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CASE STUDY

KELLY ROOFING

About Kelly Roofing
- More than 4 decades of experience
- Family-run business in the 2nd generation
- With focus on education, technology and dedication to the job
- Largest roofing company in Collier County, Florida
- Top 100 Roofing Contractor in America since 2003

Challenge & Solution
- High demand on storage space
- File & photo upload on a daily basis
- Move files & photos from CRM to SharePoint
- Reduce storage space costs

AttachmentExtractor
for MS Dynamics CRM
- Saves database space in CRM
- Moves attachments to SharePoint/FileShare
- Indexing & Search options
- Solution works in the background

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If it's broken, fix it

For more than 40 years and now in the second generation, "Kelly Roofing" stands for education, technology and dedication in all matters of professional roofing. The Kelly Family business success story proves its reliability and expert's knowledge which is pioneering the whole branch.

Today "Kelly Roofing" is the largest roofing company in Collier County, Florida and has been ranked one of the Top 100 Roofing Contractors in America since 2003. A wide range of awards and prices confirm the business philosophy aiming to achieve the best result for every customer.

Challenge: All entity-related attachments at a glance

Kelly Roofing's daily business requires a substantial documentation of files and photos for every roof-project. As a bunch of roof-consultants and other specialists are working on the same order, new files and photos are uploaded to CRM on a daily basis.

Working with a large bulk of data usually means even faster rising CRM storage costs. Comparing annual cloud storage costs reveals a huge difference between CRM-Online (~9,99 $) and SharePoint Online (~0,2 $) per GB.

Solution: Move attachments from CRM to SharePoint and reduce costs

Whenever it's about saving CRM storage space our AttachmentExtractor comes into play. This Add-on ensures that all entity-related attachments are stored in one place on SharePoint or FileExplorer. This solution runs in the background of your CRM system - unobtrusive but in a very efficient way!

AttachmentExtractor recognizes any email attachments and moves them to the document library related to the entity and record the email is about. In Kelly Roofing's case all files and photos associated with an opportunity need to be uploaded to the document library of its opportunity. Furthermore this Add-On deletes the original attachment from the CRM-email which saves space inside CRM.

To access the files again, users simply go to the required CRM records and look at the document library attached to the record or files.

> "AttachmentExtractor has saved us countless hours from dragging and dropping files into folders. It ensures that we look in one location for everything relating to an account. And, by storing the files in SharePoint, it keeps monthly CRM costs to a minimum." Ken Kelly, President of Kelly Roofing.