



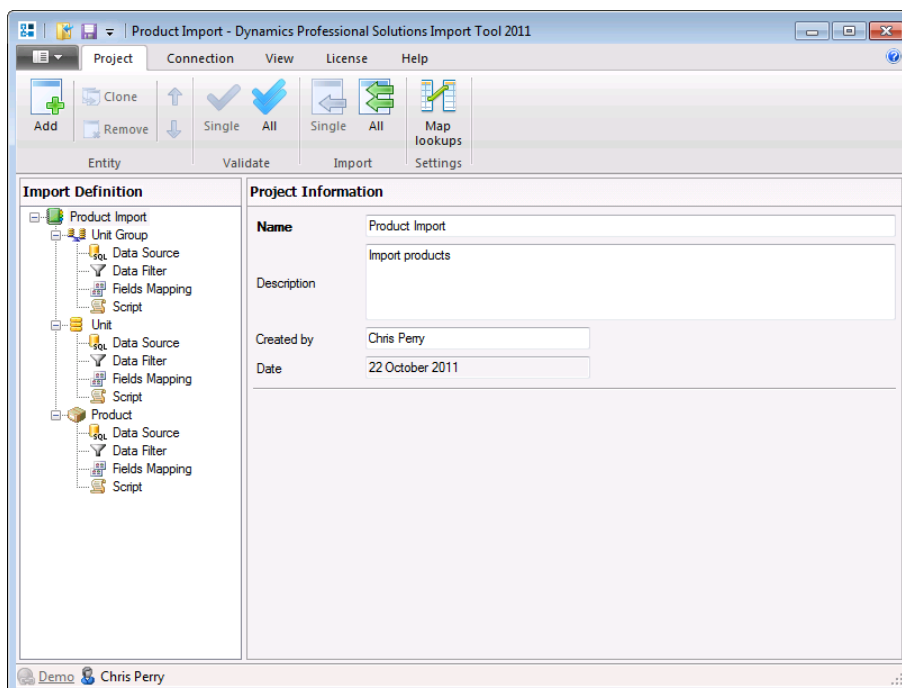
## Import Tool versions

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

Data Migration version is designed for initial data imports and will work only for 60 days. This version should help customers 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 data stored in Microsoft Dynamics CRM, for example when price lists need to be updated regularly, new products are frequently imported.

In addition to that Import Tool is divided into 7 Modules that 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 modules that are critical for their business. Furthermore custom entities import 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<br>Address<br>Competitor<br>Contact<br>Currency<br>Customer Relationship<br>Lead<br>Opportunity Relationship   | account<br>customeraddress<br>competitor<br>contact<br>transactioncurrency<br>customerrelationship<br>lead<br>customeropportunityrole   |
| Activities       | Appointment<br>Campaign Activity<br>E-mail<br>E-mail Template<br>Fax<br>Letter<br>Phone Call<br>Recurring Appointment<br>Service Activity<br>Task  | appointment<br>campaignactivity<br>email<br>template<br>fax<br>letter<br>phonecall<br>recurringappointmentmaster<br>serviceappointment<br>task  |
| Product Catalog  | Currency<br>Discount<br>Discount List<br>Price List<br>Price List Item<br>Product<br>Product Substitute<br>Unit<br>Unit Group  | transactioncurrency<br>discount<br>discounttype<br>pricelevel<br>productpricelevel<br>product<br>productsubstitute<br>uom<br>uomschedule  |
| Sales            | Account<br>Competitor<br>Currency<br>Document<br>Goal<br>Goal Metric<br>Invoice<br>Invoice Product<br>Lead<br>Marketing List<br>Marketing List Member<br>Opportunity<br>Opportunity Product<br>Opportunity Relationship<br>Order<br>Order Product<br>Queue | account<br>competitor<br>transactioncurrency<br>document<br>goal<br>metric<br>invoice<br>invoicedetail<br>lead<br>list<br>listmember<br>opportunity<br>opportunityproduct<br>customeropportunityrole<br>salesorder<br>salesorderdetail<br>queue |

|                     |   |   |
|---------------------|---|---|
|                     | Quote<br>Quote Product<br>Rollup Query<br>Sales Literature<br>Sales Attachment<br>Territory   | quote<br>quotedetail<br>goalrollupquery<br>salesliterature<br>salesliteratureitem<br>territory  |
| Service             | Account<br>Article<br>Article Comment<br>Article Template<br>Case<br>Case Resolution<br>Contact<br>Contract<br>Contract Line<br>Contract Template<br>Currency<br>Facility/Equipment<br>Queue<br>Resource Group<br>Service Activity<br>Site<br>Subject | account<br>karticle<br>karticlecomment<br>karticletemplate<br>incident<br>incidentresolution<br>contact<br>contract<br>contractdetail<br>contracttemplate<br>transactioncurrency<br>equipment<br>queue<br>constraintbasedgroup<br>serviceappointment<br>site<br>subject |
| Marketing Campaigns | Account<br>Campaign<br>Campaign Activity<br>Campaign Item<br>Campaign Response<br>Contact<br>Currency<br>Lead<br>Marketing List<br>Marketing List Member  | account<br>campaign<br>campaignactivity<br>campaignitem<br>campaignresponse<br>contact<br>transactioncurrency<br>lead<br>list<br>listmember   |
| System              | Business Unit<br>Connection<br>Connection Role<br>Currency<br>Note<br>Queue<br>Resource Group<br>Site<br>Subject<br>Team<br>Territory<br>User   | businessunit<br>connection<br>connectionrole<br>transactioncurrency<br>annotation<br>queue<br>constraintbasedgroup<br>site<br>subject<br>team<br>territory<br>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.