

c360 Import Manager User Guide

Microsoft Dynamics CRM 4.0 compatible

Table of Contents

ntroduction	.3
Features	.3
nstallation and Setup	4
Requirements	5
Short Version	5
Detailed Version	5
License	17
Creating a Server	17
Creating a User	19
imple Import	24
Text Source	24
ODBC Source	42
AQ and Common Errors	52
Installation and Setup	52
Appendix A - Installing SQL	54

Introduction

ImportManager 2008 is a powerful tool that allows mass manipulation of data inside Microsoft Dynamics CRM, with unprecedented control during both import, deletion and updating of data.

With the new intuitive Office 2007 User Interface it is easy to set up complex data manipulation tasks in just a few short steps.

ImportManager 2007 can do much more than just import data to Microsoft Dynamics CRM. Complex matching is possible without any prior SQL knowledge. There's easy drag and drop mapping of fields. With the new dynamic fields, it is possible to change data on the fly. Furthermore it is possible to delete data as opposed to import or update data.

ImportManager 2008 has a new client-server architecture that enables one ImportManager 2008 installation to connect to several different CRM Servers. It is then possible to log into the ImportManager 2008 Server from a client and control it according to ones user privileges.

In addition ImportManager 2007 can be scheduled to run tasks automatically on a regular basis, ideal for larger imports or conservation of system resources during office hours. A feature that enables you to make sure your CRM database is always updated with the latest information from all external sources.

ImportManager 2008 works with Excel, Access, SQL, ERP Systems, Text Files, other CRM Systems, any ODBC system and thus just about anything you can imagine.

Features

Feature Comparison Table (click to view full screen image).

	MS CRM 3.0	IMS 2006	MSCRM 4.0	IM2008
All Customizable entities Import into all entities and attributes in CRM, including custom entities and attributes.		~	✓	~
Relationships Manage relationships between objects.		✓	Partly	✓
Save Import Save import mappings as a template for later use.		×	×	✓
Duplicate checking Update records instead of creating duplicates when a given match criterion is met		×		V
Update records Update records based on a given key.		✓	Partly (through Excel).	~
Delete Delete records based on a given match criterion.				✓
Schedule Imports Schedule imports on a daily basis.		×		✓
Data sources Connect and collect data from other sources.	CSV	CSV, ODBC, Custom	CSV	CSV, ODBC, Excel, Access, Custom
Transformations Transform, combine and manipulate data on-the-fly when Importing.				~
CRM-to-CRM data migration (multi tenant) Import data from other Microsoft Dynamics CRM Systems.				~
Advanced Ownership Set the ownership of any given object in the system based on data from the data source or inherit from related objects.		¥		~
Advanced match criteria Create advanced match criteria based on multiple fields from the data source.		~		~
Command line tools Execute, stop, log imports from the Command Prompt.				~
Office 2007 UI Consistent Office 2007 Look-and-feel experience.			✓	✓
Multiple CRM installations Manage multiple CRM installations within one ImportManager instance.				V
Entity specific actions Execute platform specific logic like "Set State", "Add to marketing list", "Add User to Security Role" ect.		Partly		~
CRM 3.0 Support Connect to and manage Microsoft Dynamics CRM 3.0 installations.	¥	~		~
CRM 4.0 On-premise support Connect to and manage Microsoft Dynamics CRM 4.0 installations using Window Integrated Security.			~	~
CRM 4.0 Hosted Support Connect to and manage Microsoft Dynamics CRM 3.0 installations using Forms-Based Authentication.			~	~
CRM 4.0 Live Support Connect to and manage Microsoft Dynamics CRM 3.0 installations using Microsoft Live ID.			~	~

Installation and Setup

The installation guide comes in two versions, a short version that simply describes the three overall steps you need to go through to install ImportManager 2008 and an in depth detailed version with screen shots and step by step guidance through the entire process.

Before you commence with the actual installation, make sure you meet the requirements described in the *"Requirements"* chapter following this chapter.

Finally, if you want to be able to import more than 10 lines at a time, make sure you have a license and refer to the final chapter in this section on how to deploy this license.

Requirements

ImportManager 2008 requires a Windows Server 2003 OS with .NET 2.0 installed.

Furthermore it is important that there's a SQL Installation present on the server and that the user has administrative rights to this installation.

Refer to Appendix A for information on how to install a SQL instance.

Short Version

If you know what you're doing and just need an overall explanation of how to install ImportManager 2008, the short version is for you.

- 1. Unzip and run setup.exe to install ImportManager 2008. When prompted to open a SQL connection, make sure you do so with a user with the appropriate administrator permissions.
- Edit the "web.config" file, found in the installation root (*C:\program files\crm extensions\importmanager 2008\web.config*). Locate line 22 and change the value of ConnectionString, the part that says *"Source="* to correspond with your choice of database (selected during installation).
- 3. Open a browser to *http:/localhost:5544/* and follow the instructions (download client and start with the provided login and password information from browser).

Detailed Version

If you've experienced problems or errors when following the short version or if you want more detail, this version is for you. Screenshots and detailed explanations will describe exactly how you install ImportManager 2008 in depth.

Start by unzipping the program to a location of your choice and then run *"ImportManager 2008.MSI"*.

■ 1. Installer Startup.

The installer is started. Simply wait.

📴 ImportManager 2008 - Inst	allShield Wizard	×
	Welcome to the InstallShield Wizard for ImportManager 2008	
	ImportManager 2008 Setup is preparing the InstallShield Wizard which will guide you through the program setup process. Please wait.	
	< <u>B</u> ack <u>N</u> ext > Cancel]

■ 2. Warning.

As ImportManager 2008 needs a SQL installation, you need to make sure one is present on your system. In most cases some sort of SQL instance will be installed on your PC, but if none is present, follow the steps under requirements on how to install SQL Express 2005, which can be downloaded free of charge from Microsoft.

