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SwiftShift – Gen AI Driven Salesforce to Dynamics Migration

July 2024

Persistent SwiftShift Solution– Azure OpenAI Led Migration
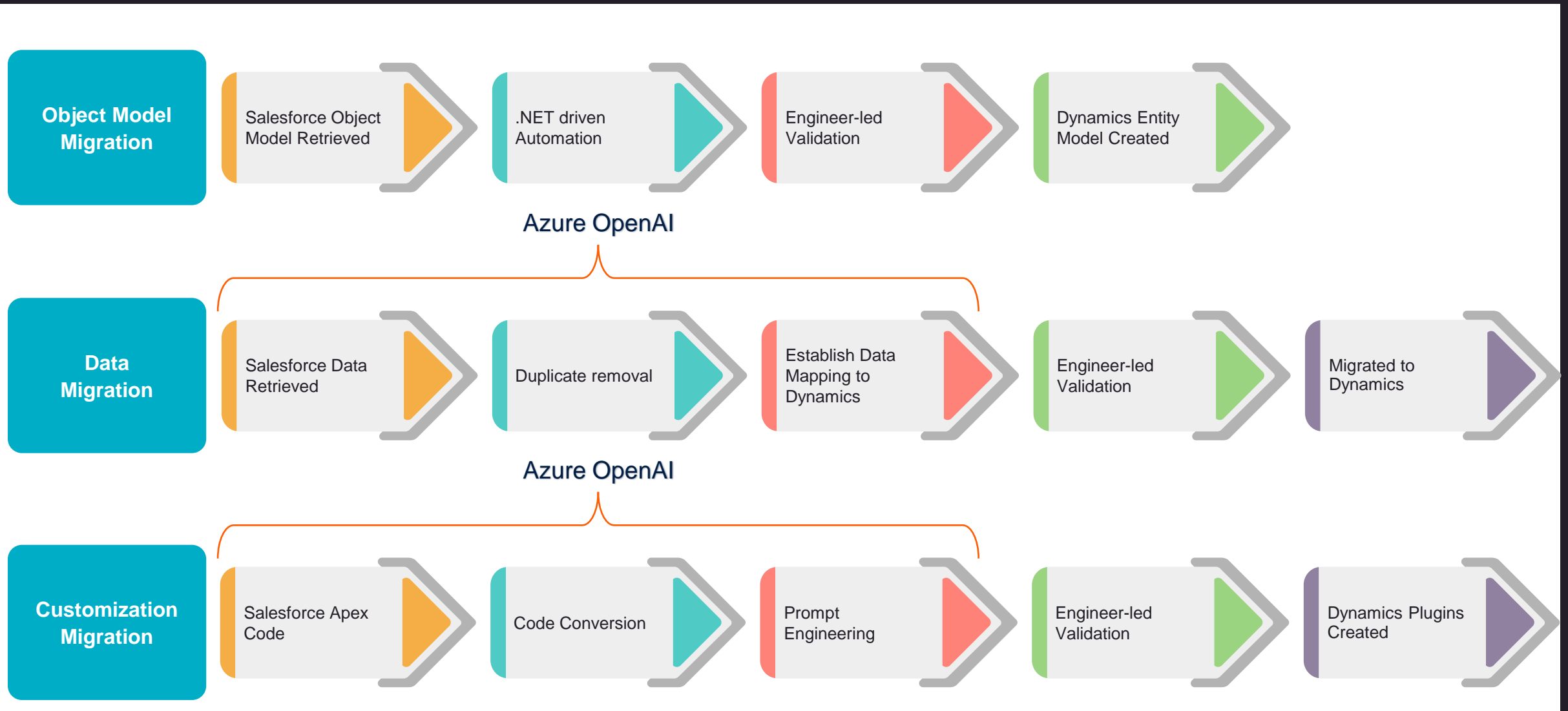
Activities

