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# *MSDW Solution Evaluation* **Celigo**



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An advanced integration platform as a service (iPaaS) for developers, business technologists, and end users.

**celigo**

**MSDW**  
MSDynamicsWorld

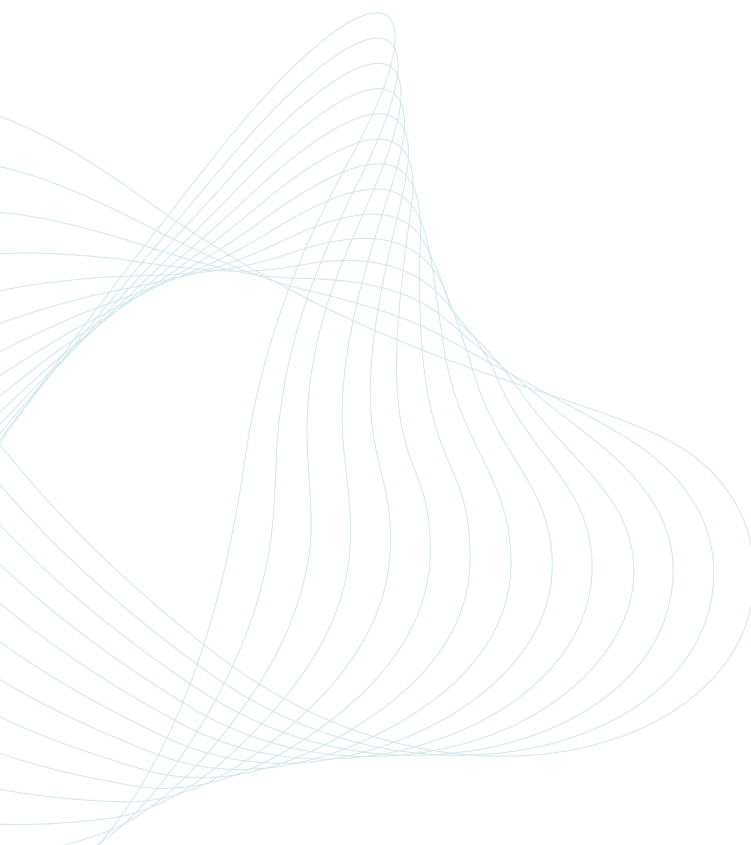
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## INTRODUCTION

Enterprise software projects often contend with complex integration requirements. For Microsoft Dynamics ERP and CRM customers, those scenarios can range from HR and engineering to supply chain, manufacturing, shipping, and beyond. What's more, the success of those critical integrations can determine the real value of a Dynamics solution investment.

In a SaaS-oriented world, user organizations now have a range of integration options for their mission critical cloud and on-premises systems of record. As organizations adopt more SaaS applications, they also face increasing pressure to provide a greater number of integrations—and to deliver them more swiftly. To meet those demands, an IT team can choose to integrate systems by coding their own solutions, using pre-built point-to-point connectors, or to invest in an integration platform that can serve as a central management layer across their solution landscape. Regardless of the method, the value of an integration strategy hinges on its ability to improve user productivity, deliver trusted performance, accelerate business processes, and improve the richness of data within the organization.

iPaaS (Integration Platform as a Service) solution provider Celigo aims to help organizations avoid the risks of coded integrations while solving the pain points of traditional iPaaS, like technical complexity, scalability, and friction typically found between IT and business teams. Celigo is also ramping up its engagement with the Microsoft ecosystem at a time when the Microsoft Business Applications channel faces dual opportunities: bringing legacy ERP and CRM customers to the cloud, and embracing Microsoft's forward-looking priorities around data, automation, and AI.



## THE EVALUATORS

This report was created with the help of an evaluation team that worked with MSDW and Celigo to learn about the solution, ask questions, perform hands-on scenarios, and provide written and verbal feedback.

### **Justin Carter – Microsoft Certified Trainer and BizApps MVP**

Justin Carter has been in the Microsoft Dynamics space since 2007 and a BizApps MVP since 2014. As of June 2024, he is now a Microsoft Certified Trainer (MCT) as well. He has been involved with the Microsoft certification exam development and MCT training materials since 2013 with the Grandmasters team. He has a passion for delivering quality Dynamics implementations, but more importantly, enabling customers to take things to the next level and grow their business by innovating with the newest technologies, not just using them. This requires customers to be an expert in how to find educational content (learn to fish), not just being trained by someone else who already did that (buying a fish at a store). As a passionate entrepreneur, he always has a few things in the works and is living his best professional life.



### **Steve Chinsky – Microsoft MVP, VP of Dynamics Practice, Accelerynt**

Steve Chinsky is a Microsoft MVP and a Dynamics Credentialed Master Professional. He has 25+ year experience as a project manager, implementor, consultant, system architect, and advisor on Dynamics NAV and Dynamics 365 Business Central implementations. His areas of expertise include process improvement, accounting, audit, and financial reporting



### **Steve Endow – Microsoft MVP**

Steve Endow is a Microsoft MVP with over twenty years of experience analyzing business processes and implementing information systems in diverse industries. He is the co-founder of Blue Dragonfly, which develops ISV applications for Dynamics 365 Business Central and also provides software development and customization services for Microsoft Dynamics 365 Business Central. He also owns Precipio Services and created ERP Center of Excellence, which provides world class training for Business Central in Latin America.



