Import Tool

For Dynamics CRM 2013

Installation Guide

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What's In This Manual

This manual provides guidelines for installing and setting up Import Tool for Microsoft Dynamics CRM version 2013. It lists system requirements, contains step-by-step guide through the installation process, gives tips on troubleshooting and describes post installation configuration procedures.

The manual is divided into the following sections:

- **Introduction**

  In this chapter you can find basic information about Import Tool, its licensing and compatibility with Dynamics CRM.

- **Installation**

  In this chapter you can find information about system requirements, how to install and uninstall Import Tool. It also contains information about post installation configuration procedures.

Introduction

This section contains a list of the supported databases and operating environments for Import Tool module, as well as the recommended system requirements for servers and client computers.

Import Tool Overview

Import Tool is a powerful application specifically designed to simplify the data import to Microsoft Dynamics CRM. It allows you to import or update all core entity types (Account, Contact, Lead, etc.), all elements of Product Catalog or any custom entities.

With the Import Tool you can:

- Import data from different sources:
  - SQL Server
  - Microsoft Excel
  - Text files (csv, txt, xml)
  - Any ODBC data provider
  - Email mailbox using POP3 or IMAP protocol
  - Or you can develop your own data source plugin.
- Save import project containing mapping schema, use functions to transform the input data, create custom scripts and much more.
- Use different import modes: import new records, update existing records, perform both at the same time, delete unwanted records or change record status (for example activate, deactivate, etc.).
- Import data into custom entities and fields.
- Run import process from a command line which can be used to automate or schedule the import process.

Versions

Import Tool comes in two versions: **Data Migration** version and **Full** version.

Data Migration version is designed for the initial data imports and will work only for 60 days. This version should help customers to import essential data into Microsoft Dynamics CRM, test and make all necessary data updates at the beginning of the implementation process.

Full version is ideal for initial and on-going data imports as it has no expiration date. This is the best choice for customers that require regular updates to the data stored in Microsoft Dynamics CRM, for example when price lists need to be updated regularly, new products are frequently imported and so on.

In addition to that, Import Tool is divided into 7 modules which allow importing or updating different groups of entities. Customers that do not need to import all types of records can choose only a single module or multiple modules that are critical for their business. Furthermore import of custom entities is always included when at least one module is registered.

Below table lists the modules available and Dynamics CRM entities they will allow to import.

Module	Dynamics CRM Record	Dynamics CRM Entities
Customer Records	Account	account
	Address	customeraddress
	Competitor	competitor
	Contact	contact
	Currency	transactioncurrency
	Customer Relationship	customerrelationship
	Lead	lead
	Opportunity Relationship	customeropportunityrole
Activities	Appointment	appointment
	Campaign Activity	campaignactivity
	E-mail	email
	E-mail Template	template
	Fax	fax
	Letter	letter
	Phone Call	phonecall
	Recurring Appointment	recurringappointmentmaster
	Service Activity	serviceappointment
	Task	task
Product Catalog	Currency	transactioncurrency
	Discount	discount
	Discount List	discounttype
	Price List	pricelevel
	Price List Item	productpricelevel
	Product	product
	Product Substitute	productsubstitute
	Unit	uom
	Unit Group	uomschedule
Sales	Account	account
	Competitor	competitor
	Currency	transactioncurrency
	Document	document
	Goal	goal
	Goal Metric	metric
	Invoice	invoice
	Invoice Product	invoicedetail
	Lead	lead
	Marketing List	list
	Marketing List Member	listmember
	Opportunity	opportunity
	Opportunity Product	opportunityproduct
	Opportunity Relationship	customeropportunityrole
	Order	salesorder
	Order Product	salesorderdetail
	Queue	queue
	Quote	quote
	Quote Product	quotedetail
	Rollup Query	goalrollupquery
	Sales Literature	salesliterature
	Sales Attachment	salesliteratureitem
	Territory	territory

Service	Account Article Article Comment Article Template Case Case Resolution Contact Contract Contract Line Contract Template Currency Facility/Equipment Queue Resource Group Service Activity Site Subject	account kbarticle kbarticlecomment kbarticletemplate incident incidentresolution contact contract contractdetail contracttemplate transactioncurrency equipment queue constraintbasedgroup serviceappointment site subject
Marketing Campaigns	Account Campaign Campaign Activity Campaign Item Campaign Response Contact Currency Lead Marketing List Marketing List Member	account campaign campaignactivity campaignitem campaignresponse contact transactioncurrency lead list listmember
System	Business Unit Connection Connection Role Currency Note Queue Resource Group Site Subject Team Territory User	businessunit connection connectionrole transactioncurrency annotation queue constraintbasedgroup site subject team territory systemuser
Full version	All Above	All Above

Product Licensing

Demo Licenses

Import Tool is licensed per Organization. Downloaded version is fully functional limited to importing or updating 5 records only. This is the only restriction when no registration key has been entered. Evaluation license is not needed.

Compatibility

Import Tool 2013 is compatible with all deployment types of Microsoft Dynamics CRM 2013.

Installation

In this chapter you can find information about system requirements, how to install and uninstall Import Tool. It also contains information about post installation configuration procedures.

System Requirements

This chapter contains a list of the supported databases and operating systems, as well as components that must be installed on a server before you can start Import Tool installation process.

➢ Supported operating systems

Microsoft Windows 8
Microsoft Windows Vista* (32 and 64 bit)
Microsoft Windows 7 (32 and 64 bit)
Microsoft Windows Server 2008 (32 and 64 bit)
Microsoft Windows Server 2008 R2

*) This version of the Import Tool introduces Ribbon instead of menu and toolbar; minimum version of the operating system required is Windows Vista SP2 with Platform Update. Otherwise only standard menu and toolbar will be available.

