



xRM³ and Fire Sprinkler Systems: From Partner-Hosted to On-Premise Microsoft Dynamics CRM

Fire Sprinkler Systems, Inc., based in San Diego, California, has been installing residential fire sprinkler systems in new construction since 1993. Since 1993, they've installed:

- 2,645,983 sprinkler heads
- 40,075,684 feet of sprinkler pipe
- 96,741 residential unit systems

Partner-hosted Microsoft Dynamics CRM In the Cloud

In July of 2012, Fire Sprinkler Systems was using cloud-based Microsoft Dynamics CRM 2011 with a hosting partner. Fire Sprinkler Systems needed custom workflows to track new construction or projects and to assign personnel according to different parameters within each project. The hosting partner suggested Fire Sprinkler Systems contact xRM³. xRM³ began working with Chris Rodgers, IT Manager at Fire Sprinkler Systems, configuring Microsoft Dynamics CRM using custom entities, dashboards and providing user training.

Over the next two years, Fire Sprinkler Systems' business grew, which created the need for new workflows and processes. Somehow Fire Sprinkler Systems managed to hit a ceiling in the partner-hosted environment, as the older hosted environment wouldn't support those customizations. Rodgers decided to take control over Fire Sprinkler Systems' data by migrating Microsoft Dynamics CRM from the partner-hosted environment to Fire Sprinkler Systems's own on-premise environment. He called xRM³.

"We needed more flexibility — managing our own install and adding customizations to Microsoft Dynamics CRM that were not possible with our partner-hosted solution. I called xRM³"

CHRIS RODGERS

Manager IT
Fire Sprinkler Systems, Inc.

Migration to Microsoft Dynamics CRM On-Premise

xRM³ advised Fire Sprinkler Systems upgrade to the current version of Microsoft Dynamics CRM, pointing out that within the new version, Fire Sprinkler Systems could customize workflows and processes so that all of the employees follow the same path, every time. Rodgers looked into it, saw the benefits and agreed.

The main concerns with the upgrade and migration to on-premise Microsoft Dynamics CRM were not just maintaining the database's integrity or the value of the upgrade — timing was critical. The hosting partner set a deadline for Fire Sprinkler Systems to get its database off the hosting partner's server. The new software licenses had to be up and running to provide a landing spot for the database when it was removed from the hosted environment.



Because business is not two-dimensional

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A Perfect Landing for CRM

To get started, xRM³ helped Fire Sprinkler Systems settle the terms of their current hosting contract and obtain the new license for Microsoft Dynamics CRM. Once that was in place, xRM³ installed the current version of Microsoft Dynamics CRM on the new server. Next, they made sure that the previous customizations would work in the new environment and that the user ID's remained intact. After rewriting some Java script and updating a few workflows, it was time to migrate the database.

At that point, the go-live was simple and easy. Chris Rodgers handled it himself, with support from xRM³. As Rodgers states, "There were a few minor glitches but it was nothing xRM³ couldn't take care of." Everything went very smoothly, with the software install and the migration. Nothing was lost.

To finalize the project, xRM³ designed an Internet-facing deployment, so Fire Sprinkler Systems employees and subcontractors could access Microsoft Dynamics CRM through a secure Internet connection, anywhere on any compatible device.

"xRM³ kept up with all the deadlines and the expectations were met. It seemed to go off without a hitch and we were up and running in no time."

CHRIS RODGERS

Manager IT
Fire Sprinkler Systems, Inc.

Dynamics CRM Solidly On-Premise

Fire Sprinkler Systems wanted control over their environment and now, with Microsoft Dynamics CRM on-premise, they have this control. Chris Rodgers manages all of Fire Sprinkler Systems' apps, customizations and upgrades in house, consulting with xRM³ when he needs extra support. Fire Sprinkler Systems and xRM³ have a collaborative relationship, working together to make Microsoft Dynamics CRM an optimized, customized software solution that can continue to grow with Fire Sprinkler Systems' business.

"We are fifty times more productive than we were. With all the customizations we've done, our workflow is as automated as possible."

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