ImportMa	ImportManager 2008 - InstallShield Wizard				
į	WARNING!	ImportManager requires an SQL Installati	on.		
		ОК			

∃ 3. Welcome.

In the welcome screen simply click "Next".

🙀 ImportManager 2008 - Ins	tallShield Wizard	x
	Welcome to the InstallShield Wizard for ImportManager 2008	
	The InstallShield(R) Wizard will install ImportManager 2008 on your computer. To continue, click Next.	
	WARNING: This program is protected by copyright law and international treaties.	
	< Back Next > Cancel	

■ 4. End-User License Agreement.

Read the EULA by scrolling down.

After reading and agreeing to the EULA, click the *"I accept the terms in the license agreement"* radio button.

Click "Next".



5. Destination Folder.

ImportManager 2008 will as a default install to *"C:\Program Files\CRM Extensions\ImportManager 2008\". We* recommend that you do not change this folder. Nevertheless, should you choose to do so, simply click the *"Change"* button. Click *"Next"*.

🚏 ImportManager 2008 - InstallShield Wizard	×
Destination Folder Click Next to install to this folder, or click Change to install to a different folder.	
Install ImportManager 2008 to: C:\Program Files\CRM Extensions\ImportManager 2008\ Change	
InstallShield < <u>B</u> ack <u>Next</u> > Cancel	

■ 6. Database Server.

You now need to choose a database server for ImportManager 2008 to use. This server must be created prior to the installation of ImportManager 2008, as otherwise it will fail to show up in the drop down list here.

When choosing connection method, it is imperative that you only choose "Windows authentication credentials of current user" if the current user has administrative rights on the chosen server! Otherwise choose "Server authentication using the Login ID and password below" and then provide a login ID and password for a user with the necessary administrative permissions for the chosen SQL Server.

🚰 ImportManager 2008 - InstallShield Wizard	×
Database Server Select database server and authentication method	
Select the database server to install to from the list below or click Browse to see a list of all database servers. You can also specify the way to authenticate your login using your current credentials or a SQL Login ID and Password.	
local)/IM2008	1
Connect using:	
Windows authentication credentials of current user	
Server authentication using the Login ID and password below	
Login ID; sa	
Password: ********	
InstallShield	
< <u>B</u> ack <u>N</u> ext > Cancel	

■ 7. Ready to Install.

The installation is now ready to run, as all the necessary information has been gathered. Click *"Install"*.



■ 8. Installing.

Simply wait while the installation progresses.

🔂 ImportM	lanager 2008 - InstallShield Wizard	- 🗆 🗵
Installing The prog	gram features you selected are being installed.	4
12	Please wait while the InstallShield Wizard installs ImportManager 2008. This may take several minutes.	
	Status:	
InstallShield		
	< <u>B</u> ack <u>N</u> ext > Canc	e

■ 9. Completed.

The installation has been completed. Click *"Finish"*.

🕼 ImportManager 2008 - InstallShield Wizard			
	nstallShield Wizard Completed		
Tr	he InstallShield Wizard has successfully installed nportManager 2008. Click Finish to exit the wizard.		
	< <u>B</u> ack <u>Finish</u> Cancel		

■ 10. Edit web.config.

You need to edit the web.config file found in the root of the ImportManaegr 2008 installation (usually C:\Program Files\CRM Extensions\ImportManager 2008\web.config).

Locate the "add" tag (usually on line 22) and inside the "connectionString" value, locate the part that say "Source=.;". Change the dot to your database name, unless you simply run on the local database, which is the same. E.g. .\IM2008 would be the same as local\IM2008



∃ 11. Connect.

Open a browser to the address <u>http://localhost:5544/</u> and it should look something along the lines of the screen to the right. In the *"Links"* section to the right, click the *"Import Manager 2008 Client"* link.

🖉 Import Manager 2008 - Windows Internet Explorer	
	ve Search
😪 🏟 🍘 Import Manager 2008	• 🔝 • 🖶 • 🔂 Page • 🎯 T <u>o</u> ols • »
Import Manager 2008	
Thank you for choosing Import Manager 2008	Links
Getting started To get started you need to download and install the windows client which can be found <u>here</u> .	Import Manager 2008 Client Product information
Setup After installing and starting the client you need to enter the following information:	Help to get started
Server: http://localhost:5544/ Username: Admin Password: Admin	
Support Visit <u>the getting started guide</u> to get help on your fist experience with Import Manager 2008.	
	Local intranet 🔍 100% 👻 //

■ 12. File Download - Security Warning.

When asked what to do with the ImportManagerClientSetup.msi file, choose "Run". Alternatively you can Download the file to a local destination and run it from there.

File Down	load - Security Warning 📃 🛛 🔁	4			
Do you want to run or save this file?					
17	Name: ImportManagerClientSetup.msi Type: Windows Installer Package, 2.16MB From: localhost				
	<u>R</u> un <u>S</u> ave Cancel				
۲	While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. <u>What's the risk?</u>				

■ 13. IE - Security Warning.

Most likely you will receive a second security warning, where you should simply confirm that you want to run the MSI file.

Click "Run".



I4. Welcome.

At the welcome screen simply	y click <i>"Next"</i>	•	
🙀 Import Manager 2008 Client			
Welcome to the Import I Wizard	Manager 20	08 Client Set	up
The installer will guide you through the st computer.	eps required to inst	all Import Manager 200	18 Client on your
WARNING: This computer program is pro Unauthorized duplication or distribution o or criminal penalties, and will be prosecul	otected by copyrigh if this program, or ar ted to the maximum	t law and international ny portion of it, may res extent possible under	treaties. ult in severe civil the law.
	Cancel	< <u>B</u> ack	<u>N</u> ext >

■ 15. Select Installation Folder.