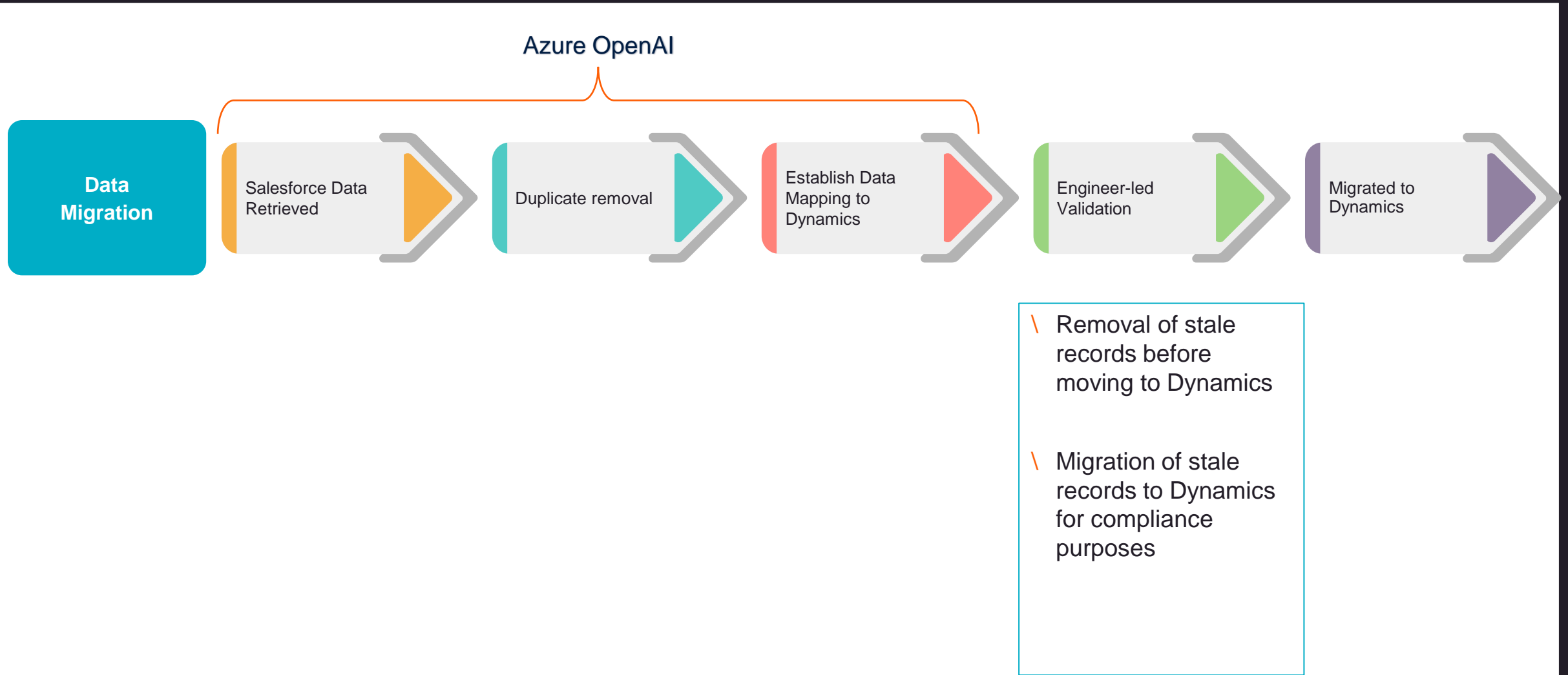| Setup and Analysis	Transform and Migrate	Test and Validate
\ Setup our SwiftShift solution components as per customer requirements \ Automated discovery of Salesforce object model & data and documentation.	\ Automated migration of Salesforce object model \ Azure OpenAI driven Salesforce data migration \ Transform Salesforce Apex code to Dynamics plugins harnessing Persistent Code Conversion Framework	\ The migrated objects, associated data & customization will be tested in the UAT for end-to-end functionality & nonfunctional requirements

