



# **Import Tool**

**For Dynamics CRM 2015**



# Import Tool

- Import Tool is a powerful add-on built specially to import data into Microsoft CRM.
- It allows you to import, update or delete core Microsoft CRM entities (Accounts, Contacts, Leads, Products, Price Lists etc.) as well as custom ones.

The screenshot shows the 'Fields Mapping' window of the Microsoft CRM Import Tool. The window title is 'Customer Import - Dynamics Professional Solutions Impor...'. The menu bar includes 'File', 'Project', 'Connection', 'View', 'License', 'Help', and 'Design'. The 'Fields Mapping' tab is active. On the left, the 'Import Definition' pane shows a tree view with 'Customer Import' expanded to show 'Account' and 'Contact' entities, each with sub-items for 'Data Source', 'Data Filter', 'Fields Mapping', and 'Script'. The main area is titled 'Fields Mapping' and contains a table with columns: 'Key', 'Target Field', 'Datatype', 'Mapping Type', 'Mapped To', 'Sample Data', and 'Import'. A 'Filter:' text box is above the table. The table lists various fields for the 'Account' entity, with checkboxes in the 'Key' and 'Import' columns. The 'Account Name (name)' field is highlighted in red and has its 'Key' checkbox checked. The 'Owner (ownerid)' field is also highlighted in red. The 'Parent Account (parentaccountid)' field has its 'Key' checkbox checked. The 'Import' column has checkboxes for each row, with most checked.

Key	Target Field	Datatype	Mapping Type	Mapped To	Sample Data	Import
<input type="checkbox"/>	Account Number (accountnumber)	String	Source field			<input type="checkbox"/>
<input type="checkbox"/>	Address 1: City (address1_city)	String	Source field	Address 1: City	Bothell	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Address 1: Country/Region (address1_...)	String	Source field	Address 1: Country/Region	U.S.	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Address 1: County (address1_county)	String	Source field	Address 1: County		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Address 1: Street 1 (address1_line1)	String	Source field	Address 1: Street 1	1001 South...	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Address 1: Street 2 (address1_line2)	String	Source field	Address 1: Street 2		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Address 1: ZIP/Postal Code (address1...)	String	Source field	Address 1: ZIP/Postal Code	20937	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<b>Account Name (name)</b>	String	Source field	Account Name	A B Store	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<b>Owner (ownerid)</b>	Owner	User	Adam McAmA		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Parent Account (parentaccountid)	Lookup	Source field	Parent Account		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Primary Contact (primarycontactid)	Lookup	Source field	Primary Contact	Orlando Gee...	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Main Phone (telephone1)	String	Source field	Main Phone	555-0159	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Currency (transactioncurrencyid)	Lookup	Source field	Currency	Pound Sterling	<input checked="" type="checkbox"/>

# Import Tool

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.

