



# **Import Tool**

**For Dynamics 365 v 9.x**



Installation Guide

## Copyright

Copyright © 2018 Dynamics Professional Solutions. All rights reserved. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Dynamics Professional Solutions.

## Warranty disclaimer

Dynamics Professional Solutions disclaims any warranty regarding the sample code contained in this documentation, including the warranties of merchantability and fitness for a particular purpose

## Limitation of liability

The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as any type of commitment by Dynamics Professional Solutions. Dynamics Professional Solutions assumes no responsibility or liability for any errors or inaccuracies that may appear in this manual.

## License agreement

END USER SOFTWARE LICENSE AGREEMENT - PLEASE READ THIS AGREEMENT CAREFULLY

By installing, copying or otherwise using the SOFTWARE, you agree to be bound by the terms of this EULA. If you do not agree to the terms of this EULA, the LICENSOR is unwilling to license the SOFTWARE to you. In such event, you may not use or copy the SOFTWARE, and you should promptly contact the LICENSOR for instructions on return of the product.

THIS IS A LICENSE AGREEMENT ("AGREEMENT") BETWEEN DYNAMICS PROFESSIONAL SOLUTIONS LTD ("LICENSOR"), AND YOU ("LICENSEE" OR "YOU") FOR USE OF THE ACCOMPANYING SOFTWARE AND USER DOCUMENTATION (THE "SOFTWARE"). LICENSOR IS WILLING TO GRANT YOU THE LICENSE TO USE THE SOFTWARE ACCORDING ONLY ON THE CONDITION THAT YOU ACCEPTS ALL TERMS IN THIS AGREEMENT.

The SOFTWARE includes computer software, the associated media, any printed materials, and any "online" or electronic documentation.

1. COPYRIGHT. The Software is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. All title and copyrights in and to the Software and any printed or electronic materials accompanying the Software are owned by the Licensor or its suppliers.
2. GRANT OF LICENSE. This EULA grants you the following rights: Software Installation and Use.
3. RESTRICTIONS. You may not delete or obscure any copyright, trademark or other proprietary notice on the Software or accompanying printed materials. You may not decompile, modify, reverse engineer, disassemble or otherwise reproduce the Software. You may not copy, rent, lease, sublicense, distribute, publicly display the Software, create derivative works based on the Software or otherwise commercially exploit the Software. You may not "hack," "crack," or otherwise attempt to circumvent any copy protection, access control, or license-enforcement mechanisms associated with or related to the Software. You may not electronically transmit the Software from one computer, console or other platform to another or over a network. You may not use any backup or archival copy of the Software for any purpose other than to replace the original copy in the event it's destroyed or becomes defective.
4. TERMINATION. This Agreement is effective until terminated. You may terminate this Agreement at any time by destroying the Software. This Agreement will terminate automatically without notice from Licensor if you fail to comply with any provision of this Agreement. Upon notice of termination, you agree to promptly destroy all of your copies of the Software. All provisions of this Agreement as to warranties, limitation of liability, remedies and damages will survive termination.
5. LIMITED WARRANTY

THIS SOFTWARE IS LICENSED "AS IS." THE COMPANY MAKES NO WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY OF FITNESS FOR A PARTICULAR PURPOSE, REGARDING THE SOFTWARE. THE COMPANY DOES NOT WARRANT, GUARANTEE OR MAKE ANY REPRESENTATIONS REGARDING THE USE OR THE RESULTS OF THE USE OF THE SOFTWARE IN TERMS OF ITS CORRECTNESS, ACCURACY, RELIABILITY, CURRENTNESS OR OTHERWISE. THE ENTIRE RISK AS TO RESULTS AND PERFORMANCE OF THE SOFTWARE, AND ITS INTERACTION WITH OTHER EQUIPMENT OR SOFTWARE OWNED OR USED BY YOU, IS ASSUMED BY YOU. SOME TERRITORIES DO NOT PERMIT THE EXCLUSION OF IMPLIED WARRANTIES. THE ABOVE EXCLUSION MAY NOT APPLY TO YOU.

IN NO EVENT WILL THE COMPANY, AND ITS DIRECTORS, OFFICERS OR AGENTS (COLLECTIVELY THE COMPANY) BE LIABLE TO YOU FOR ANY CONSEQUENTIAL, INCIDENTAL OR INDIRECT DAMAGES (INCLUDING DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE) ARISING OUT OF THE USE OR THE INABILITY TO USE THE SOFTWARE EVEN IF THE COMPANY INC. HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. BECAUSE SOME STATES DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY FOR CONSEQUENTIAL DAMAGES, THE ABOVE LIMITATIONS MAY NOT APPLY TO YOU.

Copyright (c) 2006-2018 Dynamics Professional Solutions Ltd. All Rights Reserved.