Deliverables / Outcomes

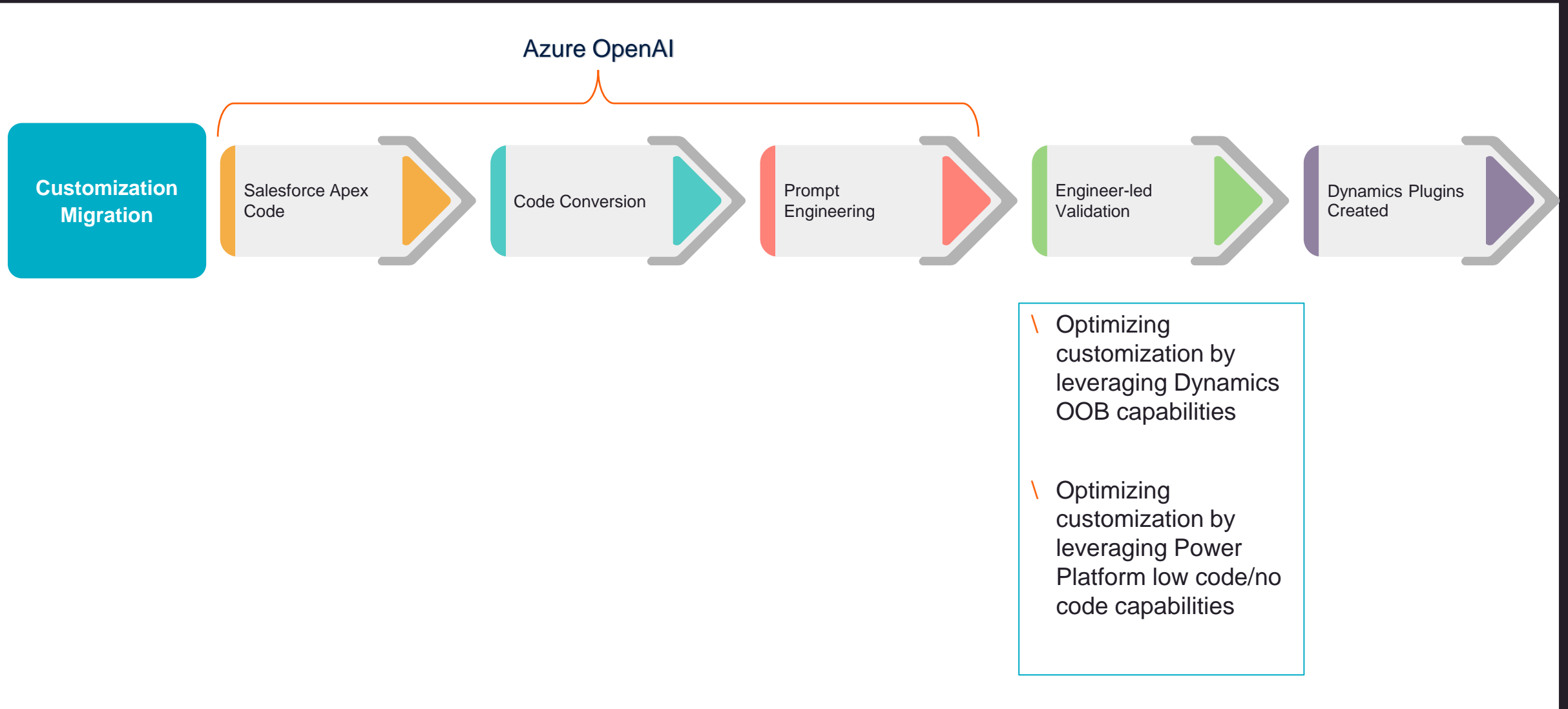|		
\ Accelerated discovery of Salesforce object model & data led by Gen AI	\ Azure OpenAI led highly accurate & efficient migration \ Optimized Salesforce object model, data, and customization before migrating to Dynamics utilizing necessary human interventions offered by our SwiftShift solution	\ Functionally equivalent Dynamics application \ Reduced customization leading lower ongoing maintenance

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CRM Migration Process Flow

Object Model Migration
- Salesforce Object Model Retrieved
- .NET driven Automation
- Engineer-led Validation
- Dynamics Entity Model Created

Azure OpenAI

Data Migration
- Salesforce Data Retrieved
- Duplicate removal
- Establish Data Mapping to Dynamics
- Engineer-led Validation
- Migrated to Dynamics

Azure OpenAI

Customization Migration
- Salesforce Apex Code
- Code Conversion
- Prompt Engineering
- Engineer-led Validation
- Dynamics Plugins Created

