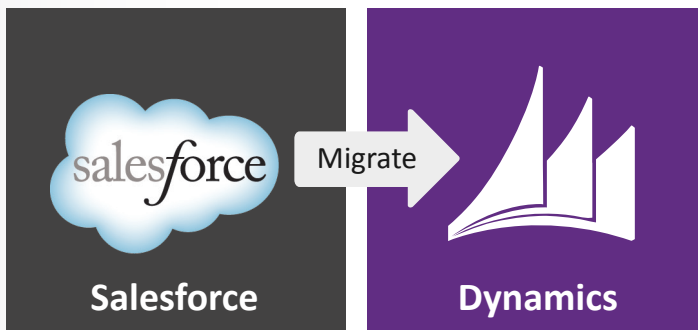**A**vePoint®
CRM MIGRATION MANAGER

AvePoint CRM Migration Manager for Microsoft® Dynamics CRM

Migrate. Automate data migration from Salesforce CRM to Microsoft Dynamics CRM – Online or on-premise editions.

Key Benefits

- Streamline the migration of CRM data from Salesforce CRM to Microsoft Dynamics CRM – Online or on-premises editions – to accelerate Dynamics CRM deployment and minimize downtime

- Minimize disruptions to business productivity by maintaining platform co-existence throughout the migration project and utilizing customizable mappings to ensure customer data – including entities, fields, and attachments – are appropriately represented in Dynamics CRM

- Reduce the time and manual effort required to migrate customer data, allowing organizations to re-focus IT resources on higher-value activities such as process automation, custom dashboard development, and report creation

Salesforce → Migrate → **Dynamics**

Accelerate Dynamics CRM Adoption: Minimize the Time and Business Disruption of Migration

Automating Migration to Dynamics CRM

Many organizations currently using Salesforce CRM solutions for customer support and services are looking to transition to Microsoft Dynamics CRM for their customer relationship management (CRM) initiatives in order to reduce costs and further automate business processes.

To appropriately address these challenges, AvePoint CRM Migration Manager simplifies the migration from Salesforce CRM to Dynamics CRM – Online or on-premises editions – to save organizations significant time and effort as well as ensure proper representation of legacy elements in Dynamics CRM. AvePoint CRM Migration Manager migrates all CRM data, including contacts, leads, attachments, and custom fields, with minimal downtime ensuring your organization can continue to support effective enterprise collaboration with confidence.

Microsoft Partner
Gold Application Development
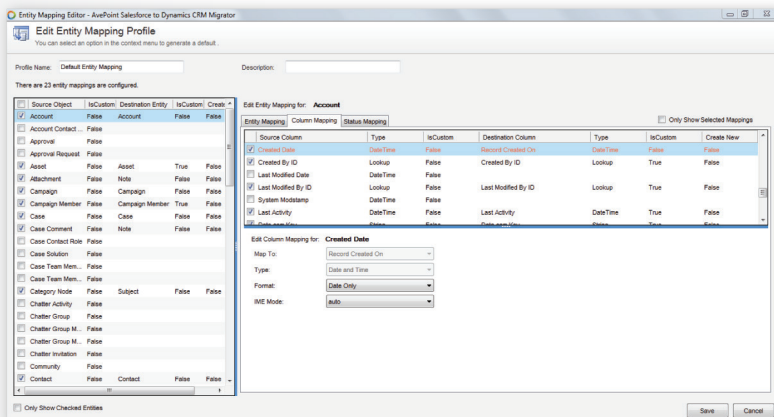Gold Collaboration and Content

FREE
30-DAY TRIAL

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AvePoint® CRM Migration Manager for Microsoft® Dynamics CRM

Key Features

- Scan your Salesforce CRM environment to identify data, customizations, and fields that should be captured in the migration to Dynamics CRM

- Generate mappings to ensure proper representation of legacy Salesfore CRM data, fields, and users in Dynamics CRM, creating Dynamics schema – such as custom fields or entities – on the fly

- Selectively migrate customer data, including accounts, contacts, leads, opportunities, custom fields, and attachments, with granular content selection or filtering based on built-in or custom metadata properties

- Migrate attachments to Notes sections of Dynamics CRM entities or to SharePoint if document management is configured

- Utilize test runs to validate migration results before populating production CRM environments, and re-use migration templates to apply successful migration plan configurations to production environments

- Perform live or scheduled migrations of Salesforce CRM data, custom fields, and attachments into Dynamics CRM

- Maintain platform co-existence throughout the migration process with the ability to perform full and subsequent incremental migrations, capturing modifications to data since the last migration

- Track the progress of your migration projects through a user-friendly dashboard, and produce detailed job reports upon completion

- Compare source Salesforce CRM or Sales Cloud data with migrated data in Dynamics CRM to check for consistency and verify that all data has properly migrated, flagging any inconsistencies that may call for subsequent incremental migrations

- Supports migration to Dynamics CRM Online or on-premises editions, and utilizes only fully supported Microsoft methodologies and APIs

Take advantage of pre-migration testing to compare environments and automatically create entity/object mappings between source and destination

Next Steps

Please contact DynamicsSolutions_Sales@avepoint.com to learn more about AvePoint's solutions for migrating to and optimizing Microsoft Dynamics CRM.