## **Table Of Contents**

---

Table Of Contents .....	4
What's In This Manual.....	5
Introduction .....	6
Import Tool Overview.....	6
Versions .....	6
Product Licensing .....	9
Compatibility .....	9
Installation.....	10
System Requirements.....	10
Installation Step by Step .....	11
Post Installation Configuration .....	15
Uninstallation .....	20
Support.....	22

## ***What's In This Manual***

---

This manual provides guidelines for installing and setting up Import Tool for Microsoft Dynamics CRM version 2016. 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 Address Competitor Contact Currency Customer Relationship Lead Opportunity Relationship	account customeraddress competitor contact transactioncurrency customerrelationship lead customeropportunityrole
Activities	Appointment Campaign Activity E-mail E-mail Template Fax Letter Phone Call Recurring Appointment Service Activity Task	appointment campaignactivity email template fax letter phonecall recurringappointmentmaster serviceappointment task
Product Catalog	Currency Discount Discount List Price List Price List Item Product Product Substitute Unit Unit Group	transactioncurrency discount discounttype pricelevel productpricelevel product productsubstitute uom uomschedule
Sales	Account Competitor Currency Document Goal Goal Metric Invoice Invoice Product Lead Marketing List Marketing List Member Opportunity Opportunity Product Opportunity Relationship Order Order Product Queue Quote Quote Product Rollup Query Sales Literature Sales Attachment Territory	account competitor transactioncurrency document goal metric invoice invoicedetail lead list listmember opportunity opportunityproduct customeropportunityrole salesorder salesorderdetail queue quote quotedetail goalrollupquery salesliterature salesliteratureitem 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 kbarcode kbarcodecomment kbarcodetemplate 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 2016 is compatible with all deployment types of Microsoft Dynamics 365.

# **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**

Windows 10 (64-bit and 32-bit versions)  
Windows 8.1 or Windows 8 (64-bit and 32-bit versions)  
Windows 7 Service Pack 1 (64-bit and 32-bit versions)  
Microsoft Windows Server 2012 R2  
Microsoft Windows Server 2012  
Microsoft Windows Server 2008 (32 and 64 bit)  
Microsoft Windows Server 2008 R2

### ➤ **Required components**

Microsoft .NET Framework 4.5.2 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>

## Installation Step by Step

---

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.

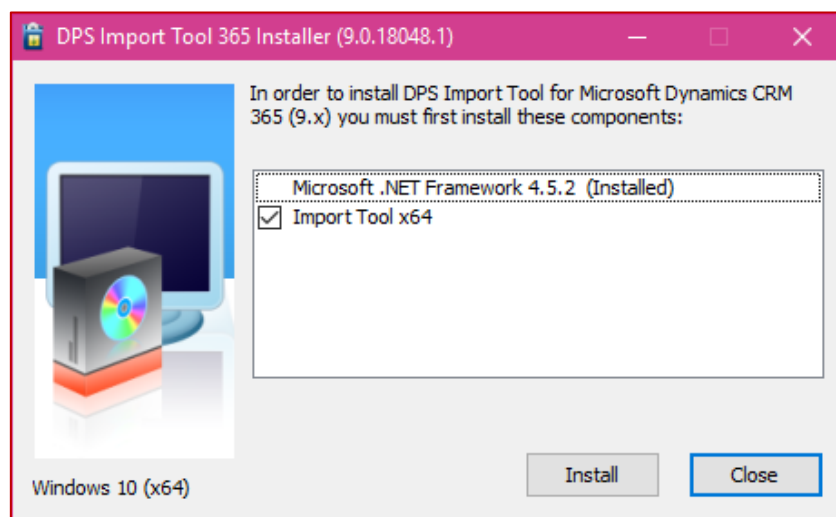
### 1. Installation file

- a. Unzip *ImportTool\_365.zip* file.
- b. Launch *ImportTool\_365.exe*.

