Import Tool

For Dynamics 365 v 9.x

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. 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
- Save import projects 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 the command line which can be used to automate or schedule the import process.

Options

Import Tool comes in two versions: **60 Days License** version and **Full** version.

60 Days License is designed for the initial data imports and will work only for 60 days. This version should help customers to import essential data into Dynamics 365, 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.

Product Licensing

Demo Licenses

Import Tool is licensed per Organization. Trial 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 365 is compatible with all deployment types of Microsoft Dynamics 365 version 9.x.

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)
Microsoft Windows Server 2019
Microsoft Windows Server 2016
Microsoft Windows Server 2012 R2
Microsoft Windows Server 2012

➢ **Required components**

Microsoft .NET Framework 4.7.2 Full – installer will download it and install if needed or alternatively you can download it and install separately from: https://dotnet.microsoft.com/download/dotnet-framework/net472

Installation Step by Step

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

1. **Installation file**

    a. Unzip *ImportTool _365_9.x.xxxxx.x.zip* file.

    b. Launch *ImportTool _9.x.xxxxx.x.exe file.*

2. **Components**

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

    - Microsoft .NET Framework 4.7.2 – installer will download it if required or you can install it separately from: https://dotnet.microsoft.com/download/dotnet-framework/net472
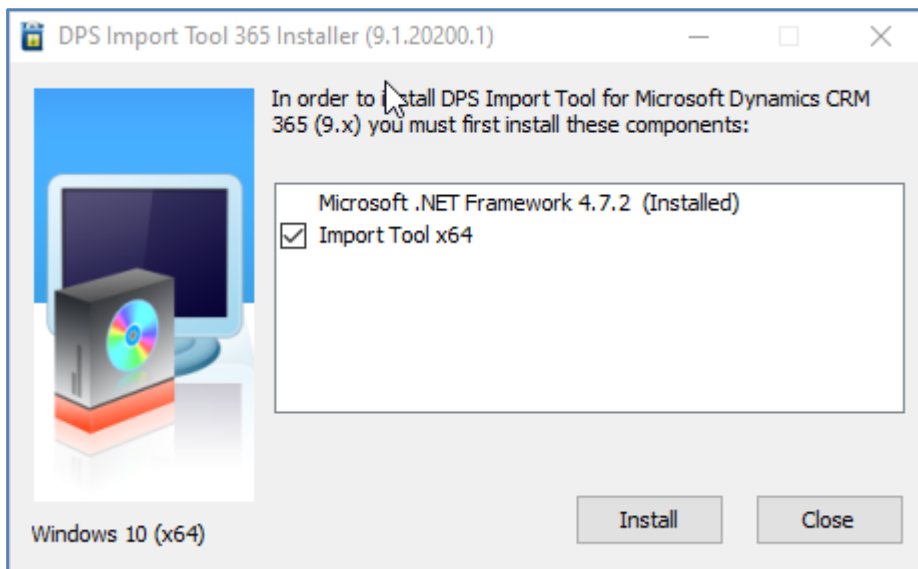
    - Import Tool 365

Click install to start the installation process. Once first two components are installed, Import Tool setup will be launched.
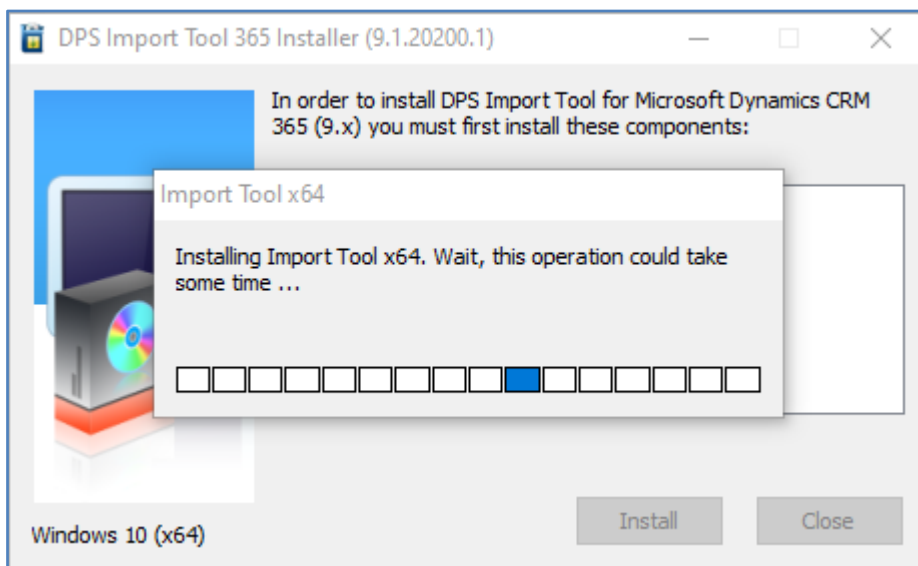
3. **Welcome screen.**
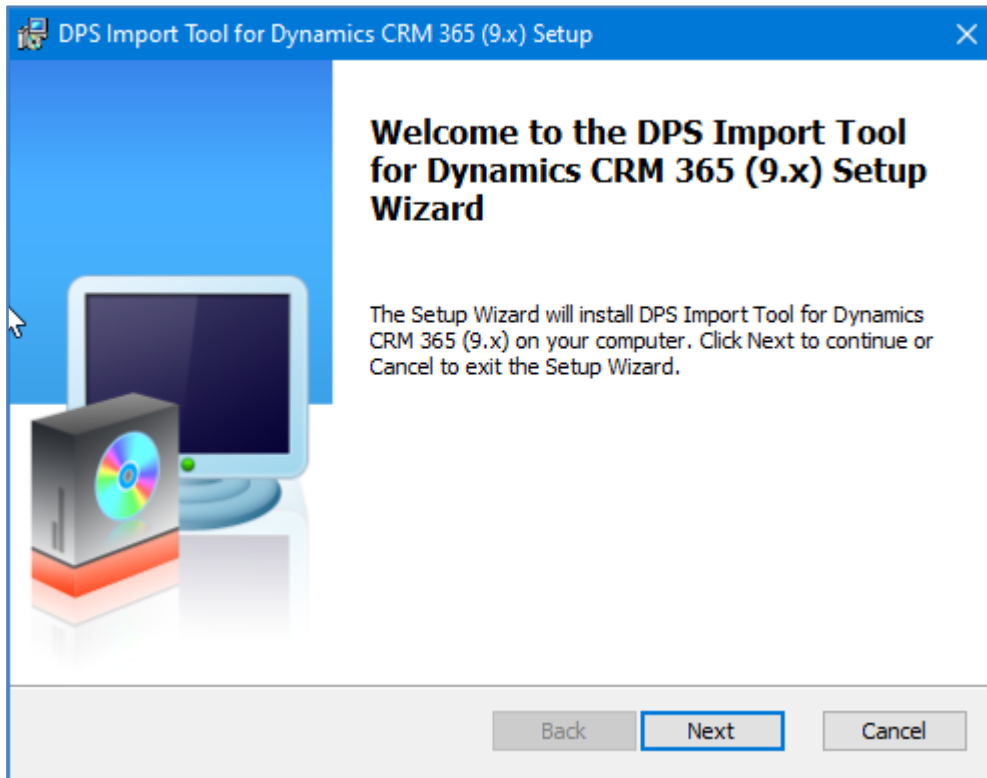
In the Welcome screen click "Next".

