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c360 Import Manager User Guide

Microsoft Dynamics CRM 4.0 compatible

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Table of Contents

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..		✓		✓
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.				✓
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.
2. 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.
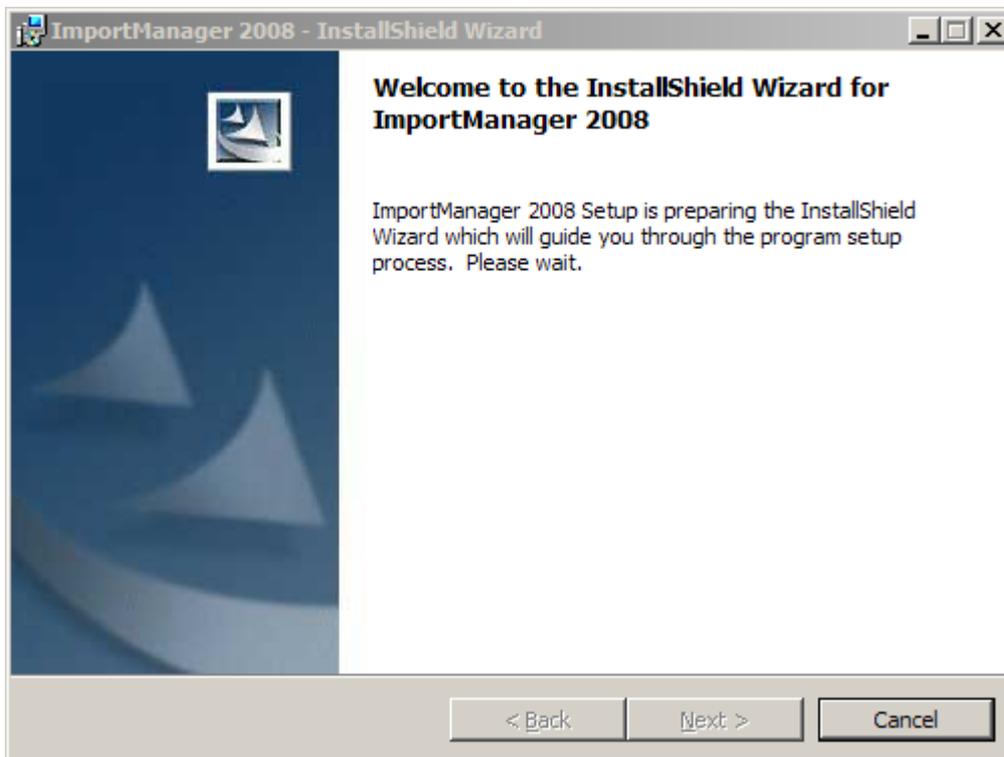
□ **2. Warning.**

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.
Click *"OK"*.

□ **3. Welcome.**

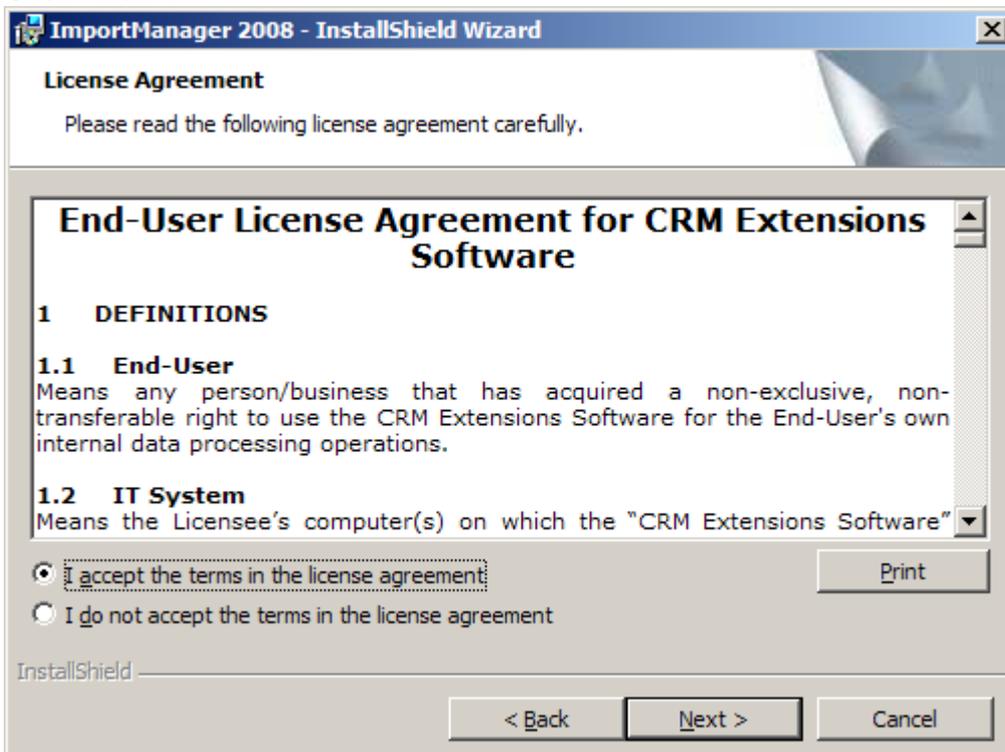In the welcome screen simply click *"Next"*.

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\". W*e recommend that you do not change this folder.
Nevertheless, should you choose to do so, simply click the *"Change"* button.
Click *"Next"*.

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.
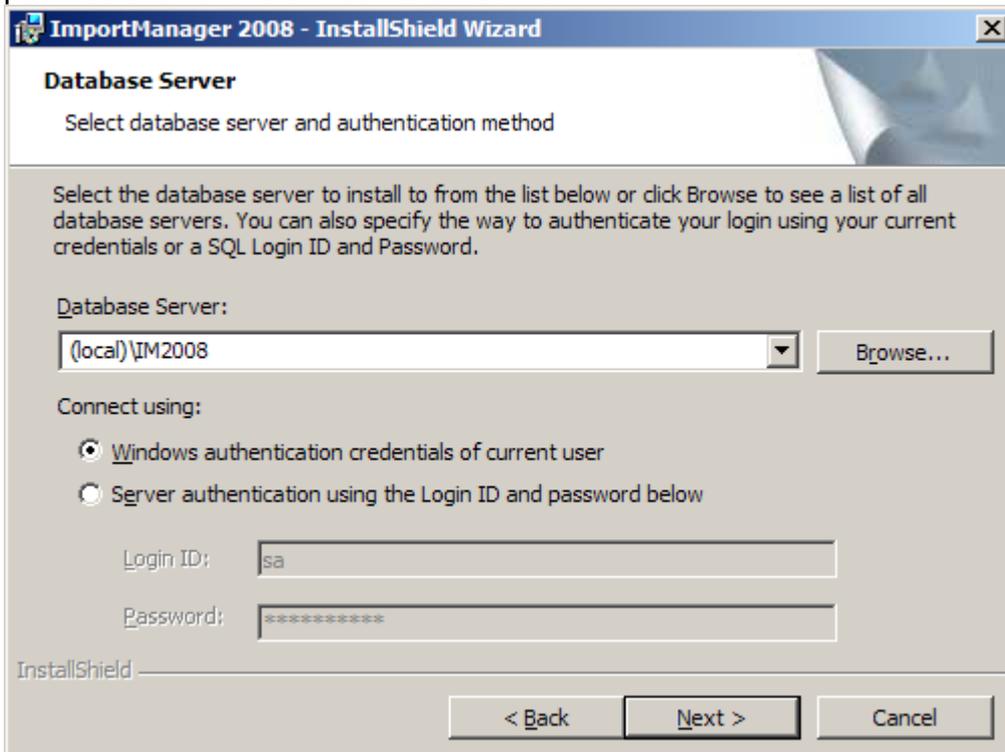
7. Ready to Install.

The installation is now ready to run, as all the necessary information has been gathered. Click *"Install"*.
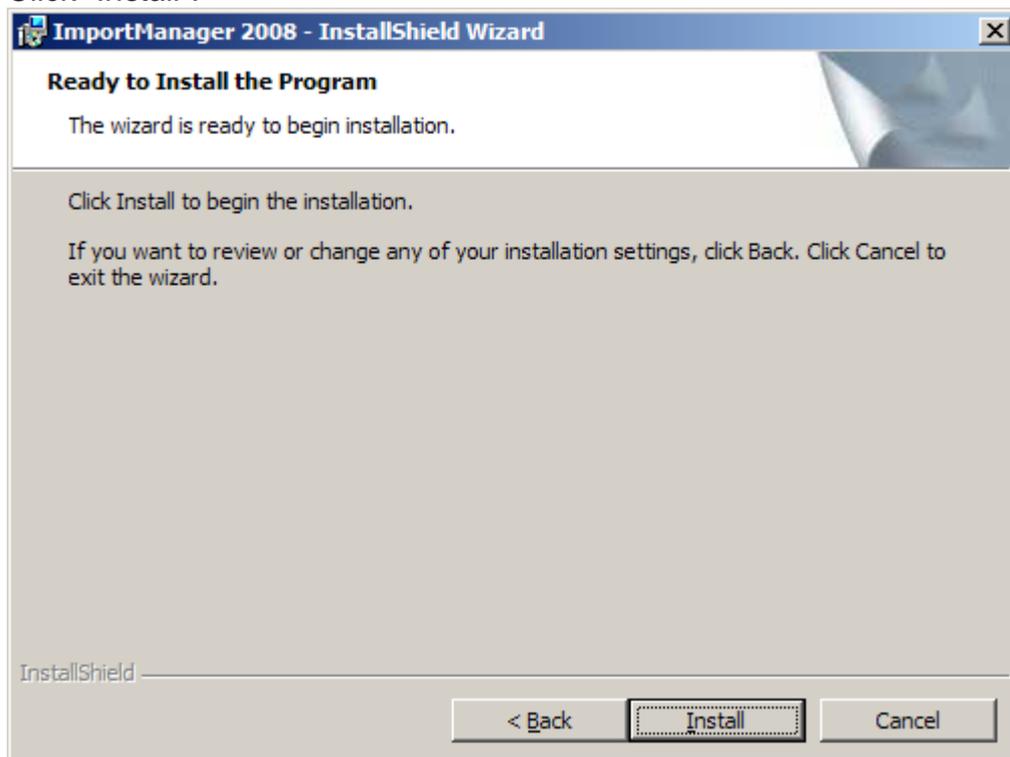
- **8. Installing.**
  Simply wait while the installation progresses.
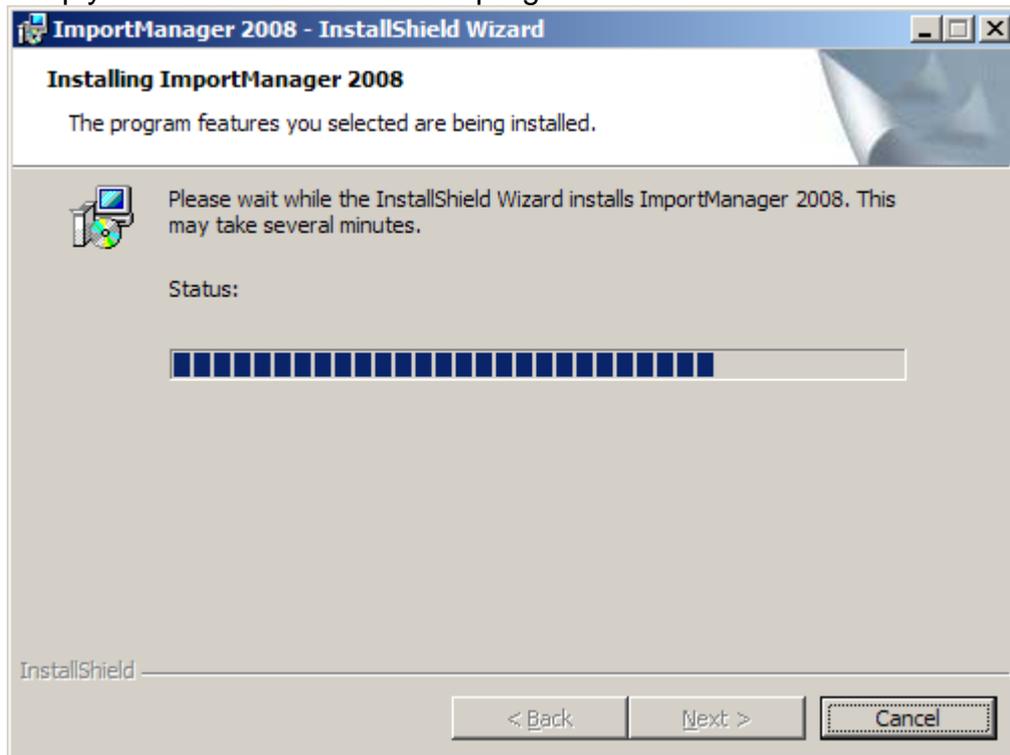
- **9. Completed.**
  The installation has been completed.
  Click *"Finish"*.

InstallShield Wizard Completed

The InstallShield Wizard has successfully installed ImportManager 2008. Click Finish to exit the wizard.
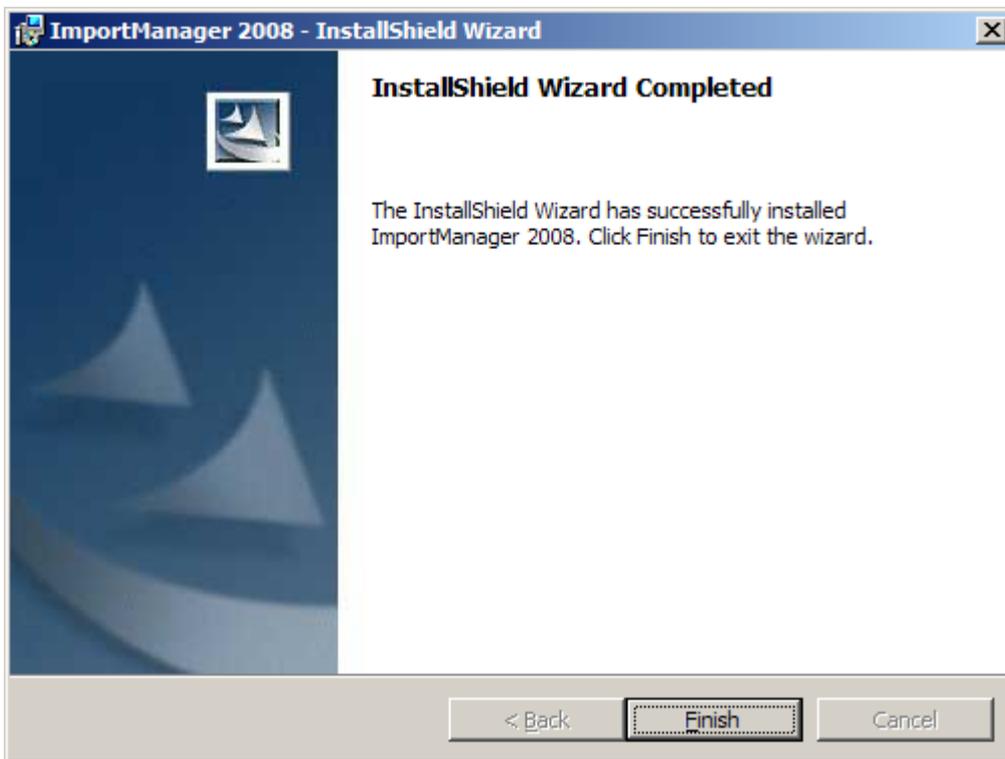
⊟ **10. Edit web.config.**
You need to edit the web.config file found in the root of the ImportManaegr 2008 installation (usually C:\Program Files\CRM Extensions\ImportManager 2008\web.config).
Locate the *"add"* tag (usually on line 22) and inside the *"connectionString"* value, locate the part that 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

```
1   <?xml version="1.0"?>
2   <!--
3       Note: As an alternative to hand editing this file you can use the
4       web admin tool to configure settings for your application. Use
5       the Website->Asp.Net Configuration option in Visual Studio.
6       A full list of settings and comments can be found in
7       machine.config.comments usually located in
8       \Windows\Microsoft.Net\Framework\v2.x\Config
9   -->
10  <configuration>
11    <appSettings>
12      <add key="MailFrom" value="kbo@crmextensions.com"/>
13      <add key="MailServer" value="smtp.fullrate.dk"/>
14      <add key="LogViewerUrl" value="http://localhost:5005/logviewer.aspx"/>
15    </appSettings>
16    <connectionStrings>
17      <clear/>
18  <!--
19      OBS -> to make sure ImportManager 2008 can connect to the SQL Tables created during installation,
20      it is important that the Source is changed to the location were you selected to create these tables.
21      -->
22      <add name="CrmExtensions.ImportManager.Server.Properties.Settings.ImportManagerConnectionString"
        connectionString="Data Source=.;Initial Catalog=ImportManager;Uid=ImportUser;Pwd=Password#1"
        providerName="System.Data.SqlClient"/>
23    </connectionStrings>
```

⊟ **11. Connect.**
Open a browser to the address http://localhost:5544/ 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.

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.
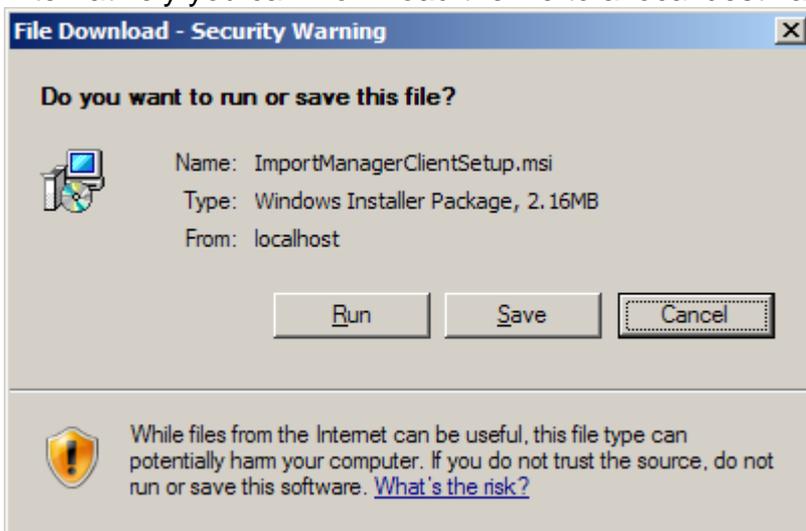
13. IE - Security Warning.
Most likely you will receive a second security warning, where you should simply confirm that you want to run the MSI file.
Click *"Run"*.
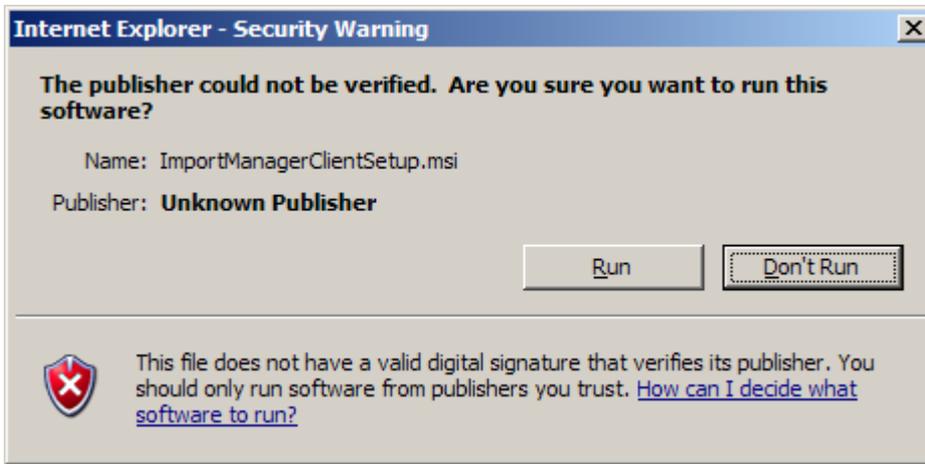
14. Welcome.
At the welcome screen simply click *"Next"*.