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## THE SOLUTION EVALUATION GUIDE

To provide the Dynamics ERP and CRM ecosystem with a more detailed and objective perspective on Celigo's offering and its fit in typical customer and partner scenarios, their team has engaged with the MSDW Solution Evaluation program. The findings of the evaluation include key details of Celigo's integrator.io platform and supporting resources, as well as feedback from an expert panel of independent evaluators from the Microsoft Dynamics community who have spent time educating themselves on the solution, talking with Celigo experts, and undertaking hands-on trials.

This evaluation report, authored by MSDW, offers Microsoft Dynamics customers and partners a comprehensive overview of Celigo as a potential iPaaS solution provider that could enhance their business solution architecture. It is based on three sources of data:

1. information provided directly by Celigo;
2. information supplied by third-party sources;
3. assessments from an independent panel of evaluators.

Celigo provided the following elements:

- Company and product information;
- Briefings to evaluators;
- Technical resources for evaluators, including access to the technology for demonstration and testing and the availability of their experts to present information and demonstrations and provide technical support during the evaluation.

The vendor does not have editorial control over the evaluator's final feedback used by the MSDW team in writing this report. The evaluators provide assurances to MSDW of their independence from the vendor being evaluated and share any other disclosures before engaging in an evaluation. For this report, each of the evaluators affirmed having no previous relationship with Celigo.

## ABOUT CELIGO

### Overview

*This section provides data and information provided by Celigo to educate readers on the fundamentals of the firm's solution and company characteristics.*

Celigo's iPaaS is a 100% multi-tenant platform built on elastic infrastructure at Amazon Web Services (AWS), running in an Amazon Virtual Private Cloud (VPC), architected as a streaming platform where huge data is always broken down into smaller pages of data. The platform is SOC2 Type II, GDPR, HIPAA, and California Privacy compliant. Data is encrypted end-to-end in motion and at rest and data is persistent only long enough for it to be moved. Administration capabilities include monitoring, activity logging, connector policy management including optimization for speed and volume.

Celigo describes their solution across four layers:

1. A foundation consisting of a ready-made platform that requires less coding than a raw development platform and that can scale with a collection of integrations and data volume changes. As a platform, Celigo handles updates, maintenance, and bug fixes and has compliance certifications that can help clients meet regulatory requirements.
2. Core iPaaS capabilities include support for multiple formats, user and error management, revision control, and connections management.
3. Templates and connectors that are free to use with an Integrator.IO License. Templates are prebuilt collections of common use case flows between applications and are meant to serve as starting points that can be installed and changed or modified. A comprehensive Integration Marketplace has hundreds of templates.
4. Integration apps from Celigo offer prebuilt flows, settings, and configurations for common business process automation use cases. They are designed to automate processes like order to fulfillment or quote to cash. These apps can be managed by Celigo or a partner.

In addition to prebuilt business process automations and a low-code UX for non-technical users, Celigo provides a developer workspace to easily create custom flows to meet unique business process automation needs with robust tools to extract, filter, map, transform and load data. It includes AI/ML driven features like Automapping to accelerate flow development.

Celigo attributes their ability to auto-resolve 95% of API and integration errors and reduce error resolution time by 90% to their 'AI-powered Error Management solution. Capabilities of this system include:

- Auto-resolution of repetitive errors once identified and fixed
- AI-enabled error messages that deliver clear and consistent explanations, even for APIs newly added to the platform.
- An advanced error management dashboard and email notifications

## KEY CHARACTERISTICS

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### Celigo facts & figures

- Over 5,000 customers and 40,000 users
- Over 700 employees
- Over 16 billion records processed per month
- Over 150,000 active processes
- Over 417 million errors auto resolved per month

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### Typical client characteristics

Celigo targets companies in the mid-market <\$1b.

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### Microsoft Business Apps compatibility

Celigo can connect to any business system, but it is optimized for SaaS solutions with APIs, which includes all Dynamics 365 solutions. Users interface with the platform through a web-based interface at <https://integrator.io/home>. Celigo recently announced a partnership with CData to expand their connectivity to on-premises business systems that support JDBC.

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### Integration types offered

- Application integration
- Data integration using ELT
- B2B integration via EDI or flat files
- Event-driven
- Formats supported: FTP, AS2, GraphQL, HTTP(s), REST APIs, flat files (CSV, EDI, etc), and more.

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### Custom connectors

Provides a set of universal adaptors for HTTP, FTP, REST

## KEY CHARACTERISTICS

<b>User roles</b>	IT can delegate the management and monitoring to non-technical resources without IT intervention.
<b>Error handling</b>	Error messages don't require developer resources to resolve. The solution's "AI-enabled error handling" means error messages are consistent even for API's new to the platform. The platform will auto-resolve repetitive errors once an error has been fixed.
<b>Architecture</b>	Celigo provides a multi-tenant platform built on elastic infrastructure at Amazon Web Services (AWS), running in an Amazon Virtual Private Cloud (VPC), architected as a streaming platform where huge data is always broken down into smaller pages of data.
<b>Capacity Considerations</b>	<p>As a multi-tenant platform built on AWS, Celigo's solution allows very big data to travel through their system in a scalable manner and seamlessly flow into external apps that do not natively support huge payloads.</p> <ul style="list-style-type: none"><li>• No practical limit to the number of applications that can be connected.</li><li>• No practical limit to the number of flows that can be defined.</li><li>• No practical limit to the number of flows that can be run in parallel.</li><li>• No practical limit to the size of data that can be processed</li></ul>
<b>Privacy and compliance</b>	<ul style="list-style-type: none"><li>• The platform is SOC2 Type II, GDPR, HIPAA, and California Privacy compliant.</li><li>• Data is encrypted end-to-end in motion and at rest and data is persistent only long enough for it to be moved.</li><li>• Administrators get monitoring, activity logging, and connector policy management including optimization for speed and volume.</li></ul>

## KEY CHARACTERISTICS

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**Trials** Celigo offers a full-feature 30-day trial

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**Marketplace** Celigo offers a marketplace of pre-built business process automations and connectors.

