Cambridge Air Solutions: Migrating from Salesforce to Microsoft Dynamics 365

ORGANIZATION

Cambridge Air Solutions, based in Chesterfield, Missouri, has designed and manufactured commercial and industrial HVAC equipment for more than 60 years, guided by its mission to "Create Healthy Working Environments for Hard-Working People." Its product lines span HTHV space heating (S-Series and SA-Series), make-up air (M-Series), evaporative cooling (ESC-Series and E-Series), and freeze protection (Spec Air Series) for warehouse, distribution, manufacturing, industrial, and transportation facilities. Cambridge sells through independent Rep Firms, which reach end users through mechanical contractors and engineering firms.

CHALLENGE

Cambridge ran its sales pipeline and customer service on Salesforce. The platform carried a high monthly cost and was built piecemeal over time, without an overall data architecture. Components were glued together, so data did not flow cleanly from one team to the next. Key work lived entirely outside the CRM: zip-code territory assignments sat in several separate databases, leads were tracked in a marketing spreadsheet, and pre-sale engineering requests sat in a shared inbox until resolved.

The Salesforce model also centered on Accounts, Contacts, and Rep Firms. But one thing touches every part of Cambridge's business: the physical unit it ships, identified by serial number. Sales, Service, and Engineering could not easily see a single unit's full history. Cambridge wanted to consolidate Sales and Service onto one scalable platform that fit its Microsoft 365 environment and its Epicor ERP, and it needed a partner who could redesign the data model rather than simply copy the old one.

TECHNICAL SOLUTION

Why XTIVIA: XTIVIA brought hands-on expertise in both Salesforce and Microsoft Dynamics 365, so the team could read the existing Salesforce configuration (objects, Flows, Process Builders, Apex triggers, reports and email templates) and map each piece to its right-fit Dynamics equivalent.

XTIVIA began with discovery sessions across Sales, Marketing, Service and Engineering, and produced a Functional Specification Document and entity relationship diagrams for Dynamics 365 Sales Enterprise and Customer Service Enterprise. The central design decision shifted from an account-centric model to an equipment-centric one. Equipment (Assets) synced from Epicor now links to customer accounts, Rep Firms, mechanical contractors, contacts, sales orders, Factory Startups, Cases, and Field Reports, and is searchable by serial number across the system.

Specialized tools were used to move data from Salesforce into Dataverse. XTIVIA rebuilt the Epicor–CRM integration in Microsoft Power Automate, keeping the existing jobs and adding products, customer shipments, zip-code mappings, equipment serial numbers, RMAs, and case numbers on parts quotes and orders. This eliminated the need for a previously used 3rd-party integration tool subscription and incorporated everything into the unified Microsoft Dynamics platform. The team also enabled the standard

HubSpot–Dynamics connector for companies and contacts, and the out-of-the-box Vonage telephony integration. Salesforce Process Builders and Flows were reviewed with Cambridge and retired, with the logic rebuilt as Power Automate cloud flows, cleaning up and simplifying processes along the way rather than reproducing them one-for-one. Microsoft Copilot for Sales was configured for opportunity summaries, email drafting, and meeting preparation.

The solution was planned in phases. Phase 1 targeted a minimum viable product, fully off Salesforce, by June 15, 2026. A documented Phase 2 backlog covers a Rep Firm portal, a direct ConfigureOne (SMART) integration, a mapping-tool replacement for territory management and more automation. Because everything sits on Dataverse and the Power Platform, Cambridge can extend the system with new apps, flows and AI capabilities without another re-platforming.

BUSINESS RESULT

Cambridge now runs Sales and Service on one Microsoft platform, alongside the Microsoft 365 tools its teams already use. Equipment is the shared thread: a Sales rep, a Customer Service rep and an Applications Engineer all see the same unit, its orders and its service history. Epicor is the single source of truth for zip-code territory mappings, removing the manual CSV updates across Epicor and Salesforce. Leads, pre-sale requests, and building walkthroughs that once lived in spreadsheets, inboxes, and email are now tracked in CRM with full activity history. Retiring Salesforce also ended its high monthly subscription cost.

BY THE NUMBERS

- 60+ years designing and manufacturing commercial and industrial HVAC
- 40,000+ Cambridge installations and 4,900+ contractor partners
- 2 Dynamics 365 apps deployed: Sales Enterprise and Customer Service Enterprise
- 3 live system integrations: Epicor ERP, HubSpot and Vonage
- 80%+ of existing Salesforce automations expected to be rebuilt in Power Automate, with the rest retired or redesigned

KEYWORDS

Salesforce to Dynamics 365 migration, CRM migration, equipment-centric CRM, asset-centric data model, Microsoft Dataverse, Power Automate, ERP integration, HVAC manufacturing, CRM consolidation

SOFTWARE

Microsoft Dynamics 365 Sales Enterprise, Dynamics 365 Customer Service Enterprise, Microsoft Power Automate, Microsoft Power Apps (Canvas Apps), Microsoft Copilot for Sales

HARDWARE/PLATFORM

Microsoft Dataverse, Microsoft Power Platform, Microsoft 365 (cloud)

ABOUT XTIVIA

For over 30 years, XTIVIA has been a leading B2B technology solutions provider, empowering clients to leverage their chosen technology competitively. We bridge legacy systems with modern innovation through a comprehensive suite of services, including Data & AI, Apps & Integration, Cloud & DevOps, Business Solutions, QA Testing, and Managed Services. Partnering with industry leaders like Microsoft, Liferay, AWS, Databricks, and Boomi, our certified experts deliver customized solutions that drive measurable business results. If you can imagine the business outcome, XTIVIA can create it with intelligent technology and AI-powered solutions. www.xtivia.com