards

- Auditing feature to track changes made to important data

- New navigation bar similar to the familiar Microsoft Office ribbon bar

- Out-of-the-box integration with SharePoint 2010

- Easy customization and custom development

The existing CRM had significant customizations built into the system to support the client's specific business rules and applications. These customizations needed to be accurately transferred to the new version.

Silicus Solution

Silicus evaluated the client's technical systems and business requirements to prepare a detailed project plan for migration and deployment of customer data to Dynamics CRM 2011. The processes followed by Silicus consultants to ensure a trouble-free migration included:

- Evaluation of the hardware, software and network requirements for upgrading to Dynamics CRM 2011

- Guidance in the setup of data and network environments prior to migration

- Staging server deployment with Dynamics CRM 2011 to mirror the production server

- Migration of:
    - data from CRM 4.0 database into the CRM 2011 database on the staging server

    - business specific customizations from production to staging server

    - SQL Server Reporting Services reports from production CRM 4.0 into CRM 2011

- Deployment and testing of external third-party applications into CRM 2011

- Detailed CRM 2011 user acceptance testing on the staging server with documentation

After completing these steps, the staging server was then moved to production. The CRM 2011 upgrade was completed after checking for any implementation issues or errors and training end users on the new CRM system.

Technologies Used

LANGUAGE
C#, ASP.NET 4.0

DATABASE
SQL Server 2008

PLATFORM
.NET 4.0

FRAMEWORK
.NET Framework, xRM Framework (CRM)

OPERATING SYSTEM
Windows Server 2008

WEB TECHNOLOGIES
ASP.NET

WEB SERVER
Window Server 2008

PACKAGE
MS Dynamics 2011

DEVELOPMENT ENVIRONMENT
Visual Studio 2010, Team Foundation Server

PROJECT MANAGEMENT
Team Foundation Server

REPORTING
SQL Server Reporting Services

Client Benefits

PLATFORM MODERNIZATION FOR IMPROVED EFFICIENCY
The upgrade to Dynamics CRM 2011 was completed on time and without any issues. The upgraded system enabled the client to take advantage of the new version's enhanced features to better serve end users.

EXPERT END-TO-END SOLUTION CONSULTING & IMPLEMENTATION
Silicus delivered on all aspects of the migration for the client, including software and hardware requirements gathering; CRM migration; support during acceptance testing; and end-user training.

SEAMLESS THIRD-PARTY INTEGRATION

Migration and validation was done not only for the components of the CRM, but also for the client's critical third-party applications. Silicus ensured that they worked seamlessly with the new version.