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"*.
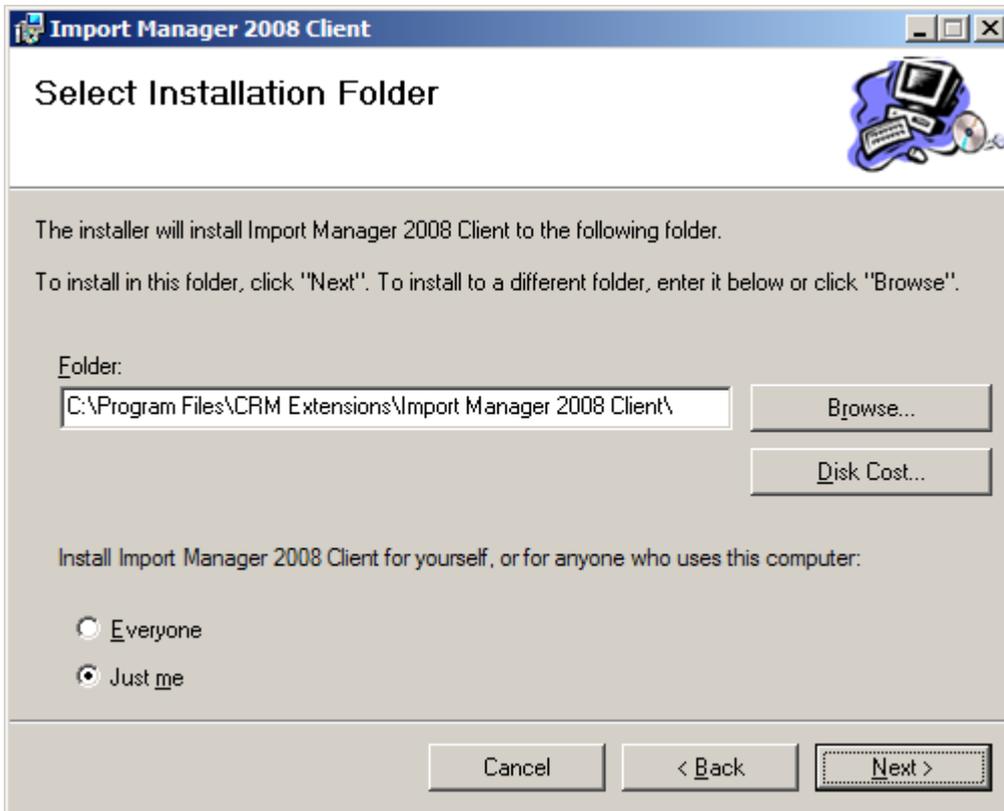
16. Confirm.
Now the installer has gathered all the necessary information to install the Import Manager 2008 Client.
Simply click *"Next"*.
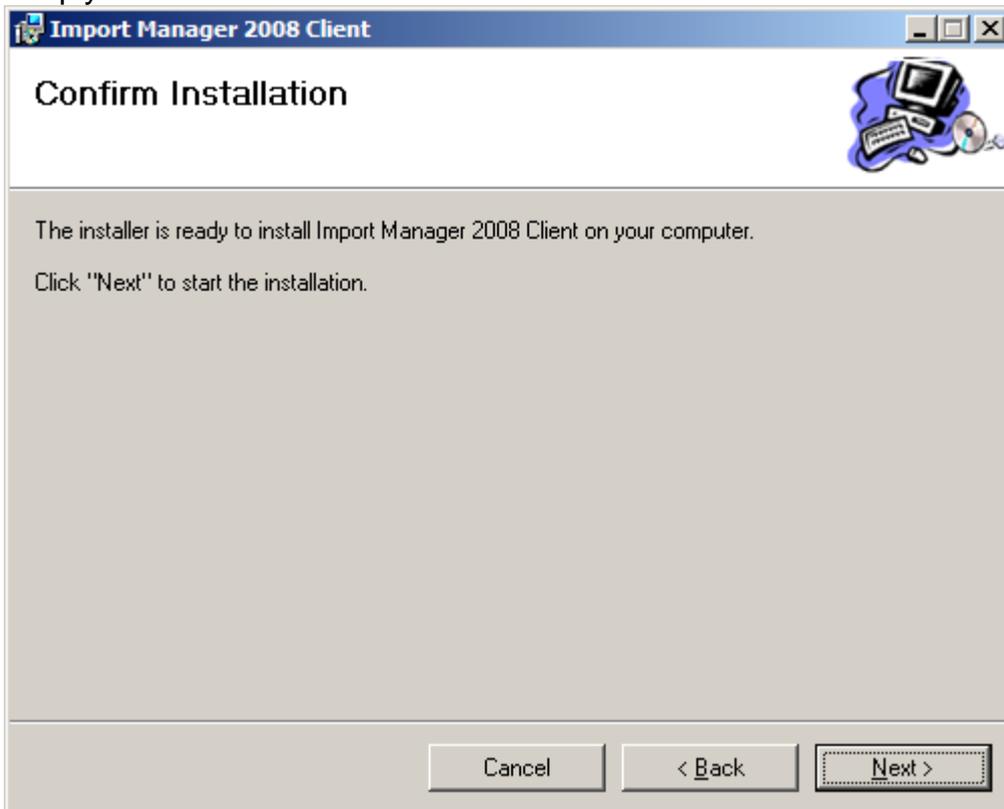
17. Installing.
Please wait while the installer progresses through the installation.
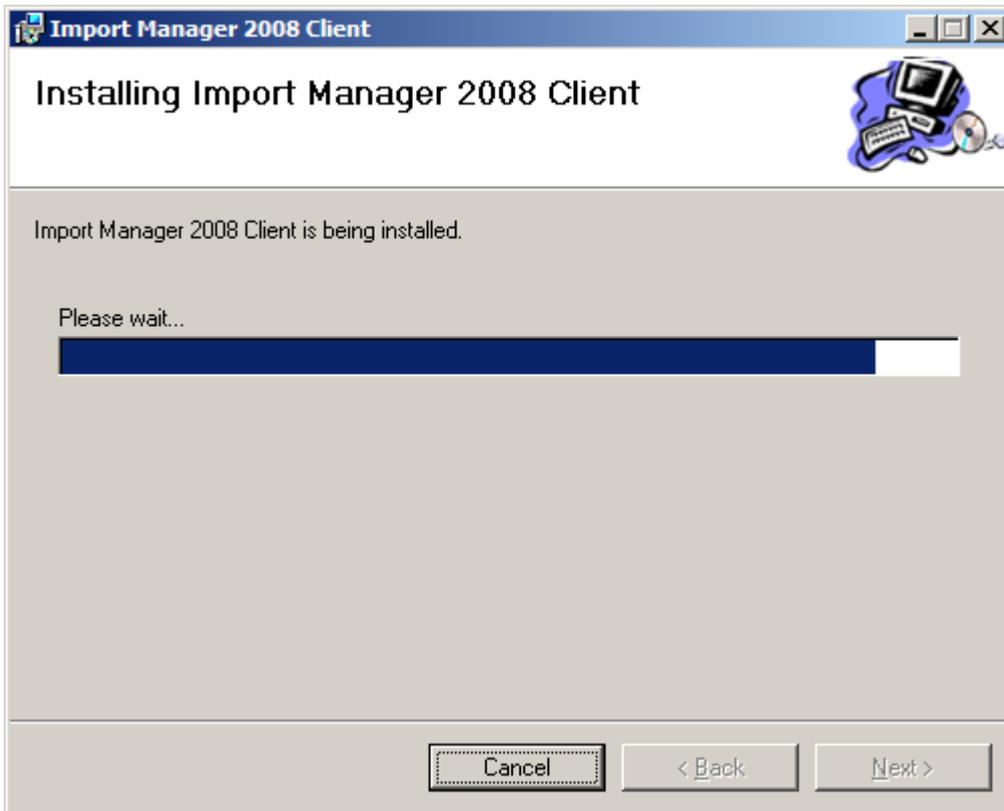
18. Complete.
The installation has been completed.
Click *"Close"*.
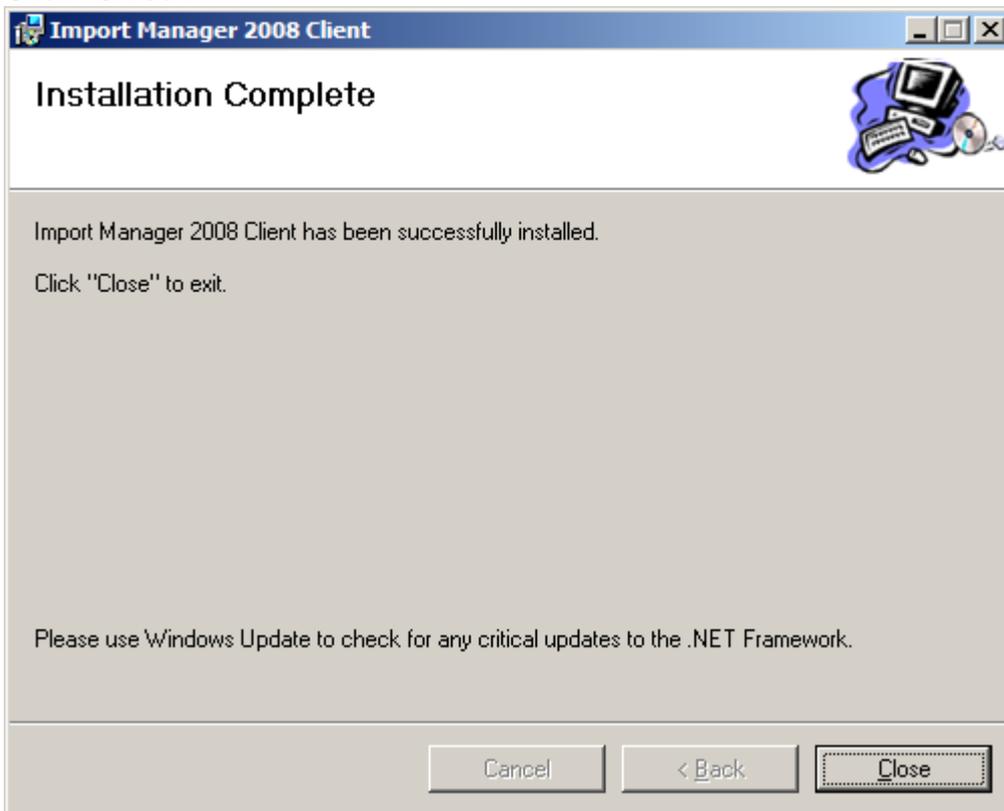
19. Locate login information.
In the browser you opened in section 10 to the address http://localhost:5544/ the information necessary to start up ImportManager 2008 was provided as seen in the screen below. Use this information in the next step.

Thank you for choosing Import Manager 2008

Getting started
To get started you need to download and install the windows cli
here.

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

Server: http://localhost:5544/
Username: Admin
Password: Admin

Support
Visit the getting started guide to get help on your fist experienc
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"*.
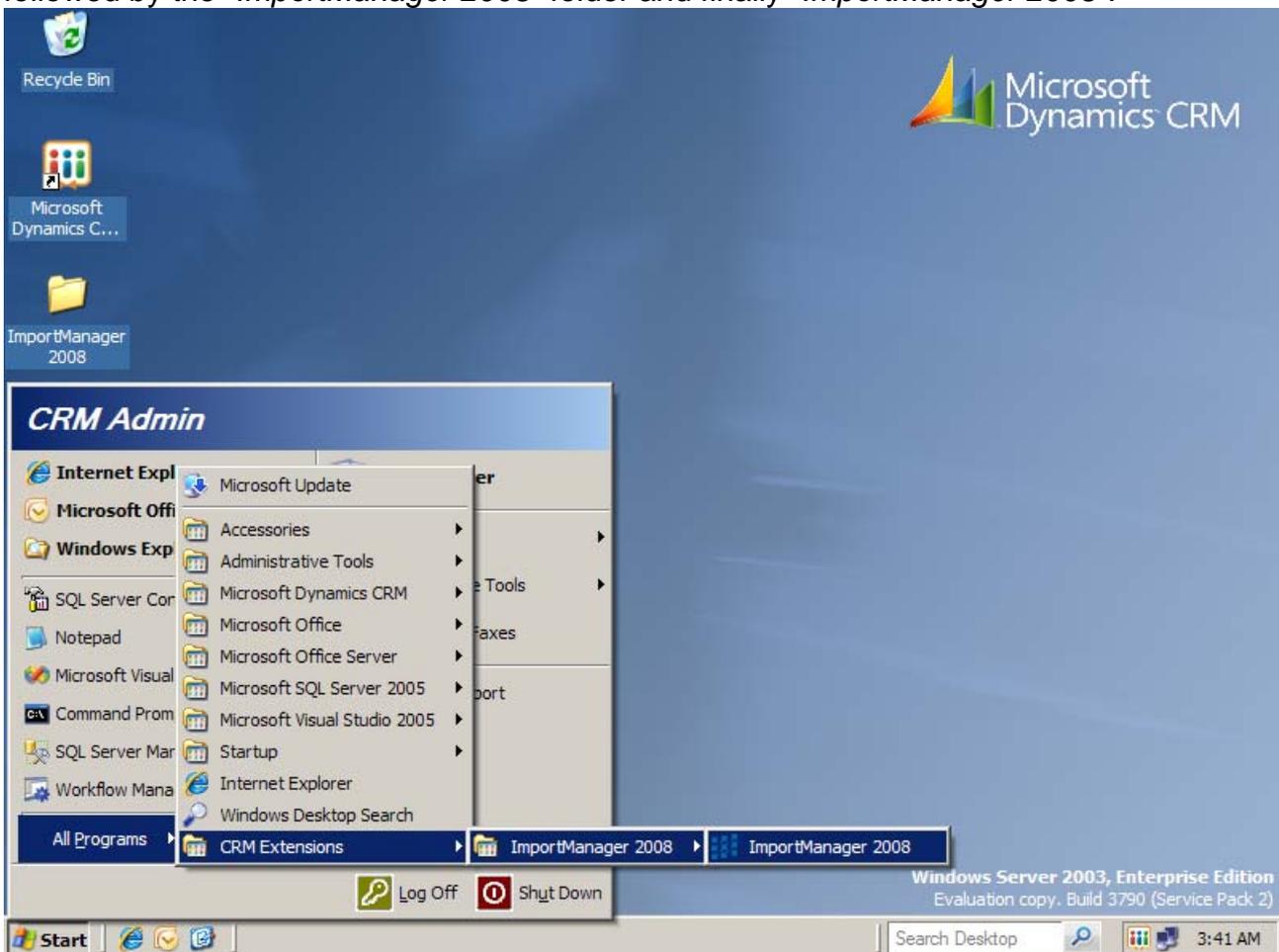
☐ **21. Login.**
The login window as seen in the screen below will pop up after a short time. Use the information provided by the browser as depicted in step 18. To log into ImportManager 2008.
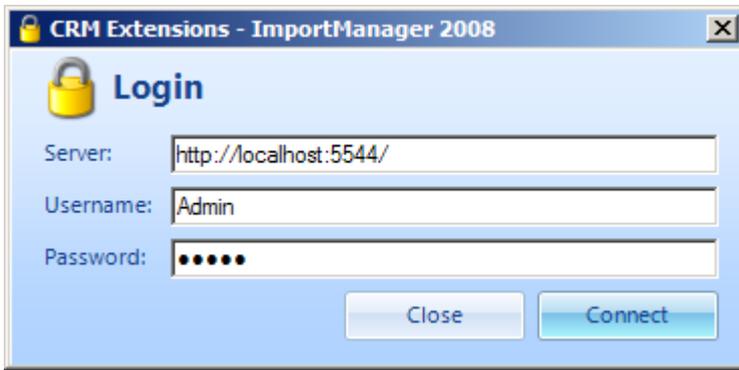
22. Starting up/connecting.
Everything will be greyed out for a spell and unless something went wrong you will be logged into ImportManager 2008 as shown in the screen in step 23.
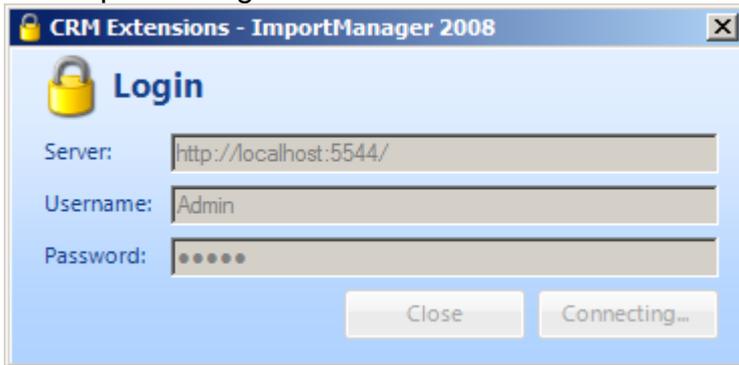
23. Finished.
ImportManager 2008 has now been started and should look like the screen below, ready to start importing.
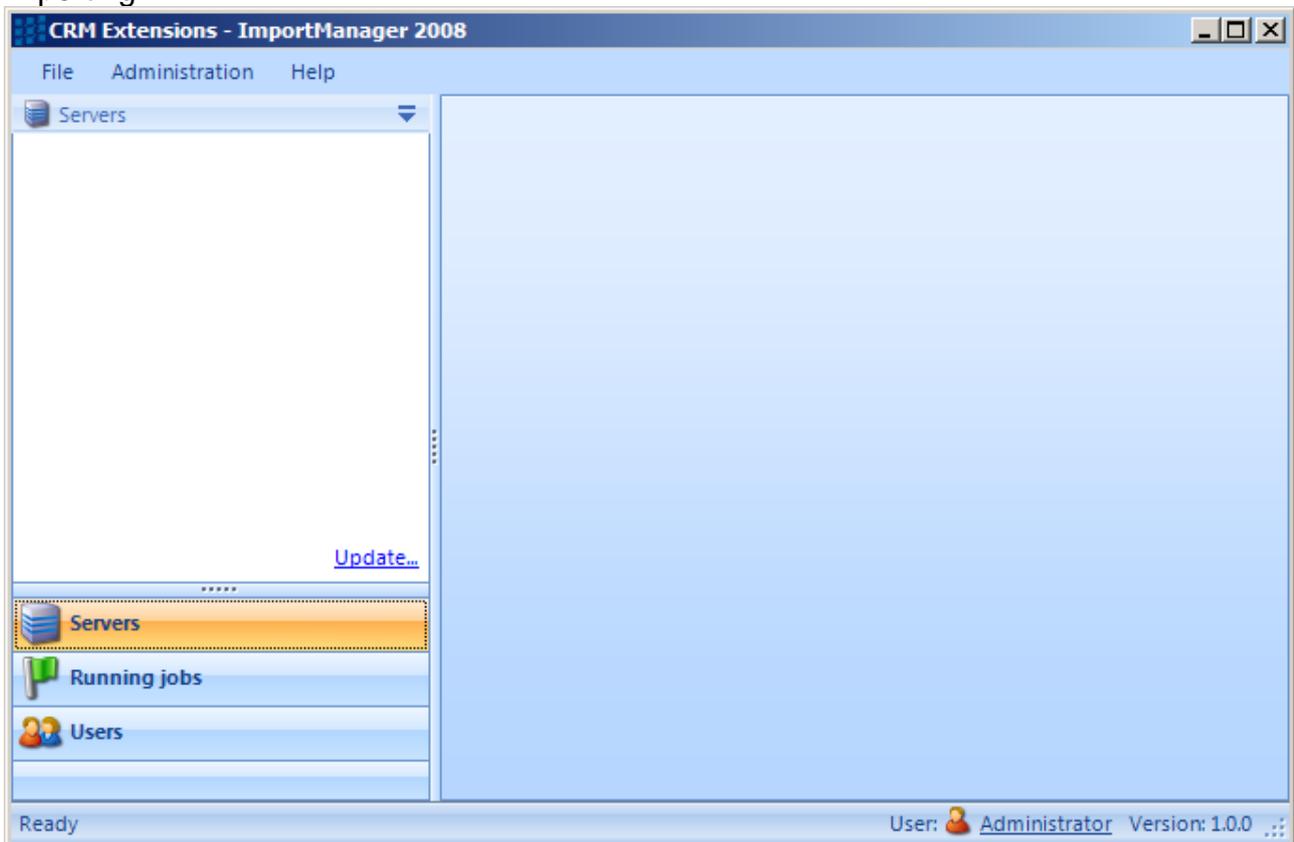
License

<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"*.
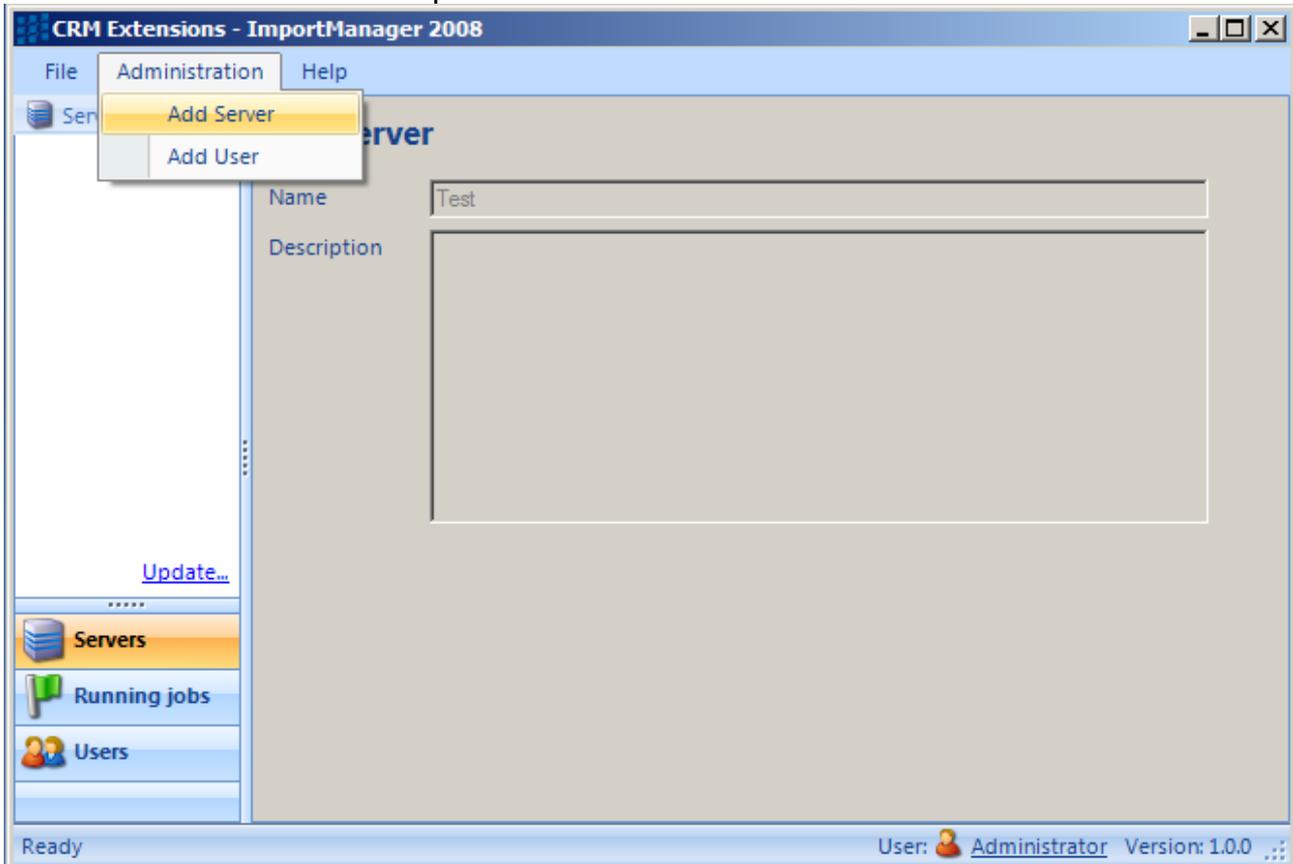
- ⊟ **2. Choose Server Type.**
  Select a server type, give the server a name and optionally, give the server a short description.