➢ Required components

Microsoft .NET Framework 4.0 Full – installer will download it and install if needed or alternatively you can download it and install separately from:
http://www.microsoft.com/download/en/details.aspx?id=17718

The Import Tool installation does not have to be performed on the Microsoft CRM server. You must have administrator privileges in order to run the installation.

1. Installation file

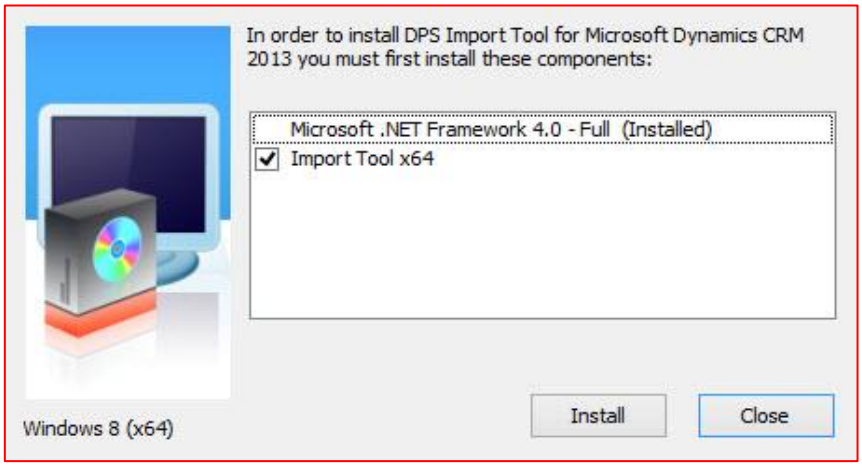
a. Unzip *ImportTool_2013.zip* file.

b. Launch *ImportTool_2013.exe*.

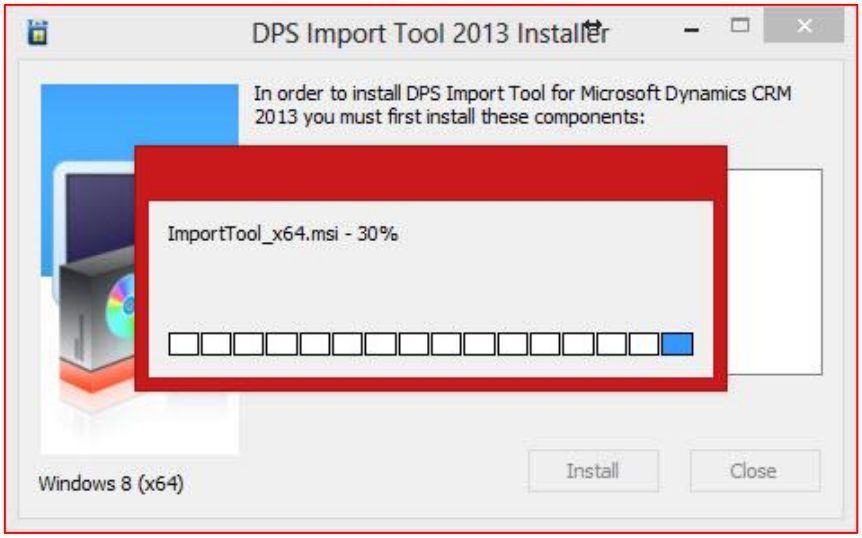
2. Components

There are three components that will be installed by the installer (if not installed already):

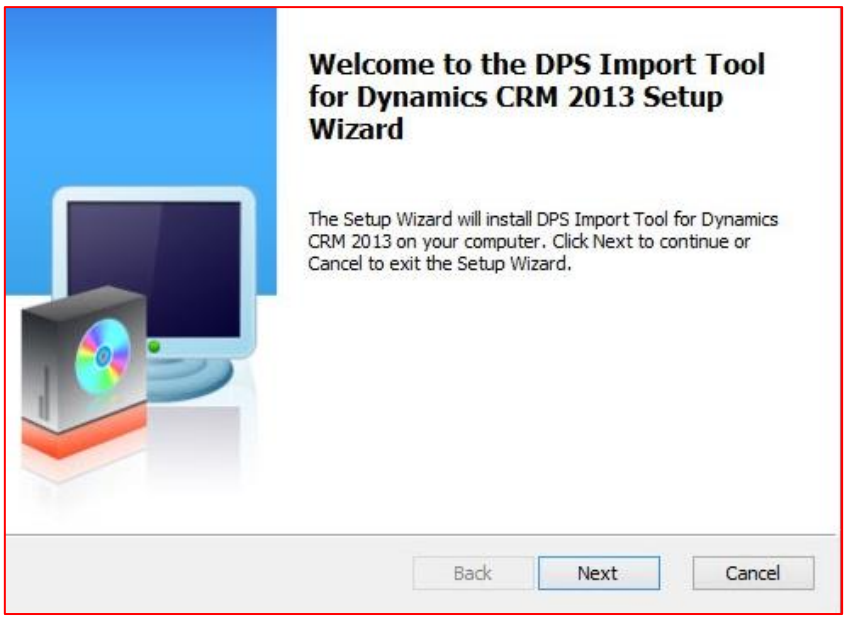
- Microsoft .NET Framework 4.0 – Full – installer will download it if required or you can install it separately from Microsoft: http://www.microsoft.com/download/en/details.aspx?id=17718
- Windows Identity Framework components
- Import Tool 2013



Click install to start the installation process. Once first two components are installed, Import Tool setup will be launched.