4. **End-User License Agreement**
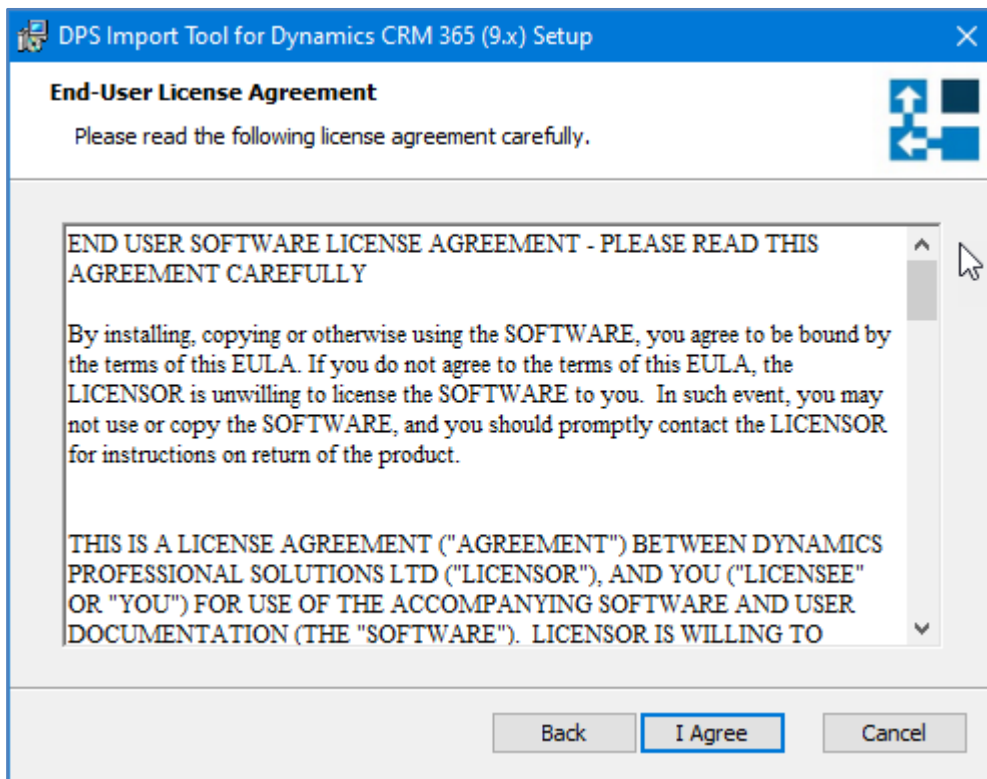
If you agree with the terms of the license agreement, click "I agree" to continue the installation.

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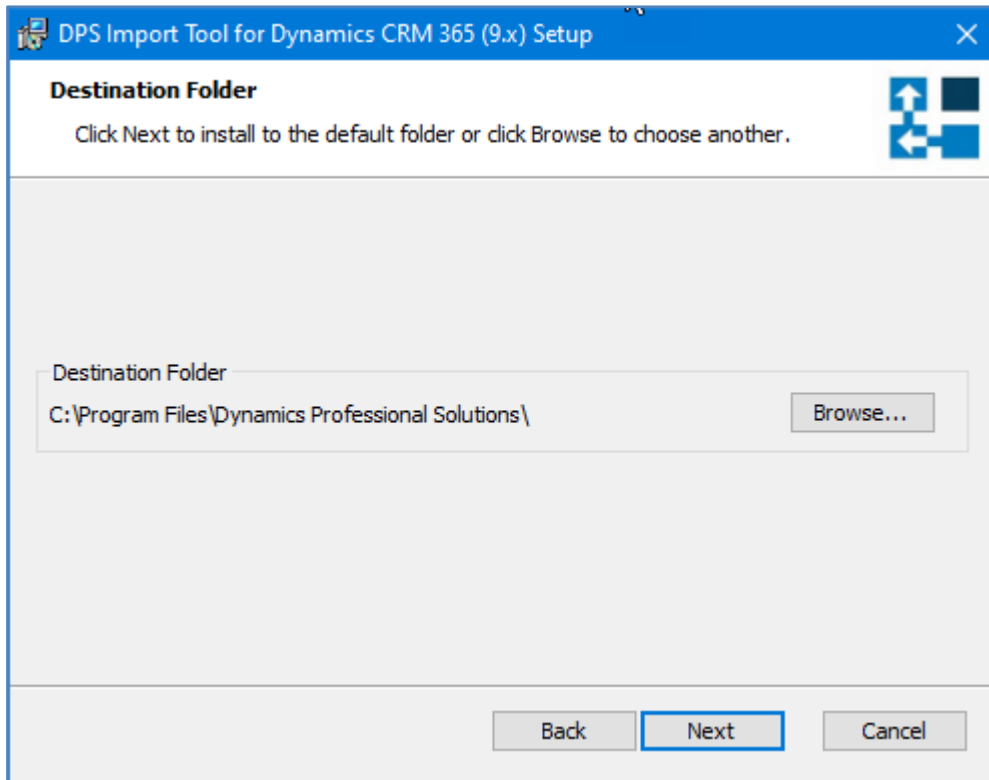
Select the directory where Import Tool should be installed. Click "Next" to install into default directory or click "Browse" and select the destination folder of your choice and click "Next".