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

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"*.
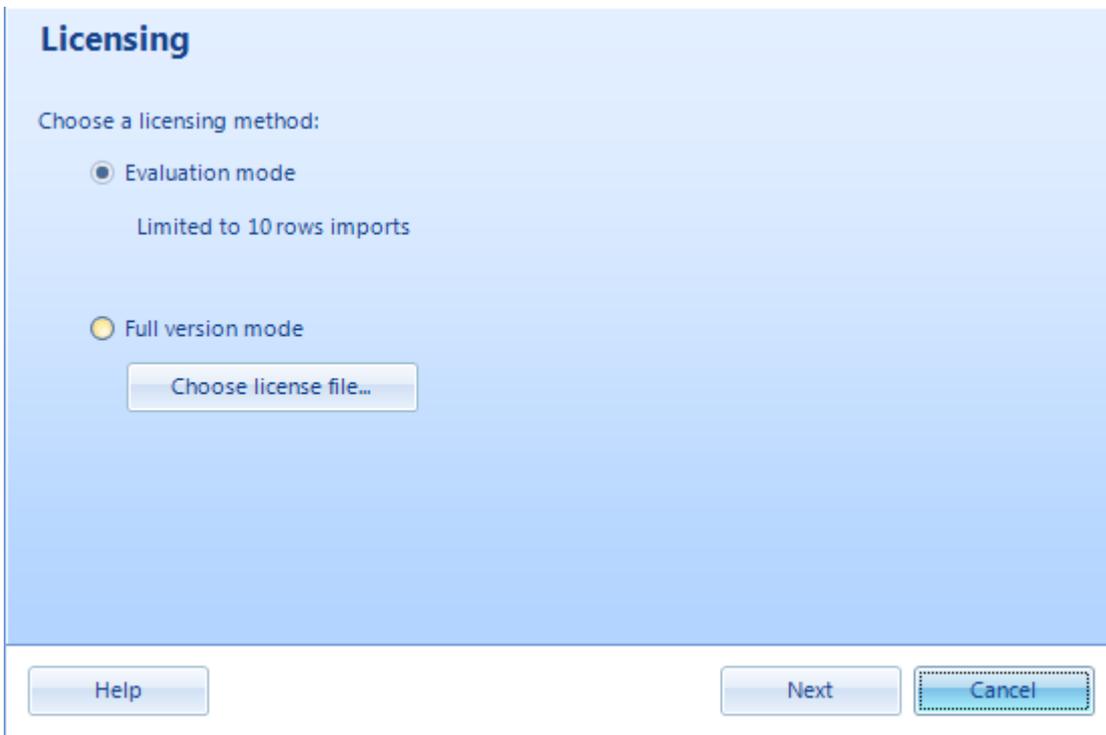
⊟ 5. Finished.
ImportManager 2008 recaps the choices you've made for the new server and if you're satisfied, click *"Create"* and the server will be created. Alternatively you can click *"Cancel"* and start over.

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"*.
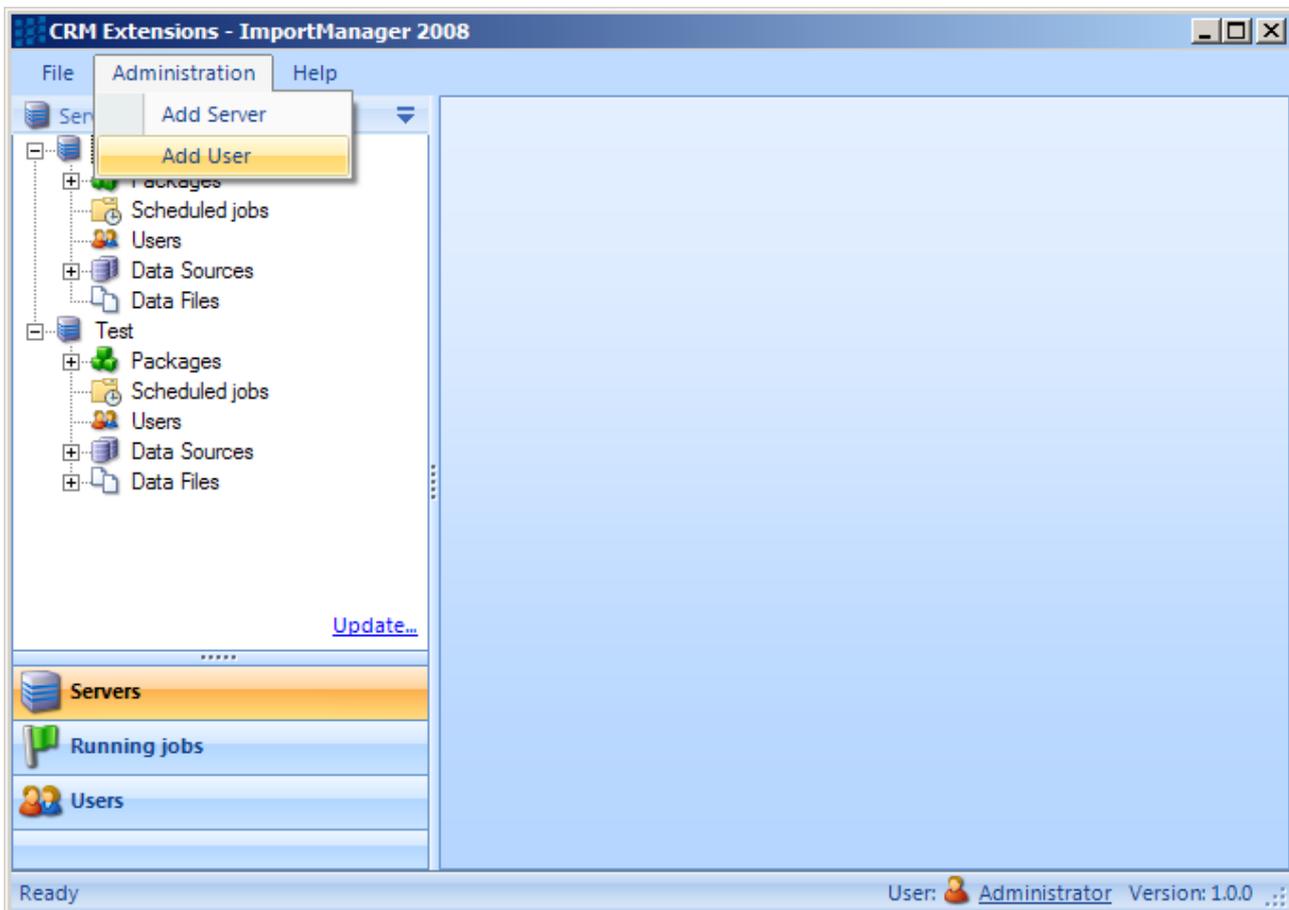
2. User Details.
Fill in the necessary information for the new user as illustrated in the screen below.
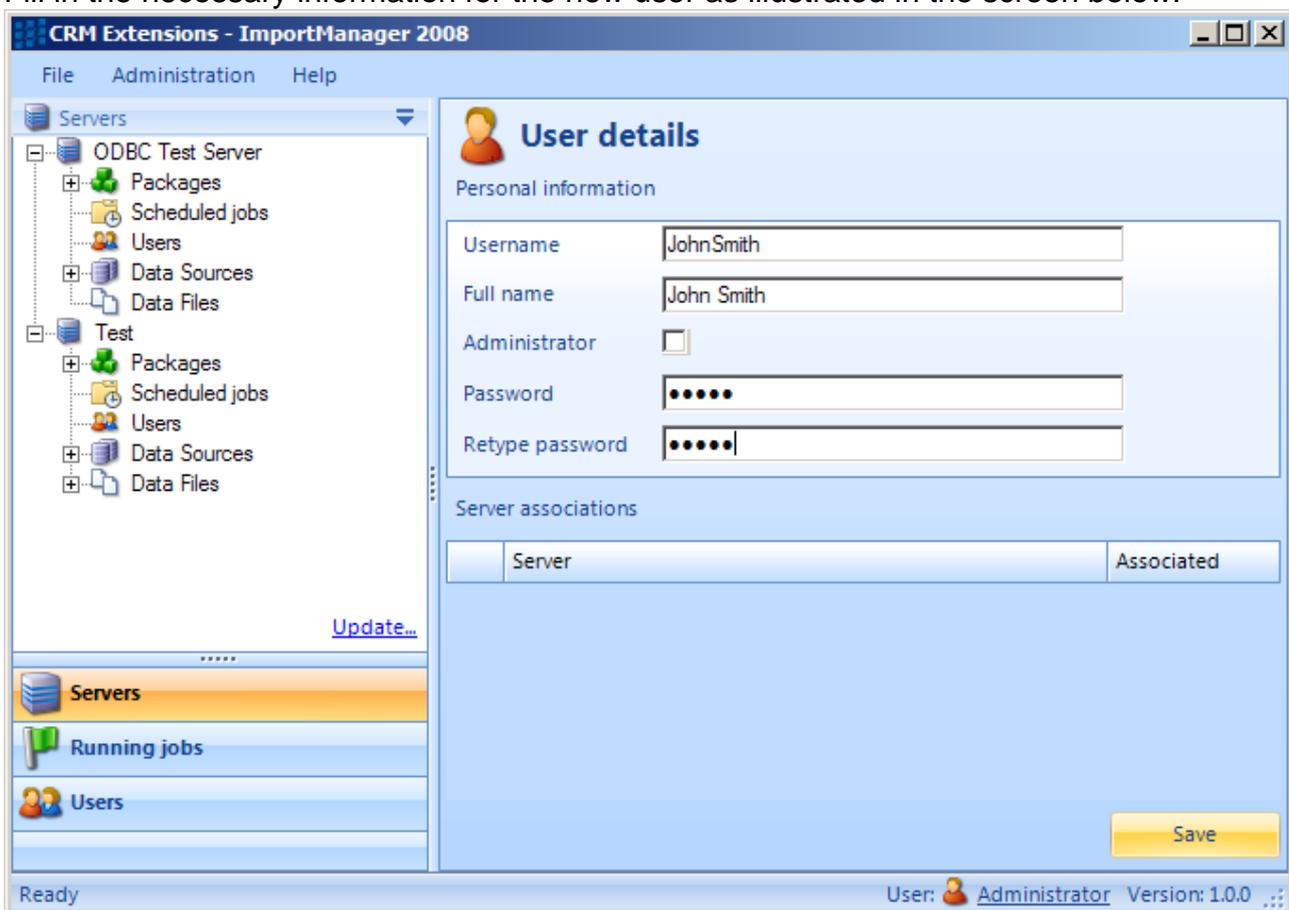
3. Save User.

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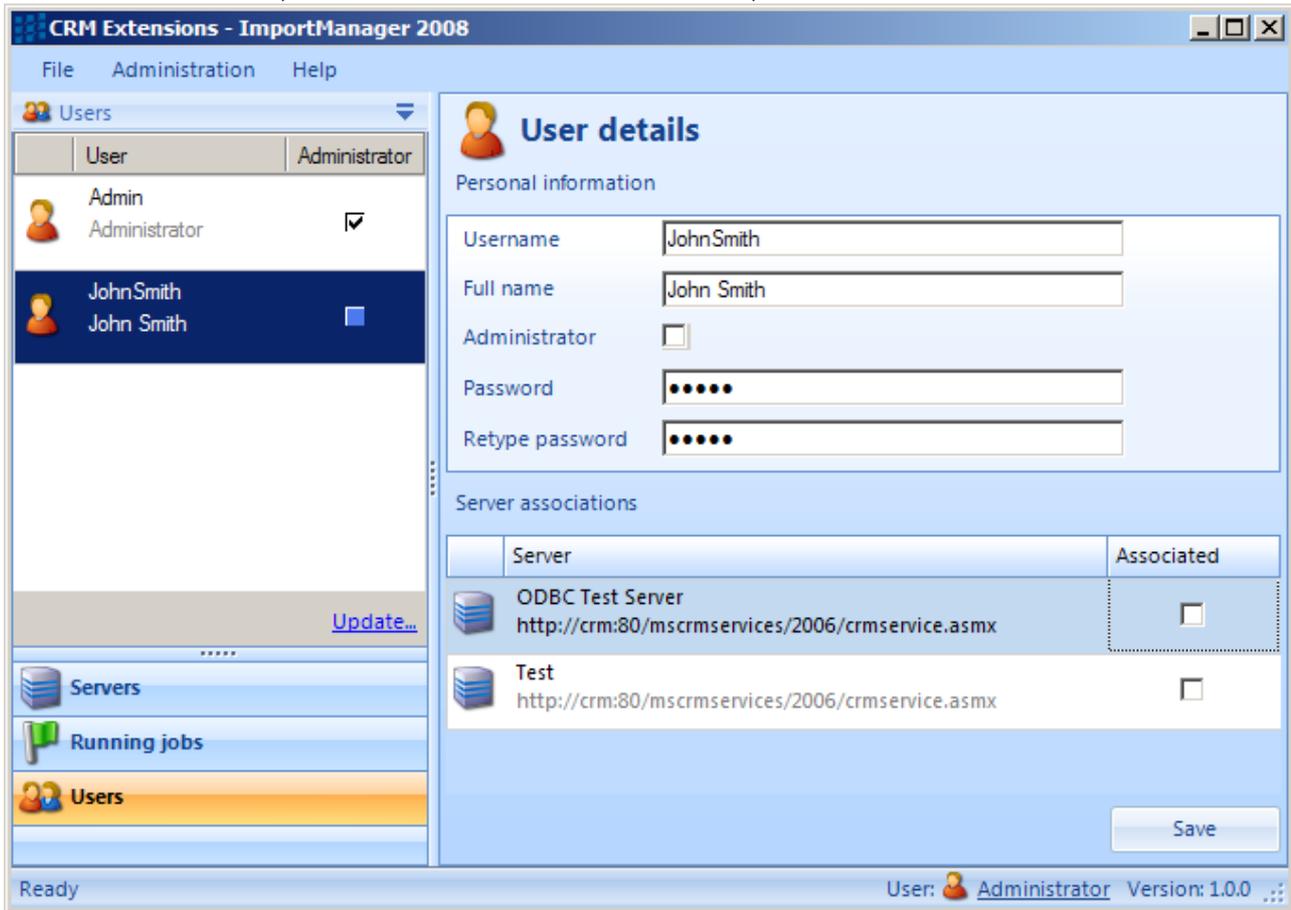
4. Associating Server.

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.
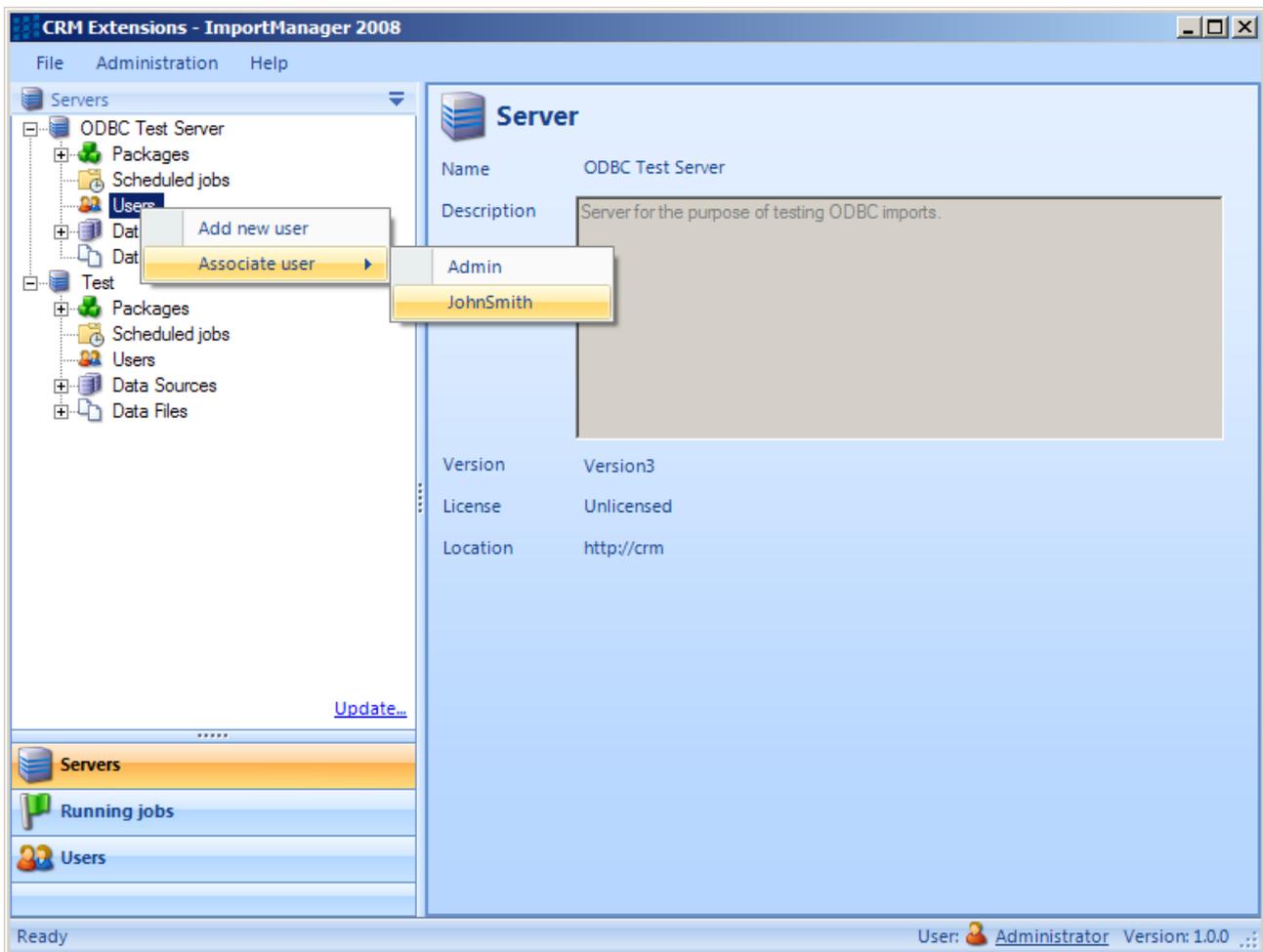
☐ **5. User Associated.**
When clicking *"Users"* in the bottom left corner and then selecting the new user, it is now possible to se
that the user has been associated with a server.
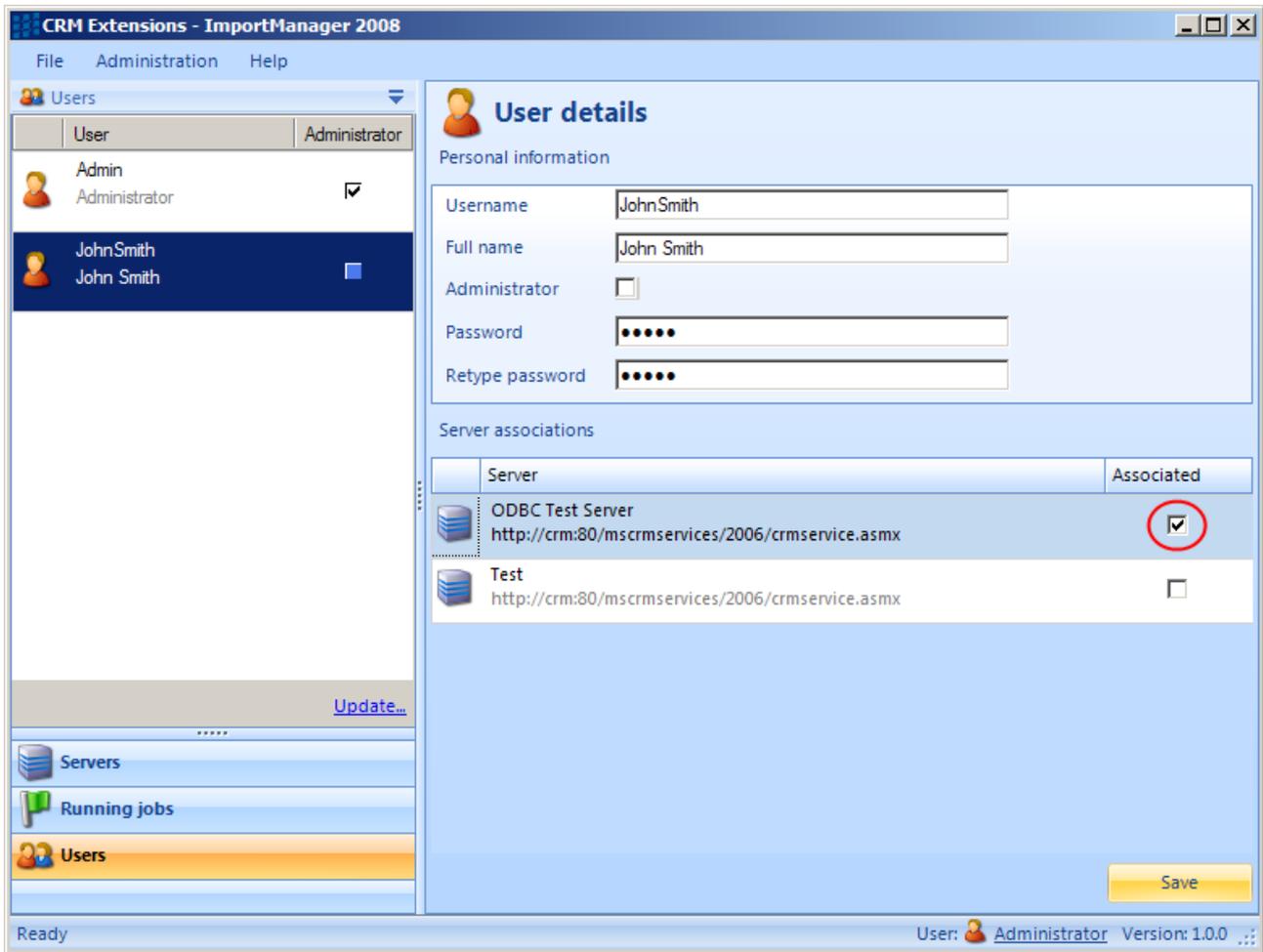
6. Log In.