3. Welcome screen

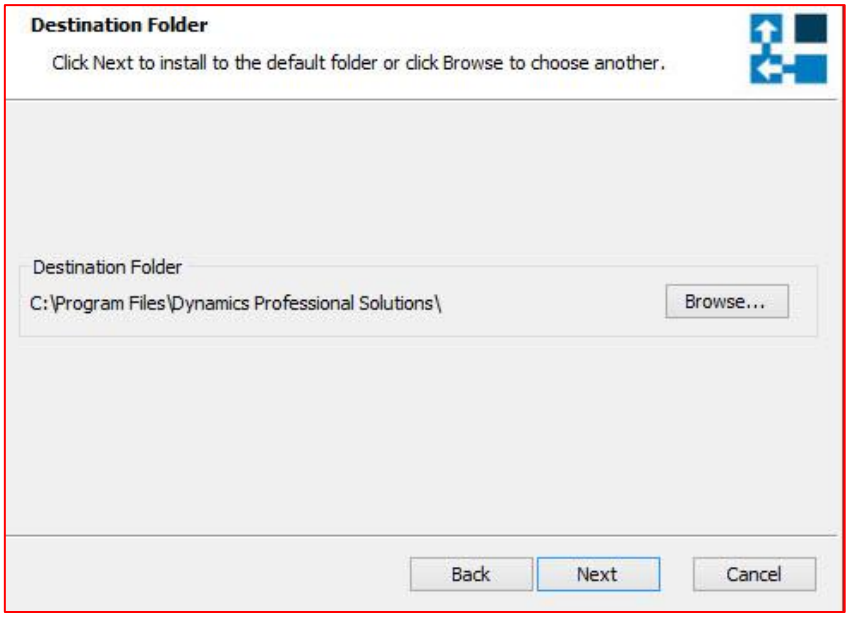


In the Welcome screen click "Next".

4. End-User License Agreement

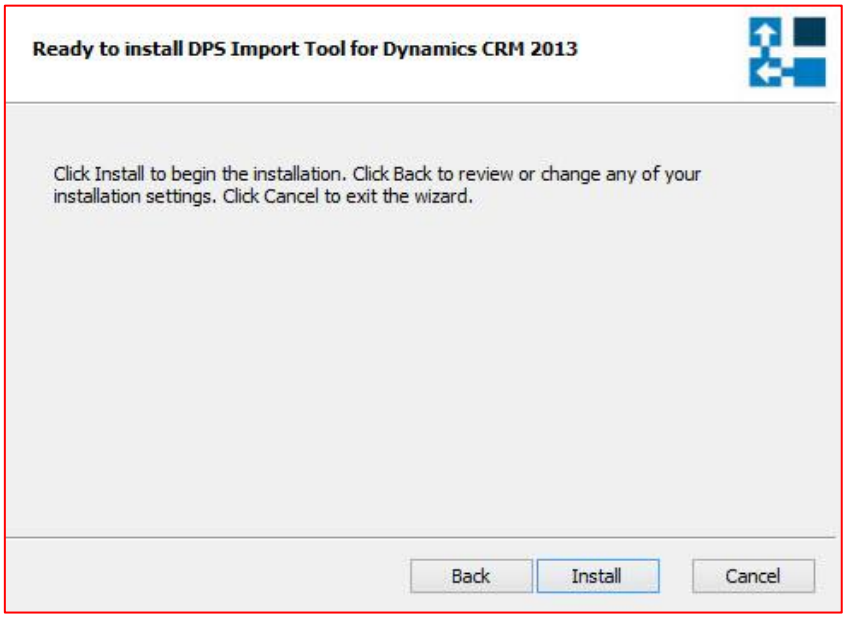
If you agree with the terms of the license agreement, click "I agree" to continue the installation.

5. Destination Folder



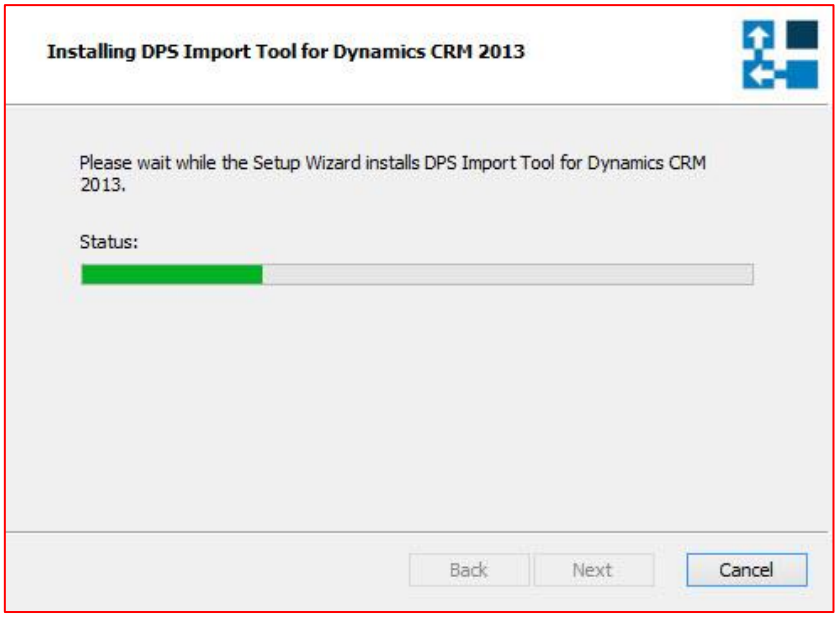
Select the directory where Import Tool should be installed. Click "Next" to install into default directory or Click "Browse" and select the destination folder of your choice and click "Next".

