



Import Tool

For Dynamics 365



Import Tool

- Import Tool is a powerful add-on built specially to import data into Microsoft Dynamics 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 displays the 'Import Tool - Import Tool' window. The 'Mapping' tab is active, showing a configuration for 'Account - Add'. The 'Mode' is set to 'Import new records only' and 'Conflicts' is set to 'Ignore (skip records)'. The 'Field Mapping' section shows a table of source fields being mapped to target fields in the CRM system.

Target Field	Data Type	Mapping Type	Key	Mapped To	More	Sample Data	Import
> Account Name (name)	String	Source field	<input type="checkbox"/>	Account Name		DPS	<input checked="" type="checkbox"/>
Account Number (accountnumber)	String	Source field	<input type="checkbox"/>	Account Number		DPS00	<input checked="" type="checkbox"/>
Address 1: City (address1_city)	String	Source field	<input type="checkbox"/>	Address 1: City		London	<input checked="" type="checkbox"/>
Address 1: County (address1_county)	String	Source field	<input type="checkbox"/>	Address 1: County		United Kingdom	<input checked="" type="checkbox"/>
Address 1: Name (address1_name)	String	Source field	<input type="checkbox"/>	Address 1: Name		Main Address:	<input checked="" type="checkbox"/>
Currency (transactioncurrencyid)	Lookup	Source field	<input type="checkbox"/>	Currency		Pound Sterling	<input checked="" type="checkbox"/>
Email (emailaddress1)	String	Source field	<input type="checkbox"/>	Email		DPS_HQ@dps.com	<input checked="" type="checkbox"/>
Industry (industrycode)	Picklist	Source field	<input type="checkbox"/>	Industry	Map	Information Technology	<input checked="" type="checkbox"/>
Main Phone (telephone1)	String	Source field	<input type="checkbox"/>	Main Phone		123456789	<input checked="" type="checkbox"/>
Owner (ownerid)	Owner	Source field	<input type="checkbox"/>	Owner		Ama Akar	<input checked="" type="checkbox"/>
Ownership (ownershipcode)	Picklist	Source field	<input type="checkbox"/>	Ownership	Map	Private	<input checked="" type="checkbox"/>
Primary Contact (primarycontactid)	Lookup	Source field	<input type="checkbox"/>	Primary Contact			<input checked="" type="checkbox"/>

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.
- 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.