6. Ready to Install
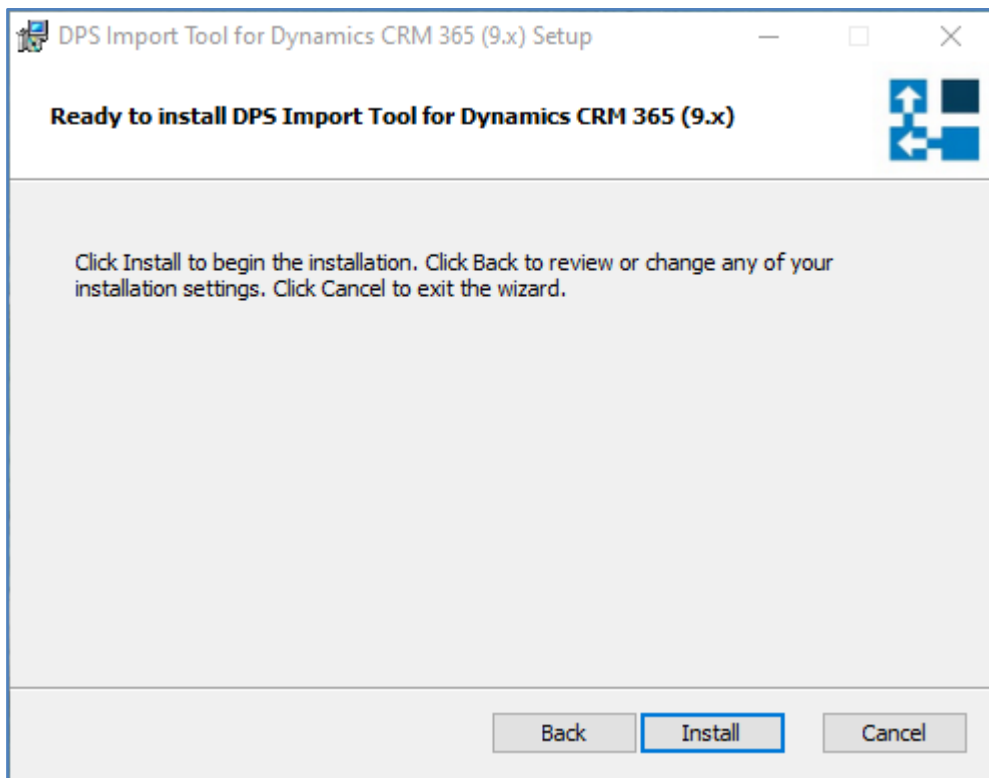
Click "Install" to begin the installation.

7. Installing DPS Import Tool for Dynamics 365
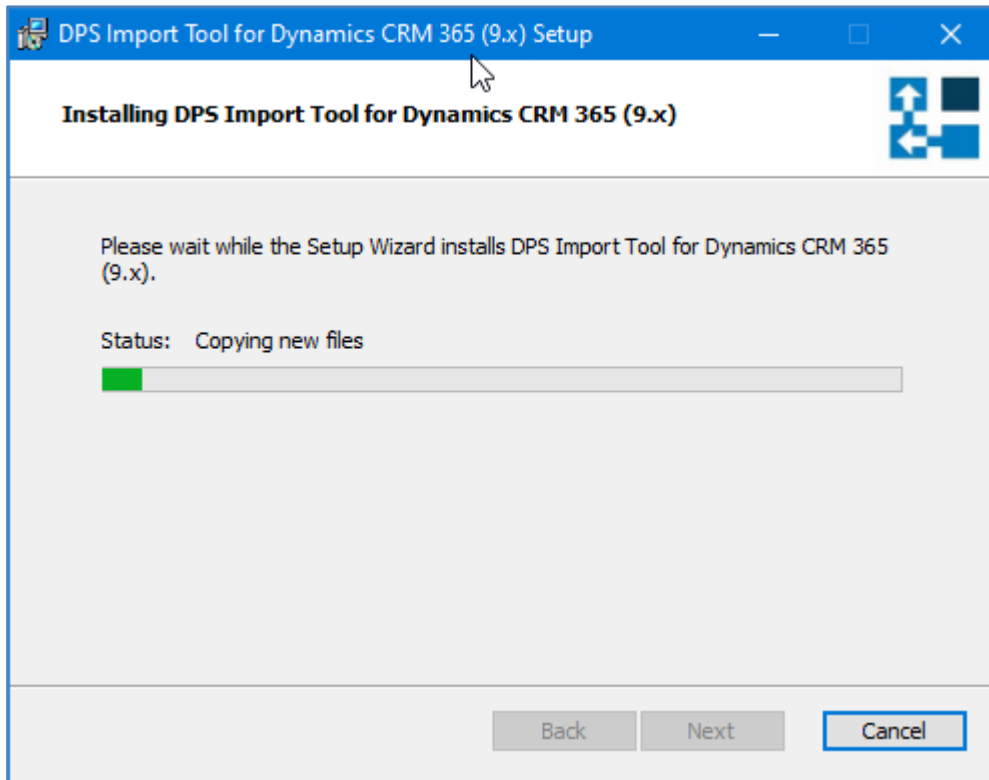
Installation can take few minutes to complete.