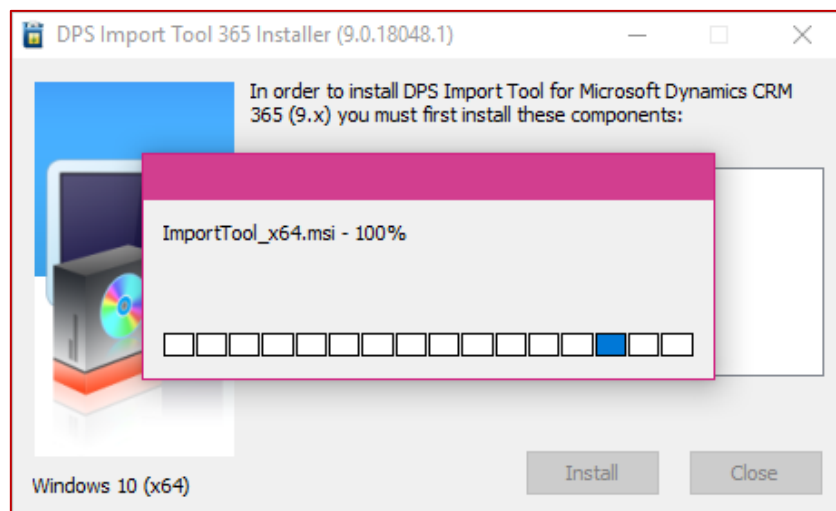
### 2. Components

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

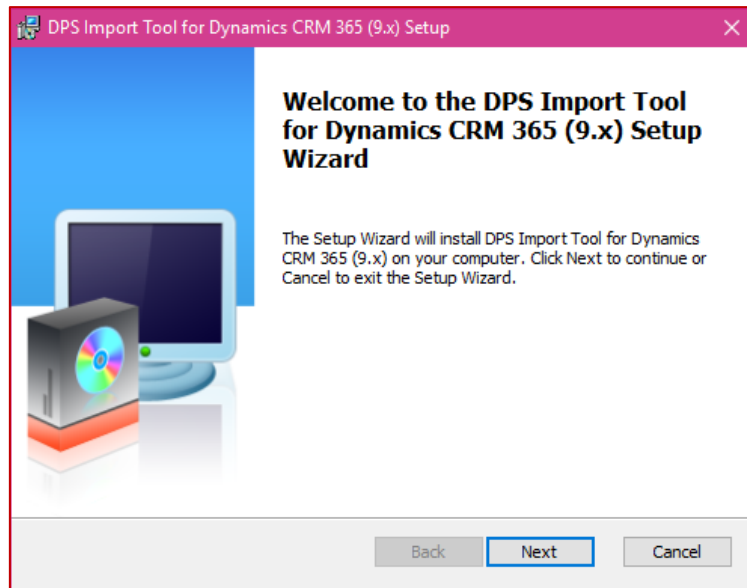
- Microsoft .NET Framework 4.0 – Full – installer will download it if required or you can install it separately from Microsoft:  
<http://www.microsoft.com/download/en/details.aspx?id=17718>
- Windows Identity Framework components
- Import Tool 2016



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

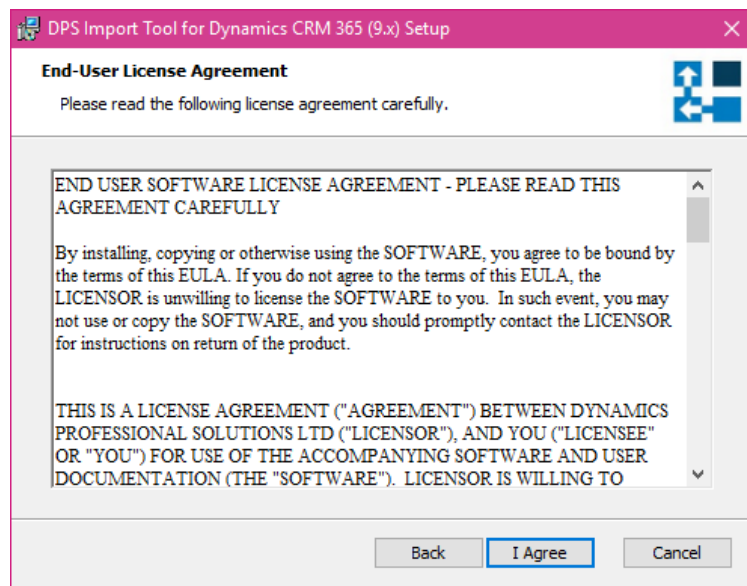


### 3. Welcome screen



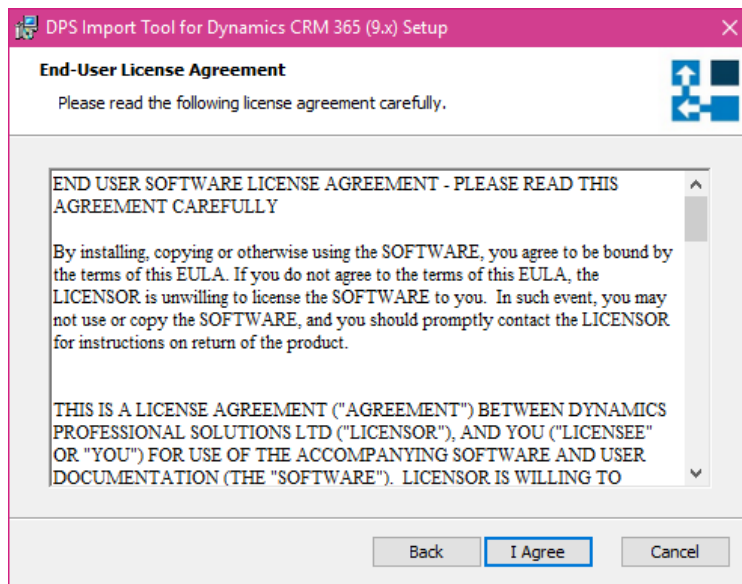
In the Welcome screen click “Next”.