We recommend that you keep the default destination folder, as seen in the screen below, but it is possible to change this location by clicking *"Browse"*. The ImportManager 2008 Client takes up only very little space, but if the amount of space concerns you, click *"Disk Cost"*. Choose whether to install the client for everyone or just the current user profile. Click *"Next"*.

🙀 Import Manager 2008 Client		_ 🗆 🗙
Select Installation Folder	r	
The installer will install Import Manager 20	08 Client to the following folder.	
To install in this folder, click "Next". To ins	stall to a different folder, enter it b	elow or click "Browse".
Eolder: C:\Program Files\CRM Extensions\Imp	oort Manager 2008 Client\	Browse
		<u>D</u> isk Cost
Install Import Manager 2008 Client for yo	ourself, or for anyone who uses th	is computer:
C <u>E</u> veryone		
Just me		
	Cancel < <u>B</u> ack	. <u>N</u> ext >

□ 16. Confirm.

Now the installer has gathered all the necessary information to install the Import Manager 2008 Client. Simply click "Next"

🙀 Import Manager 2008 Client			
Confirm Installation			
The installer is ready to install Import Mar	nager 2008 Client o	n your computer.	
Click "Next" to start the installation.			
	Cancel	< <u>B</u> ack	<u>N</u> ext>

17. Installing. Please wait while the installer progresses through the installation.

🙀 Import Manager 2008 Client			
Installing Import Manag	jer 2008 Clier	nt	
Import Manager 2008 Client is being inst	talled.		
Please wait			
	Cancel	< <u>B</u> ack	<u>N</u> ext >

■ 18. Complete.

The installation has been completed. Click *"Close"*.

🙀 Import Manager 2008 Client			
Installation Complete			
Import Manager 2008 Client has been suc	cessfully installed.		
Click "Close" to exit.			
Please use Windows Update to check fo	r any critical update	s to the .NET Frame	work.
	Cancel	< <u>B</u> ack	

■ 19. Locate login information.

In the browser you opened in section 10 to the address http://localhost:5544/ the information necessary to start up ImportManager 2008 was provided as seen in the screen below. Use this information in the next step.

Thank you for choosing Import Manager 2008

Getting started To get started you need to download and install the windows cli-<u>here</u>.

Setup

After installing and starting the client you need to enter the follo



Support

Visit the getting started guide to get help on your fist experience 2008.

■ 20. Start ImportManager 2008.

To start ImportManager 2008 click the "Start" button, select "All Programs" and then "CRM Extensions" followed by the "ImportManager 2008" folder and finally "ImportManager 2008".

Recyde Bin	Microsoft Dynamics CRM
Microsoft Dynamics C	
CRM Admin	
Image: Pricesoft Office Accessories Image: Windows Exp Image: Accessories Image: Accessories Image: Accessories Image: Accessori	
Microsoft Visual Microsoft SQL Server 2005 Command Prom Microsoft Visual Studio 2005 SQL Server Mar Startup Workflow Mana Internet Explorer Windows Desktop Search All Programs CRM Extensions Microsoft Visual Studio 2005 Microsoft Visu	mportManager 2008
Log Off 💽 Shut Down	Windows Server 2003, Enterprise Edition Evaluation copy. Build 3790 (Service Pack 2) Search Desktop Search Desktop

□ 21. Login.

The login window as seen in the screen below will pop up after a short time. Use the information provided by the browser as depicted in step 18. To log into ImportManager 2008.

🔒 CRM Extensions - ImportManager 2008		
🔒 Log	in	
Server:	http://localhost:5544/	
Username:	Admin	
Password:	••••	
	Close Connect	

■ 22. Starting up/connecting.

Everything will be greyed out for a spell and unless something went wrong you will be logged into ImportManager 2008 as shown in the screen in step 23.

🔒 CRM Extensions - ImportManager 2008 🛛 🗙				
🔒 Login				
Server:	http://localhost:5	544/		
Username:	Username: Admin			
Password:				
		Close	Connecting	

■ 23. Finished.

ImportManager 2008 has now been started and should look like the screen below, ready to start importing.

CRM Extensions - Im	portManager 20	008	
File Administration	Help		
Servers	Ŧ		
	Update		
Servers			
P Running jobs			
Sers			
Ready		User: 备 <u>Administrator</u> Ve	ersion: 1.0.0

<u>License</u>

<Under Construction>

Creating a Server

ImportManager 2008 uses a client-server architecture and therefore the first thing you need to do, is to create a server.

■ 1. Create Server.

Click "Administration" in the top bar menu and select "Add Server".

CRM	1 Extensions ·	- ImportManager 2008	
File	Administrati	tion Help	
📄 Sen	Add Se	erver	
	Add Us	Jser	
		Name Test	
		Description	
		, ,	
	Update		
Se Se	rvers		
P Ru	unning jobs		
and the second s	sers		
Ready		User: 실 <u>Administrator</u> Version:	1.0.0 .::

□ 2. Choose Server Type.

Select a server type, give the server a name and optionally, give the server a short description.

Choose your server type				
Microsoft Dynamics CRM 3.0 On-premise	Microsoft Dynamics CRM 4.0 On-premise	Microsoft Dynamics CRM 4.0 Hosted	Microsoft Dynamics CRM 4.0 Live	
Name:				
Description:				
This server is for testing pur	poses.			
Help		Nex	t Cancel	

3. Connection Information.

Enter the CRM server URL, as well as administrative credentials for this CRM server (Username, Password and Domain name).

Microsoft Dynamics CRM 3.0 On-premise		
Server Url:	http://cm/	
	E.g. http://crm/ or https://crm.myserver.com:5555/	
Credentials:		
Username	cmadmin	
Password	•••••	
Domain	contoso	
Help	Next Cancel	

4. Choose licensing method.

If you have a license, choose the *"Full version mode"* (see the license chapter for more information on this) and if not, choose the *"Evaluation mode"*. Click *"Next"*.