8. Installation Complete
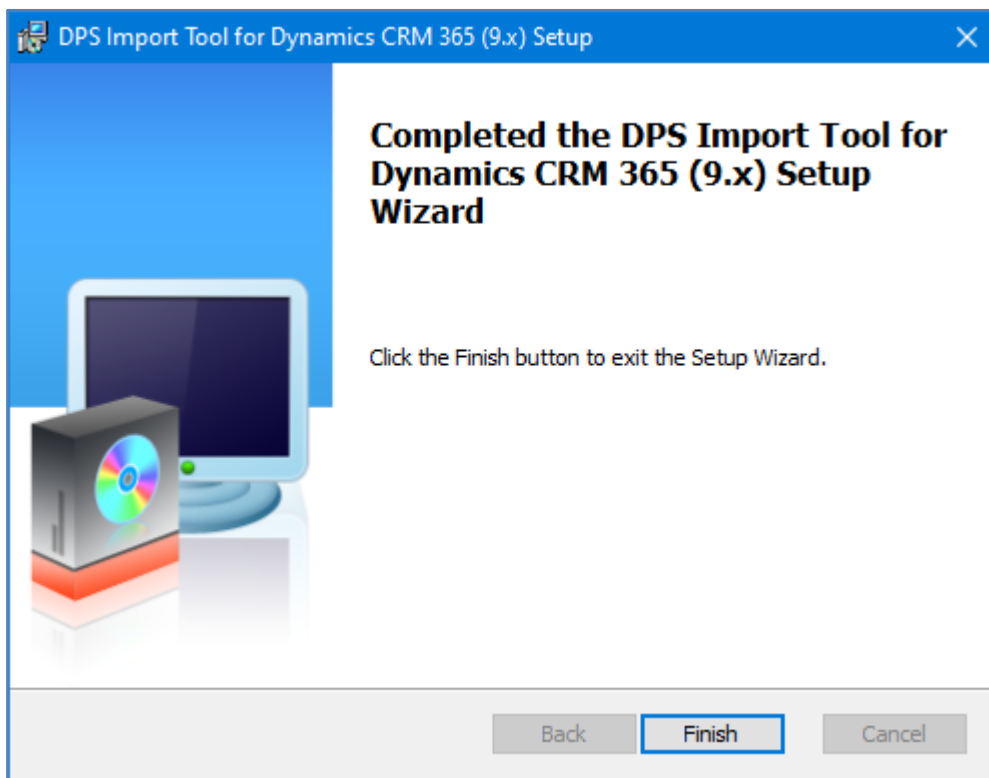
Click "Finish" button to close the installation wizard.

DPS Import Tool 365 Installer (9.1.20200.1)

In order to install DPS Import Tool for Microsoft Dynamics CRM 365 (9.x) you must first install these components:

DPS Import Tool 365 Installer (9.1.20200.1)

DPS Import Tool 365 (9.x) installed successfully.

OK

Windows 10 (x64)

Install   Close
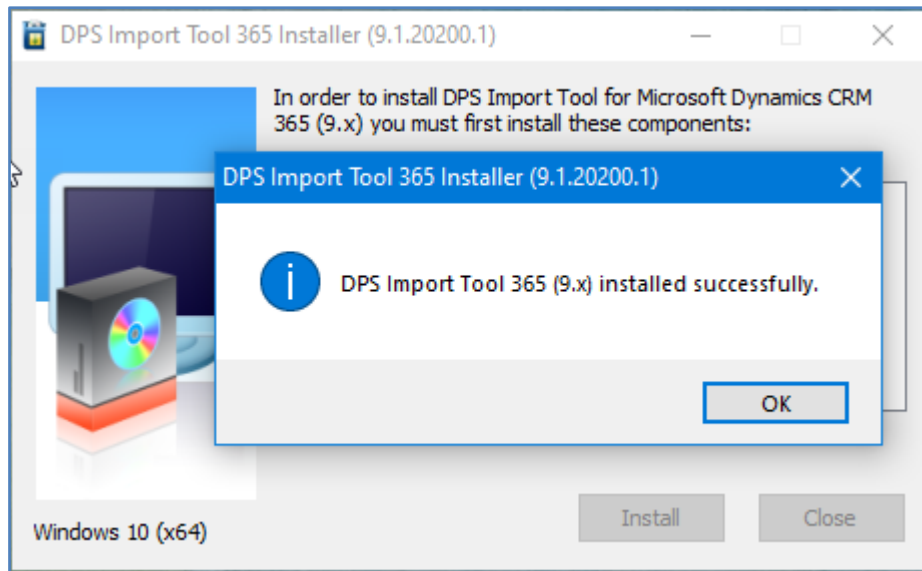
Post Installation Configuration

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

   The following shortcuts will be available:

   - Import Tool 365 (9.x)
   - Import Tool 365 (9.x) Command Line

2. **Select "*Import Tool 365 (9.x)*"**
   This will start the Import Tool application.