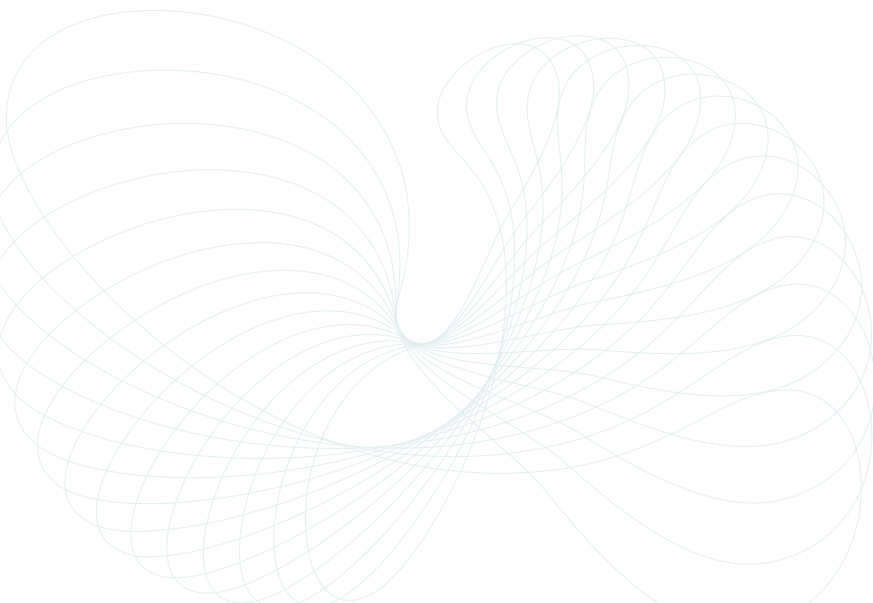
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**Learn more about Celigo** [What is Celigo?](#) (short video)  
[Demo video Comparing Integration Solutions: What's Best for you?](#) (webinar)  
[Discover the Benefits of Integrating Power Automate with iPaaS](#) (webinar)

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**Support options**

- AI Knowledge Bot
- Email & [Help desk](#)
- [Forum](#)
- [Knowledge Base](#)
- Phone, including 24/7 live reps (based on Customer Success Plan)
- Chat (for all plans)



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## PRICING

Celigo offers a tiered pricing model based on the number of endpoint applications and flows with no limits on the number of instances, users, or consumption.

The solution does not require any additional Dynamics licenses.

Celigo state that their pricing is based on simple options that prioritize predictability and transparency and that aim to avoid hidden costs, mysterious metrics, and/or other complex pricing concepts.

Pricing is calculated based on the number of endpoints and the number of flows that will be executed using those endpoints. Consumption and storage are not factored into pricing.

The company recommends that customers and their implementation partners start with the platform discussion, then move on to capacity. They should establish how many endpoints they need and how many flows they will plan to build using those endpoints. They do not look at factors like different user ids or URLs, which some competitors may use to add to the customer's costs. Celigo counts endpoints at the application level. So, a Shopify account would be one endpoint, even if there are multiple stores. For Dynamics 365 Finance and Supply Chain Management (D365 F&SCM), multiple legal entities in the same system would be considered a single F&SCM endpoint.

Three pre-designed bundles from the company offer a range of typical customer options starting with a standard edition at \$18,900 per year (at the time of this publication) and rising to an enterprise edition at \$75,000 and includes unlimited endpoints and many more flows than the lower tiers.

The company stated that they are also considering another lower-priced bundle option for Dynamics 365 Business Central customers that would provide a more limited set of endpoints and flows. The company has applied this approach for their SMB clients in the NetSuite ecosystem.

## RATINGS & REVIEWS

### Analysts

Celigo has been named a Visionary in the Gartner Magic Quadrant for iPaaS multiple times and in 2023 was recognized by Gartner Peer Insights as a “Customers’ Choice”, which indicated above average customer experiences and adoption.

### User ratings

[Gartner Peer Insights](#) - Celigo has an overall rating of 4.7 out of 5 stars at the time of publication, with 212 total ratings and 35 in the last 12 months.

[G2](#) – Celigo has an overall rating of 4.6 out of 5 stars at the time of publication, with 481 reviews.