Licensing	
Choose a licensing method:	
Evaluation mode	
Limited to 10 rows imports	
Full version mode	
Choose license file	
Help	Next Cancel

■ 5. Finished.

ImportManager 2008 recaps the choices you've made for the new server and if you're satisfied, click *"Create"* and the server will be created. Alternatively you can click *"Cancel"* and start over.

Creating a User

As an administrator, it is possible to add users and setup which servers they can connect to. Follow the procedure below to add a user and set him up to use a server.

■ 1. Add User.

Select "Administration" from the top bar and select "Add User".

CRM Extensions - ImportManager 2	008
File Administration Help	
Sen Add Server 🗢	
Add User Add User Scheduled jobs Users Data Sources Test Packages Scheduled jobs Users Users Data Files Data Sources Data Files Data Sources Data Sources Data Sources Data Sources Data Sources	
Update	
Servers	
P Running jobs	
22 Users	
Ready	User: 🍰 <u>Administrator</u> Version: 1.0.0 💥

□ 2. User Details.

Fill in the necessary information for the new user as illustrated in the screen below.

CRM Extensions - ImportManager 2	008	
File Administration Help		
Servers	User details Personal information Username John Smith Full name John Smith Administrator Image: Compare the second seco	
	Server	Associated
Update Servers Running jobs Users		Save
Ready	User: 丛 Administrator	Version: 1.0.0

■ 3. Save User.

The user is created, but as seen in the screen below, the user still isn't associated with a server.

CR	M Extensions - Imp	ortManager 2	008			<u> </u>
File	Administration	Help				
22 U	sers	Ŧ	🙎 u	ser det	ails	
	User	Administrator				
0	Admin		Personal	Information	n	
•	Administrator	I v	Usernam	ne	JohnSmith	
	JohnSmith		Full nam	e	John Smith	
ě	John Smith		Adminis	trator		
			Passwor	d	•••••	
			Retype p	password	•••••	
			Server as	sociations		
						Arrestated
			Ser	ver		Associated
		<u>Update</u>	E of	DBC Test Se tp://crm:80/	rver /mscrmservices/2006/crmservice.asmx	
	Servers		Tes	st	mermenices 12006 (cmcanica acmy	
The second	Pupping jobs		- 110	.p.//tim.ov/	inscrinservices/2000/crinservice.asinx	
5	cunning jobs					
23	Jsers					Save
						Save
Ready	1				User: 🊨 <u>Administrato</u>	r Version: 1.0.0 🔐

■ 4. Associating Server.

Click the "Servers" button in the bottom left corner. In the "Servers" tree structure right click "Users" an select "Associate user" and then the new user.



■ 5. User Associated.

When clicking "Users" in the bottom left corner and then selecting the new user, it is now possible to se that the user has been associated with a server.

File Administration Help		
Users Image: Constraint of the second seco	User details Personal information Username JohnSmith Full name John Smith Administrator Password •••••• Retype password ••••••	
	Server ODBC Test Server http://crm:80/mscrmservices/2006/crmservice.asmx Test http://crm:80/mscrmservices/2006/crmservice.asmx	Associated
Update Servers Running jobs Users		Save

□ 6. Log In.

Close down ImportManager 2008 and start it up again. This time try to log in with your newly created user account.

🧧 CRM Exte	nsions - ImportManager 2008	×
🧧 Log	jin	
Server:	http://localhost:5544/	
Username:	JohnSmith	
Password:	•••••	
	Close Connect	

∃ 7. Check.

As seen on the screen below, only the servers associated with the user is visible.

Simple Import

The Simple Import guides covers a simple bare bones import when using either a text file or a SQL (ODBC) data source.

Text Source

Follow the guide in this chapter step by step if you want to setup a simple import from a text file. This guide will not cover dynamic fields, transformations and deletions and will only skip over match criteria lightly.

Setting up the Data Source:

■ 1. Upload File.

Right click "Data Files" in the tree menu to the left and select "Upload New".

CRM Extensions - ImportManager 2008	
File Administration Help	
🗑 Servers 🗧 👻	
 □ Test □ Packages □ Scheduled jobs □ Users □ Data Sources □ Data □ Upload new 	
Update	
Servers	
P Running jobs	
Users Users	
Ready	User: 🍰 <u>Administrator</u> Version: 1.0.0 🤐

\blacksquare 2. Browse to the file.

In the browser that pops up, browse to the location of your data file and select it. Remember that the file should be in text format.

Upload data file					<u>? ×</u>
Look <u>i</u> n:	🞯 Desktop		•	3 🔊 📂 🖽-	
My Recent Documents Desktop My Documents My Computer	My Documents My Computer My Network Pla ImportManager ContactData.cs	ces 2008 Beta 1 nics CRM (Web Client)			
My Network Places	File <u>n</u> ame:	ContactData.csv		•	<u>O</u> pen
	Files of type:			•	Cancel

The tree will update, to show you that a file has been uploaded and if you right click the file, it is possibl it or delete it.

CRM Extensions - ImportManager 2008	
File Administration Help	
🗑 Servers 🗧 🔻	
Test Packages Scheduled jobs Data Sources Data Files Contact 1 cont Edit Delete Upload	
Update	
Servers	
P Running jobs	
Users	
Ready	User: 🊨 <u>Administrator</u> Version: 1.0.0 🫒

∃ 3. New Data Source.

Right click "Data Source" and select "New".

CRM Extensions - ImportManager 2008	
File Administration Help	
🥃 Servers 🗢 🔫	
□ Test □ Packages □ Scheduled jobs □ Users □ □	
Update	
Servers	
P Running jobs	
22 Users	
Ready	User: 🎴 <u>Administrator</u> Version: 1.0.0 💥

■ 4. Data Source.

Give the Data Source a name and select the *"Text file Datasource"* from the list. Click *"Create"*.