3. **Connection Configuration**

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

   From the main menu select Connection and click on 'Manage'.
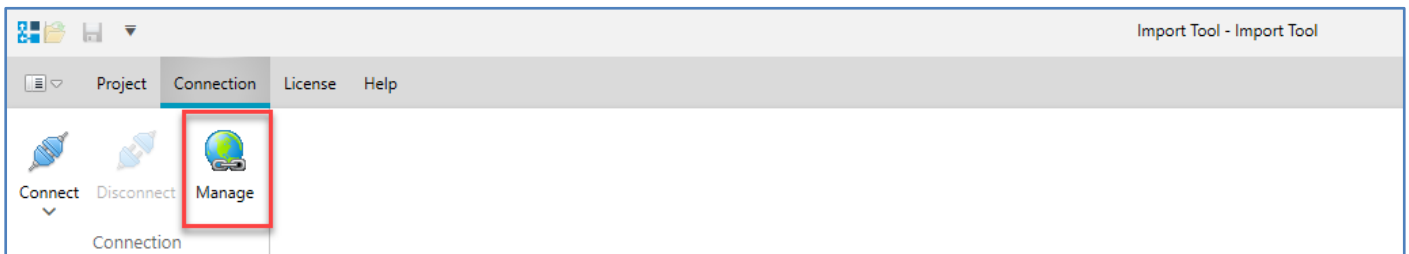
   Connection Manager screen will open. Click "New" button.
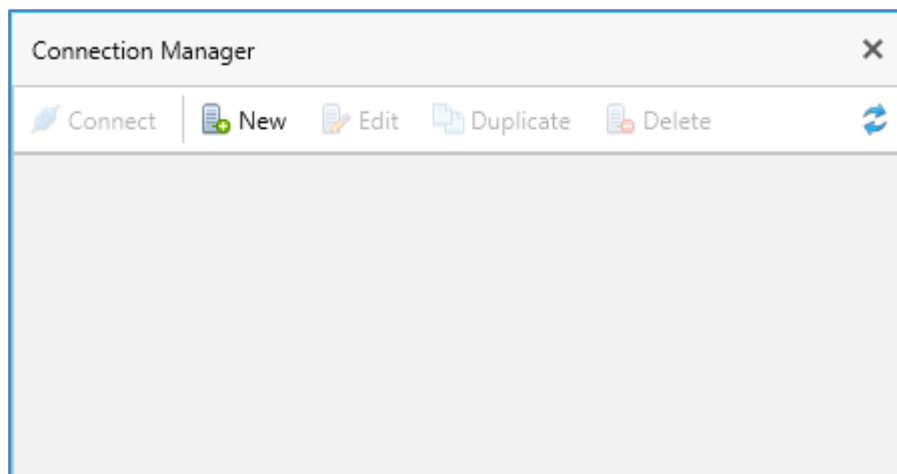
Connection Editor window will open. It has three tabs:

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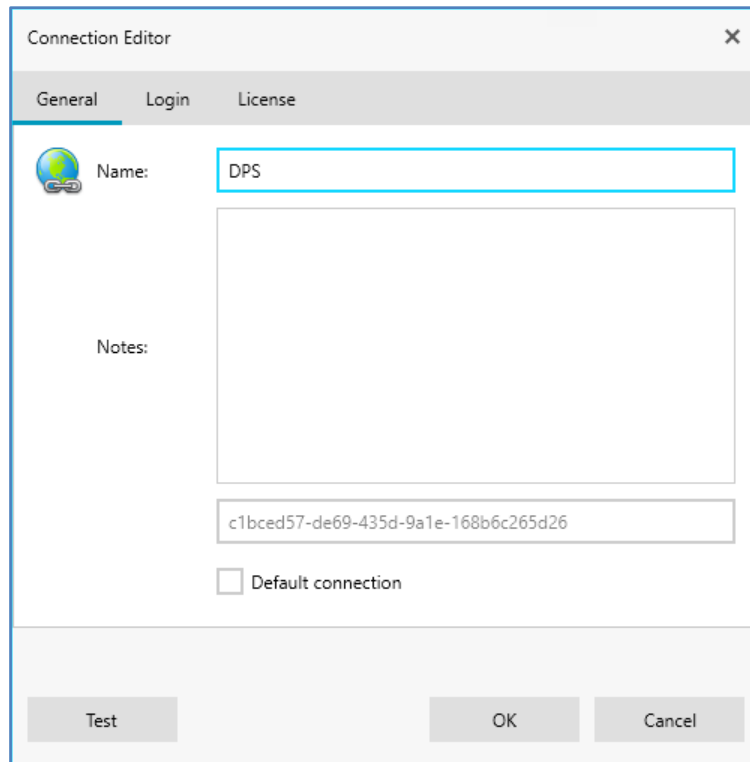
Specify the name for your connection. You can also add some notes (optional). If you tick "Default connection" then the connection you are creating will be selected when launching the Import Tool next time (assuming you have more than one connection available, otherwise if there is only one connection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

- **Login**

Dynamics 365:

On-premises:

Enter the URL of your Dynamics server you normally use. There are several connection options available:
- **365** – use this option if you are using Dynamics 365 online. The extra Prompt setting you should leave as Auto when running the application for the first time. This will ensure that consent for the Import Tool to access Dynamics 365 API can be granted. However, the following options are available and can be changed later:
  - **Auto** – automatically determine whether to prompt for user credentials which is recommended option, however you can select any other option if needed.
  - **Always** – this option will always show credentials popup window.