Close down ImportManager 2008 and start it up again.

This time try to log in with your newly created user account.
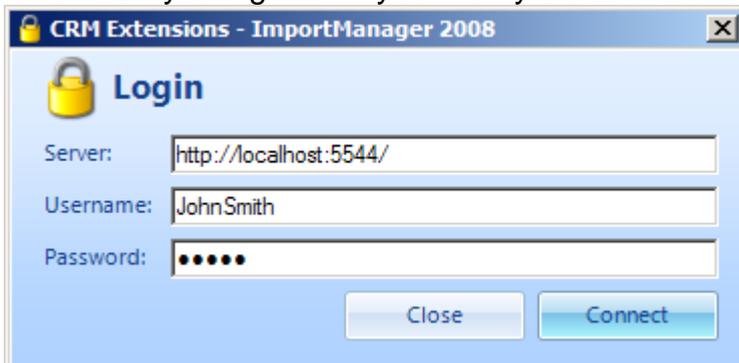
7. Check.

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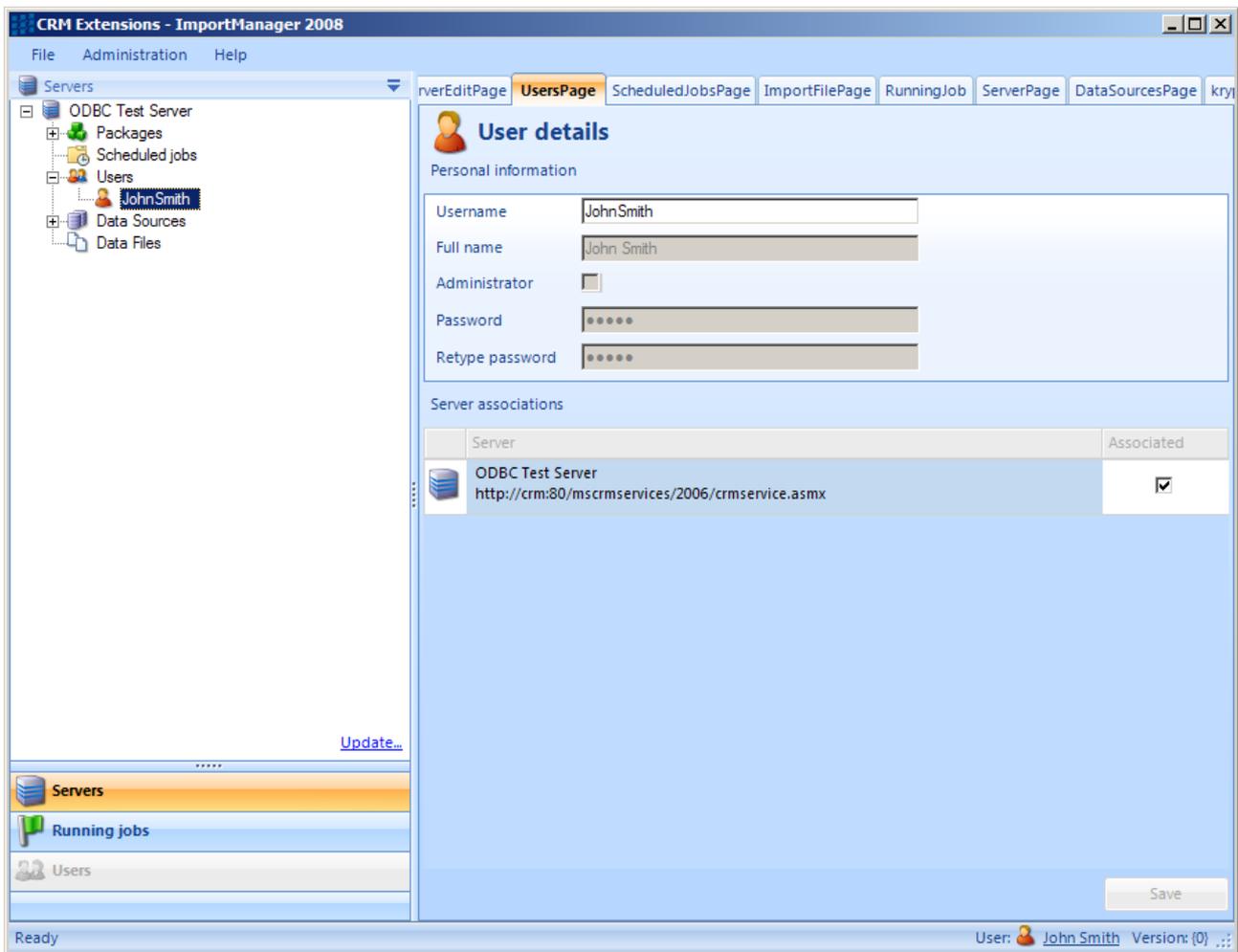
Simple Import

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"*.
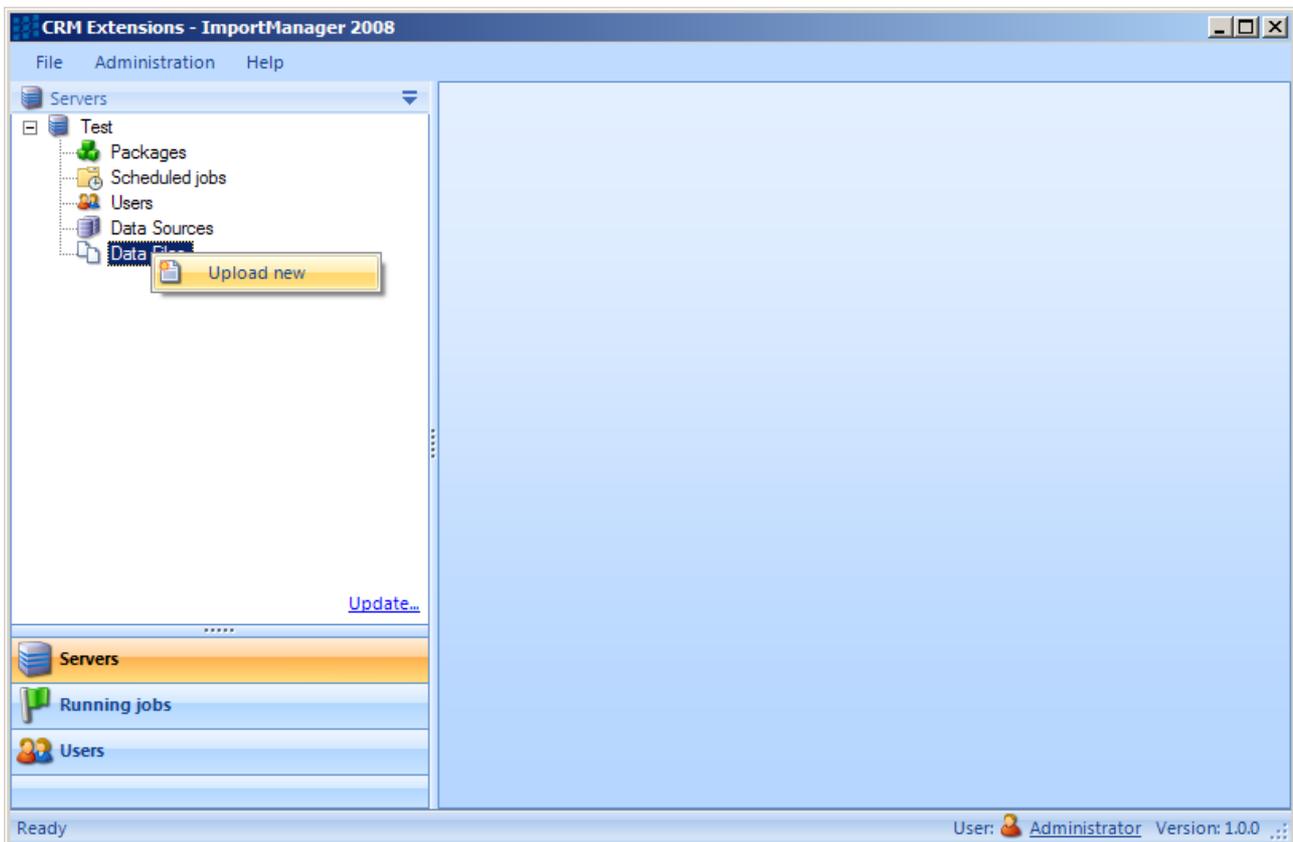
2. Browse to the file.

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.
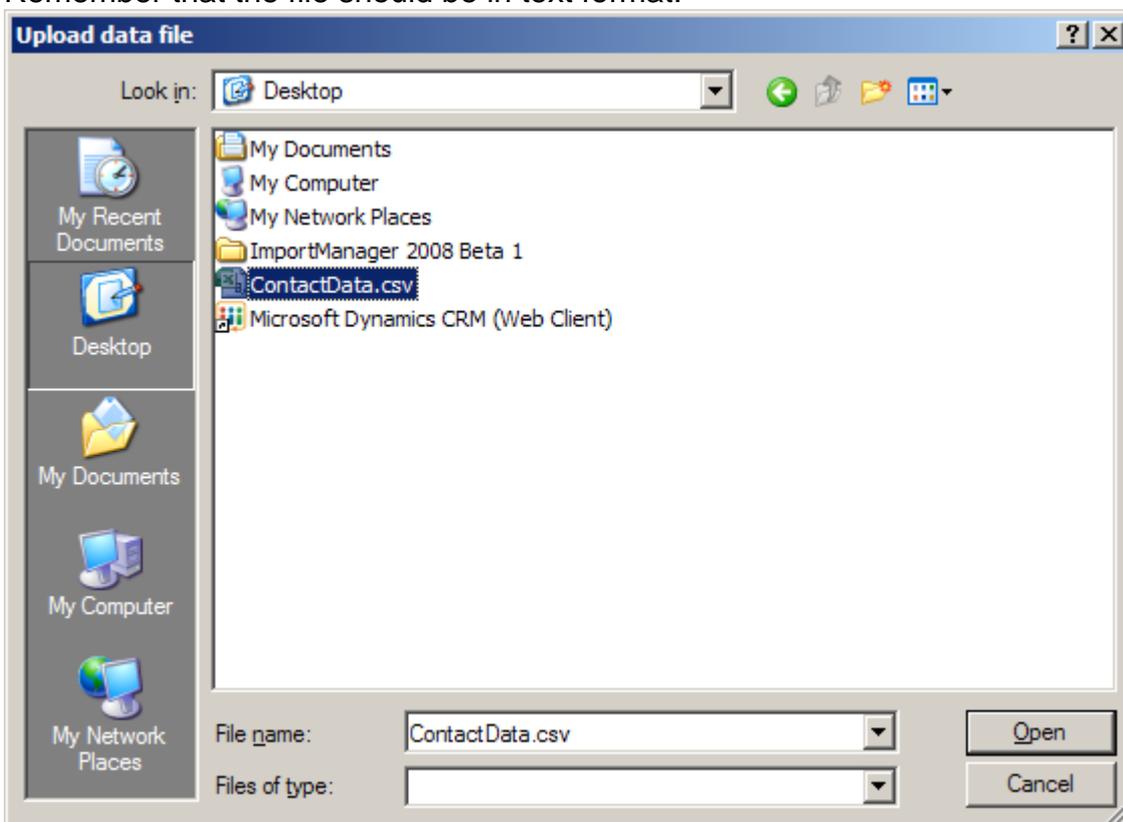
The tree will update, to show you that a file has been uploaded and if you right click the file, it is possibl
it or delete it.
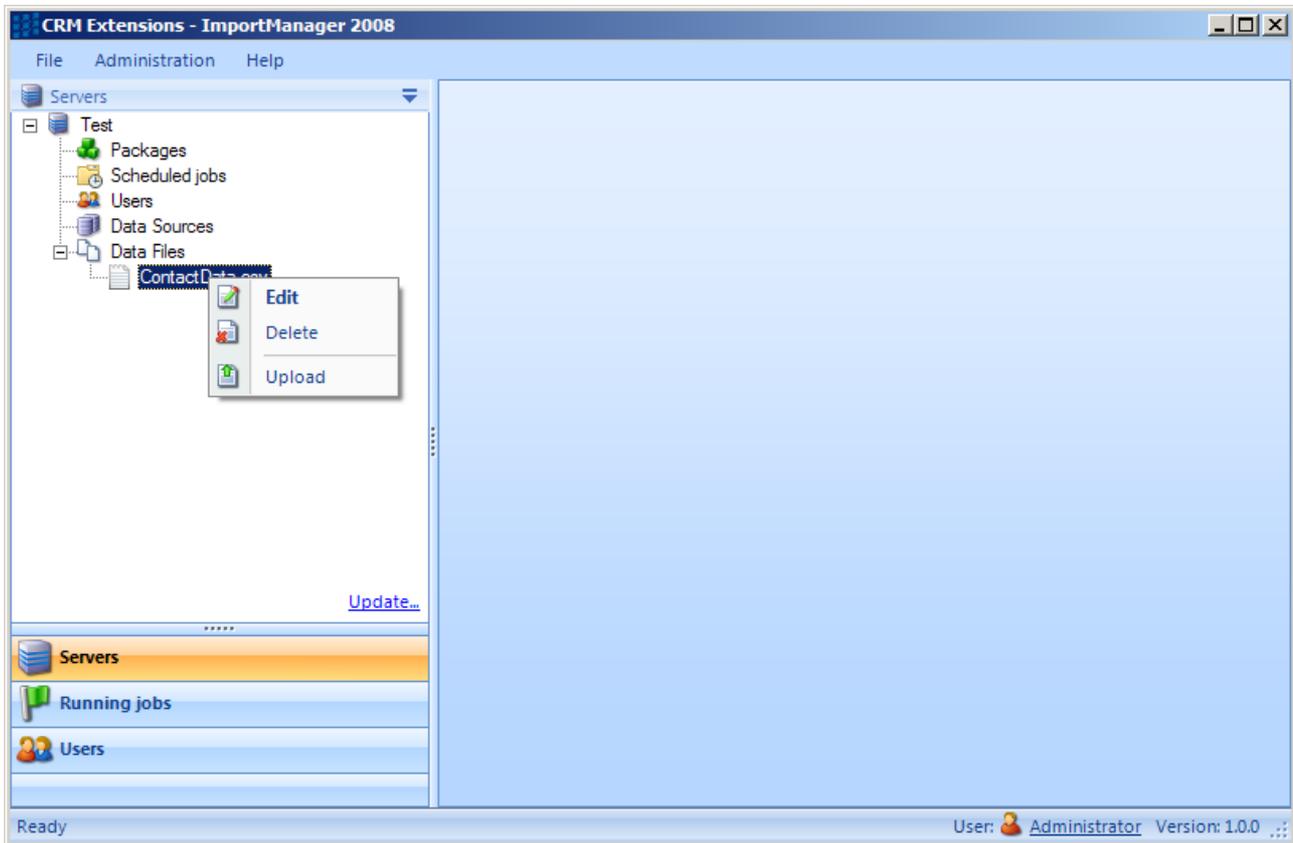
- ☐ **3. New Data Source.**
  Right click *"Data Source"* and select *"New"*.
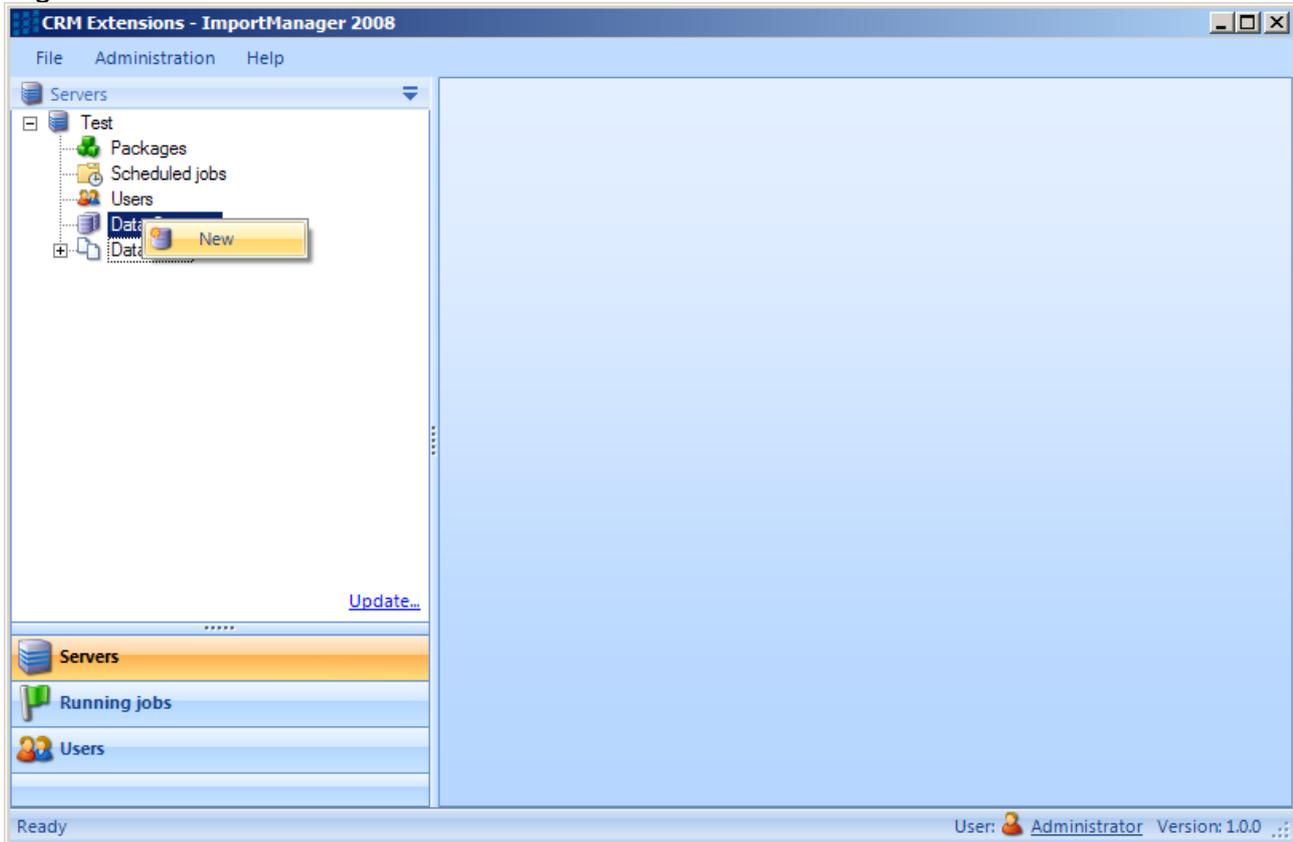
- ☐ **4. Data Source.**
  Give the Data Source a name and select the *"Text file Datasource"* from the list.
  Click *"Create"*.
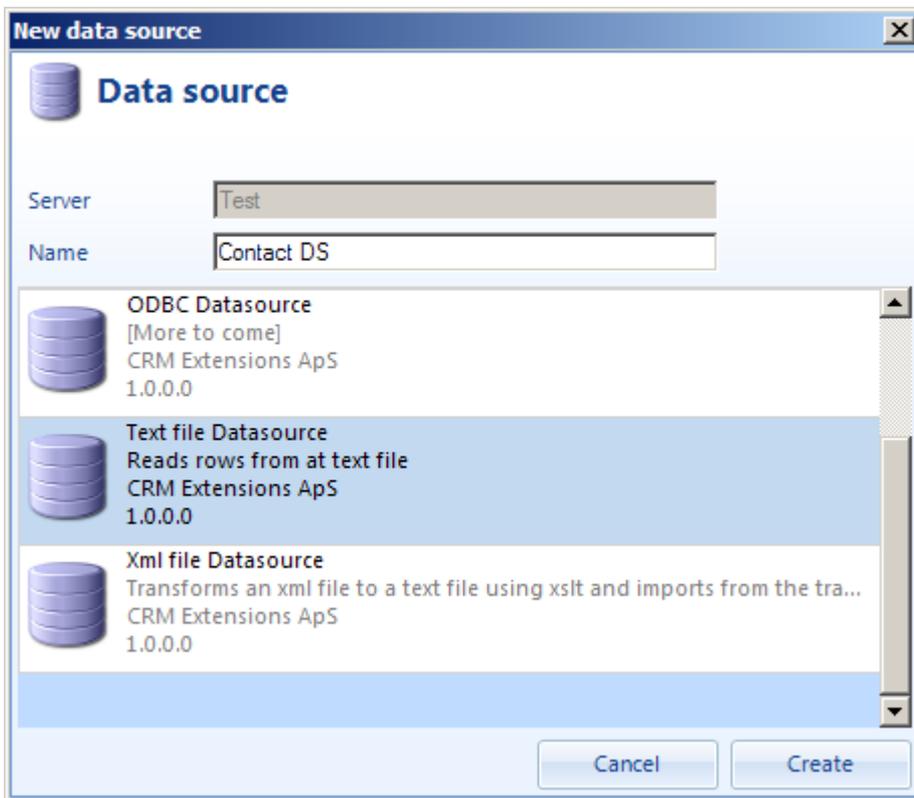
- 5. **Text File Settings.**
  Make sure that the settings for the chosen file are correct. You can select a file under the file name drop down menu, select whether this file has a header row or not, choose the Separator, if there's any quotation and finally what encoding the file uses.
  The Separator 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.
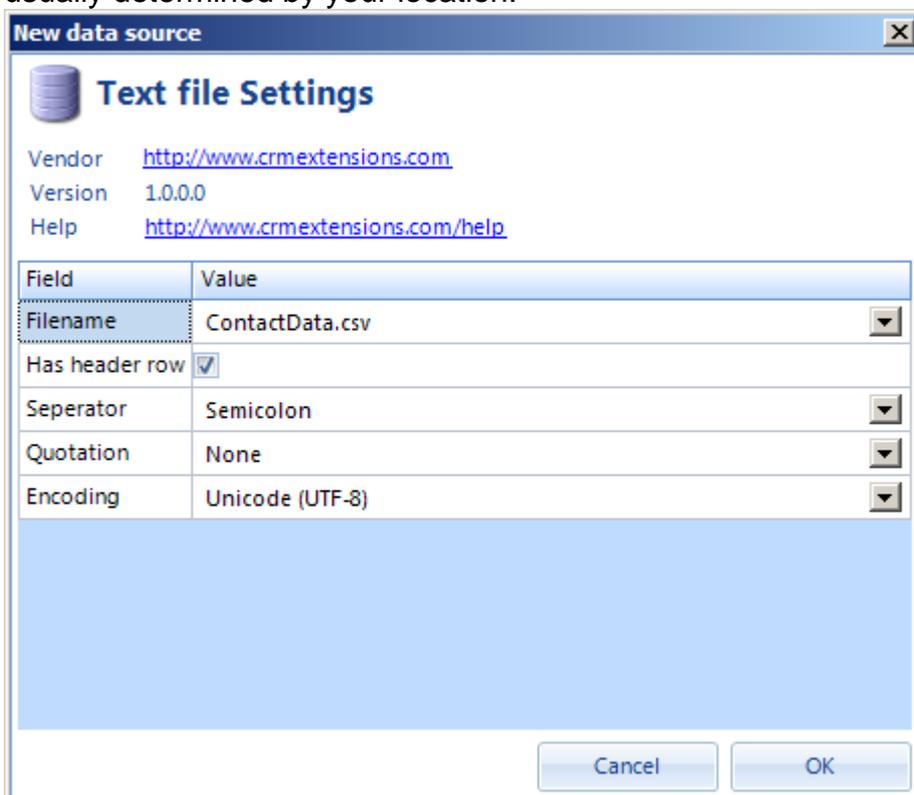
Click *"OK".*