New data	a source	×
)ata source	
Server	Test	
Name	Contact DS	
	ODBC Datasource [More to come] CRM Extensions ApS 1.0.0.0	-
3	Text file Datasource Reads rows from at text file CRM Extensions ApS 1.0.0.0	
	Xml file Datasource Transforms an xml file to a text file using xslt and imports from the tra CRM Extensions ApS 1.0.0.0	
		•
	Cancel Create	

5. Text File Settings.

Make sure that the settings for the chosen file are correct. You can select a file under the file name drop down menu, select whether this file has a header row or not, choose the Separator, if there's any quotation and finally what encoding the file uses.

The Separator is used to separate columns inside the text file, where a new line separates rows. The quotation is sometimes used for text strings. What encoding your file uses, is usually determined by your location.

New data source	e Diale Contraction of the second	×
📑 Text f	ile Settings	
Vendor <u>http:</u>	//www.crmextensions.com	
Version 1.0.0.	.0	
Help <u>http:</u>	//www.crmextensions.com/help	
Field	Value	
Filename	ContactData.csv	1
Has header row		
Seperator	Semicolon	1
Quotation	None	1
Encoding	Unicode (UTF-8)	1
	Cancel OK	

Click "OK".

□ 6. Done.

The Data Source has now been created. If you select it in the tree, by expanding "Data Sources" and s the particular data source, you can view and change settings.

CRM Extensions - ImportManager 2008		
File Administration Help		
Servers ▼ Test Packages Scheduled jobs Scheduled jobs Users □ Data Sources	Vendor <u>http:</u> Version 1.0.0 Help <u>http:</u>	ile Settings //www.crmextensions.com .0 ://www.crmextensions.com/help
Import Contacts	Field	Value
	Filename	ContactData.csv
	Has header row	
	Seperator	Semicolon
	Quotation	None
	Encoding	Unicode (UTF-8)
<u>Update</u>		
Servers		
P Running jobs		
Users		Cancel OK
Ready		User: 备 <u>Administrator</u> Version: 1.0.0 💥

Setting up the Package:

■ 7. New Package.

Right click "Package" in the left tree menu and select "New".

CRM Extensions - ImportManag	er 2008		
File Administration Help			
Servers	Select the data source to ed Create new Data Source: Name	lit or create a new one Data plugin Cm Loopback	Update Create
	Name Import Contacts	Edit	Delete Delete
Update Servers Running jobs			
Ready		User: 🊨 Admini	strator Version: 1.0.0

■ 8. Overview.

Give the new package a name and a small description.

Select the amount of information you wish to log during an import by checking the corresponding radio button.

You can also select whether you want the import to run with a single or multiple threads, the latter being faster on computers with multiple cores.



9. Data Sources.

Click Data Sources.

Notice that the Data Source created previously is listed here, so we don't need to create one.

🛃 Contact Impor	rt Package							
-								
Design	Run							
-	🔰 🔳 🌐]						
Save Save & C Close	Overview Data sources Import	rules						
Save	View							
Data So Select the data so	Select the data source to edit or create a new one							
Create new Data S	Source:			Update				
Name		Data plugin						
		Cm Loopback		Create				
			-					
Name			Edit	Delete				
Contact DS			Edit	Delete				

If there are more than one Data Source in the list, the selected Data Source will be blue as opposed to white.

🔜 sdfjfhkl				
Design	- Run			
Save Save & Close	Overview Data sources Import rules			
Data Select the data s	Sources			
Create new Data Name	a Source:	Data plugin		<u>Update</u>
		Crm Loopback		Create
Name			Edit	Delete
Contact DS			Edit	Delete
SQL Odbc			Edit	Delete

Setup Import Rule:

Import Rules.
 Create an Import Rule for our package.
 Give the rule a name and select an entity type to import into.
 Finally select the Data Source created earlier and click "Add".

Contact Import Package	2				
Design Run					
Save Save & Overview D. Save	ata sources Import rules View				
Import Rules Create, delete and edit the	import rules in this package				
Create a new Import Rule o Name:	i Entity Type:		Data Source:		
ImportRule 1	Contact	•	Contact DS		Add
ImportRule 1	Contact		Contact DS	Edit	Enabled
ImportRule 1 Name	Contact		Contact DS Delete	Edit	Enabled
ImportRule 1	Contact		Contact DS Delete	Edit	Enabled
ImportRule 1	Contact		Contact DS Delete	Edit	Enabled
ImportRule 1	Contact		Contact DS Delete	Edit	Enabled
ImportRule 1 Name	Contact		Contact DS Delete	Edit	Enabled
ImportRule 1	Contact		Contact DS Delete	Edit	Enabled

■ 11. Overview.

A pop up window will provide you with some basic information about the Contact, with default actions, which you can change to suit your needs.

Import Rule	
Design Run Import Rule	
Overview Data Source Dynamic Hatching Mapping Transformations Delete Fields Mapping	
Import Data Match Mapping Group 🗟 Group 🗟	
Information	
ObjectType: Contact	
Person with whom a business unit has a relationship. For example, a customer, a supplier, or a colleague.	
Actions	
On no match On unique match On multiple matches	
Create Create O Create O Create	
© Ignore ◎ Ignore ◎ Delete	

12. Matching. It's possible to change settings for the Data Source here, as well as create Dynamic Fields, but for this simple import we will go straight to matching. Click the "Matching" icon in the menu bar in the top.

🔡 Contac	t Import Package							<u>- 🗆 ×</u>
	Ţ In	port Rule						
<u> </u>	Design Run	Import Rule						
			-2	to the second se	*			
Overview	Data Source Dynamic Fields	Matching	Mapping	Transformations	Delete Mapping			
Import	Data	Match		Mapping		Group 🗟	Group 🗟	
诸 Match C	Iriteria							contact
Links								
				<u>Test</u>				

■ 13. Add Filter.

Right click "Criteria" and select "And".