## EVALUATOR FEEDBACK

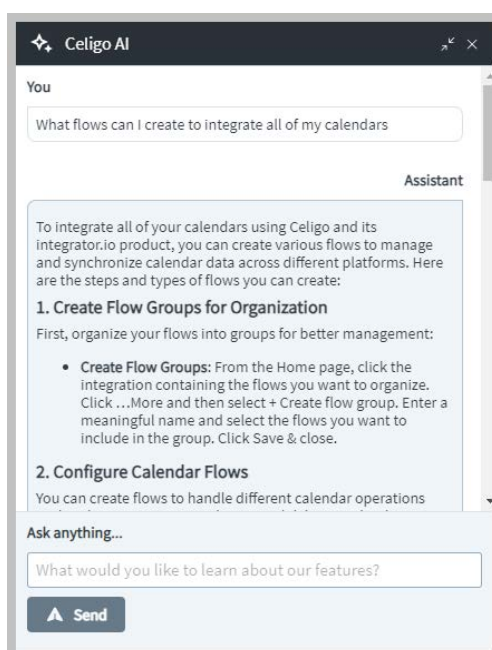
The information in this section is compiled based on feedback from our independent evaluators based on their review of information presented by Celigo, questions answered by Celigo product experts, and their hands-on experience with a demo instance of Celigo’s integrator.io platform.

### Solution Experiences

The evaluators worked with Integrator.io to build sample flows and connections. In the process, they also interacted with Celigo’s AI-based assistant to accelerate their work and other support and knowledge resources.

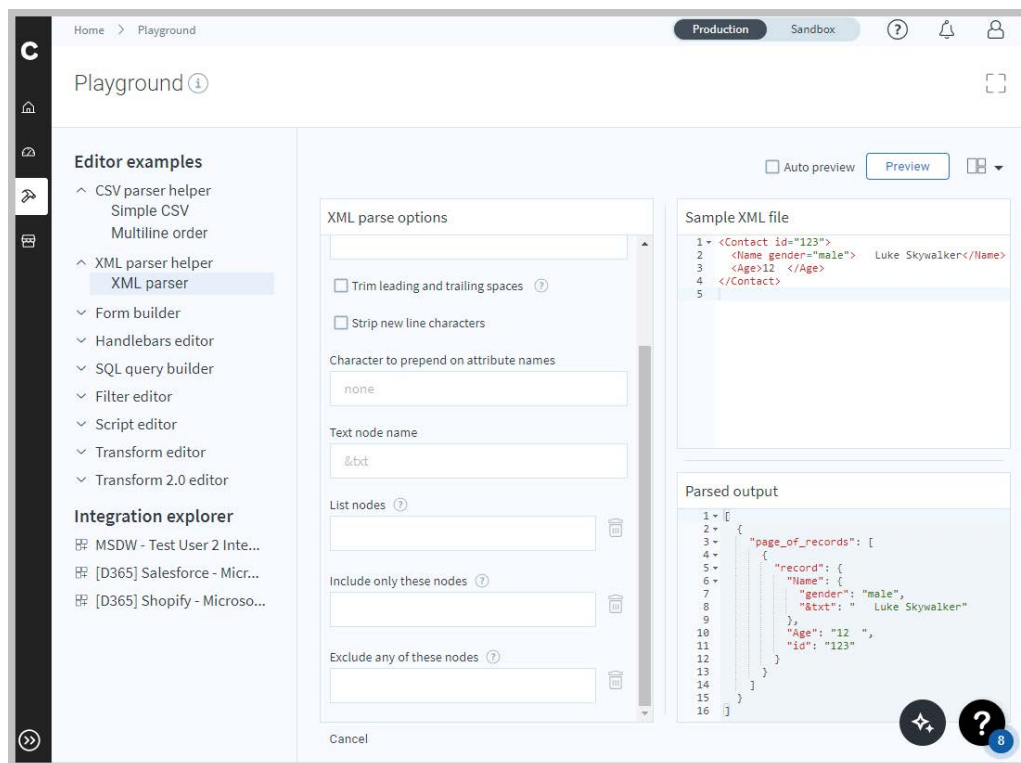
### Onboarding and transformations

Celigo AI helped at the earliest stages of the work as an evaluator investigated how to build a simple flow to extract data from an Outlook calendar. In one example, they asked how to create a flow to sync calendars:



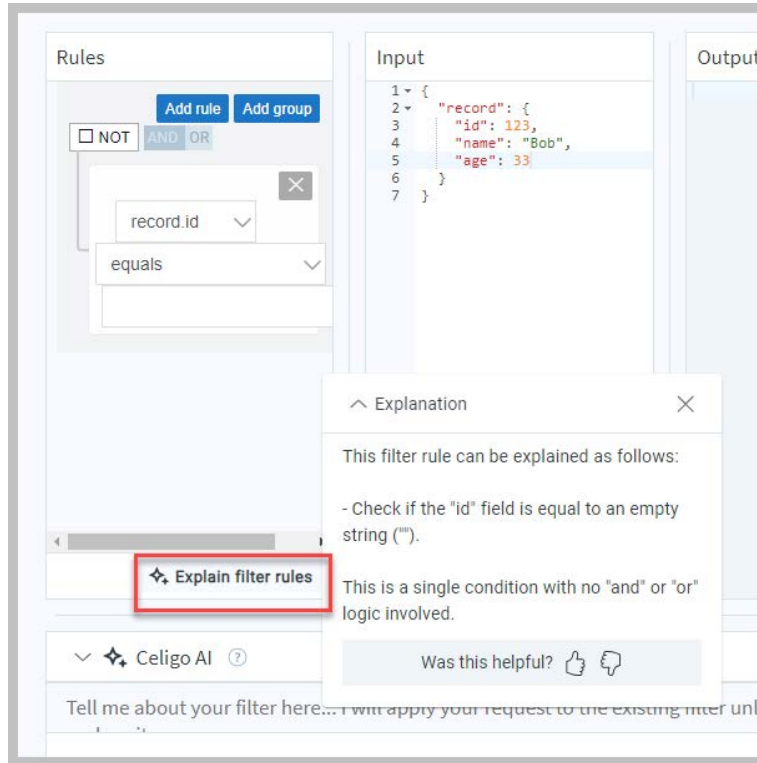
## EVALUATOR FEEDBACK, CONT'D

They also used the Playground feature to explore and preview the ETL and parsing capabilities, describing this as “a great feature” that was extra valuable because it was embedded in the integration platform. With other integration platforms and tools, customers and partners must start with external sample files in CSV or XML format that they must parse and transform first. The evaluators did note that they would like to see support for more delimiters beyond the comma, which appeared to be the only available option.



Celigo AI assists with JSON development, a feature that the evaluators found useful, especially for users who are not familiar with the syntax. The same functionality exists with the Filter and Script editors for transformation capabilities. The integrated editor also has controls to catch syntax errors and provide visual cues. Filtering was described as quite self-explanatory thanks to the visual GUI. And the tool provided good transformation options.

## EVALUATOR FEEDBACK, CONT'D

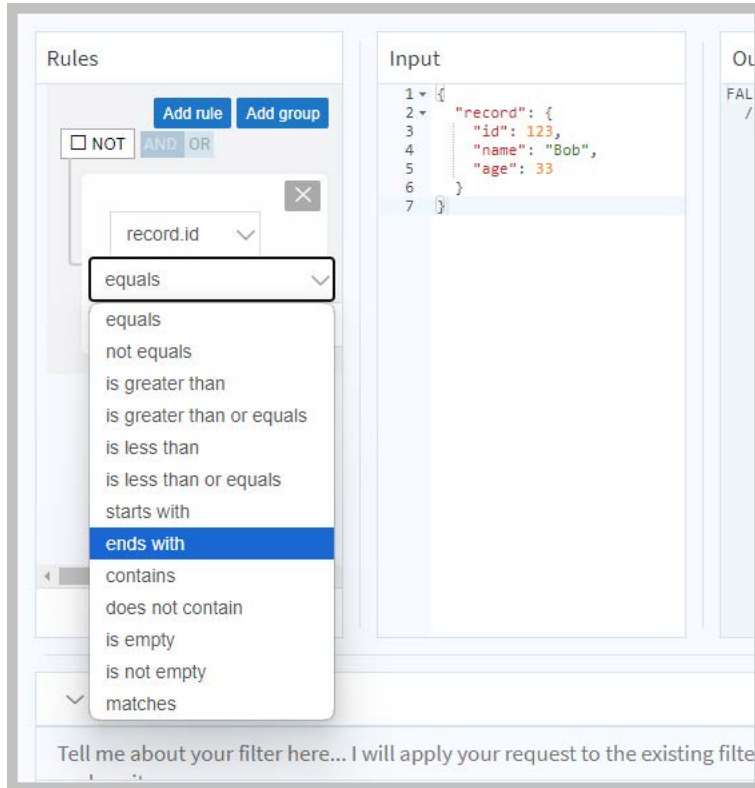


For more complex scenarios, users can apply functions to the data depending on the data types. For example, the number and string options have specific functions relevant to the data type.

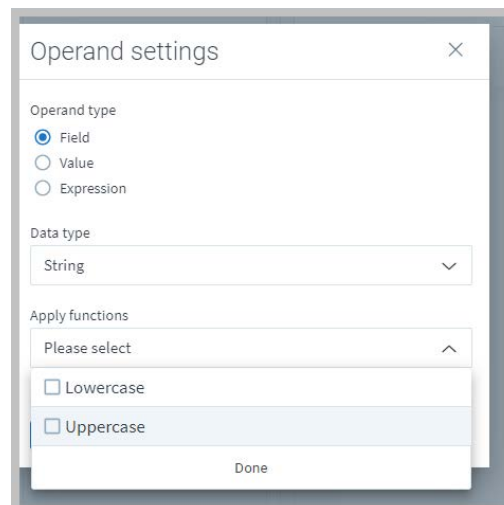
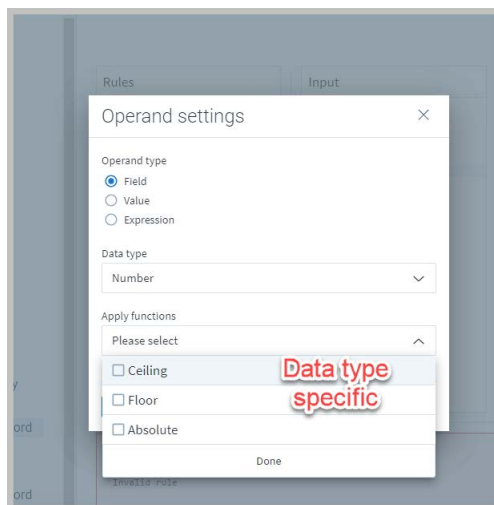
The evaluators felt the integrated help tools would be useful when setting rules for JSON. That help is more structured and can be paired with Celigo AI.

When using the Transform editor within the playground, there are a number of comprehensive rules available that the evaluators felt could address almost all transform operations when used together.

## EVALUATOR FEEDBACK, CONT'D



For more complex scenarios, you can apply functions to the data depending on the data types. See below for the number and string options that have specific functions to the data type.