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.
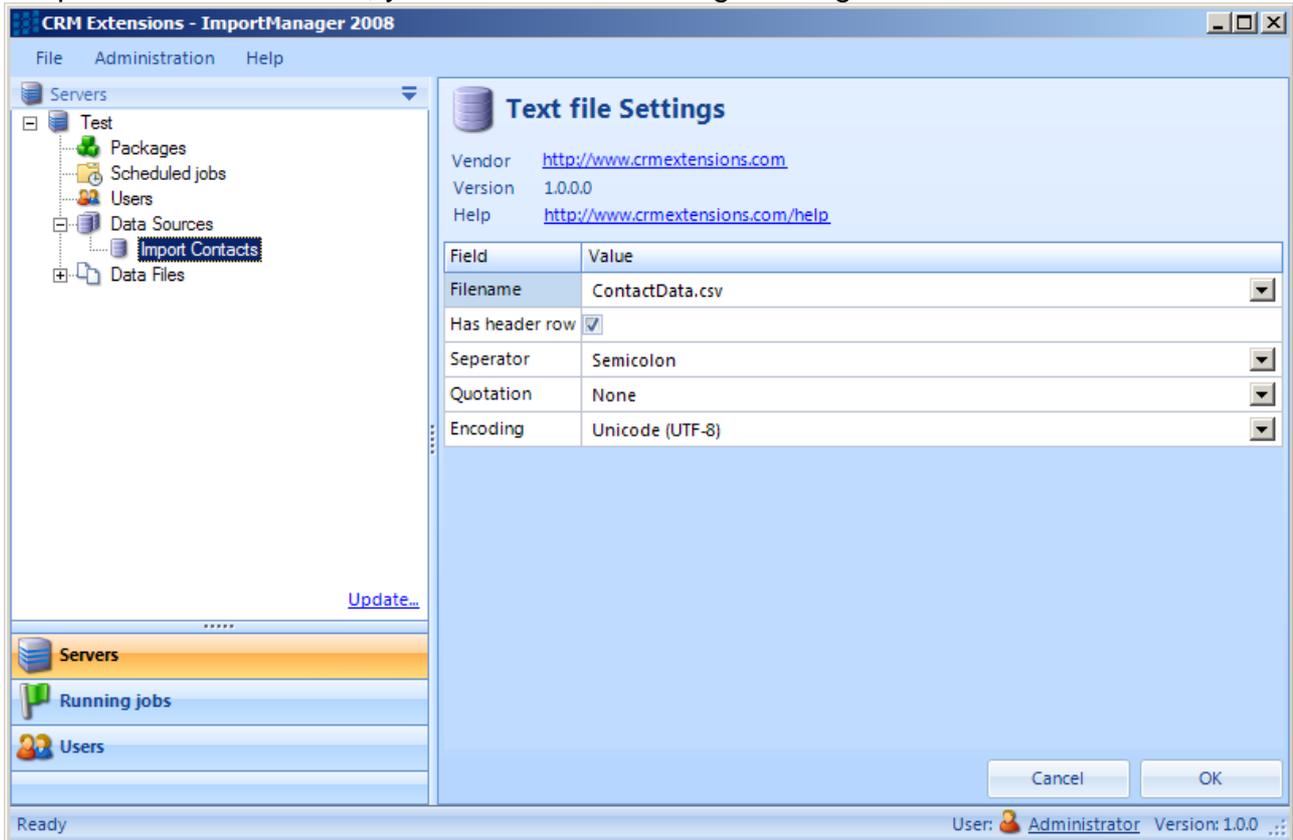
Setting up the Package:

7. New Package.

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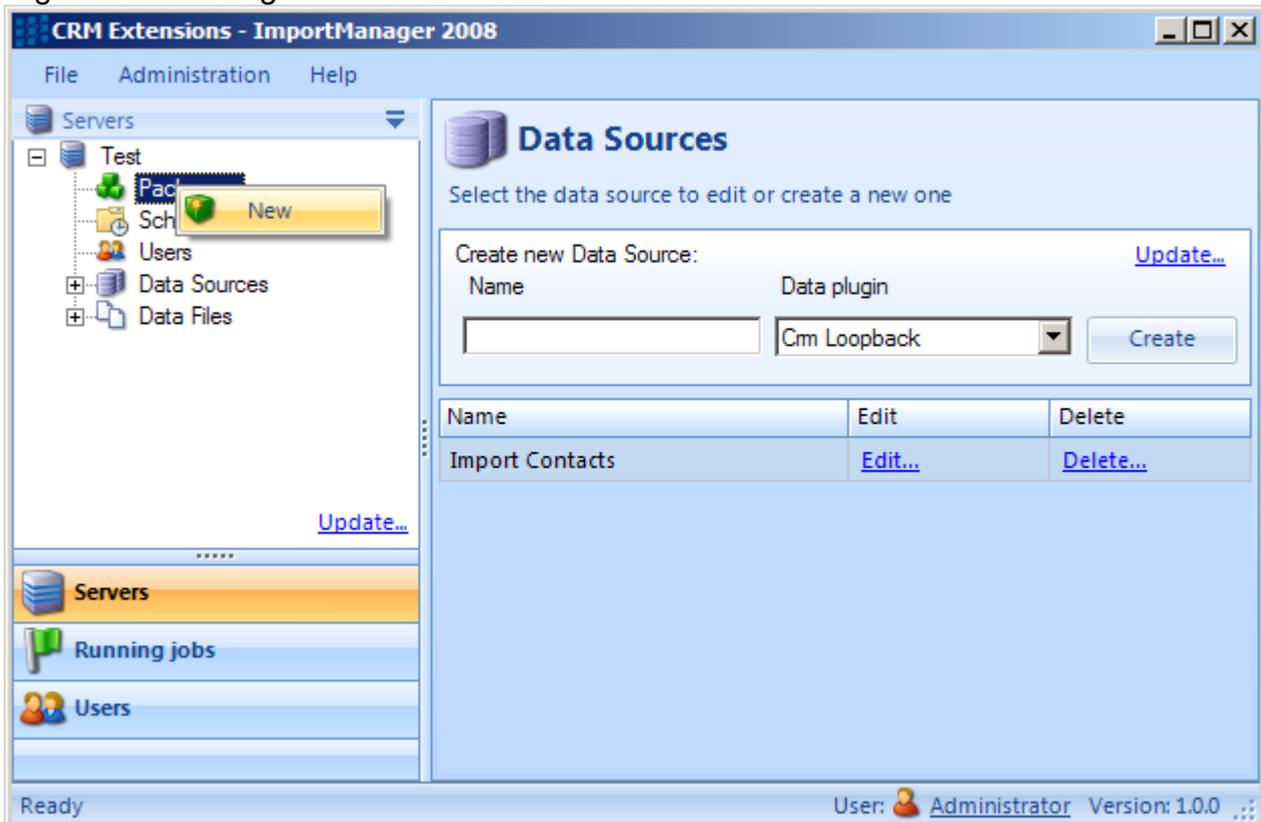
8. Overview.

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.
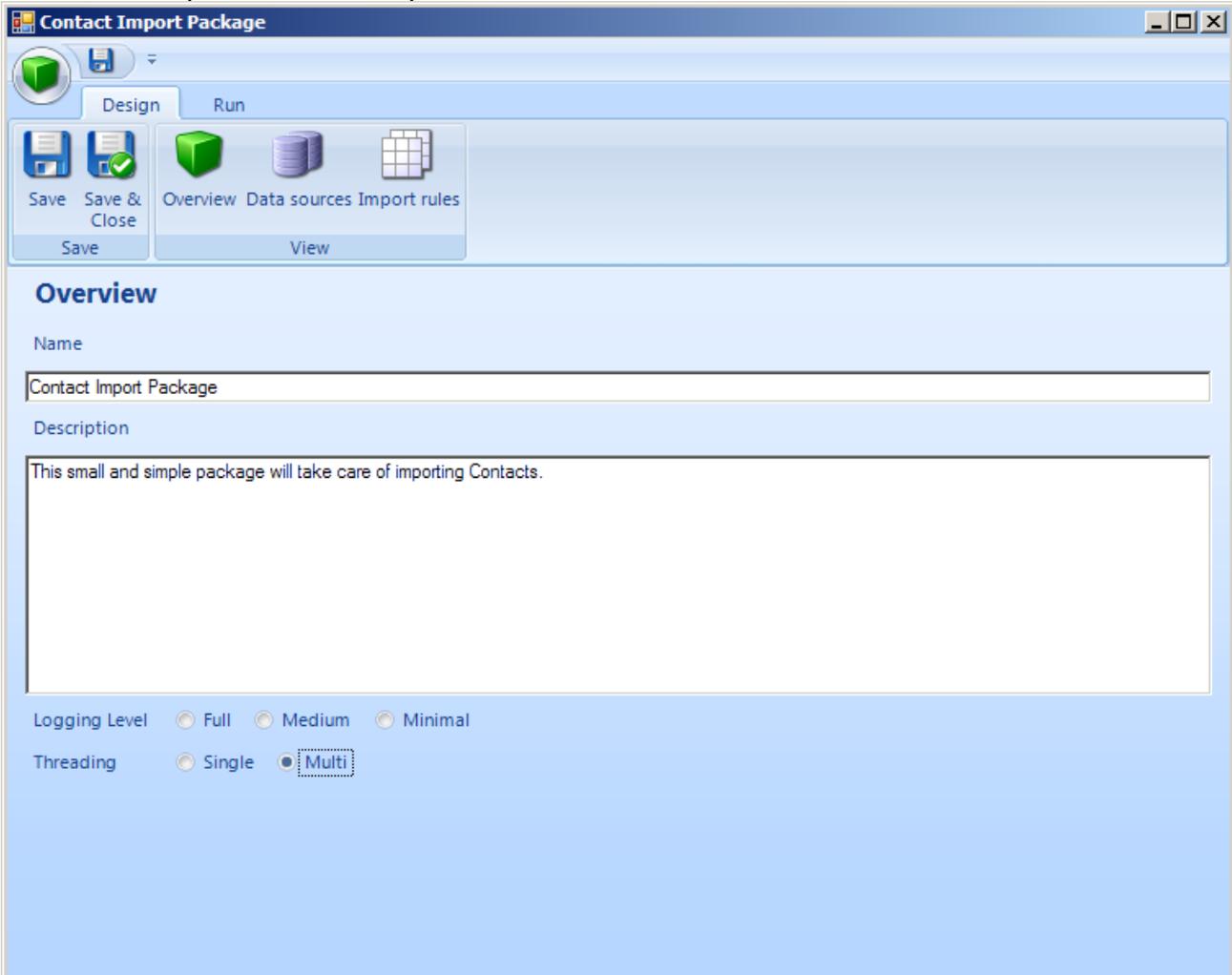
9. Data Sources.

Click Data Sources.

Notice that the Data Source created previously is listed here, so we don't need to create one.
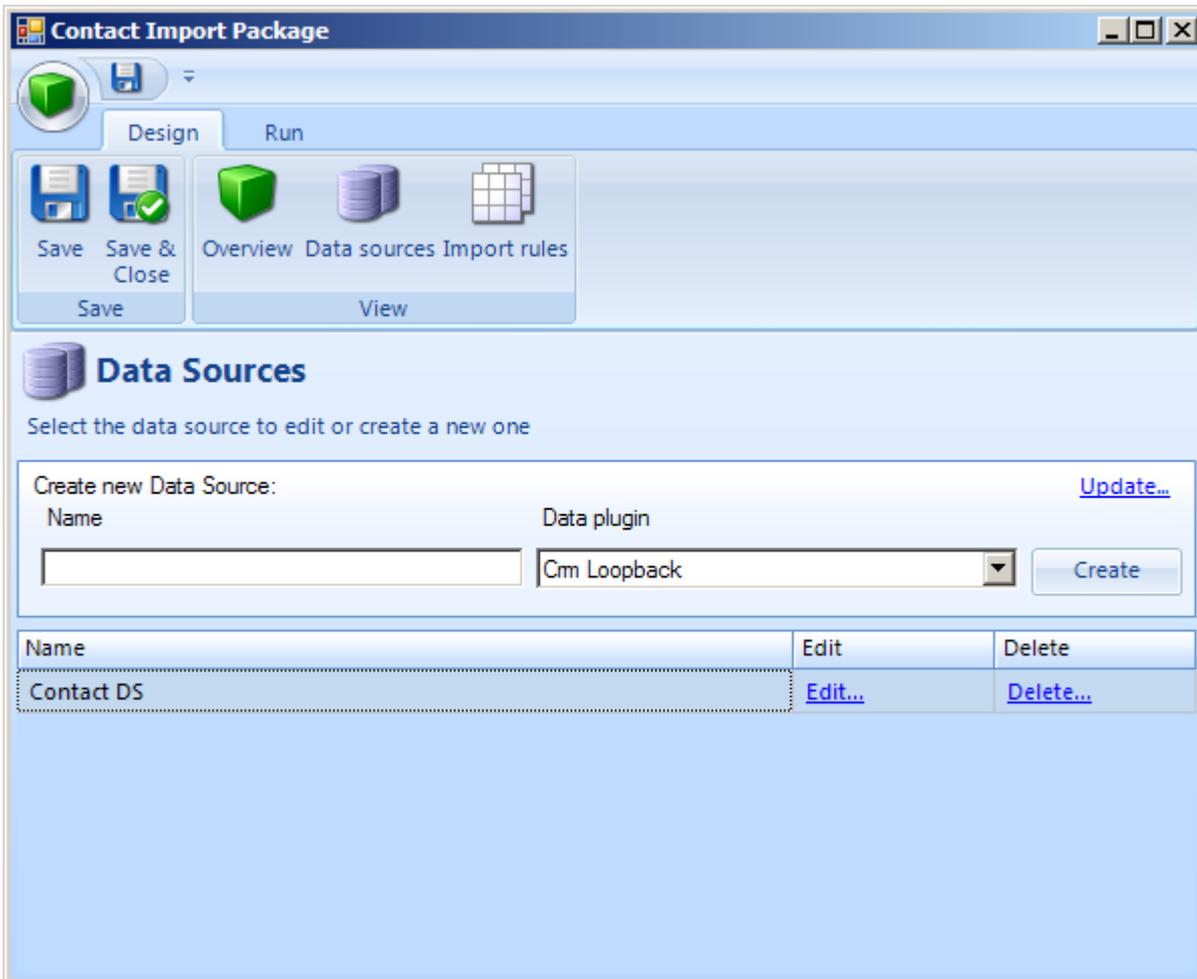
If there are more than one Data Source in the list, the selected Data Source will be blue as opposed to white.
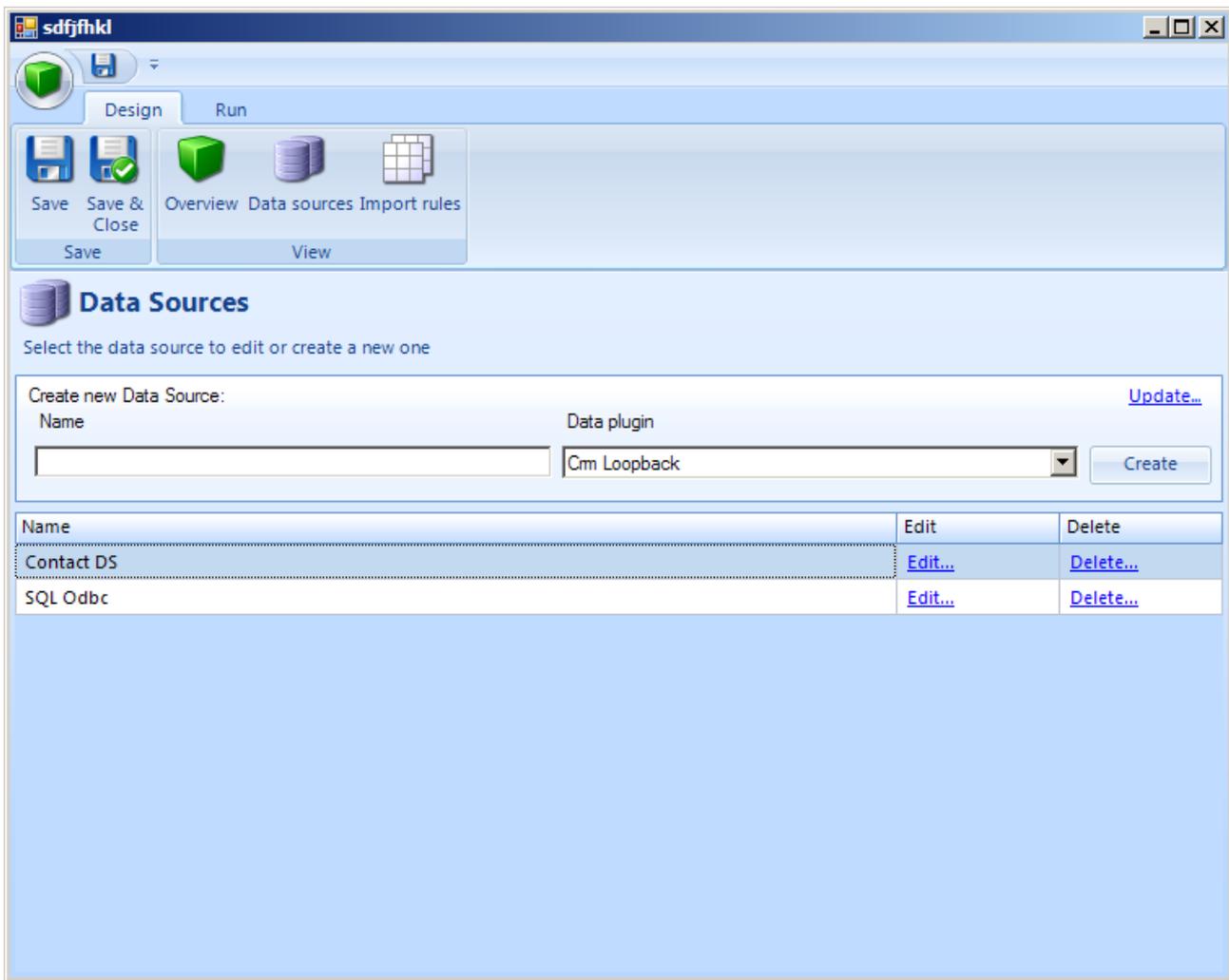
Setup Import Rule:

⊟ **10. 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"*.
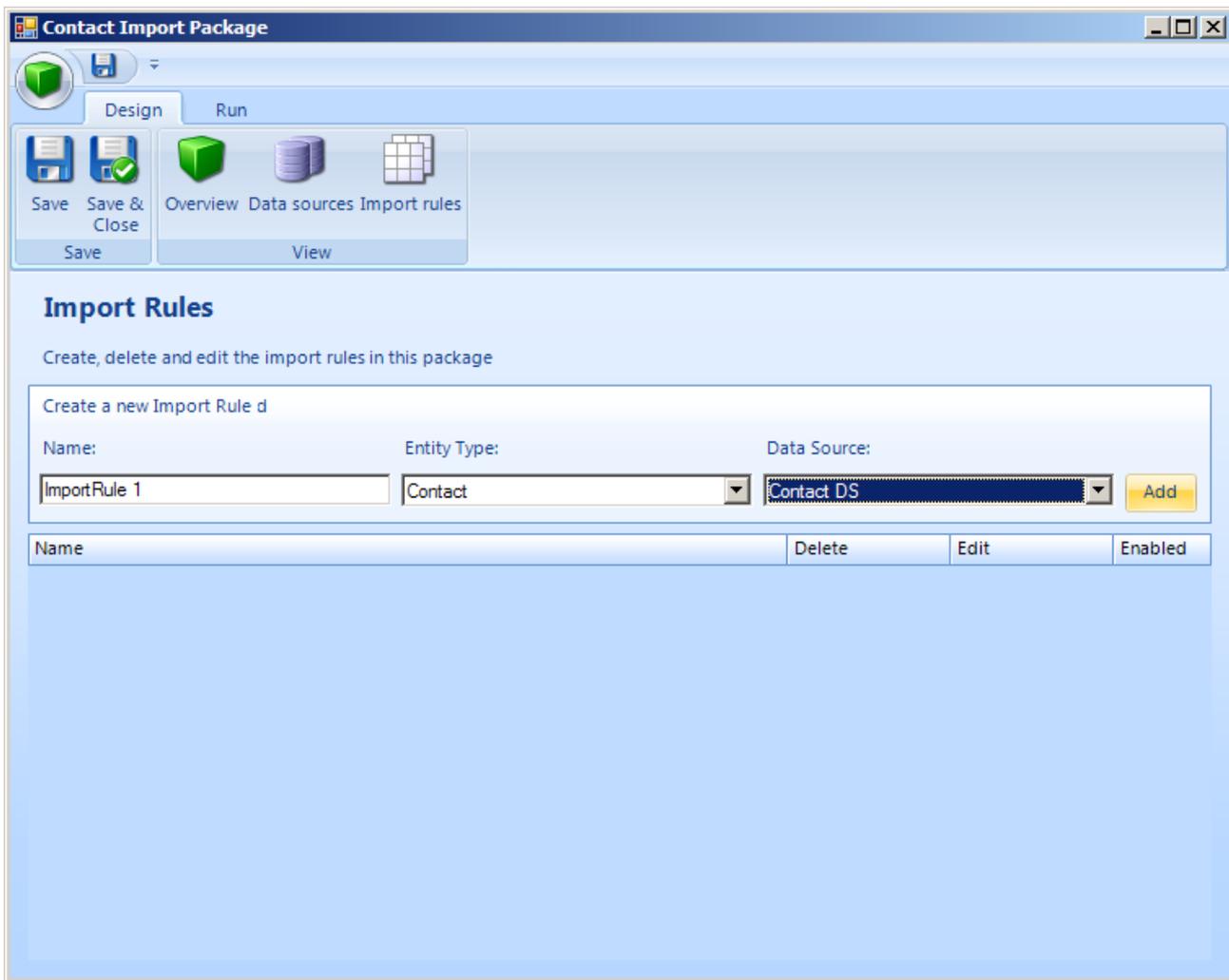
11. Overview.
A pop up window will provide you with some basic information about the Contact, with default actions, which you can change to suit your needs.
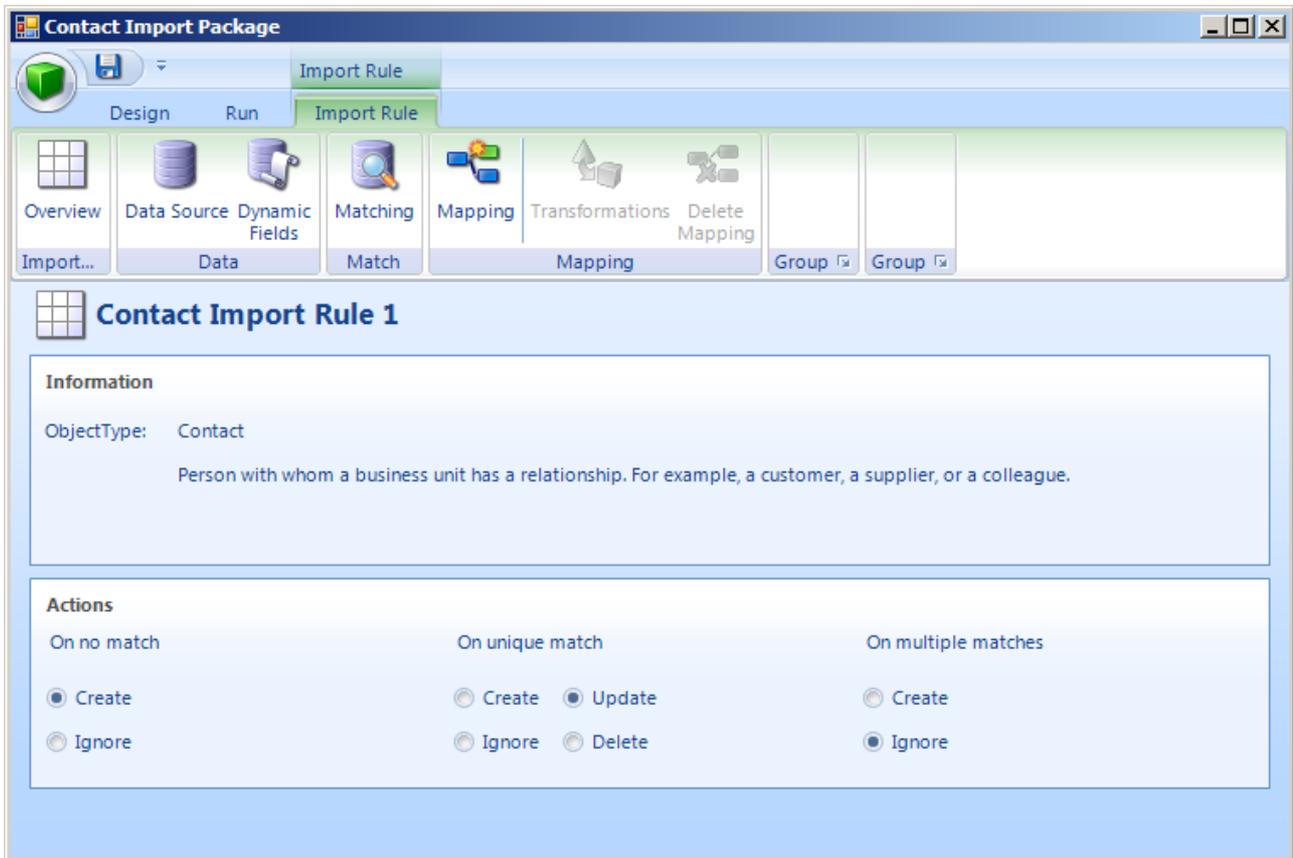
☐ **12. Matching.**
It's possible to change settings for the Data Source here, as well as create Dynamic Fields, but for this simple import we will go straight to matching. Click the *"Matching"* icon in the menu bar in the top.
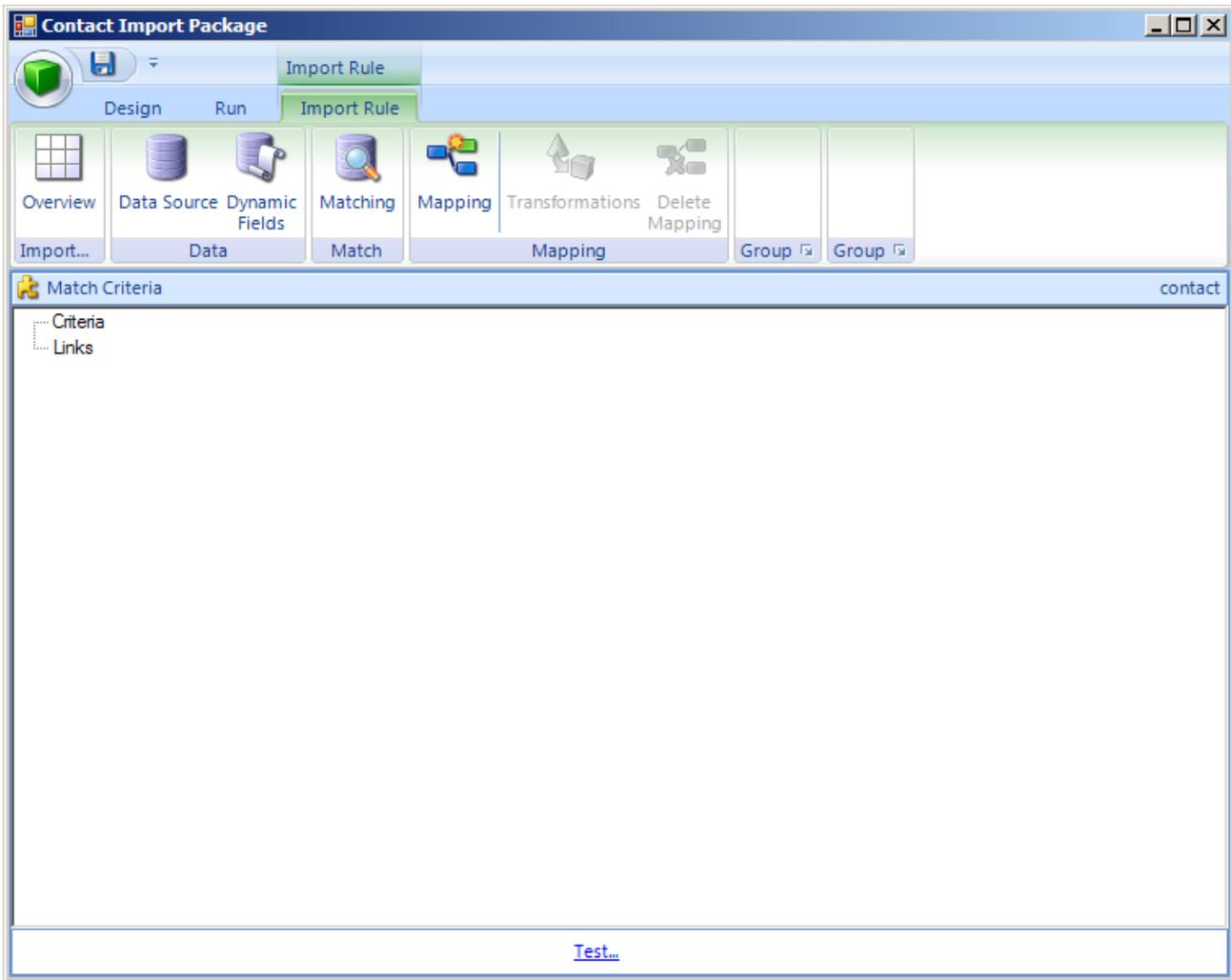
- **13. Add Filter.**
  Right click *"Criteria"* and select *"And"*.
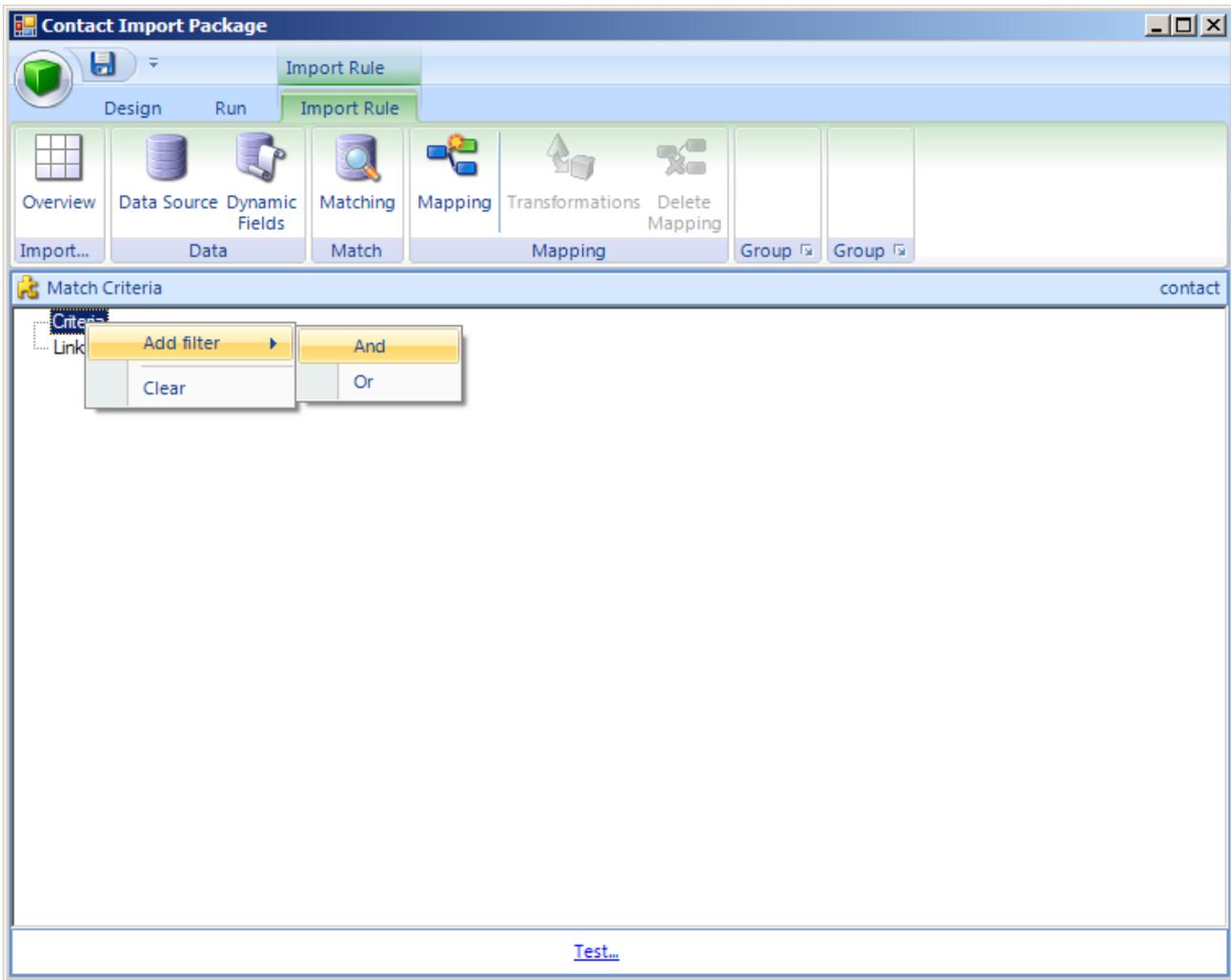
☐ **14. Add Conditions.**
Right click the newly created filter and select *"Add Condition..."*.
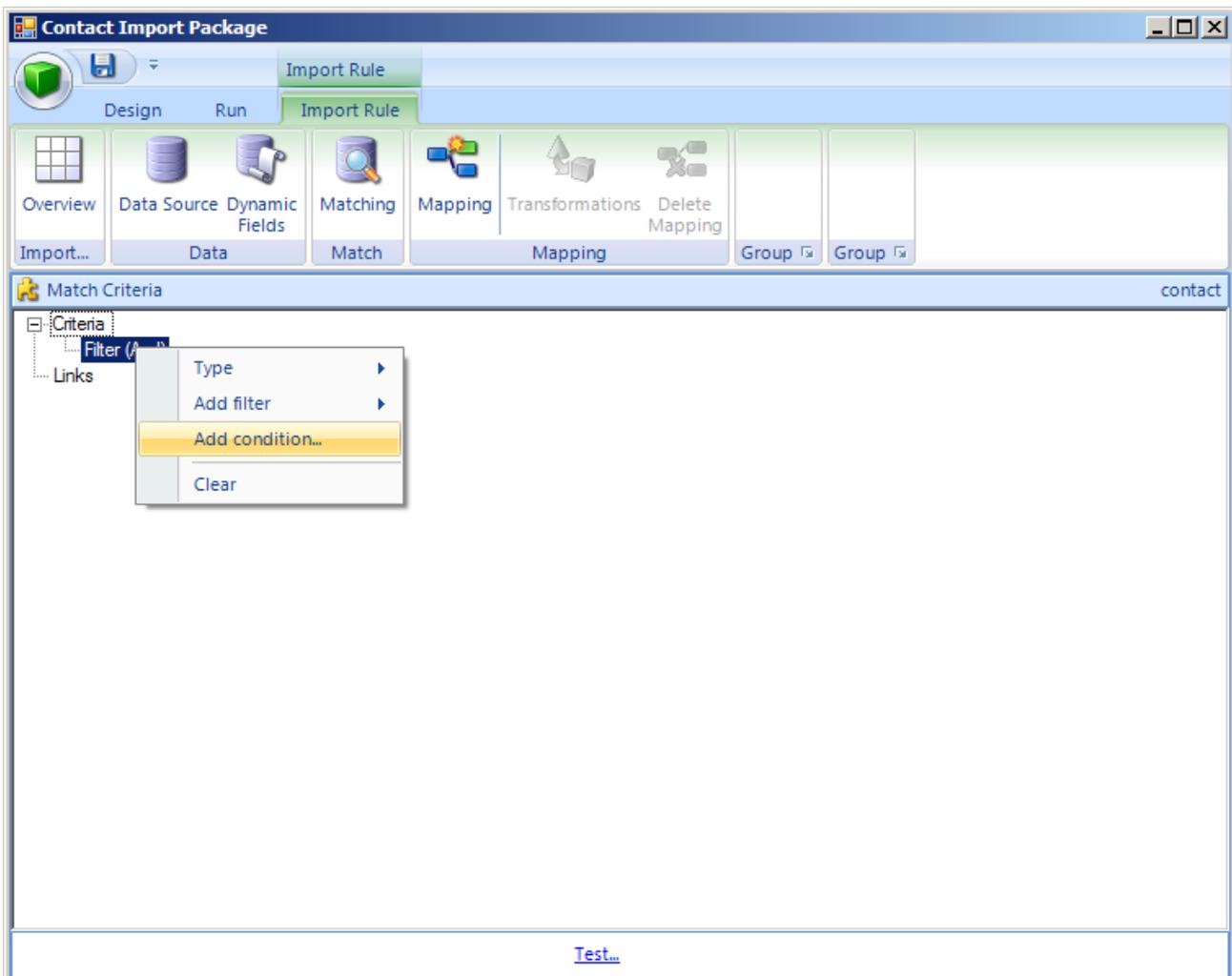
Select an *"Attribute"*, a *"Condition"* and a *"Datasource"* to match and click *"OK"*. For our example we used the *"First Name"* attribute from the contact entity, the *"Equal"* condition and *"First"* from the data source as seen in the screen below.
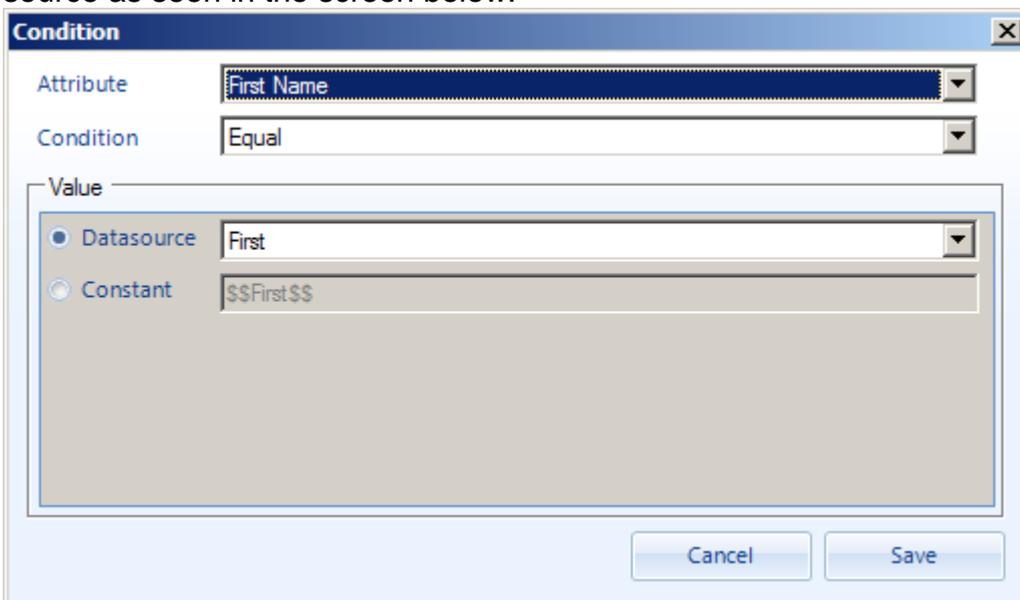