6. Ready to Install



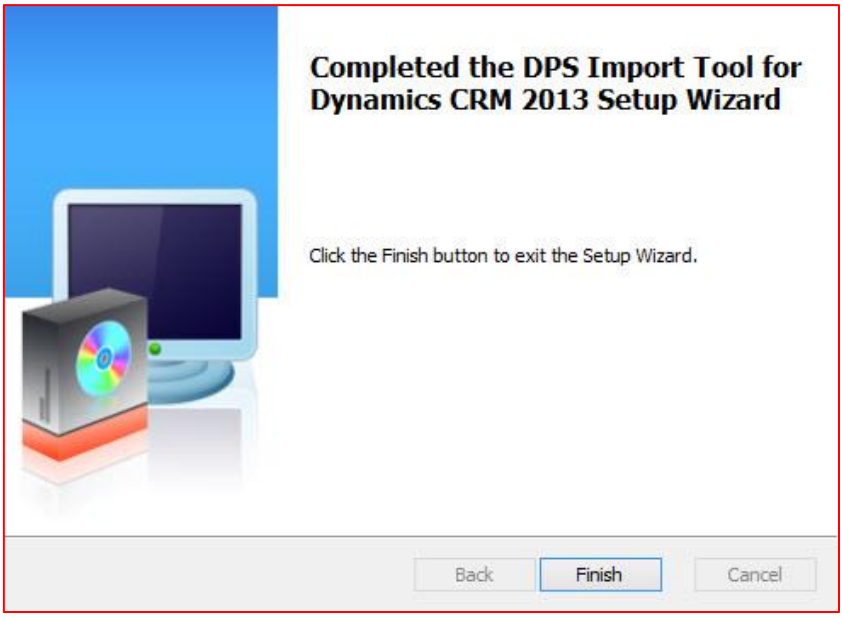
Click "Install" to begin the installation.

7. Installing DPS Import Tool for Dynamics CRM 2013

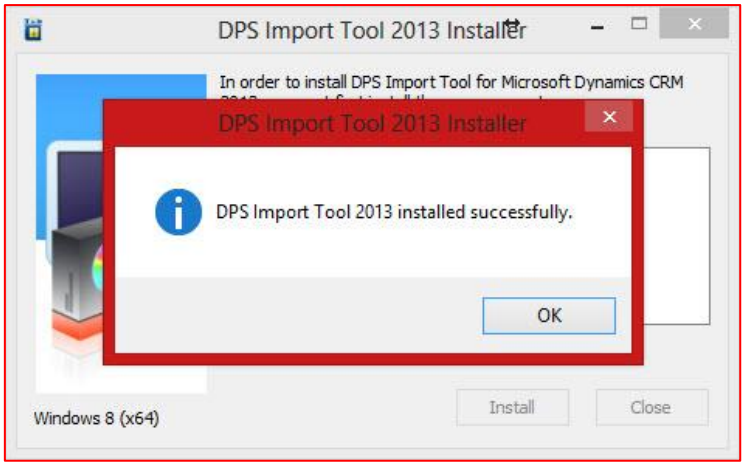


Installation can take few minutes to complete.

8. Installation Complete



Click "Finish" button to close the installation wizard.



1. **Go to All Programs and find "*DPS Limited*" folder**

   If you are using 32-bit version of Windows the following shortcuts will be available:

   - Import Tool 2013
   - Import Tool 2013 Command Line

   If you are using 64-bit version of Windows there will be two more shortcuts available:

   - Import Tool 2013 (32-bit)
   - Import Tool 2013 Command Line (32-bit)

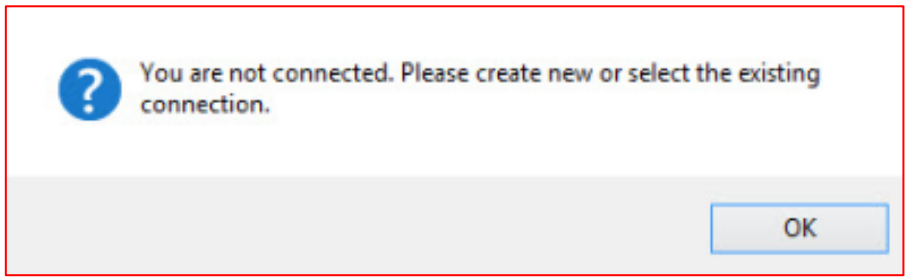
   Both 32- and 64-bit versions are fully compatible with Dynamics CRM 2013 and provide the same functionality. The only difference is that if you want to use for example Excel file as your data source and you are running 64-bit Windows, there is no 64-bit ODBC provider for Excel and you will have to use 32-bit version of the Import Tool. And this is the only reason why we are providing 32-bit version of the Import Tool.