🔜 Contact Import Package	
Import Rule	
Design Run Import Rule	
Overview Data Source Dynamic Fields Mapping Transformations Delete Mapping	
Import Data Match Mapping Group 🗟 Group 🗟	
A Match Criteria	contact
Critera	
Link Add litter And	
Clear Or	
<u>Test</u>	

I4. Add Conditions.
 Right click the newly created filter and select "Add Condition...".

🛃 Contac	t Import Package					
] ∓ Im	port Rule				
V ,	Design Run 📕	import Rule				
	I			3		
Overview	Data Source Dynamic Fields	Matching	Mapping Transformations De Map	ping		
Import	Data	Match	Mapping	Group 🗟	Group 😼	
诸 Match (Criteria					contact
	- (A - D					
Links	Type	•	1			
	Add filter	•				
	Add condition	n				
	Clear					
			,			
ļ						
			Test			

Select an "Attribute", a "Condition" and a "Datasource" to match and click "OK". For our example we used the "First Name" attribute from the contact entity, the "Equal" condition and "First" from the data source as seen in the screen below.

Condition		×
Attribute	First Name	
Condition	Equal	
Value		
Datasource	First	
 Constant 	\$\$First\$\$	
	Cancel Save	
		_

Repeat this procedure, but this time map "Last Name" to "Last" as seen below.

Condition	
Attribute	Last Name
Condition	Equal
Value	
Datasource	Last
 Constant 	\$\$Last\$\$
	Cancel Save

You've now created a match criterion that states: if first name and last name match the record, there is match.

import Rule regin Run Import Rule regin Run Import Rule regin Data Source Dynamic Fields Mapping Transformations Delete Mapping Group T Group T Group T mapping	🖶 Contac	t Import Package							
Peign Run Overview Data Source Dynamic Telds Matching Mapping Terrstormations Delete Mapping Group 5 Group 5 Group 5 Testame Control Strate Testame		🕽 후 🛛 Im	port Rule	-					
Image: Series of the source Dynamic in the series of the se	\checkmark	Design Run 📃	Import Rule						
Overview Data Source Dynamic Matching Mapping Transformations Delete Mapping Import Data Match Criteria contact Import Criteria contact Criteria Import Criteria contact Import Filter (And) Import Import Contact Import Filter (And) Import Import Contact Import Import Import Contact Contact Import Filter (And) Import Contact Contact Import Import Import Contact Contact Import Filter (And) Import Contact Contact Import Import Import Contact Contact Import Import Import Contact Contact Import Import Contact Contact Contact Import Import Contact Contact Contact Import Contact Contact Contact				-	- to	- 76			
Import Data Match Mapping Group 12 Group 12 Croup 12 Contact Contac	Overview	Data Source Dynamic Fields	Matching	Mapping	Transformatio	ns Delete Mapping			
Match Criteria contact Criteria Criter	Import	Data	Match		Mapping		Group 🗟	Group 🗟	
Creates - Fiter (And) - Instname Equal \$\$First\$\$ - Inks - Unks - Inks - Inks	诸 Match 🤇	Criteria							contact
<u>Test</u>	Links	er (And) ∙firstname Equal \$\$First\$\$ ∙lastname Equal \$\$Last\$\$	5						
					Test				

In the field mappings window you will have to columns of fields. On the left side the fields found in the data source and on the right, the fields found in the chosen CRM entity.

🔜 Contac	t Import Package							<u>_</u> _×
	🚽 🗧 Im	port Rule	_					
	Design Run 🗾	mport Rule						
			-	4	75			
Overview	Data Source Dynamic Fields	Matching	Mapping	Transformations	Delete Mapping			
Import	Data	Match		Mapping		Group 🗟	Group 🗟	
Map the s	ource fields on the left ha	and side to a	destinatio	n field on the righ	t hand side	ь.	Fie	Ids
Company Email First Last Phone							acco acco addre ad	untid [] untrolecode [Role] ass1_addressid [Address 1: ID] ass1_addresstypecode [Address 1 ass1_addresstypecode [Address 1 ass1_city [Address 1: City] ass1_country [Address 1: Country ass1_country [Address 1: Country] ass1_freighttermscode [Address 1: ass1_freighttermscode [Address 1: ass1_latitude [Address 1: Latitude] ass1_line1 [Address 1: Street 1] ass1_line2 [Address 1: Street 2] ass1_line3 [Address 1: Street 3] ass1_longitude [Address 1: Name] ass1_postalcode [Address 1: ZIP/ ass1_postolfficebox [Address 1: ZIP/ ass1_primarycontactname [Address ass1_shippingmethodcode [Address 1: ass1_telephone1 [Address 1: Tel

It is now a simple task to drag the fields on the right to their corresponding field on the left to create field mappings like seen in the screen below.



■ 16. Run Import.

Click the "Run" tab in the top followed by the "Save & Run" button and the following screen will be visible.

🖶 Contact Import	Package				
- E					
Design	Run				
it it	0 🕨 📝				
Save & Log level Validate →	Save & Running Scheduling Run Tasks				
Validate	Execution	J			
Import Rule	Execution				
Status: Starting	9			5 se	econds 💌
Records processed	d: 0		Records in queue:	0	
Records created:	0		Records updated:	0	
Records deleted:	0		Records ignored:	0	
Records failed:	0		Records per second:	0.00 records/sec	
Results					
# Time	Туре	Message			
				Page:	Get Log Details

After a while you should get something along the lines of the screen below. If the imports are a little slow to start, it is usually because IM2008 needs to start up MS CRM first.

🔜 Contact Impor	t Package				
- I					
Design	Run				
it it	o 🕨 💅				
Save & Log level Validate 🐨	Save & Running Scheduling Run Tasks				
Validate	Execution				
Import Rule	Execution				
Status: Done					5 seconds
Records processe	d: 6		Records in queue:	0	
Records created:	3		Records updated:	0	
Records deleted:	0		Records ignored:	0	
Records failed:	3		Records per second:	0.12 records/s	sec
Results]
# Time	Туре	Message			
				Page: 1	Get Log Details
				, age, [.	