### 4. End-User License Agreement



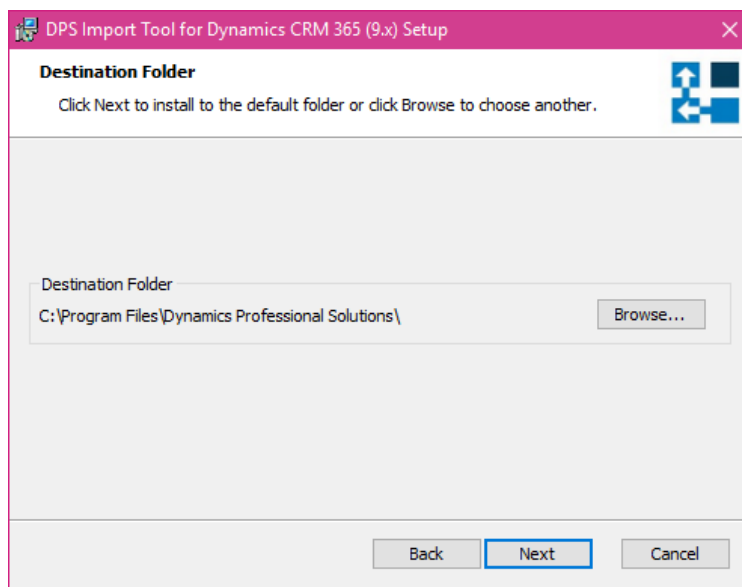
If you agree with the terms of the license agreement, click “I agree” to continue the installation.

## 5. Destination Folder



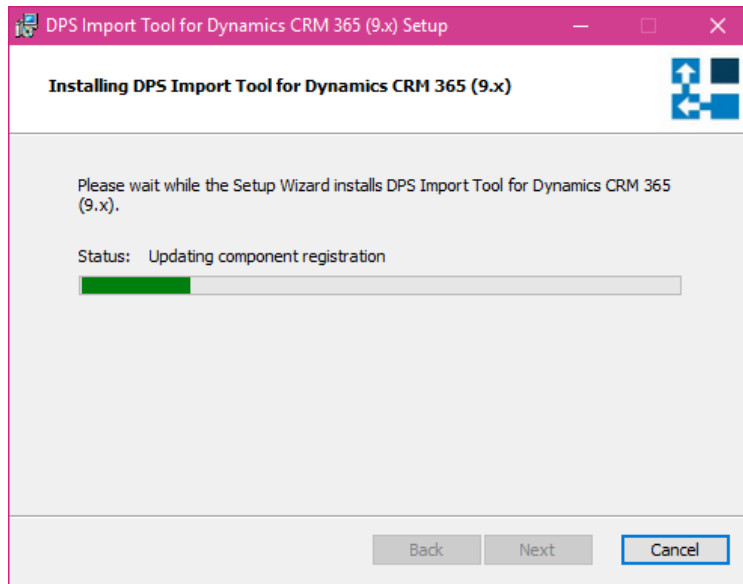
Select the directory where Import Tool should be installed. Click “Next” to install into default directory or Click “Browse” and select the destination folder of your choice and click “Next”.

## 6. Ready to Install



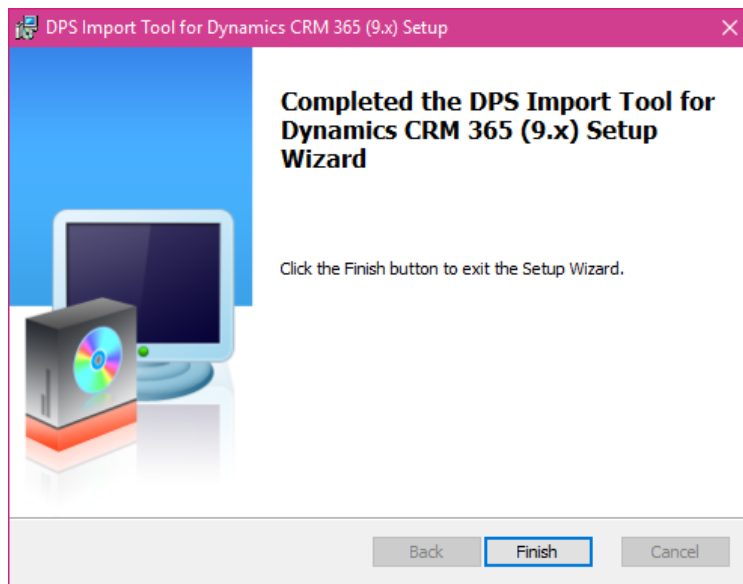
Click “Install” to begin the installation.

## 7. Installing DPS Import Tool for Dynamics 365

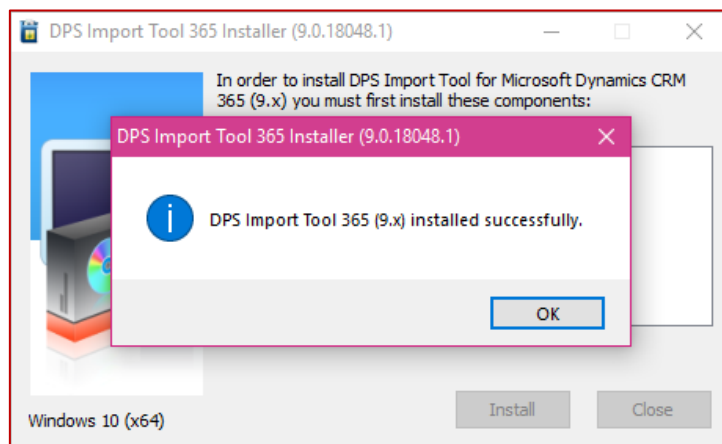


Installation can take few minutes to complete.