2. **Select "*Import Tool 2013*"**

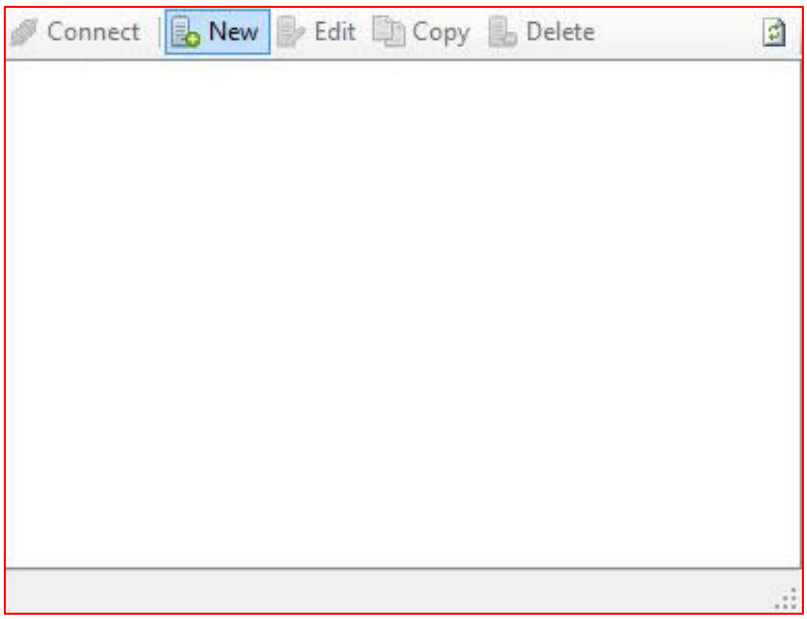
This will start the Import Tool application.

3. Connection Configuration

When running the Import Tool for the first time you will be asked to create a new connection.

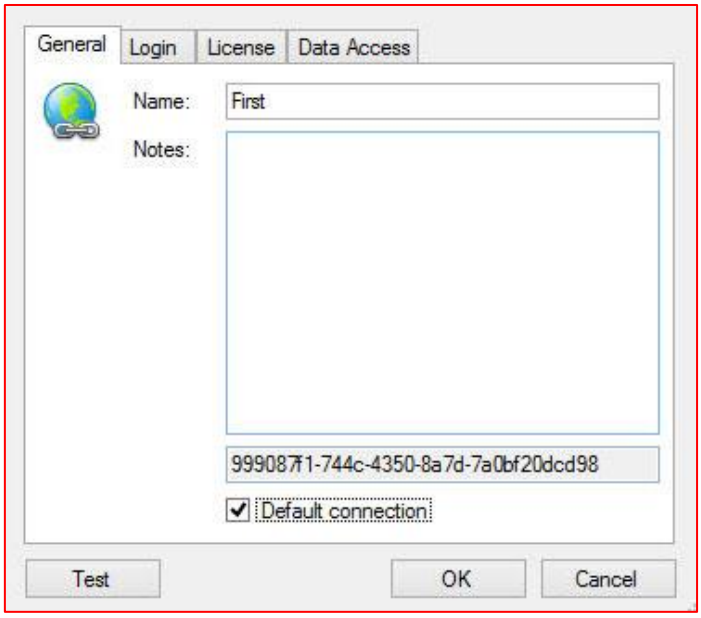


Click "OK" to continue.



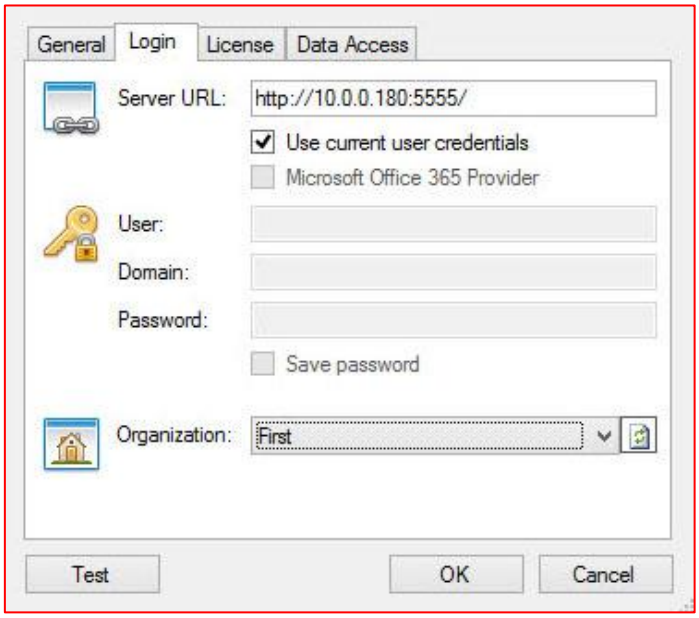
Click “New” button. “Connection Editor” window will open. It has four tabs:

- **General**



Specify the name for your connection. You can also add some notes (optional). If you tick “Default connection” then the connection you are creating will be selected when launching the Import Tool next time (assuming you have more than one connection available, otherwise if there is only one connection it is always treated as a default).

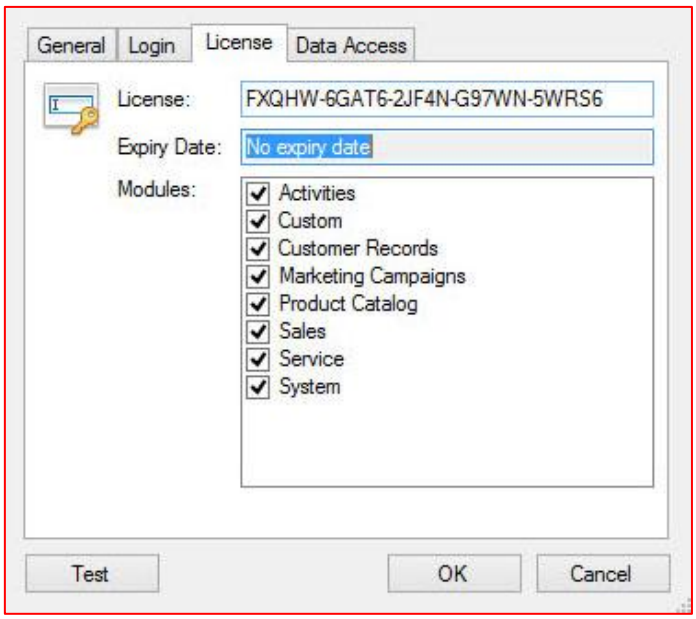
- **Login**



Enter the URL of your CRM server. If you are connecting to the local CRM installation using Active Directory authentication you can tick “Use current user credentials” if you want to use credentials of the currently logged on user. If you are connecting to other type of CRM deployment (Live, IFD, etc.) you have to provide user name and password and optionally domain name. If you don’t want to be prompted for the password every time application starts, make sure that “Save password” is ticked.