- **Refresh Session** – this option will re-authorize user even if a valid session is available. <u>Normally there is no need to use this option</u>.
- **Select Account** – use this option if user has multiple accounts at the Authorization Server. <u>Normally there is no need to use this option</u>.
- **Never** – use this option if you want to preserve user credentials and avoid the necessity to re-enter the credentials when application starts. This option may not work in some scenarios if for example using multi-factor authentication. In this case use **Auto** option.
- **On-premises** – use this option if you are using your own hosted installation of Dynamics 365. You can choose two login modes:
  - Use current user credentials or
  - Specify custom credentials with an option to preserve the password.
- **S2S** – this is advanced option that allows using server-to-server connection and requires extra configuration in your tenant.
- **IFD** – use this option if you are using on-premises setup with Internet Facing Deployment

If you are using a 365 connection, you will be asked to grant Import Tool permissions. This needs to be done at the first login only. Depending on your permissions you may see an option to give consent on behalf your organization. If you leave it unchecked, it simply means each user will have to give consent individually which is perfectly acceptable.
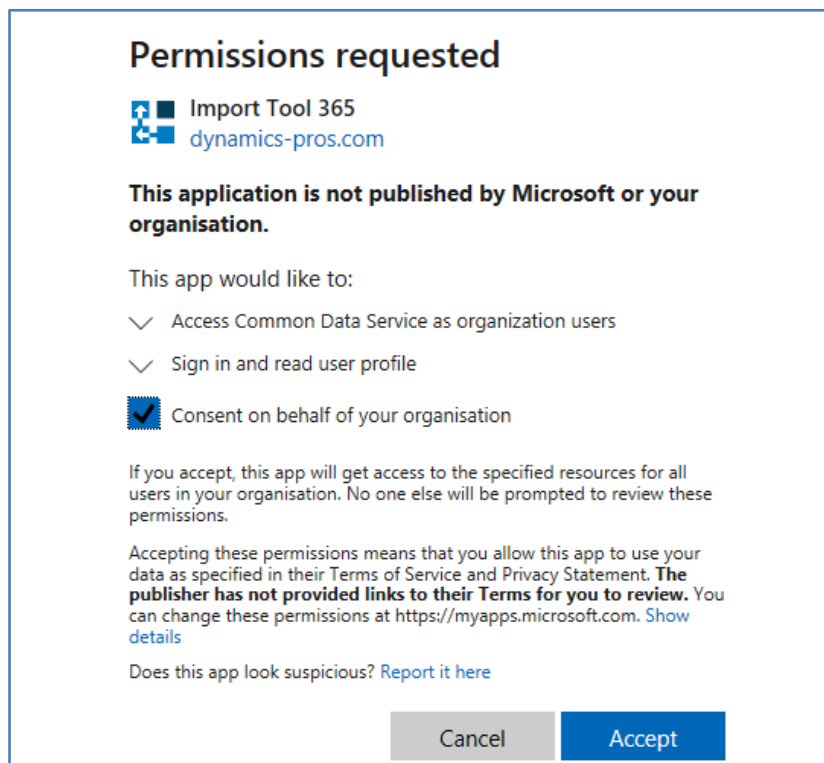
Accepting above terms is required step to grant Import Tool access to the data via the web API.

Click ▣ or try expanding Organization dropdown 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 License → Registration. Without the license application is fully functional but is limited to process (import) first five records only.

Once your connection has been defined, click "Connect".
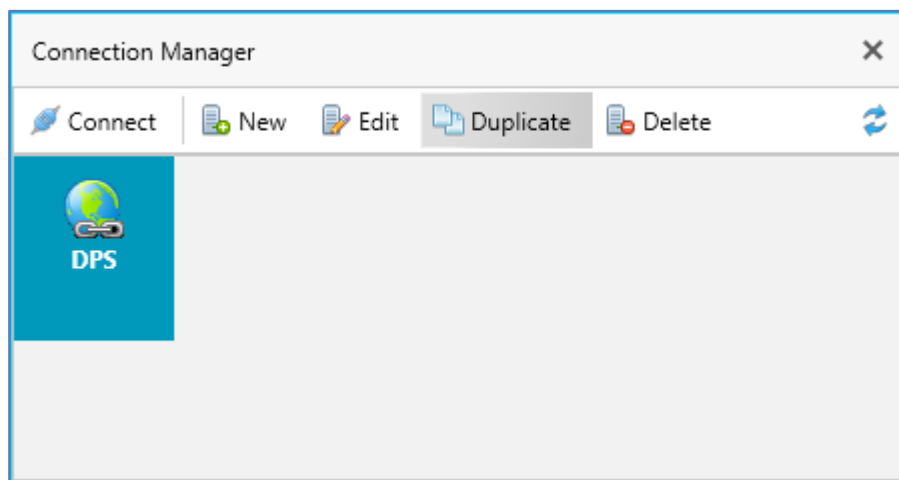
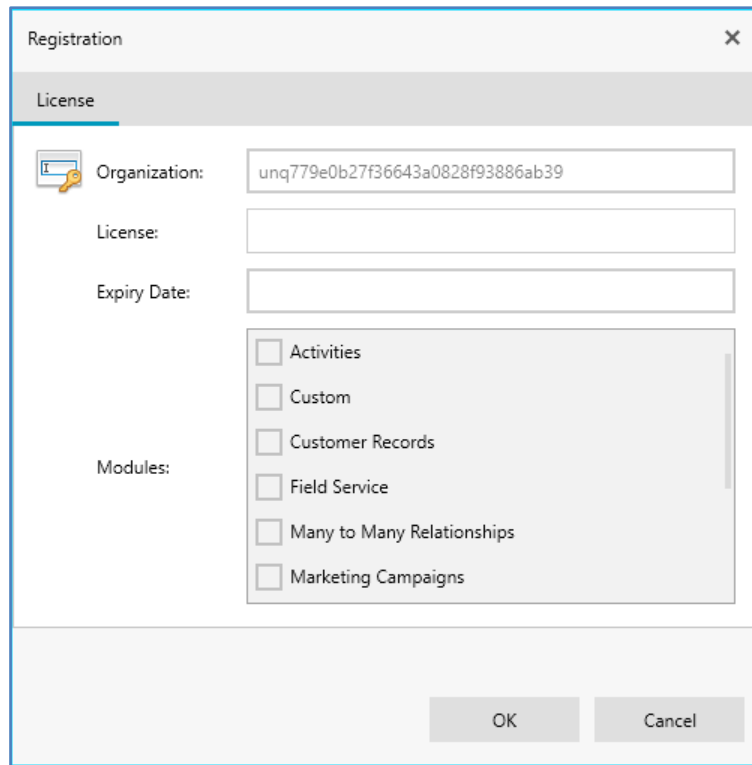4. **Progress window will be displayed:**
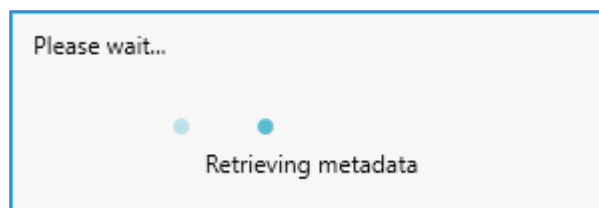
It can take few minutes to complete for the first time. The metadata will be cached locally and next time the application is launched, it should be much quicker.