## 8. Installation Complete



Click "Finish" button to close the installation wizard.



## Post Installation Configuration

---

### 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 2016
- Import Tool 2016 Command Line

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

- Import Tool 2016 (32-bit)
- Import Tool 2016 Command Line (32-bit)

Both 32- and 64-bit versions are fully compatible with Dynamics 365 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.

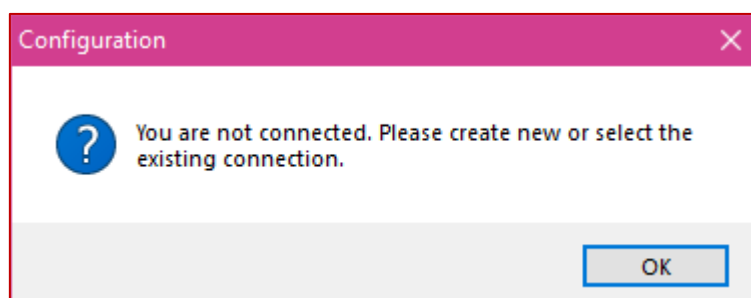
### 2. Select “Import Tool 2016”

This will start the Import Tool application.

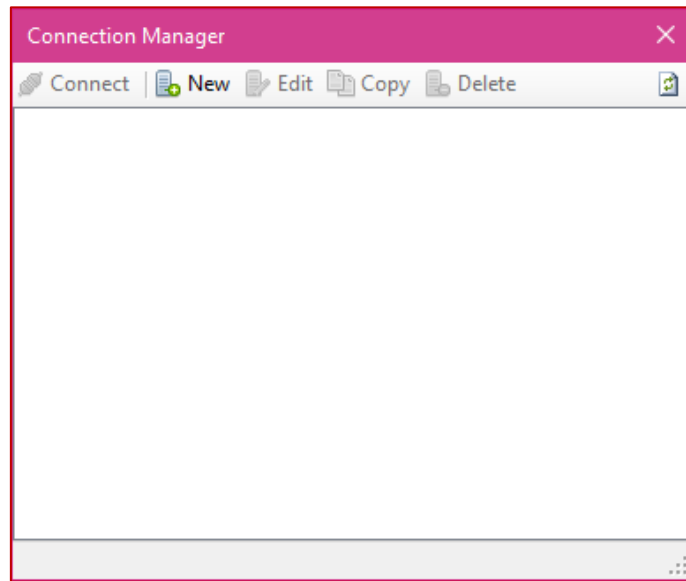


### 3. Connection Configuration

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

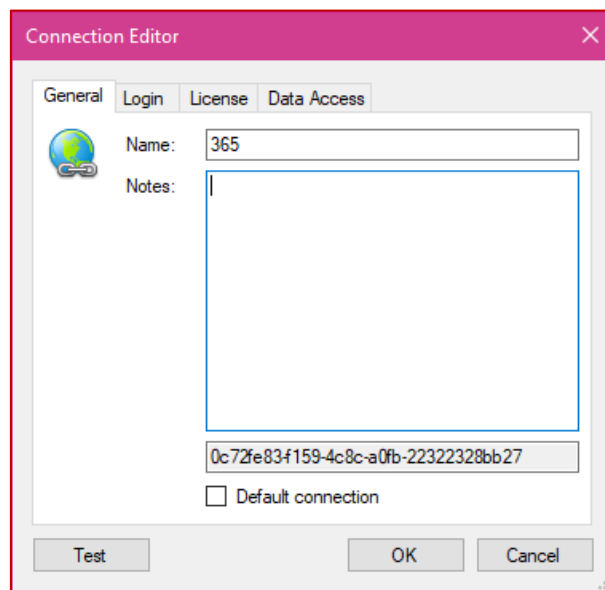


Click “OK” to continue.