□ 17. Done.

Once the import is done and you've closed down the window you can see the jobs under a particular pathe package as seen in the screen below.

CRM Extensions - ImportManager 2008									
File Administration Help									
Servers	Package Name Contact Import Package Server Test Description This small and simple package will take care of importing Contacts.								
	His	History							
		User	Start time	End time	Outcome	Rows cre	Rows upd	Rows ign	Rows failed
		Admin	12/17/2007 6	12/17/2007	Done	0	0	0	0
	۲	Admin	12/13/2007 5	12/13/2007	Done	0	0	0	0
<u>Update</u>									
Servers									
Running jobs									
and Users									
Ready						U	ser: ቆ <u>Admi</u>	nistrator Ve	rsion: 1.0.0 🔡

ODBC Source

Follow the guide in this chapter step by step if you want to setup a simple import from a text file. This guide will not cover dynamic fields, transformations and deletions and will only skip over match criteria lightly.

Setting up the Data Source:

■ 1. New Data Source.

Right click "Data Sources" under the server in the tree structure in the left side and select "New" as see screen below.

CRM Extensions - ImportManager 200	8		<u>_ 🗆 ×</u>
File Administration Help			
CRM Extensions - ImportManager 200 File Administration Help Servers ODBC Test Server Packages Composition Data Sources Data File New Test Data Sources Data Sources Data Files	B Data Sources Select the data source to edit or create a new on Create new Data Source: Name Name Name	ne Data plugin Cm Loopback Edit	Update Create Delete
Update Servers Running jobs Users Ready		User: 실 <u>Administ</u>	rator Version: 1.0.0 .;;

□ 2. Data Source Selection.

Select ODBC Datasource from the list, give your source a name and click "Create".

New data	source	×
	ata source	
Server	ODBC Test Server	
Name	SQL Data Source	
	Crm Loopback A loopback to the Crm server CRM Extensions ApS 1.0.0.0	•
9	Excel Datasource Datasource for Microsoft xls and xlsx files CRM Extensions ApS 1.0.0.0	
3	ODBC Datasource [More to come] CRM Extensions ApS 1.0.0.0	
	Text file Datasource Reads rows from at text file	•
	Cancel Create	

■ 3. ODBC Settings.

You need to give ImportManager 2008 a connection string to the ODBC Source to which you want to connect.

In our example we wish to connect to a SQL Server 2005 Database and so we need the following connection string:

Driver={SQL Native

Client};Server=myServerAddress;Database=myDataBase;Uid=myUsername;Pwd=myPassword;

After we change it to correspond with the database used in our example it looks like this:

Driver={SQL Native Client};Server=.;Database=Contacts;Uid=ImportUser;Pwd=Password#1;

Note that the User ID (Uid) and Password (Pwd) used here, is for a user created by a SQL

script when ImportManager 2008 is installed and thus they shouldn't be changed unless you've

specifically overridden this script and created a different user!

We need a SQL statement that collects the data we need. In our example the following statement will do:

SELECT * FROM Contacts

New data source	lew data source 🗙							
ODBC Settings								
Vendor http://www.crmextensions.com Version 1.0.00 Help http://www.crmextensions.com/help								
Field	Value							
Connection string	Driver={SQL Native Client};Server=;;Database=Contacts;Uid=Im							
Timeout	30							
Check Connection	Test							
SQL Command Text	SELECT * FROM Contacts							
Check Command	Test							
	Cancel OK							

As seen in the screen above, it is then possible to do a test to see if the connection string and the SQL statement are correct. This will, provided they are correct, result in the following two messages.

×	
Connection tested successfully!	×
Server version: 09.00.3054	SQL statement validated successfully!
ОК	OK

To finish, simply click "OK". You can find alternative connection strings to suit your setup on the following homepage: <u>www.connectionstrings.com</u>

Setting up the Package:

■ 4. Create Package.

Right click "Package" in the tree structure in the left side and select "New" as seen in the screen below.

CRM Extensions - ImportManager 200	8				
File Administration Help	Vendor http://www.version 1.0.0.0	ettings w.crmextensions.com			
Data Sources	Help <u>http://ww</u>	w.crmextensions.com/help Value			
	Connection string	Driver={SQL Native Client};Server=;Database=Contacts;Uid=ImportUser;Pwd=Password#1;			
	Timeout	30			
	Check Connection	Test			
	SQL Command Text	SELECT * FROM Contacts			
	Check Command	Test			
Update					
Servers Running jobs Servers					
		Cancel OK			
Ready		User: ଌ <u>Administrator</u> Version: 1.0.0 🤢			

■ 5. Package Overview.

Give the new package a name and description.

🔜 SQL ODBC In	mport Package	
	₹	
Desig	gn Run	
8		
Save Save & Close	Overview Data sources Import rules	
Save	View	
Overview	N	
Name		
SQL ODBC Imp	port Package	
Description		
This package w	will run SQL ODBC Imports for testing purposes.	
Logging Level	el 💿 Full 💿 Medium 💿 Minimal	
Threading	💿 Single 💿 Multi	

Setup Import Rule:

■ 6. Create Rule.

Click Import Rules in the top menu and give your new rule a name. Select the data source created earlier and an appropriate CRM entity type to import into.

	36		
•			
Design Run			
Save Save & Overview Da Close	ata sources Import rules		
Save	View		
Create, delete and edit the Create a new Import Rule of	import rules in this package		
Name:	Entity Type:	Data Source:	
Contact Rule	Contact	SQL Data Source	Add
1			
Name	,	Delate Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name	L	Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled
Name		Delete Edit	Enabled

Click "Add".

■ 7. Rule Overview.

