



Import Tool

For Dynamics CRM 2016



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.

Fields Mapping

Filter:

Target Field	Datatype	Mapping Type	Mapped To	Sample Data	Import	Options
Account Number (accountnumber)	String	Source field	Account Number	DPSUK01	<input checked="" type="checkbox"/>	More...
Address 1: City (address1_city)	String	Source field	Address 1: City	London	<input checked="" type="checkbox"/>	More...
Address 1: County (address1_county)	String	Source field	Address 1: County	United Kingdom	<input checked="" type="checkbox"/>	More...
Address 1: Name (address1_name)	String	Source field	Address 1: Name	Main Address:	<input checked="" type="checkbox"/>	More...
Relationship Type (customertypecode)	Picklist	Source field	Relationship Type	Customer	<input checked="" type="checkbox"/>	More...
Email (emailaddress1)	String	Source field	Email	UK-Office@dps.c...	<input checked="" type="checkbox"/>	More...
Industry (industrycode)	Picklist	Source field	Industry	Information Tech...	<input checked="" type="checkbox"/>	More...
Account Name (name)	String	Source field	Account Name	DPS United King...	<input checked="" type="checkbox"/>	More...
Ownership (ownershipcode)	Picklist	Source field	Ownership	Private	<input checked="" type="checkbox"/>	More...
Main Phone (telephone1)	String	Source field	Main Phone	44 (01983) 245245	<input checked="" type="checkbox"/>	More...
Currency (transactioncurrencyid)	Lookup	Source field	Currency	Pound Sterling	<input checked="" type="checkbox"/>	More...

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.