Repeat this procedure, but this time map *"Last Name"* to *"Last"* as seen below.
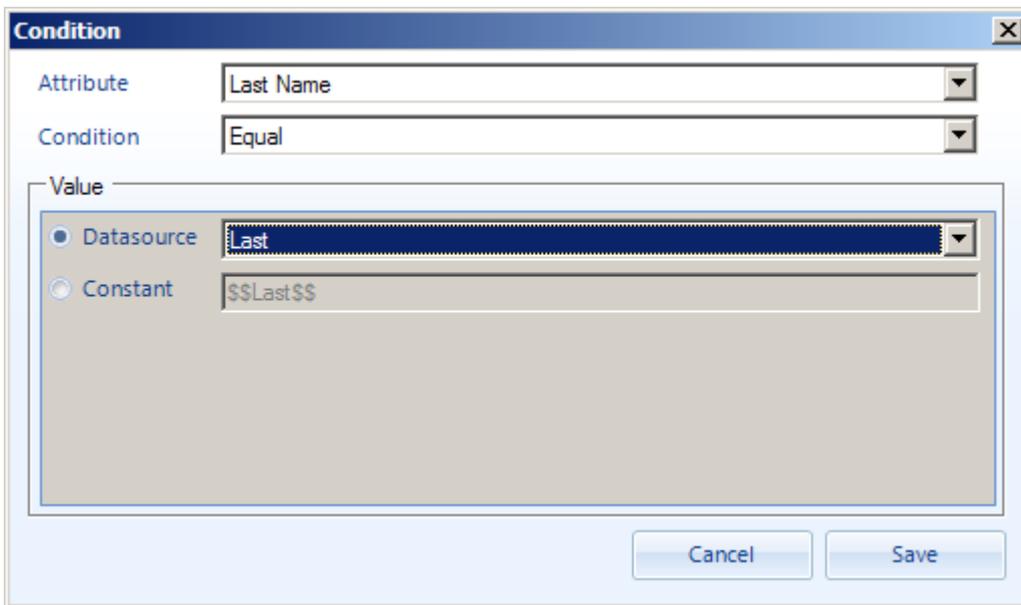
You've now created a match criterion that states: if first name and last name match the record, there is match.
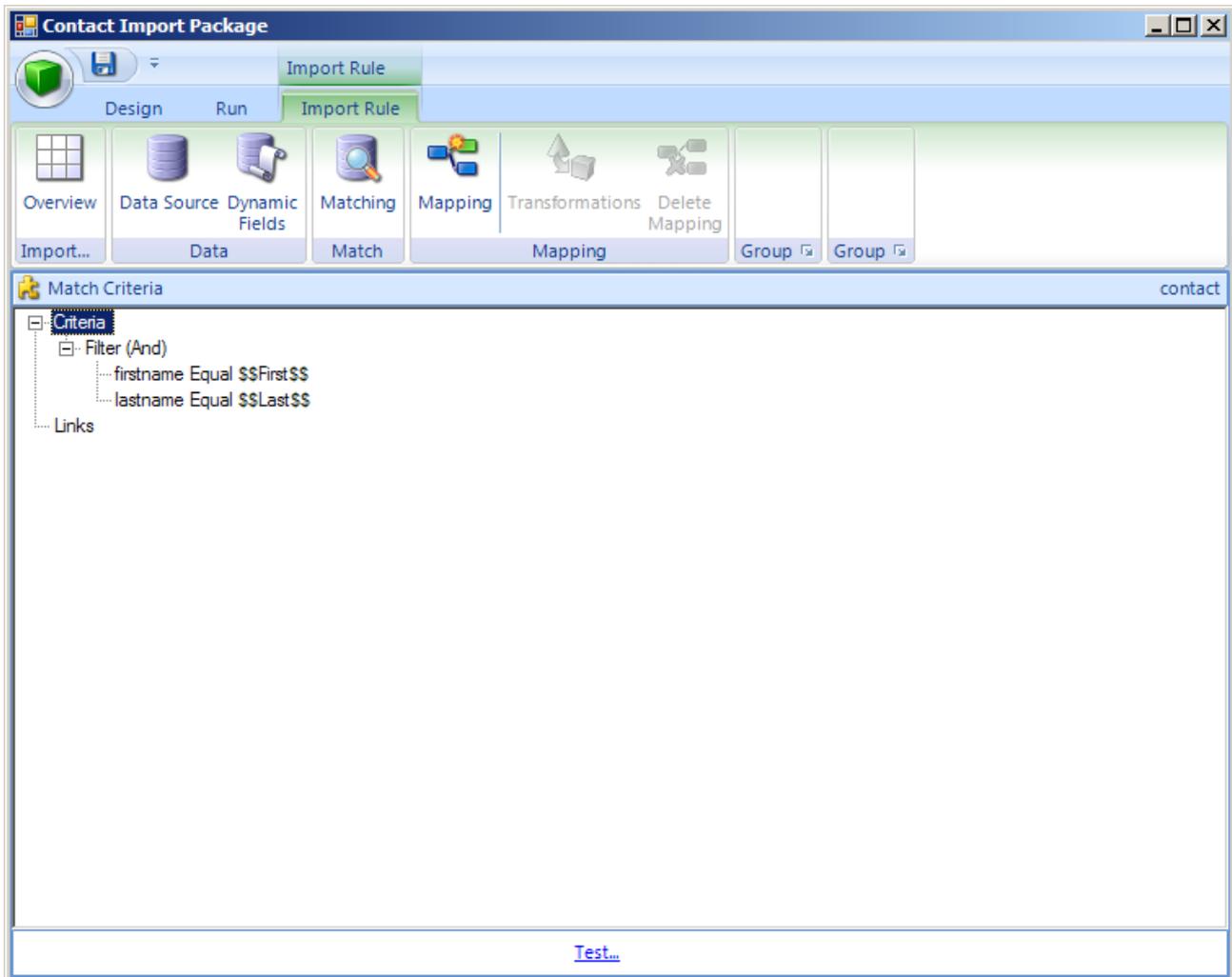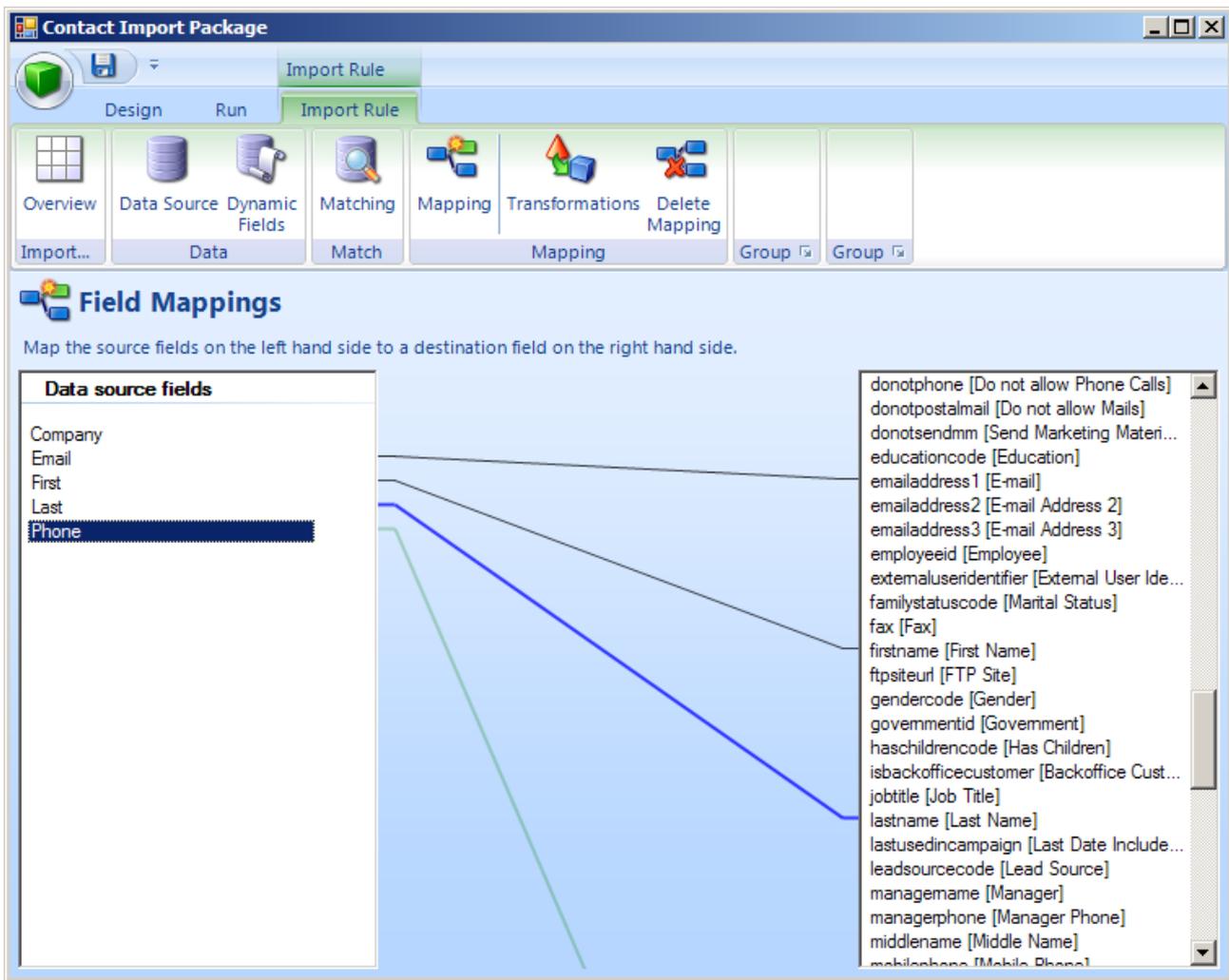

▱ **15. Field Mapping.**
In the field mappings window you will have to columns of fields. On the left side the fields found in the data source and on the right, the fields found in the chosen CRM entity.
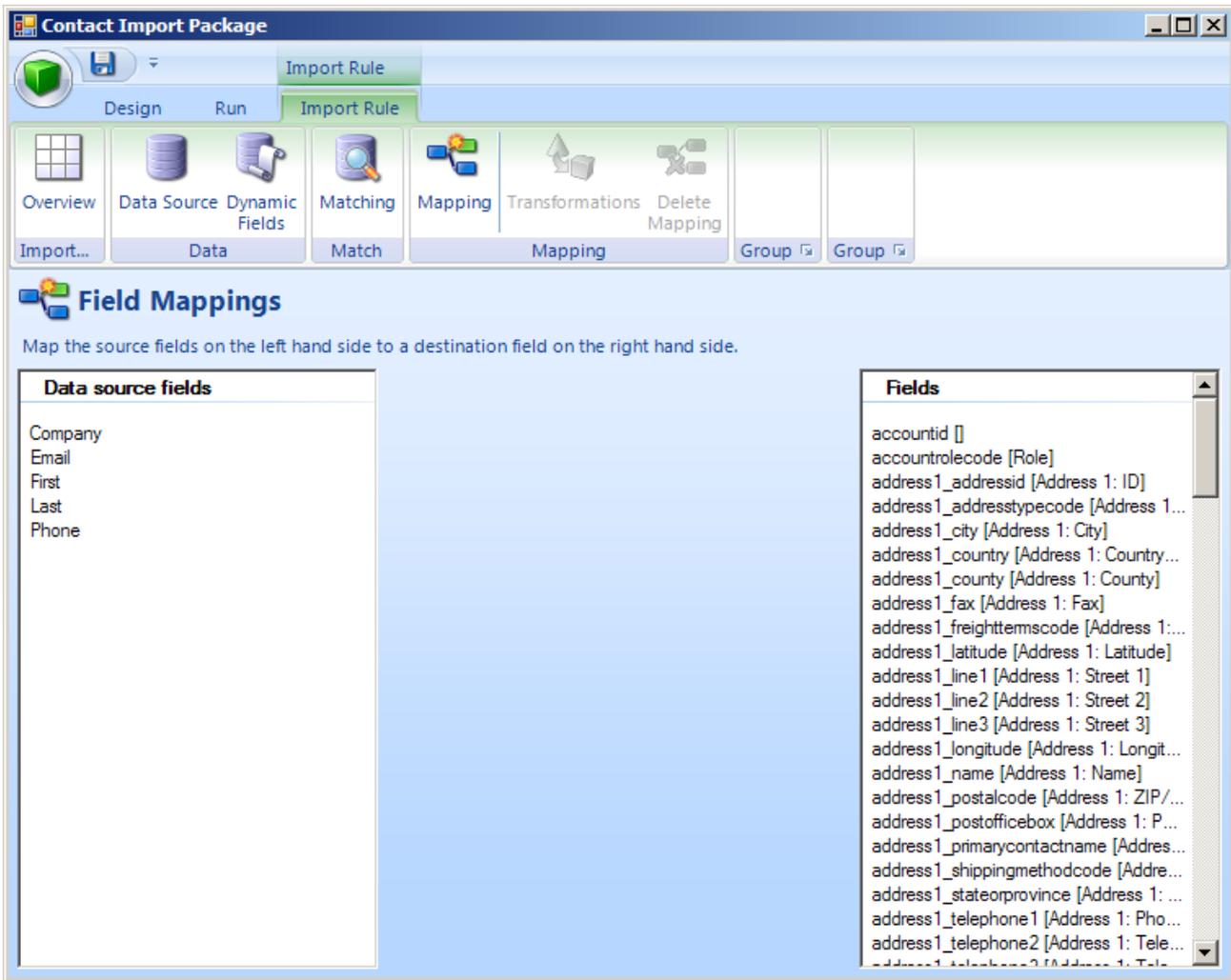
It is now a simple task to drag the fields on the right to their corresponding field on the left to create field mappings like seen in the screen below.

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

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.
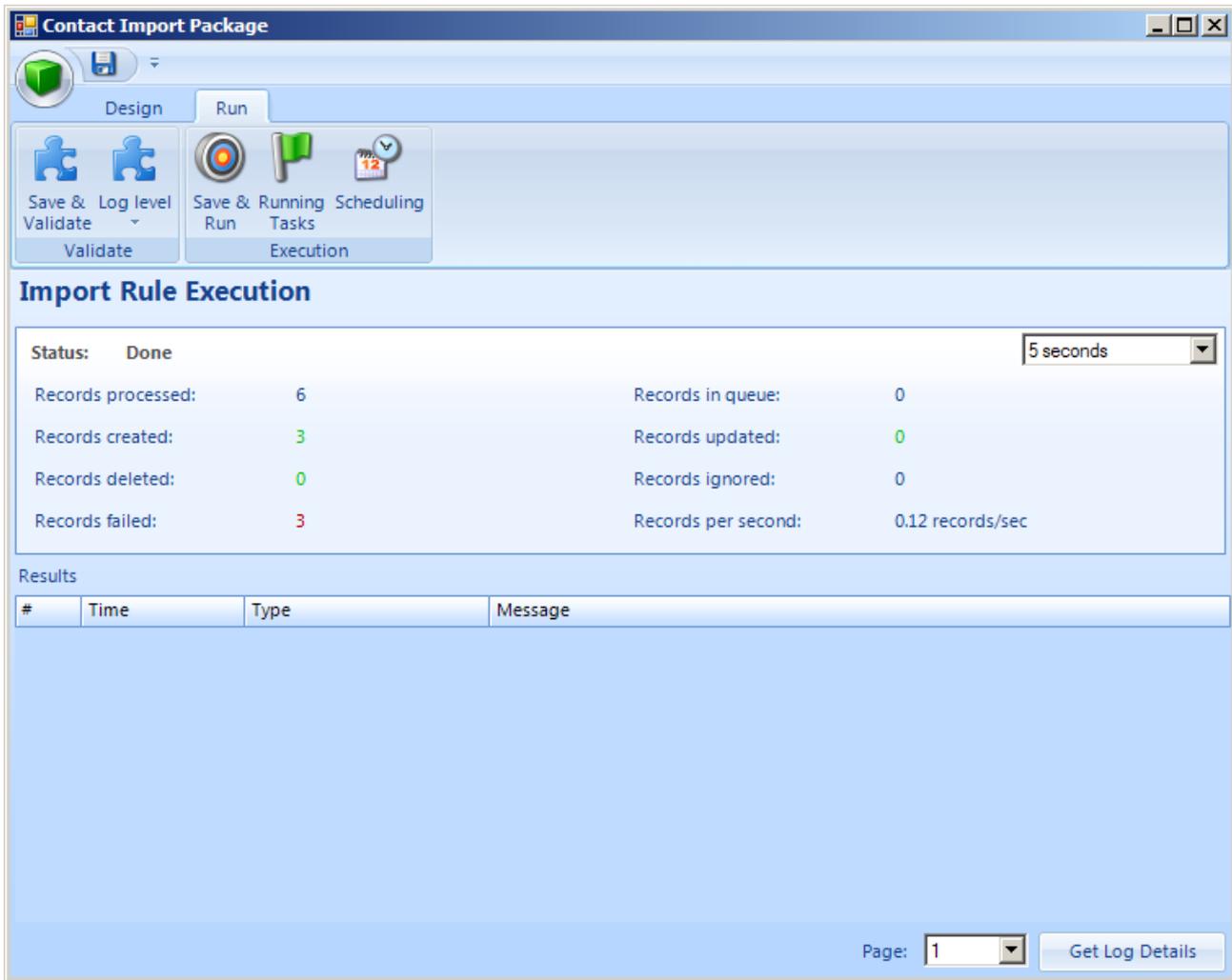
□ 17. Done.