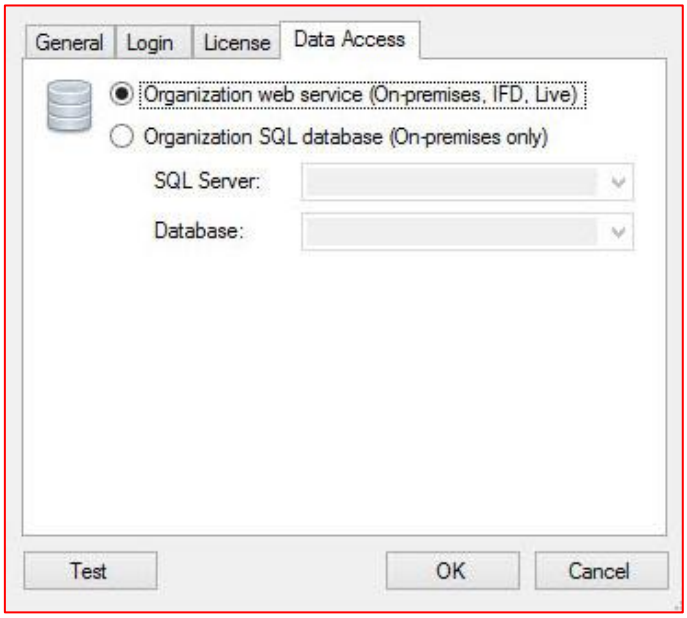
Click to populate the organizations and select the organization you want to connect to. At this stage you can test your connection by clicking “Test” button.

- **License**



Enter your registration key if you already have it. You can always enter the registration key later using this window or from the Main Menu by going to Tools → Registration. Without registration the application is fully functional, but is limited to process (import) first five records only.

- **Data Access**

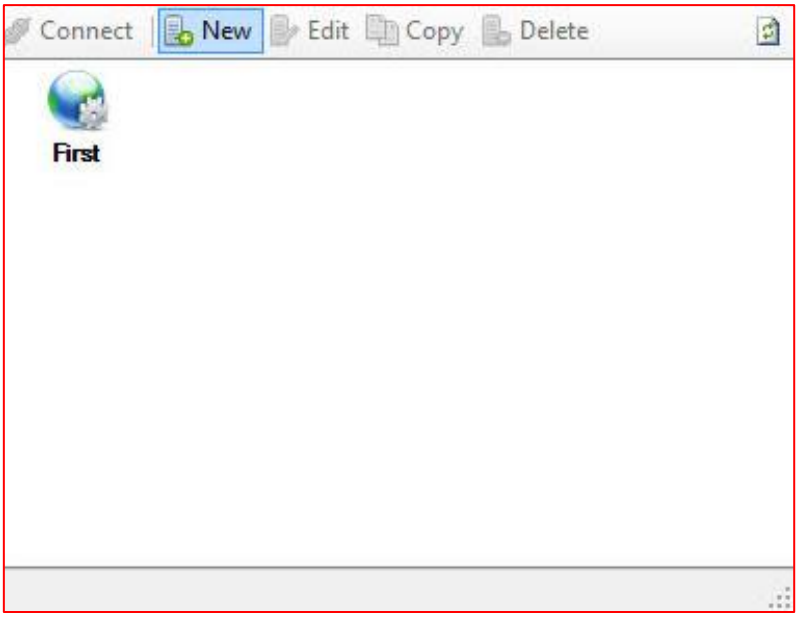


Data Access settings specify how the organization data is accessed. There are two modes:

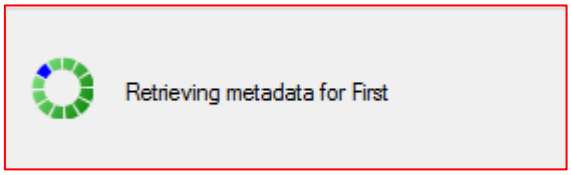
- *Organization web service* – this is recommended setting. When selected, CRM data will be accessed using the CRM web services only.
- *Organization database* – this option can be enabled to improve performance when accessing the CRM data (database is used for read operations only). However this can only be used in on-premises installation types as you will have to specify SQL Server and Database that should be used (make sure that it matches the selected organization).

Connection Manager can be access from the main menu: Connections → Manage.

Once your connection has been defined, click "Connect".