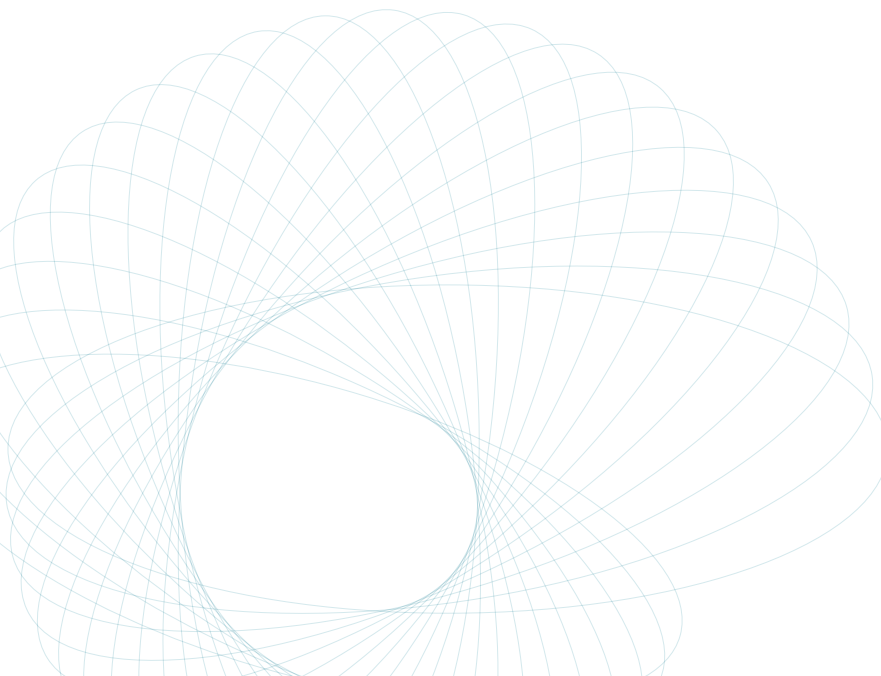
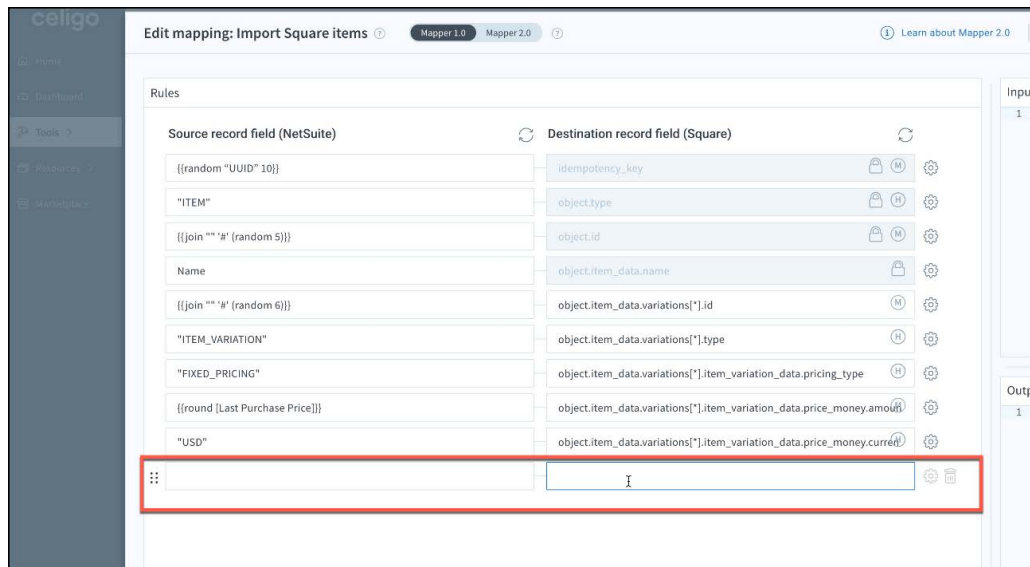


## EVALUATOR FEEDBACK, CONT'D

There are two versions of the Transform Mapper tool. The evaluators praised Celigo's broad range of built-in help options including the Knowledge Base, support (including live chat), and training to answer preliminary questions about the correct way to set up operations.

The Transform Mapper 2.0 tool provides the ability to help populate variables as you type and to create output rows and records from the input record.

