



MIGRATE FROM SALESFORCE TO DYNAMICS 365

MIGRATE IN 1 WEEK

This 1-week blueprint is designed to securely and efficiently migrate up to 100,000 of your critical Account, Contact, and related users from Salesforce to Dynamics 365.

PAINLESSLY MIGRATE FROM SALESFORCE TO DYNAMICS 365 IN 1-WEEK

Microsoft Dynamics 365 is the leading solution for AI-powered salesforce automation, marketing, and customer service. TrellisPoint's exclusive migration engine provides a low-risk option for organizations seeking to lower technology costs by quickly migrating from pricey Salesforce subscriptions to a budget-friendly Dynamics 365 plan.

Streamlined data-mapping

TrellisPoint's exclusive migration engine utilizes extensive pre-configured data-mappings to reduce manual processes and cut migration time.

Custom data matching

TrellisPoint ensures precise data transfer by matching and creating new, custom fields to guarantee all data is moved accurately.

Data cleansing

We'll work with you to cleanse outdated data, enhance functionality, and create automated workflows tailored to your business processes.

ABOUT TRELLISPOINT

TrellisPoint is a strategic growth consulting firm and Microsoft Solutions Partner specializing in technologies such as Microsoft Dynamics, Power Platform, and AI (Copilot), and transformation services such as business process engineering and organizational change management. We collaborate with growing companies that are looking to transform technology from a cost center into a key differentiator. Our proven TrellisPoint Success Framework delivers flexible solutions that will provide value for your present and future requirements. At TrellisPoint, your success is our success.

MIGRATION ROADMAP



DAY 1 ASSESSMENT & DATA COLLECTION

- Provide Assessment Web meeting
- Gather existing Salesforce system details
- Collect sample data for out-of-the-box Account & Contact data fields to be migrated
- Audit Salesforce database to identify current, retired and deleted users



DAYS 2-4 CLOUD DEPLOYMENT

- Deploy an out-of-the-box Microsoft Dynamics 365 Cloud environment
- Import all identified historical Salesforce.com users into Microsoft Dynamics 365
- Assign licenses and existing Salesperson security role to Microsoft Dynamics 365 users
- Perform data migration using TrellisPoint's Migration Engine



DAYS 5 REVIEW AND LAUNCH

- Joint review of migrated data
- Provide 1-hour Microsoft Dynamics 365 interface overview

Seamless Integration with Microsoft Products

Dynamics 365 integrates effortlessly with other Microsoft services like Office 365, SharePoint, and Power BI, enhancing productivity and collaboration.