The Import Rule window will pop up. Here you may change actions though the default actions are fine for most purposes, including ours.

🔡 SQL OD	BC Import Package								
	🕽 후 🛛 Im	nport Rule							
	Design Run 📃	Import Rule							
			-2	4	72				
Overview	Data Source Dynamic Fields	Matching N	Mapping Tra	ansformations	Delete Mapping				
Import	Data	Match		Mapping		Group 🗟	Group 🗟		
	Contact Rule								
Informa	ation								
ObjectT	vpe: Contact								
	Person with who	m a husiness ur	nit has a rela	tionshin. For e	vample a c	rustomer a	supplier o	r a colleague	
	1 claon with who	in a basiness a	nic has a rela	donanip. rore	.xumpre, a v	customer, a	supprier, o	r a concagae	
Actions	;								
On no r	match		On unique	match			On multipl	e matches	
Crea	ite		Create	Update			Create		
💿 Igno	ore		Ignore	Oelete			Ignore		

 8. Matching.
 Click the Matching tab to see the matching window.
 Right click "Criteria" and select "And".
 Right click the newly created filter and select "Add Condition...".
 Select an "Attribute", a "Condition" and a "Datasource" to match and click "OK". For our example we used the "Email Address 1" attribute from the contact entity, the "Equal" condition and finally the "Email form the data course. from the data source.

🛃 SQL OD	BC Import Package						
	🕽 후 🛛 Im	port Rule					
	Design Run 🗾	Import Rule					
			~	- 75			
Overview	Data Source Dynamic Fields	Matching	Mapping Transform	ations Delete Mapping			
Import	Data	Match	Mappir	ng	Group 🗟	Group 🗟	
诸 Match 🤇	Criteria						contact
Links	- emailaouress i Equal \$\$6						
			<u>Te</u>	<u>st</u>			

■ 9. Field Mappings.

Click the *"Mapping"* icon in the top menu to see the *"Field Mappings"* window. In the left column you will find the fields found in your data source and in the right column, the fields found in your CRM Entity.

Drag and drop each of the data source fields to the corresponding CRM entity field on the right.



IO. Save & Run.

Click the "Run" tab and then "Save & Run" to save and run your rule.

🔜 SQL ODBC Impo	ort Package				- 🗆 🗵
- 6					
Design	Run				
	o 🕨 💅				
Save & Log level Validate	Save & Running Scheduling Run Tasks				
Validate	Execution				
Import Rule	Execution				
Status: Done				5 seconds	•
Records processe	d: 5		Records in queue:	1	
Records created:	3		Records updated:	0	
Records deleted:	0		Records ignored:	0	
Records failed:	2		Records per second:	0.12 records/sec	
Results					
# Time	Туре	Message			
				Page: 1 Get Lo	g Details

□ 11. Finished.

Once the import is done and you've closed down the window you can see the jobs under a particular paselecting the package as seen in the screen below.

CRM Extensions - ImportManager 20	08								
File Administration Help									
File Administration Help Servers Image: Constraint of the server Image: Conserver Image: Conserver	Na Sei De	Packag me SQL ODBC I rver ODBC Test escription s package will ru	e mport Package Server n SQL ODBC Imp	orts for testing pu	poses.				
	His	tory							
		User	Start time	End time	Outcome	Rows cr	Rows u	Rowsig	Rows fai
	1	Admin	12/17/2007 8	12/17/2007	Done	0	0	0	0
Update Servers P Running jobs Users									
Ready						User:	Adminis	trator Vers	ion: 1.0.0 🔐

FAQ and Common Errors

In this chapter you will find a mixture of frequently asked questions and common errors. These have been divided into sub chapters, to allow you to identify locate your problem or question in a fast and efficient manner.

Installation and Setup

Here you will find a list of common errors pertaining to the installation and setup of ImportManager 2008.

■ 1. Login failed.

The error seen in the screen below is encountered when either your login or your password or both are incorrect when trying to log in (as seen in step 22).



■ 2. Unable to connect to remote server.

This error message will likely pop up when the wrong port number is provided during login.

Error	
General Details Data	
Stack Trace Technical information	
Unable to connect to the remote server	

■ 3. The remote name could not be resolved: 'local.

This error message will show when the wrong server name is provided – in this case the name *"local"*.



4. Client found response content type of 'text/html', but expected 'text/xml'. The request failed with an empty response.

As the server provided has been provided without a port number, the connection cannot be

established. This happens when you omit 5544 from http://localhost:5544/

Error	
General Details Data	
Stack Trace Technical information	
Client found response content type of 'text/html', but expected 'text/xml'. The request failed with an empty response.	

■ 5. Error 27502.

This error window will be encountered, when the SQL Database ImportManager needs, isn't present!

This can happen if the login information provided during installation was for a user with insufficient permissions to the database. You need to reinstall ImportManager and be sure to provide a SQL login with administrative permissions to the database!

Alternatively you can run a SQL script, provided from CRM Extensions.

ImportM	anager 2008 X
1	Error 27502. Could not connect to Microsoft SQL Server '(local)\IM2008'. [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. (17)
	ОК

Appendix A - Installing SQL

SQL Express 2005 can be downloaded from Microsoft using the following link:

http://www.microsoft.com/downloads/details.aspx?familyid=220549b5-0b07-4448-8848-

dcc397514b41&displaylang=en

Simply run the .exe file and follow the instructions.

Alternatively you can run the installer from a command console like this:

sqlexpr32.exe /qn addlocal=all instancename="SQLExpressIM2008" SECURITYMODE=SQL SAPWD=Password#1 SQLAUTOSTART=1

This will install a SQL Express instance named "SQLExpressIM2008", which you can log into (see step 6 in the detailed version for installing ImportManager 2008) using the login "sa" and the password "Password#1".

Your index page goes here...

In MS-Word, select INDEX AND CONTENTS from the INSERT menu. Select INDEX and click OK.