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

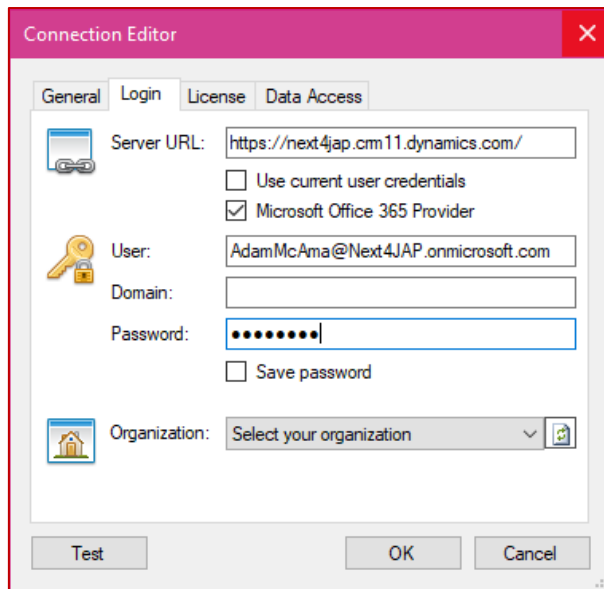
- **General**




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**

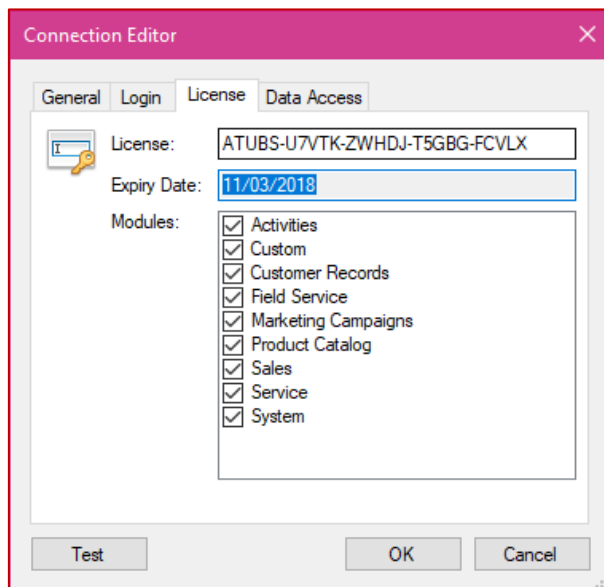




Enter the URL of your CRM server. If you are connecting to the local CRM installation using Active Directory authentication you can tick “Use current user credentials” if you want to use credentials of the currently logged on user. If you are connecting to other type of CRM deployment (Live, IFD, etc.) 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.

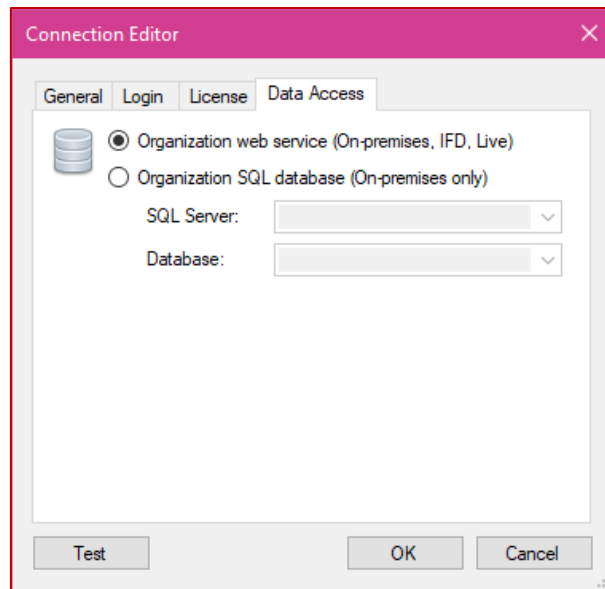
Click  to populate the organizations and select the organization you want to connect to. At this stage you can test your connection by clicking “Test” button.

- **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.

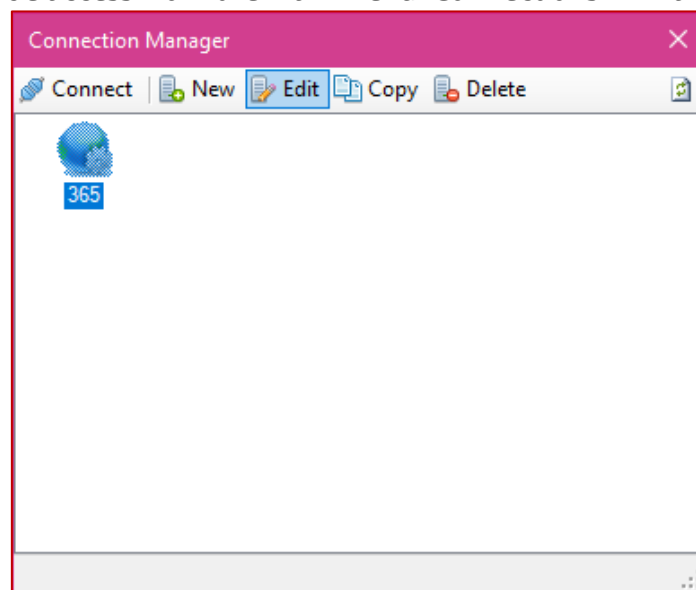
- **Data Access**



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

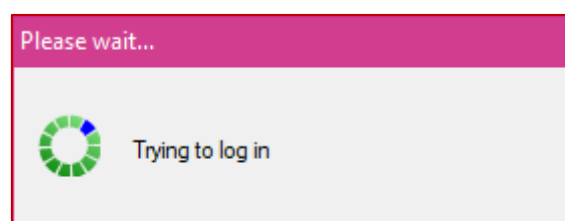
- *Organization web service* – this is recommended setting. When selected, CRM data will be accessed using the CRM web services only.
- *Organization database* – this option can be enabled to improve performance when accessing the CRM data (database is used for read operations only). However this can 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:**