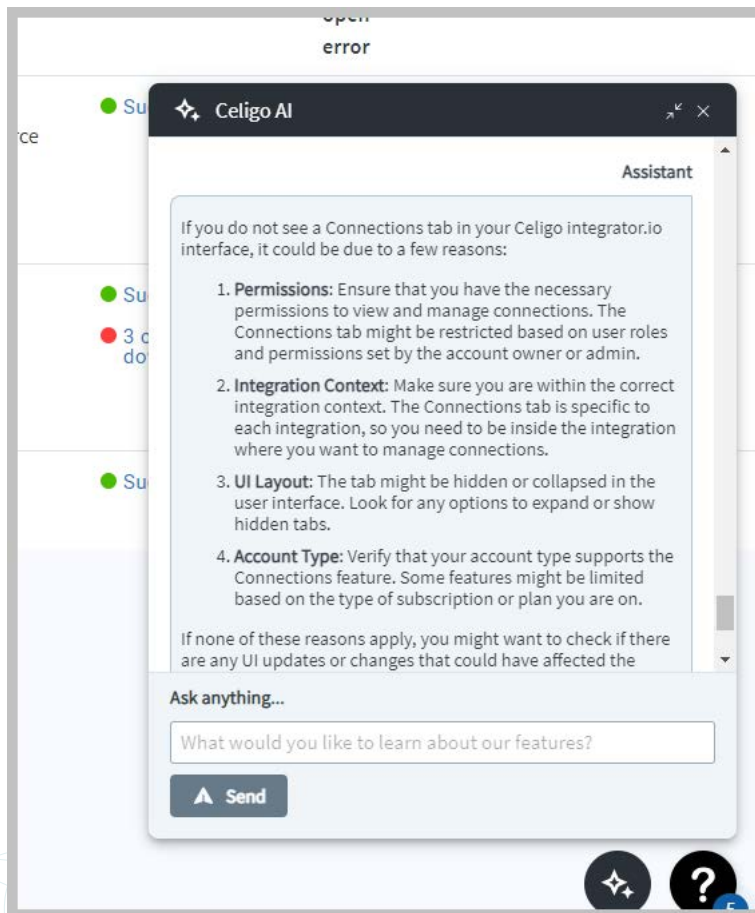
For Mapper 1.0 if you want to add additional mappings you can enter the additional fields in the empty set of mapping fields at the bottom of the current mappings



## EVALUATOR FEEDBACK, CONT'D

### Building an integration

In one scenario, they worked to export appointments from an Outlook calendar. Unsure how to begin, they asked the Celigo AI chatbot the right way to get started. After a few questions, they determined that they needed to build out their new connection from within a new flow in Integrator.io. This approach is different from other integration platforms they had experienced, and the AI tool was helpful in clarifying that difference and helping them find the right approach.



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## EVALUATOR FEEDBACK, CONT'D

From an existing flow, they built a connection to Outlook. That allows the flow builder to choose from a list of API actions, which in this case focused on actions related to the Calendar (getting a calendar, listing events, etc.). They then used Celigo AI to create the Handlebars template to filter the data and populated it with preview data.

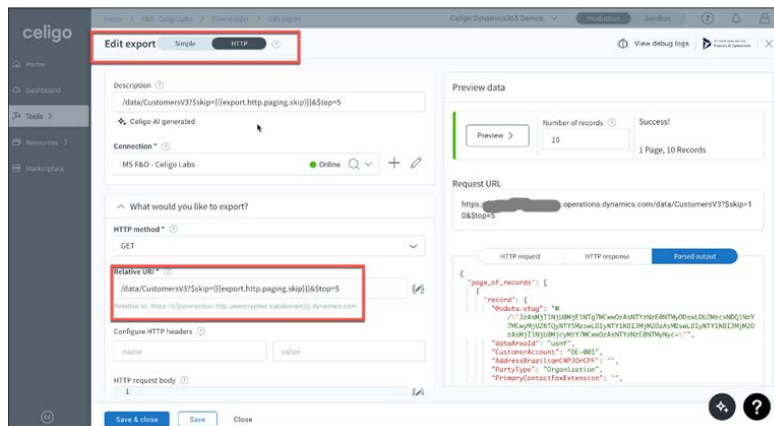
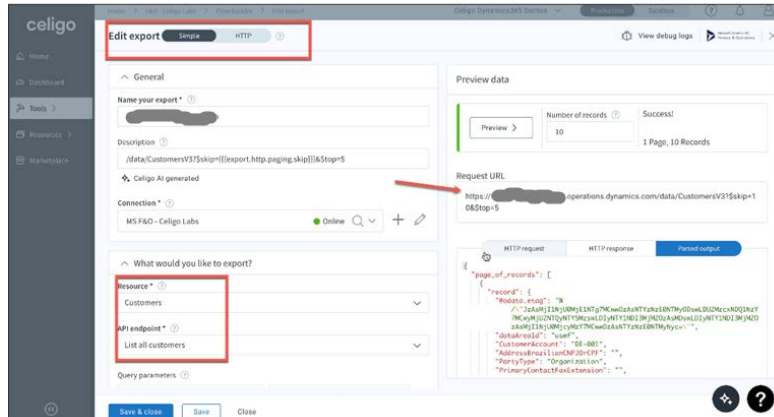
The overall experience to create this basic flow using an out of the box connector with a filter took about 15 minutes, they reported, adding:

“It is my assumption that for more complicated integrations with required data transformation would require much more time, but could be tackled in pieces based on a well-structured integration development technical design from a solution architect by a relatively junior developer.”

In a second scenario, the evaluators looked at how to create a flow that integrated with Dynamics 365 SCM or Finance. After following the same steps to create a connection, they connected to an instance. There were resources for 14 possible connector resources, with 11 that were related to header or line information for purchase orders, sales orders, and invoices. Dynamics 365 Finance, Supply Chain Management, and Commerce have thousands of OData endpoints.

Celigo's perspective on the topic of endpoint support is that providing a limited set is by design. The connectors that they create are there to help with the most common API endpoints that they have seen users use and they do plan to add more high value endpoints based on feedback from users and partners. Rather than provide all possible endpoints, the platform is designed to allow for creating the connectors to help assist with building flows and Celigo does not limit users to only what is in the dropdown. By toggling the “simple” and “http” switch you can change to the HTTP view and then modify the URL to whatever OData endpoint you need.

