

# Visionet Salesforce to Microsoft Dynamics 365 Modernization Accelerator

Automation-first approach | Built-in Copilot AI

## Built for enterprises ready to modernize CRM and unify customer engagement

Moving from Salesforce to Microsoft Dynamics 365 doesn't have to be risky or disruptive. Visionet's CRM Migration Framework accelerates your transition with automation-led migration, intelligent workflow reengineering, and real-time integration using Microsoft-native tools.

Whether you're modernizing sales, marketing, or service operations, our migration framework ensures your transition is seamless, scalable, and AI-ready, with no compromise on performance or data integrity.

## What you get – at a glance

Feature	What it means for you
Automated schema and data migration	Secure, accurate move from Salesforce to Microsoft Dataverse
Workflow and automation modernization	Convert Flows and Apex to Power Automate and BPFs
Integration upgrade	Real-time sync with Azure Logic Apps, Dual Write, and APIs
Copilot for sales and service	Embedded AI-driven assistance and process automation
Real-time reporting with Power BI	Forecasting, performance tracking, and customer insights
Six-phase delivery model	Structured execution from discovery to go-live and hypercare



## Ideal for

- CIOs leading large-scale CRM modernization
- CRM and IT teams seeking automation and AI-readiness
- Enterprises looking to consolidate platforms and reduce TCO



## Key outcomes

- **Unified CRM, reduced complexity**
  - Move from fragmented Salesforce instances to a modern, integrated Microsoft platform
- **Faster migration, less disruption** -
  - Use automation to speed delivery, cut risk, and minimize impact on day-to-day business
- **Embedded intelligence** - Enable Copilot-powered AI for smarter sales, service, and marketing decisions



## Why Visionet's CRM Migration Framework is a game changer

- Retire outdated workflows and rigid structures—rebuild with Power Platform flexibility
- AI-first from day one - Bring in Microsoft Copilot to assist reps, agents, and marketers with real-time insights
- Role-based access, audit trails, and Microsoft's trusted cloud ensures a safe transition
- Automation-first metadata extraction tooling
- AI-assisted field mapping and schema rationalization
- Pre-built Salesforce-to-Dataverse object mapping templates
- Microsoft funding alignment (ECIF eligible)
- Azure-native integration architecture (not lift-and-shift middleware recreation)
- Zero-downtime phased migration model



## How it works



### Connect

- Map Salesforce objects to Microsoft Dataverse
- Establish secure pipelines for schema and data migration



### Rebuild

- Automate with Power Automate, BPFs, and plug-ins
- Replace middleware with Azure-native integrations



### Launch

- Perform UAT, train users, and go live with hypercare support



### Migrate

- Transform legacy records, flows, triggers, and approvals
- Cleanse and validate for accuracy and completeness



### Enable

- Deploy Copilot for sales, service, and marketing
- Activate Power BI dashboards and AI-driven insights

## Support and scalability

- **Out-of-the-box methodology:** Repeatable across industries
- **Optional managed support:** SLA-based post-migration packages
- **Licensing:** Power Platform & Dynamics 365

## Ready to modernize your CRM and move beyond migration?

Let's show you how Visionet's CTF Framework can transform Salesforce complexity into Microsoft-powered clarity