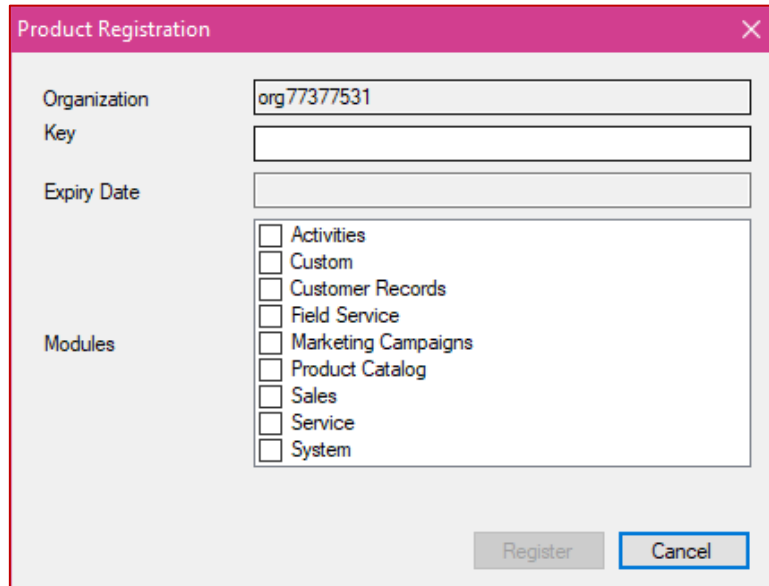
It can take couple minutes for the first time to complete.

## 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).

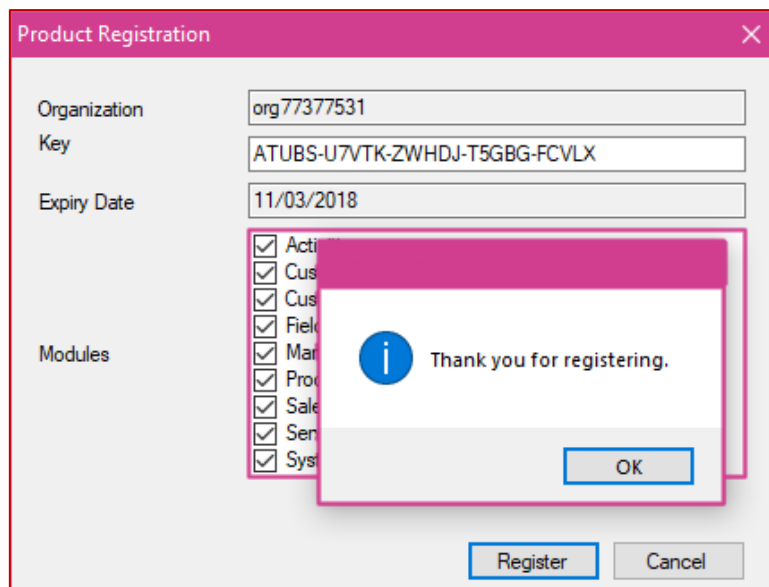


The image shows a 'Product Registration' dialog box with a pink header and a close button (X) in the top right corner. It contains the following fields and options:

- Organization:
- Key:
- Expiry Date:
- Modules: A list of checkboxes for various modules:
  - Activities
  - Custom
  - Customer Records
  - Field Service
  - Marketing Campaigns
  - Product Catalog
  - Sales
  - Service
  - System

At the bottom right, there are two buttons: 'Register' (disabled) and 'Cancel' (active).

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



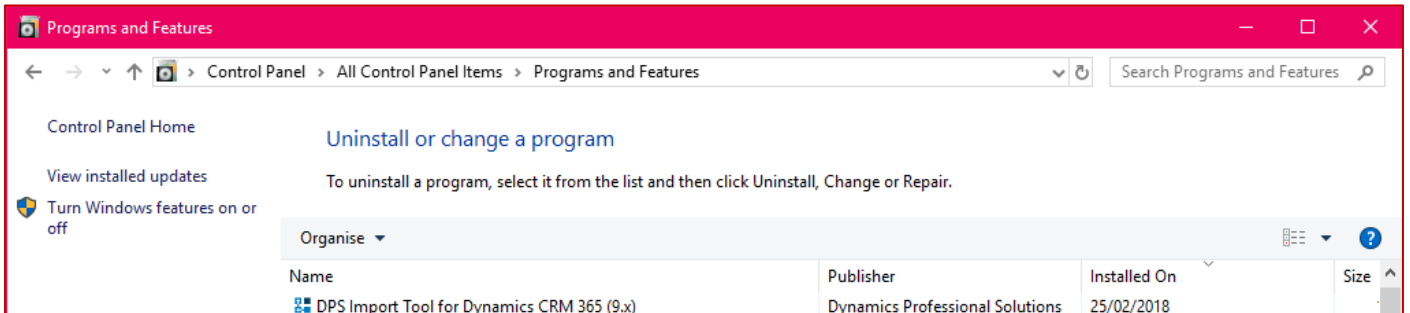
The image shows the 'Product Registration' dialog box after successful registration. The fields are now populated:

- Organization:
- Key:
- Expiry Date:
- Modules: All checkboxes are now checked:
  - Activities
  - Custom
  - Customer Records
  - Field Service
  - Marketing Campaigns
  - Product Catalog
  - Sales
  - Service
  - System

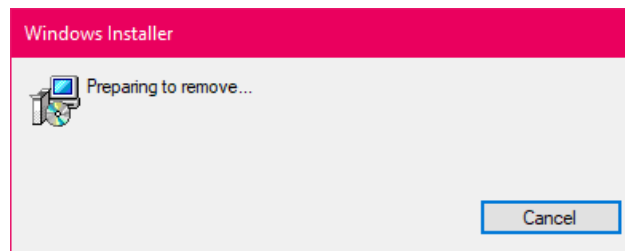
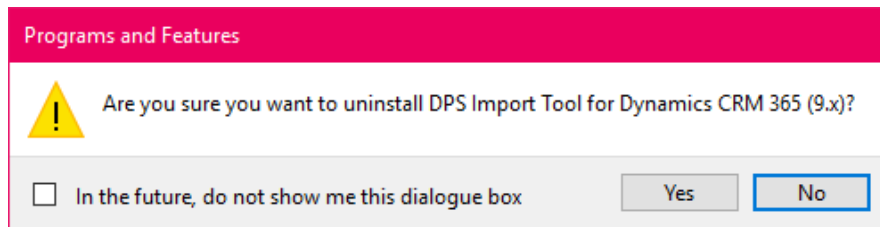
A modal message box is overlaid on top of the dialog, containing an information icon (i) and the text: "Thank you for registering." Below the message is an 'OK' button. At the bottom of the dialog, the 'Register' button is now active and the 'Cancel' button is disabled.

## 1. Uninstall using Programs and Features

Go to Control Panel and open Programs and Features item. Find DPS Import Tool for Dynamics 365 and click Uninstall.

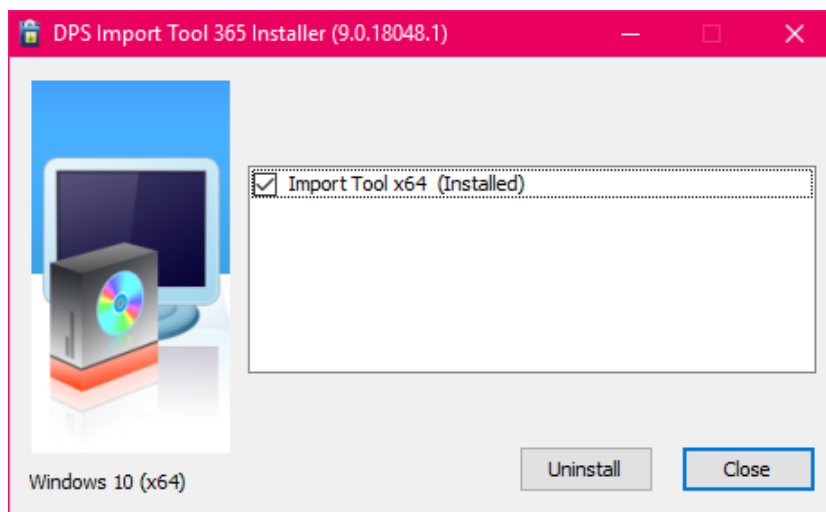


Confirm the operation and uninstall process will start.

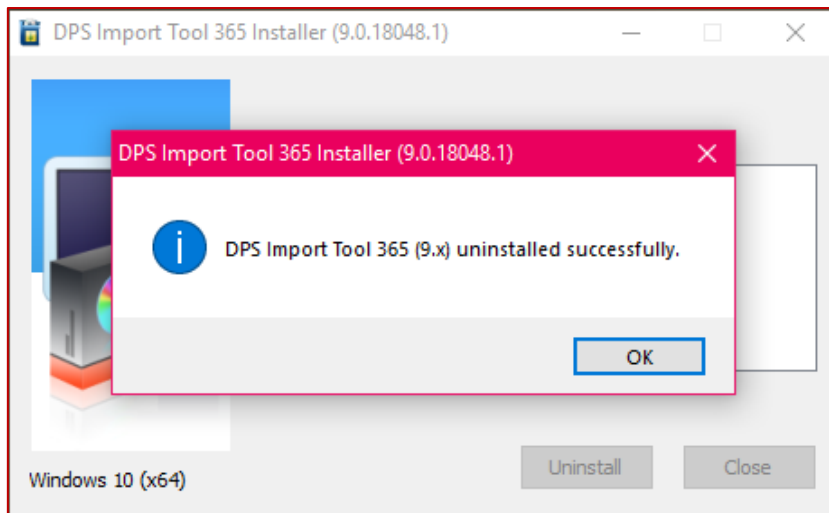


## 2. Uninstall using the installer file

Launch the ImportTool\_2016.exe.



Click Uninstall button to begin.



## ***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.

**Support:** <http://www.dynamics-pros.com/support>

**Download:** <http://www.dynamics-pros.com/downloads>