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Data Migration Process Flow

Azure OpenAI

Data Migration → Salesforce Data Retrieved → Duplicate removal → Establish Data Mapping to Dynamics → Engineer-led Validation → Migrated to Dynamics

\ Removal of stale records before moving to Dynamics

\ Migration of stale records to Dynamics for compliance purposes

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Customization Migration Process Flow

Azure OpenAI

Customization Migration → Salesforce Apex Code → Code Conversion → Prompt Engineering → Engineer-led Validation → Dynamics Plugins Created

\ Optimizing customization by leveraging Dynamics OOB capabilities

\ Optimizing customization by leveraging Power Platform low code/no code capabilities

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Few Samples Highlighting Key Aspects of Migration (Object & Data Migration)

\ Optimizing object model with human interventions

\ Mapping the Salesforce object attributes into Dynamic entity fields leveraging intelligent mapping by Azure OpenAI

\ Migrating data to Dynamics harnessing Azure OpenAI & Dynamics organizational service APIs

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Few Samples Highlighting Key Aspects of Migration (Customization Migration)

```
public with sharing class autoAccountSearchController
{
    public String strDebugl { get; set; }
    public List accounts { get; set; }
    public autoAccountSearchController()
    {

        accounts = new List();
        Account a = [select Id, Name, OwnerId, Site from Account limit 1];
    }
    public PageReference populateAccounts()
    {
        accounts = [select Id, Name, OwnerId, Site from Account where Name like :(strDebugl + '%')];
        return null;
    }
}
```

```
public class AutoAccountSearchController
{
    public string StrDebugl { get; set; }
    public List<Account> Accounts { get; set; }

    public AutoAccountSearchController()
    {
        Accounts = new List<Account>();
        Account a = new Account();
        a = from acc in Account
            select Id, Name, OwnerId, Site;

    }


    public void PopulateAccounts(string StrDebugl)
    {
        Accounts = from acc in Account
                where name like StrDebugl
                select Id, Name, OwnerId, Site;


    }
}
```

\ Persistent Gen AI Code Conversion Framework equipped with prompt engineering to accurately convert Salesforce Apex code to Dynamics plugins

\ Azure OpenAI driven unit test case preparation for Dynamics plugins which ensure code reliability, facilitate test-driven development practices, and accelerate migration significantly

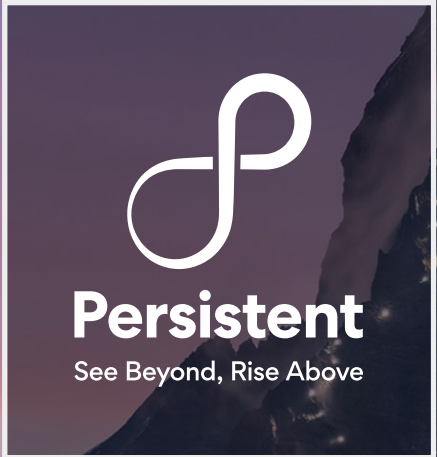Persistent

Benefits & Well-Grounded Statistics

Benefits

\ Solution: Comprehensive solution addresses all the complex migration aspects– object model, data, Salesforce customization through Apex coding

\ Timeline: Accelerating the migration process harnessing automation through .NET coding and Azure Open AI (Gen AI) to reduce the migration timelines by ~40%

\ Quality: Eliminating most of the manual migration errors & resulting in a highly stable migration

\ Cost: Reduced CRM Migration cost – **no third-party licenses cost for data migration**

\ Cost: Reduced Dynamics maintenance cost – **Harnessing Gen AI driven optimization of CRM data & customization to deliver drastically optimized ongoing Dynamics CRM maintenance cost**

Few Pivotal Statistics

\ Medium complex Salesforce object model with 30 objects can be migrated to Dynamics in ~6 weeks with Including optimization and validation

\ 15 Objects with 1 million Salesforce records can be migrated to Dynamics in ~8 weeks including optimization and validation

\ 30 medium complex Salesforce Apex libraries can be migrated to Dynamics plugins in ~8 weeks including optimization and validation

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See Beyond, Rise Above

THANK YOU