4. Progress window will be displayed:



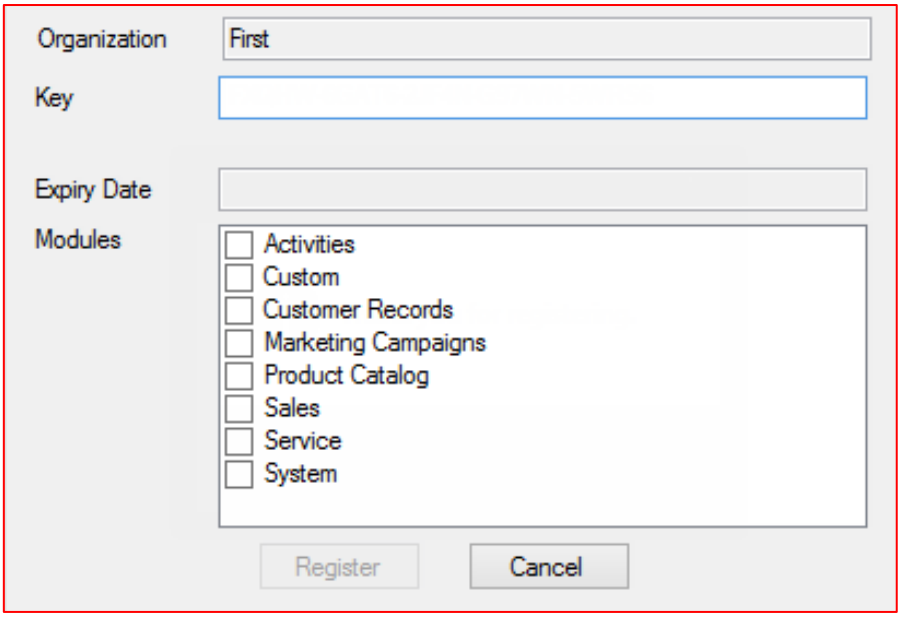
It can take couple minutes for the first time to complete.

5. Product Registration

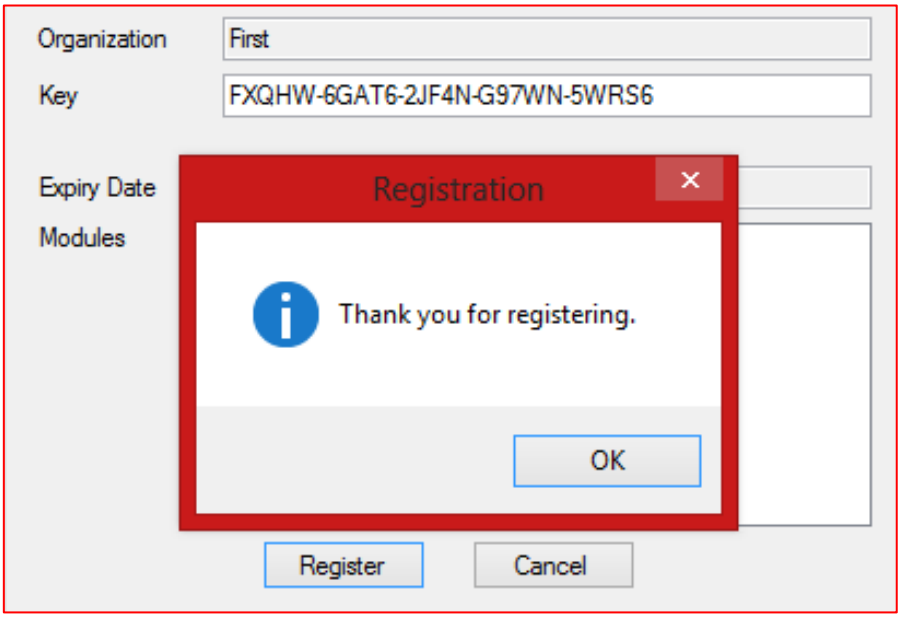
The downloaded version of the Import Tool contains a fully functional product with a limit of five records that can be processed (created, updated, etc.). This restriction is waived upon product registration.

If you purchased a license key then select Tools→ Registration from the Main Menu and enter your registration key. Or click the "Unregistered Version" link displayed in the status bar.

You can also enter the registration information in the Connection Editor window (License tab).

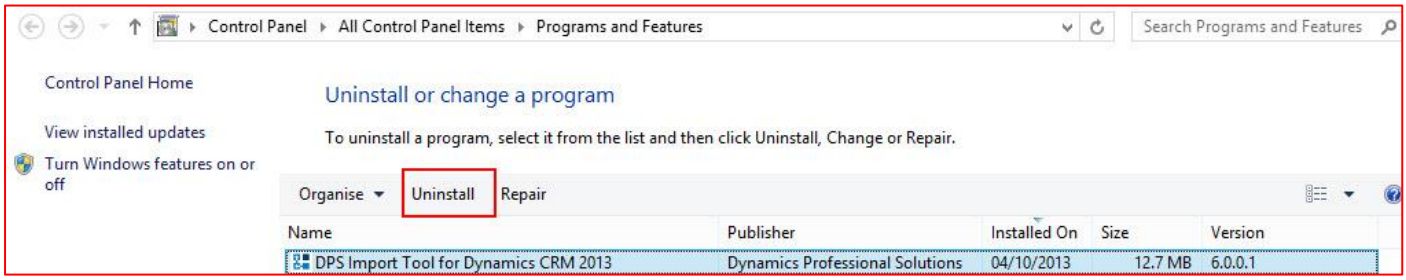


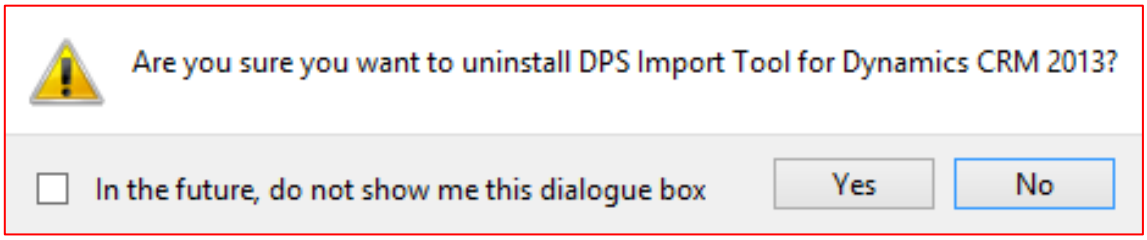
Enter your registration key that was emailed to you and click "Register".