## EVALUATOR FEEDBACK, CONT'D



### Other platform impressions

Evaluators all praised Celigo's user experience. One specifically noted that it is much easier and more enjoyable to use as a functional expert than other iPaaS services commonly considered by Dynamics 365 customers. Elements they liked included:

- A flow building experience that was “easy, clean, and simple to get around as a novice”. One evaluator stated that the experience was clearly better than competing integration platform options they had seen.
- Flow-building principles were easy to understand and “simple to get around as a novice.”
- Concepts related to table or field mapping were straightforward. They found the transformation tools and related Playground feature to be powerful when working with data.
- Navigation was easy to understand.
- When investigating new integrations to systems without a pre-built integration, the process seemed reasonable. Evaluators did not create any custom connectors.
- They liked the availability of the embedded marketplace, available within the customer user experience, to quickly find available pre-built integrations to an application.
- They found direct and useful assistance from the various support channels including Celigo AI, the knowledge base, and support via chat.

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## EVALUATOR FEEDBACK, CONT'D

### **Comparison to other integration options**

Celigo's platform provides a strong alternative vision compared to the likely default options that Microsoft and VARs offer to Dynamics 365 customers: Power Automate, point-to-point integrations, or custom development.

As one evaluator stated, "Power Automate is just not a valid option for business-critical integrations." Similarly, some consultants, including some of our evaluators, stated that in recent years they have made the decision to refuse client requests to develop new custom integrations due to the problems that arise and the unexpected time and cost.

All our evaluators shared stories of integration choices that Dynamics customers had made that may have been a lower upfront cost but that turned out to be more expensive to develop and maintain. For example, a custom-coded ecommerce integration one evaluator recently encountered was "a mess," that was going to now cost the customer much more to fix and keep running. Furthermore, asking a Microsoft partner to handle custom integrations as part of a Dynamics 365 ERP project is outside of their core competency in most cases.

Pre-built point-to-point integrations, when available from individual ISVs to integrate with a Dynamics 365 solution, tend to be a popular option for customers, especially when addressing such requirements over time. But our evaluators noted that even when the ISV supports this type of integration, it becomes part of a collection of disparate modules that quickly accumulate around a Dynamics 365 solution (and for other business critical systems) and become difficult and expensive to monitor, manage passwords for, update, and fix when it breaks.

### **Marketplace**

Evaluators felt the Celigo integration marketplace still had rough edges for Dynamics-focused integrations, and they noted the varying levels of completeness for different Dynamics apps. For example, Celigo's marketplace (available for authenticated users) offers 28 integration apps and templates for Business Central, but only 3 for Customer Engagement and none so far for Finance or Supply Chain Management.

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## EVALUATOR FEEDBACK, CONT'D

### **Pricing**

Evaluators identified Celigo's pricing as one of the challenges that Dynamics customers, especially SMBs, will face. They largely felt the price points were justified given the robust capabilities of the platform. They also noted that it would be a point of friction for organizations that are price sensitive. Organizations that can embrace the concept of a full-featured integration platform with an annual cost that covers management of the integration logic, error management, logging, maintenance, and administration, will be most likely to consider the solution. By contrast, organizations that deliberate over every dollar spent and struggle to analyze the business value of different options are likely to select options with a lower upfront cost like customization or a less sophisticated integration platform, even if those options could have a higher lifetime cost in terms of both IT and business performance.

### **Other Impressions**

Evaluators wanted to understand more about Celigo's evolution over the last eight years as an iPaaS vendor. One rough sketch of the company's progress can be seen through their improving position in analyst reports. For example, Celigo has been named a Visionary in the Gartner Magic Quadrant for iPaaS (report), multiple times and in 2023 were recognized by Gartner Peer Insights as a "Customers' Choice", which indicated above average customer experiences and adoption.

Evaluators also wanted to see more use cases specific to Dynamics solutions to help gauge the type of customers who would be the best fit for deploying Celigo.

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## CONCLUSIONS

Celigo brings over a decade of iPaaS experience to the Microsoft Business Applications space. Their solution offers easy-to-understand pricing and licensing based on endpoints and flows and avoids complicated rules and metrics.

Evaluators agreed that the user experience for people building integration in Celigo's platform was well-designed and worked well, allowing them to quickly design simple integration flows with little to no training. They also felt the integration marketplace, which contains a vast range of pre-designed integration templates between known data sources including SaaS solutions, was a high value resource for users trying to build new flows for their organization.

While Celigo has thousands of customers and years of proven success helping organizations integrate all manner of solutions, our evaluators noted the company's relative lack of experience working with Dynamics 365 customers and partners specifically as a potential weakness at this time, but one that Celigo is actively addressing with more investment in partners and senior leadership familiar with the Dynamics 365 channel. They encouraged the firm to continue to enrich the integration marketplace with scenarios supporting Dynamics 365 Business Central, F&O, and CE and to work to build more partnerships in this channel.

An additional potential challenge noted by evaluators, especially for Business Central customers, was the current pricing model. It should be noted that Celigo acknowledge the concern and expressed flexibility in offering pricing models more favorable to SMBs. Our evaluators also advised Celigo to work at shedding their image as a newcomer by building trust with partners and users. They encouraged Celigo to talk more about typical areas where their solution can help customers and to develop more examples that show depth of knowledge in the Microsoft Dynamics space, specifically by functional area or business case.