



Import Tool

For Dynamics 365



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 Dynamics Professional Solutions Import Tool 365 (9.x) interface. The window title is "Customers - Dynamics Professional Solutions Import Tool 365 (9.x)". The menu bar includes File, Project, Connection, View, License, Help, and Design. The toolbar contains buttons for Single, Clear, Map automatically, and Show or hide, along with a Mode dropdown set to "Import new records only" and a Conflicts dropdown set to "Do nothing (skip records)".

The "Import Definition" pane on the left shows a tree view for "CUSTOMERS" with sub-items: Account, Data Source, Data Filter, Fields Mapping, Script, Contact, Address, Competitor, Lead, and leadcompetitors.

The "Fields Mapping" pane on the right contains a table with the following data:

| Key | Target Field | Datatype | Mapping Type | Mapped To | Sample Data | Import | Options |
|-------------------------------------|--------------------------------------|----------|--------------|-------------------|--------------------|-------------------------------------|---------|
| <input type="checkbox"/> | Main Phone (telephone1) | String | Source field | Main Phone | 44 (01983) 245245 | <input checked="" type="checkbox"/> | More... |
| <input type="checkbox"/> | Address 1: Name (address1_name) | String | Source field | Address 1: Name | Address: | <input checked="" type="checkbox"/> | More... |
| <input type="checkbox"/> | Relationship Type (customertypecode) | Picklist | Source field | Relationship Type | Map... Customer | <input checked="" type="checkbox"/> | More... |
| <input type="checkbox"/> | Account Number (accountnumber) | String | Source field | Account Number | DPS United Kingdom | <input checked="" type="checkbox"/> | More... |
| <input checked="" type="checkbox"/> | Account Name (name) | String | Source field | Account Name | DPS United Kingdom | <input checked="" type="checkbox"/> | More... |
| <input type="checkbox"/> | Address 1: City (address1_city) | String | Source field | Address 1: City | London | <input checked="" type="checkbox"/> | More... |
| <input type="checkbox"/> | Address 1: County (address1_county) | String | Source field | Address 1: County | United Kingdom | <input checked="" type="checkbox"/> | More... |

Import Tool

With the Import Tool you can:

- Import data from various 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.

