



CASE STUDY: DIGITAL TRANSFORMATION WITH MICROSOFT DYNAMICS 365

MIGRATION TO THE CLOUD FOR A CLIENT IN THE WIRELESS COMMUNICATIONS INDUSTRY

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Solutionade's team worked with a US-based client that provides services related to cellular lease negotiations, valuation, and brokerage. They develop, procure, own, and operate broadcast and cellular towers. Our client maintains one of the most comprehensive tower location databases that is privately available and a database of cell tower lease rates for ground leases, collocation leases, and tenant improvement leases across the United States.

Although our client had used Microsoft Dynamics CRM in the past to manage their vast databases and customer relationships – they wanted to explore the benefits of moving to the cloud and access the latest features and functionality of Microsoft Dynamics 365.

They needed a Microsoft Dynamics 365 Partner that could take a strategic approach to cloud migration, deliver a seamless digital transformation and ensure they make the the best use of the features and enhancements available in the cloud.

After consulting with Solutionade's team on the different aspects of the data migration process and execution, our client chose Solutionade as their digital transformation partner to help them migrate their Dynamics CRM 2016 solution to the latest version of Dynamics 365 CE in the cloud along with their related custom apps and database integrations.

WHY HAVE THEY NOT MOVED TO THE CLOUD, YET?

- **REPORTING CAPABILITIES**

Our client wanted to overcome the challenges with reporting in Dynamics 365 in the cloud, and was not aware of the full reporting capabilities that Dynamics 365 currently has.

The Solutionade team helped them migrate the reports from their Microsoft Dynamics CRM to Dynamics 365 online by recreating their SQL reports using a FetchXml connection.

- **INTEGRATING DATA FROM MULTIPLE EXTERNAL DATABASES**

Another challenge the client was facing as they were contemplating their move to the cloud was the integration of data from multiple external databases.

They needed to integrate important data from various external sources and we helped the client integrate all the necessary data with Dynamics 365 by using SSIS Kingswaysoft and Azure Logic Apps.

WHY DID THEY MOVE TO THE CLOUD?

- **ELIMINATE DOWNTIME & COST OF IT INFRASTRUCTURE**

One of the biggest concerns our client had with their on-premise CRM is the monthly server cost, as well as constant issues with the server vendor, memory leaks, updates, and the overall system maintenance. By moving to the cloud, they get to eliminate this cost while at the same time maximize performance through maximum security and seamless scalability the cloud brings.

- **SECURITY, COMPLIANCE & REGULATIONS**

Moving to the cloud, enabled our client to fully control who can access their systems or data over the network.

With the Microsoft Trusted Cloud and their Microsoft Dynamics 365 cloud CRM business applications, our client is now able to comply with GDPR and deploy their own cloud-based solutions to scenarios that have unique compliance and security requirements.



APPROACH

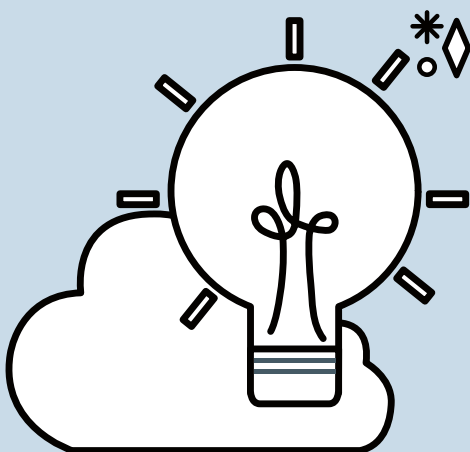
Solutionade provided a team consisting of a Project Manager, D365 Solution Architect, and two dedicated D365 consultants working remotely to upgrade the solution and make code compatible with the new version. We managed to finish up the migration and ensure a secure and seamless move to the cloud within a few weeks.

Not only did we help our client move and embrace the functionality of the cloud – but we ensured the migration was well planned without causing any disruption throughout the process.

We were fast to respond to any challenges that came up and maintained steady communication with the client.

The Solutionade team took the Microsoft Dynamics Sure Step approach to manage the digital transformation thoroughly within 3 months. We had a Dedicated Project Manager assigned to the project to oversee the end-to-end process and ensure comprehensive and quality testing.

The Solutionade team delivered comprehensive reports of the progress that is made and the setbacks that might need to be addressed which helped the client to easily anticipate changes and unpredictable factors that may disrupt their day-to-day.



SOLUTION: MIGRATION PROCESS

Solutionade's team prepared the cloud environment by setting up the Dynamics 365 Online organization, setting up their mailbox, and creating Users and Teams.

We helped the client upgrade to the most current version of Outlook as well, as the Outlook version they were using at the time is soon to be deprecated.

There were a couple of things to consider when preparing the on-prem solution for migration to the cloud. Our team looked at all the Entities, managed and unmanaged solutions, web resources, system workflows, and plugins that needed to be refactored or recreated to make them compatible with the latest SDK and UCI requirements.

To resolve the initial worry our client had in regards to reporting in Dynamics 365 online – we helped them migrate the reports from their Microsoft Dynamics CRM to Dynamics 365 online by recreating their SQL reports utilizing the FetchXml approach, as well as using direct Azure DB access to the MS Dataverse also known as CDS (Common Data Service).

Using a data migration tool like SSIS Kingswaysoft, we built the data packages and prepared them for migration. We used the same tool to import data from external sources/databases to their cloud environment.

Finally, we helped our client migrate their external web applications as well, using direct SQL access to the Azure Cloud. By doing this, the client will now be able to host their critical web applications without managing infrastructure, while at the same time being able to scale their applications when needed, without affecting the performance.

During the go-live, the web redirect was deployed, the code updated, the on-premise servers were stopped and the final data was uploaded to the new platform.

We carefully managed the migration and ensured that support was provided every step of the way.



RESULTS

Minimized Infrastructure Costs

By migrating to the cloud our client could finally eliminate the monthly cost they had to endure for an on-premise server. The constant issues with the server vendor, memory leaks, updates, and the challenges with overall system maintenance are now eliminated.

Updated Functionality

By migrating to Microsoft Dynamics 365, our client has embraced the new features and functionality that are not available to Dynamics CRM on-premise users.

They can now utilize the latest MS cloud functionalities like Power Automate, Power Apps, and MS Flow while consistently getting important updates.

Scalability

The client can now easily access vast amounts of computing resources such as additional servers, CPUs, or memory to support data collection and the scalability of their business.

FOR MORE INFORMATION:

Solutionade is a Silver Microsoft Partner focused on developing solutions for Microsoft Dynamics 365 and The Power Platform.

To contact the Solutionade team, email info@solutionade.net

For more information about Solutionade and its services, visit www.solutionade.net