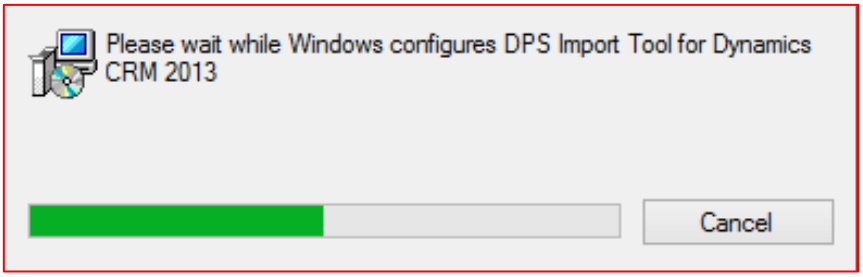
1. Uninstall using Programs and Features

Go to Control Panel and open Programs and Features item. Find DPS Import Tool for Dynamics CRM 2013 and click Uninstall.



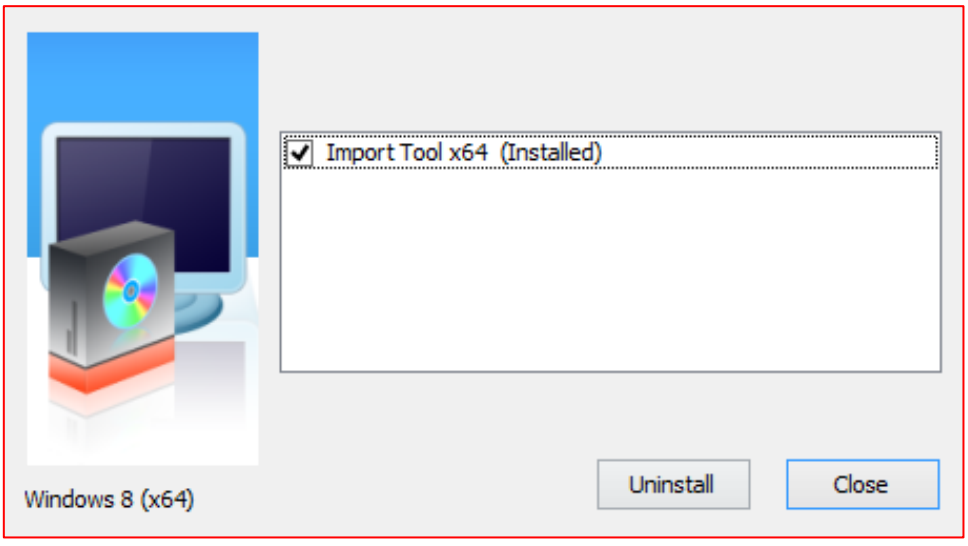


Confirm the operation and uninstall process will start.

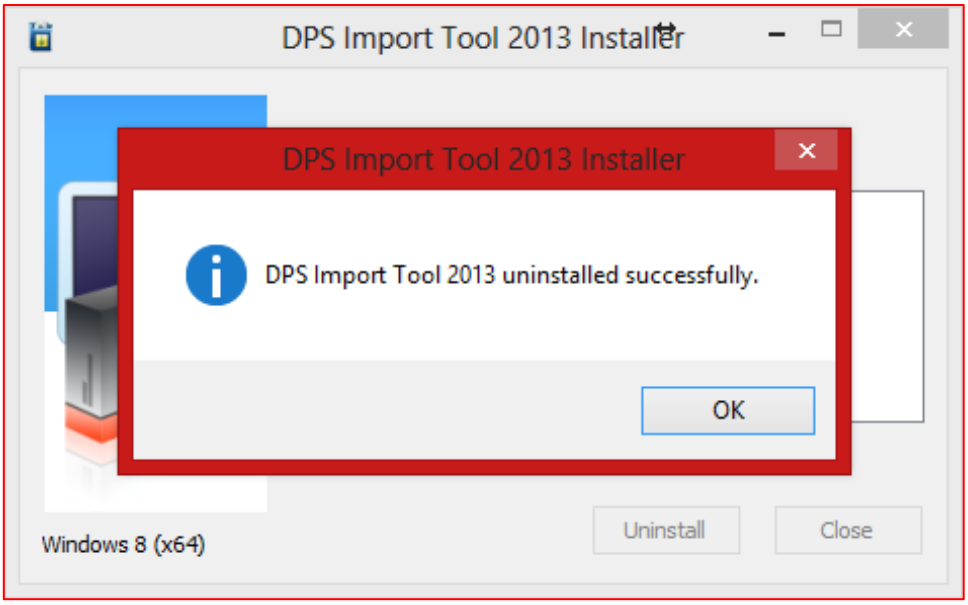


2. Uninstall using the installer file

Launch the ImportTool_2013.exe.



Click Uninstall button to begin.


DPS Import Tool 2013 Installer
DPS Import Tool 2013 Installer
DPS Import Tool 2013 uninstalled successfully.
OK
Windows 8 (x64)
Uninstall
Close

Support

If you have any questions or problem with our products contact our support team. Submit your question using New Support Request Form on our Web page. A member of our support team will get in touch with you as soon as possible.

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