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 the license, then go to License → Registration from the Main Menu and enter your registration key. Alternatively lick the "Unregistered Version" link displayed in the status bar in the bottom left corner of the application window.

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

Enter your registration key and click "OK".

1. **From Main Menu select Help**

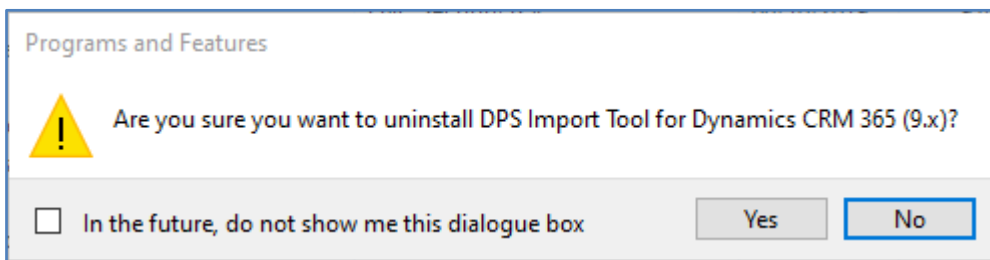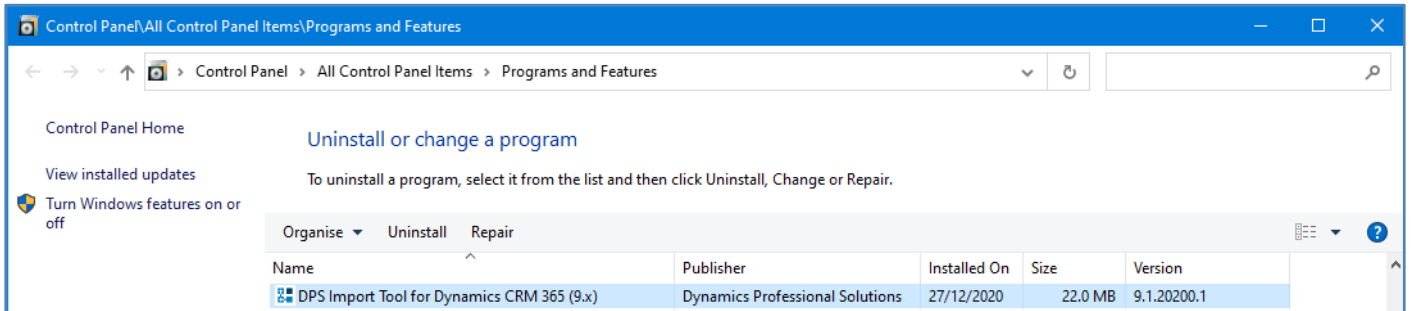2. **Click Check for Updates**
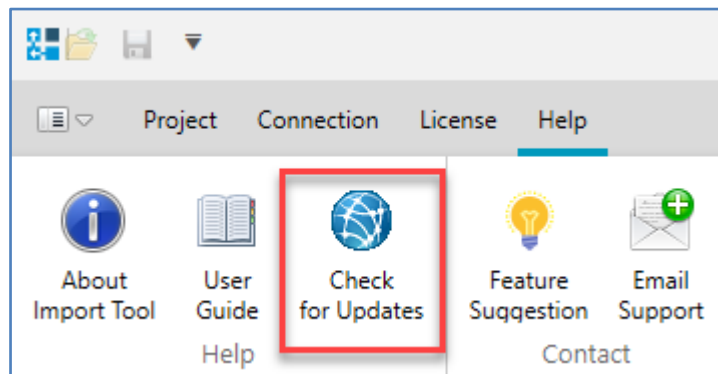
3. **Check for updates screen will open and system will verify if you are using the latest version.**
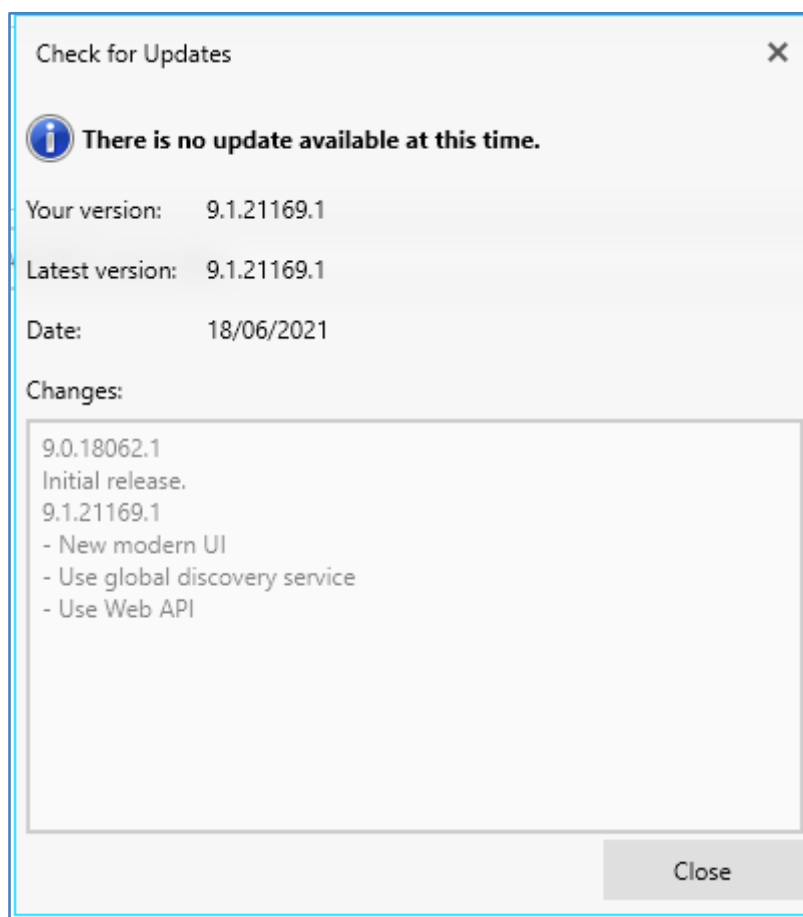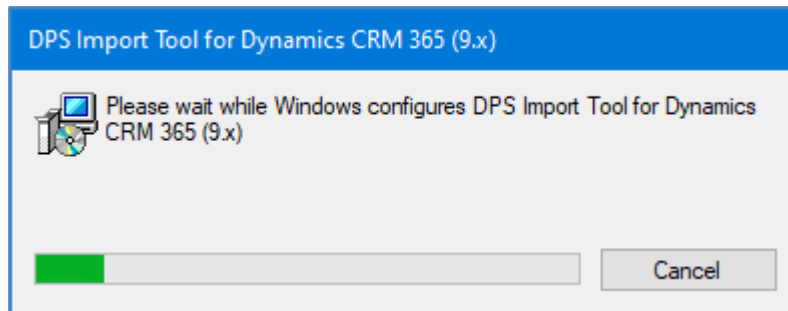
4. **Uninstall using Programs and Features.**

   Go to Control Panel and open Programs and Features item. Find DPS Import Tool for Dynamics CRM 2016 and click Uninstall.
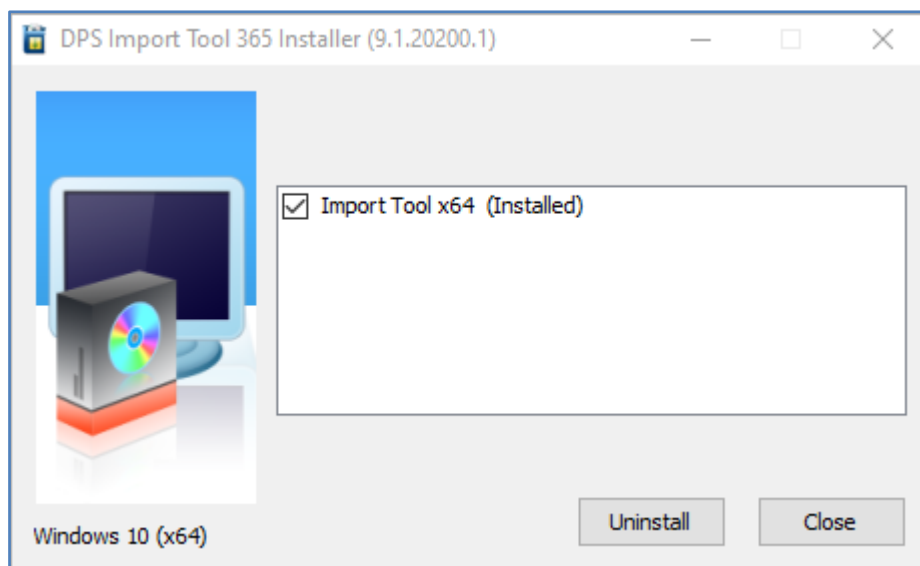

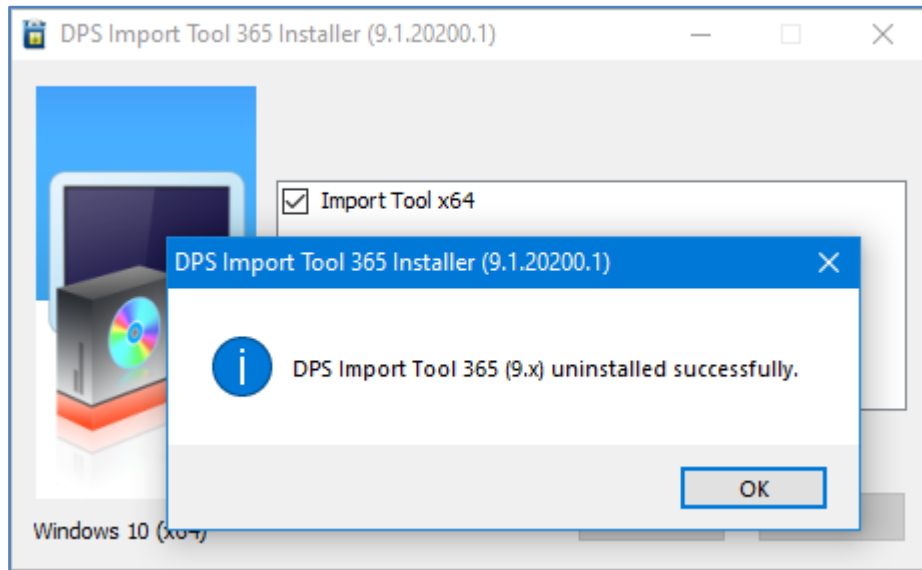   Confirm the operation and uninstall process will start.

5. **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.

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