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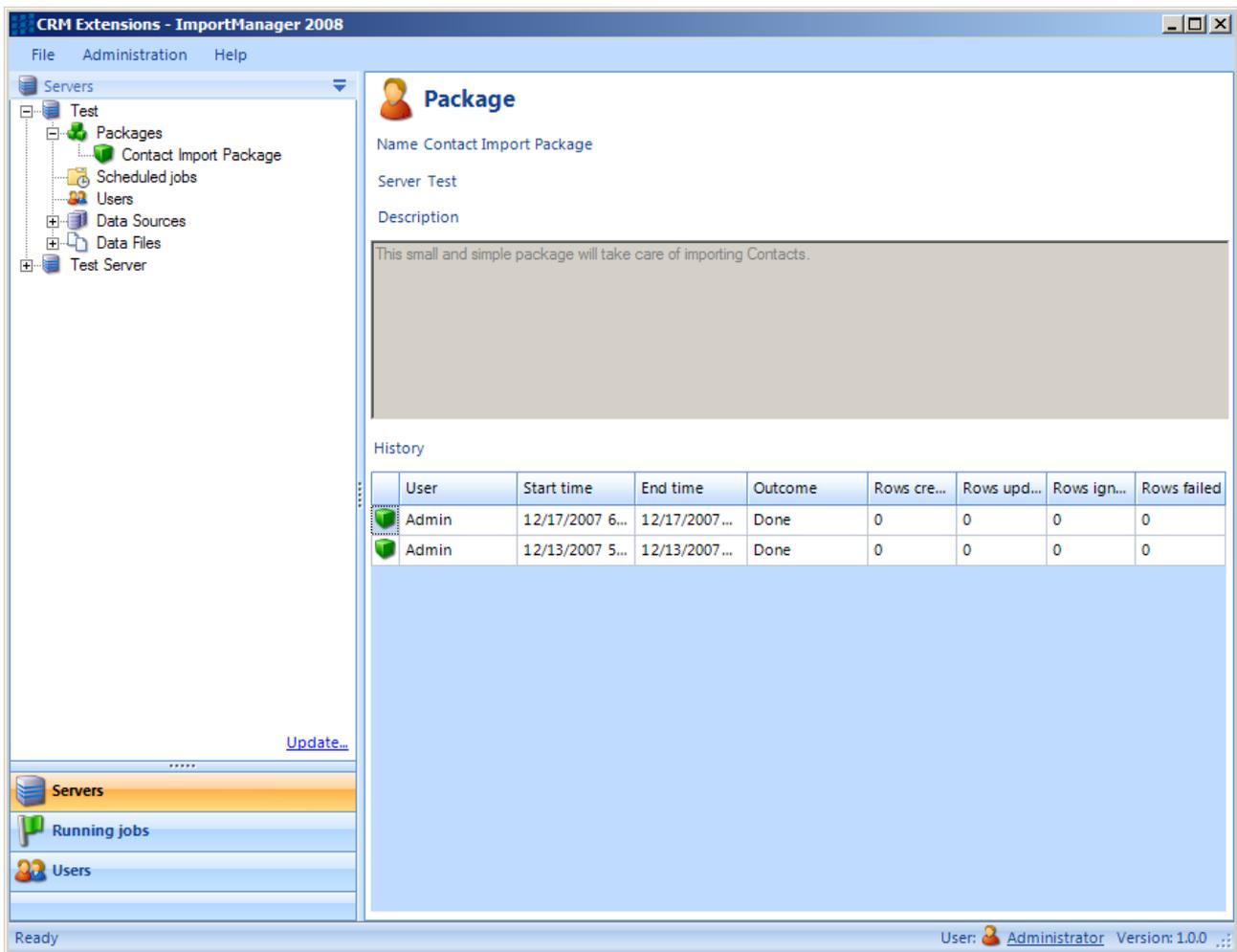
ODBC Source

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.
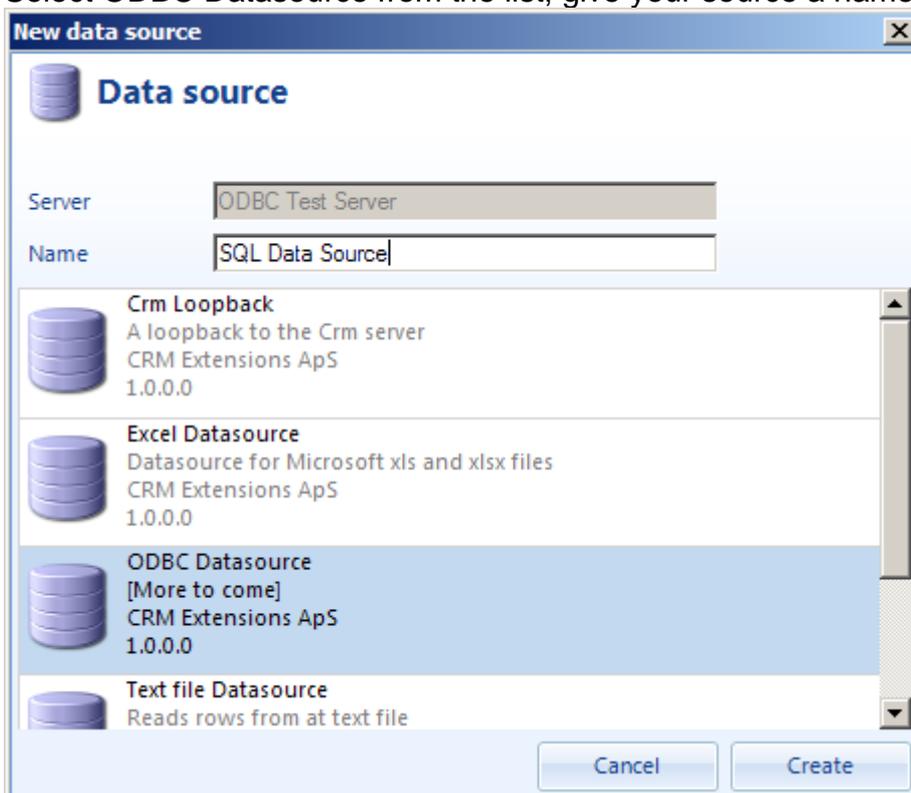
Setting up the Data Source:

☐ **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.
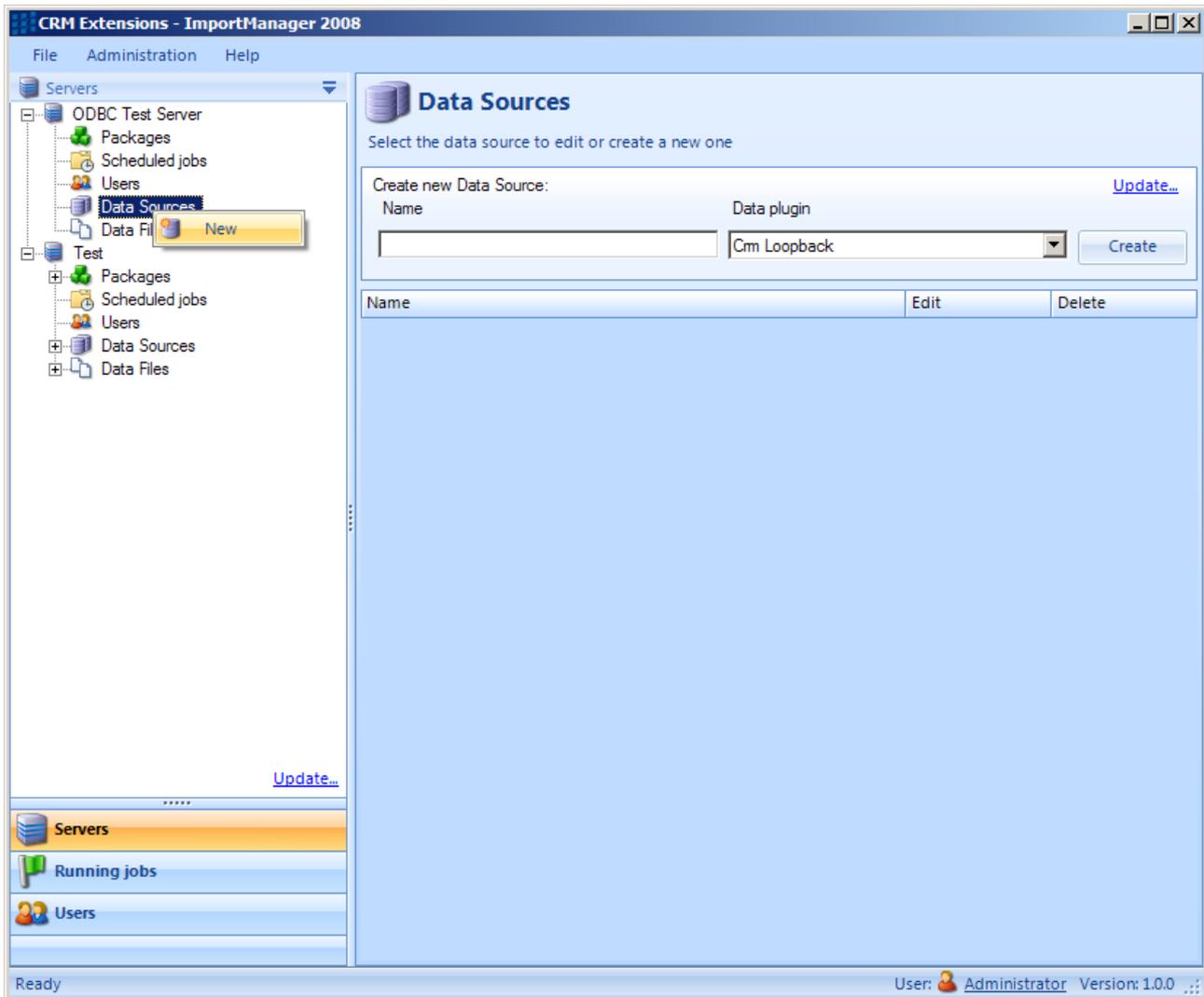
2. **Data Source Selection.**
   Select ODBC Datasource from the list, give your source a name and click *"Create"*.

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
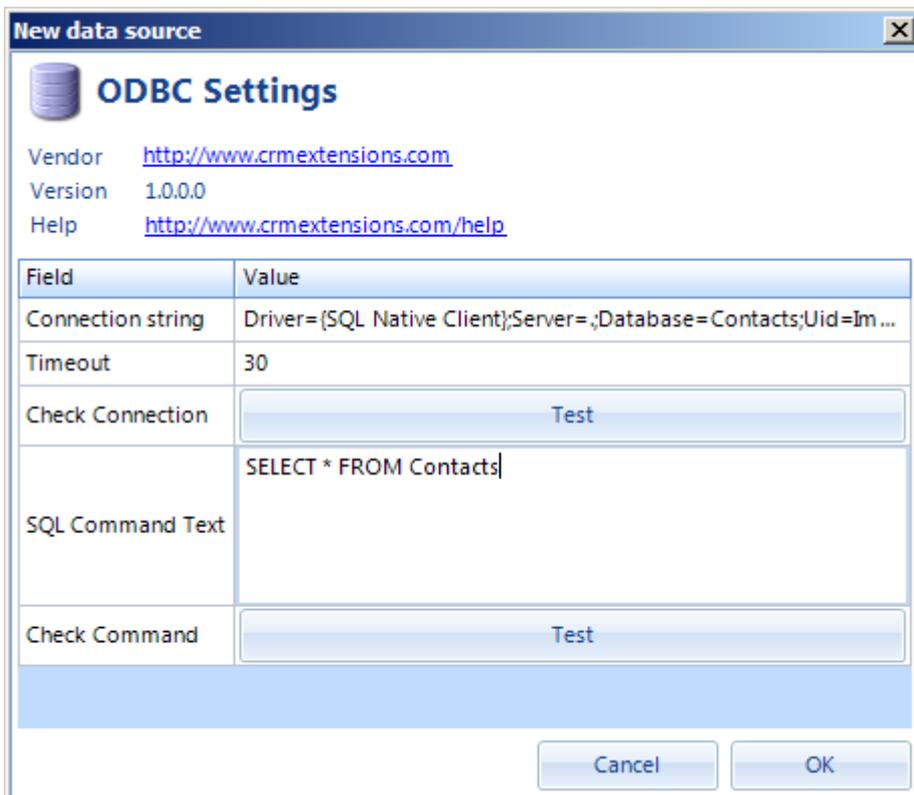
As seen in the screen above, it is then possible to do a test to see if the connection string and the SQL statement are correct. This will, provided they are correct, result in the following two messages.
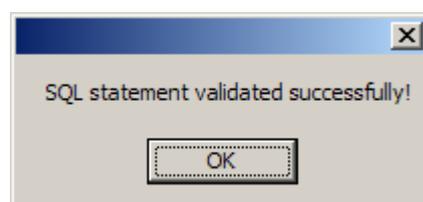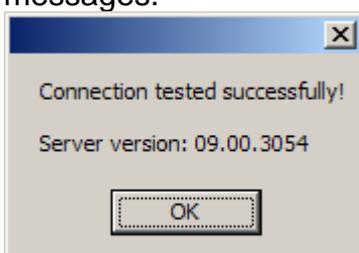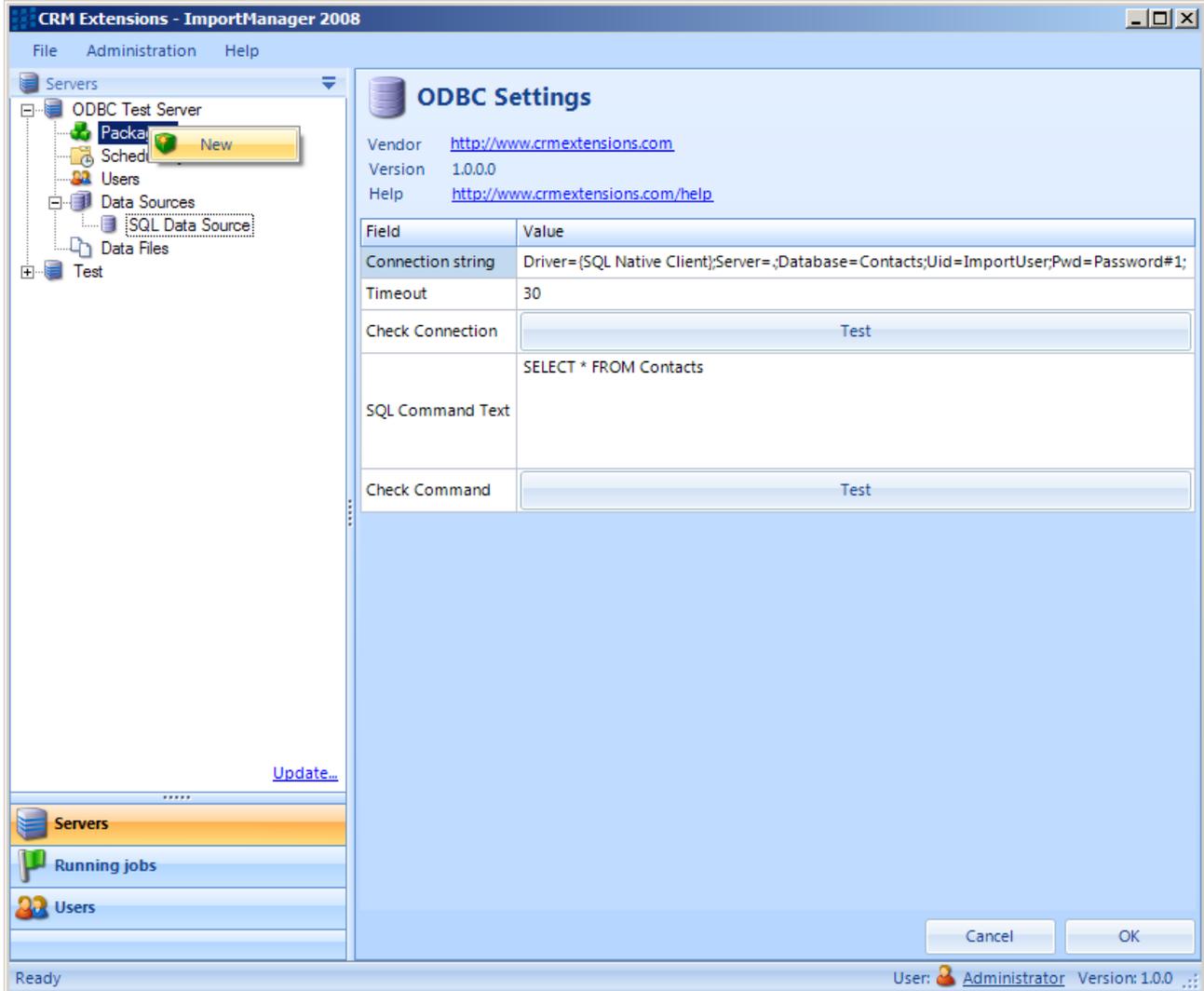
To finish, simply click *"OK".*
You can find alternative connection strings to suit your setup on the following homepage:
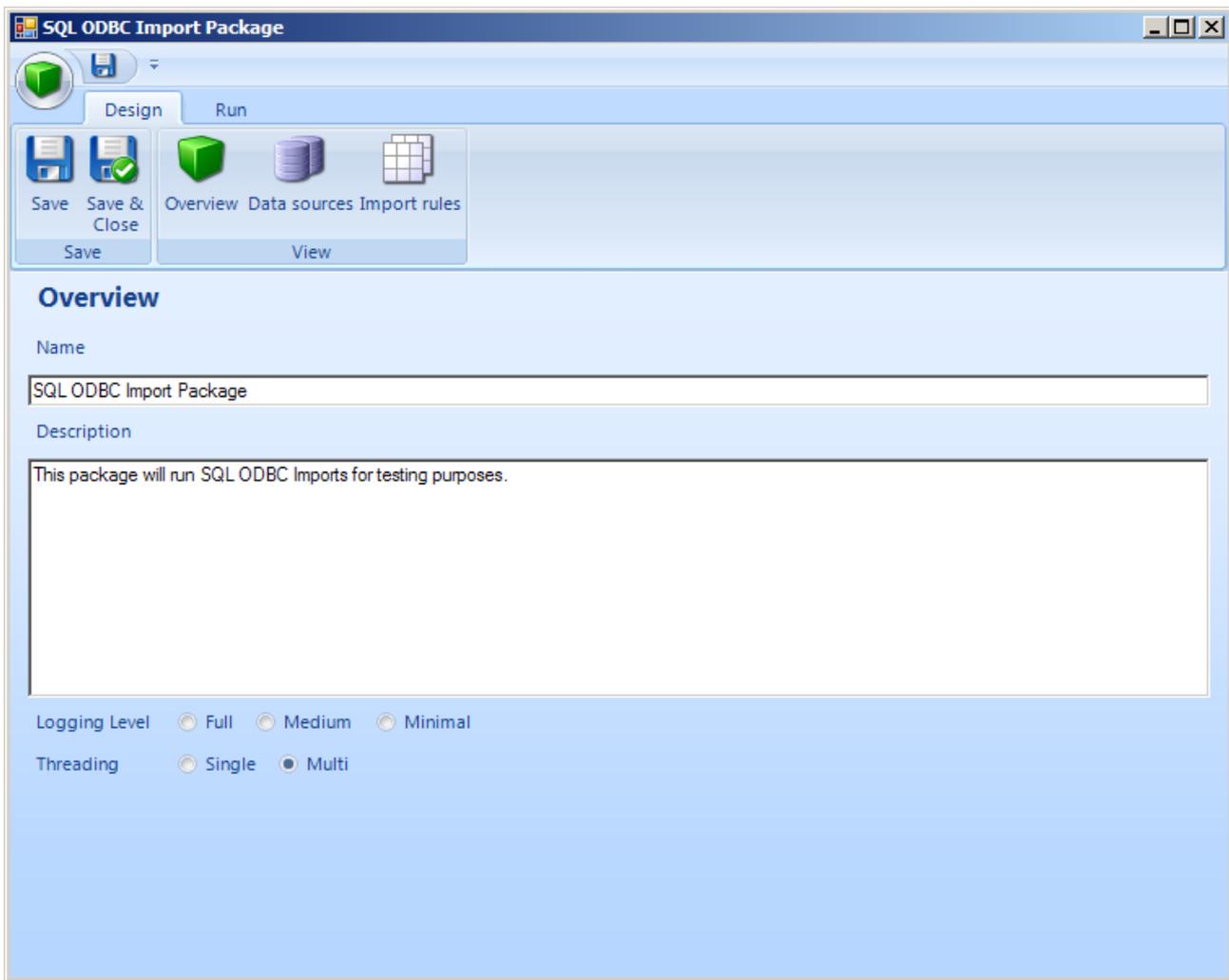www.connectionstrings.com

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.
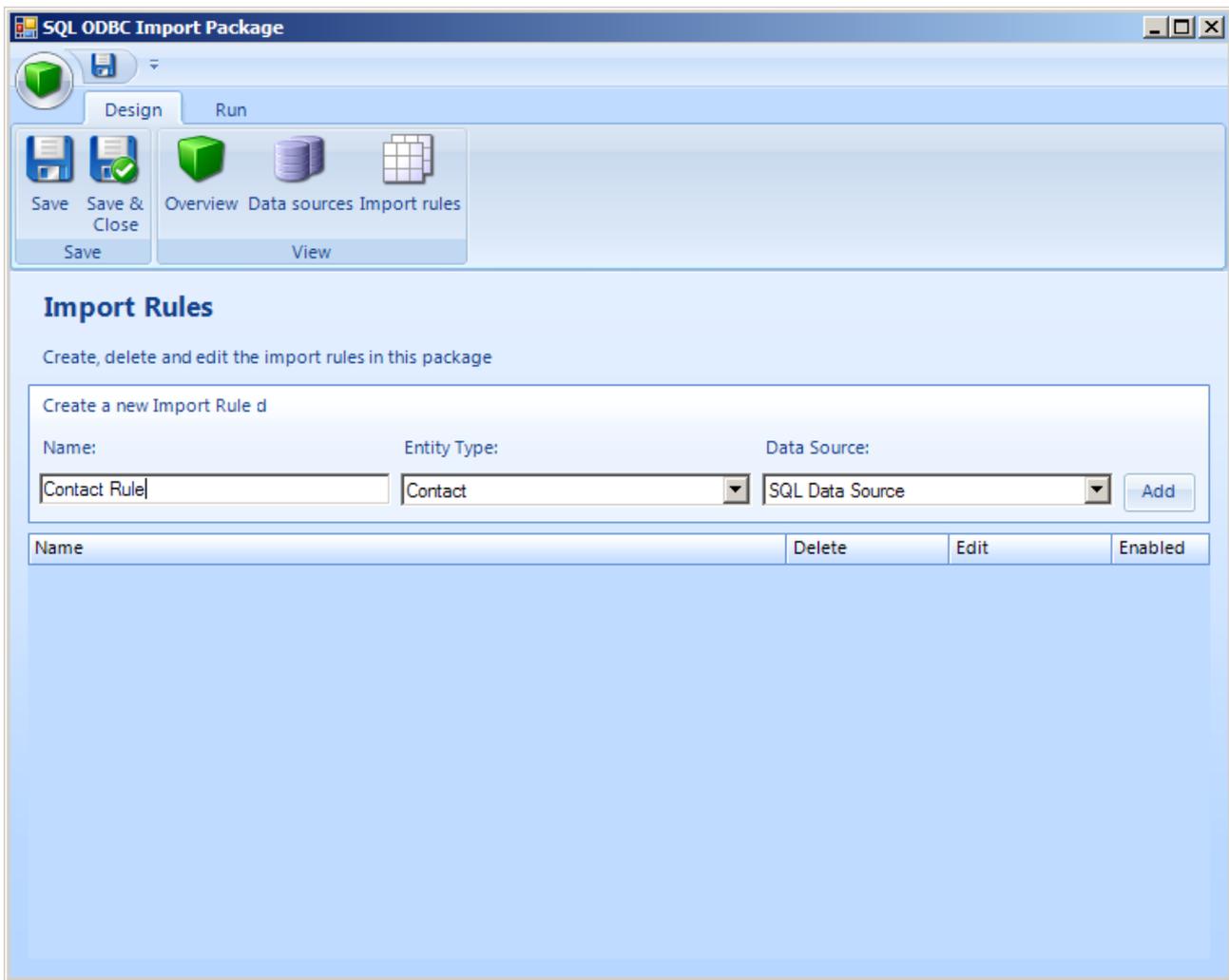

⊟ **5. Package Overview.**
Give the new package a name and description.

Setup Import Rule:
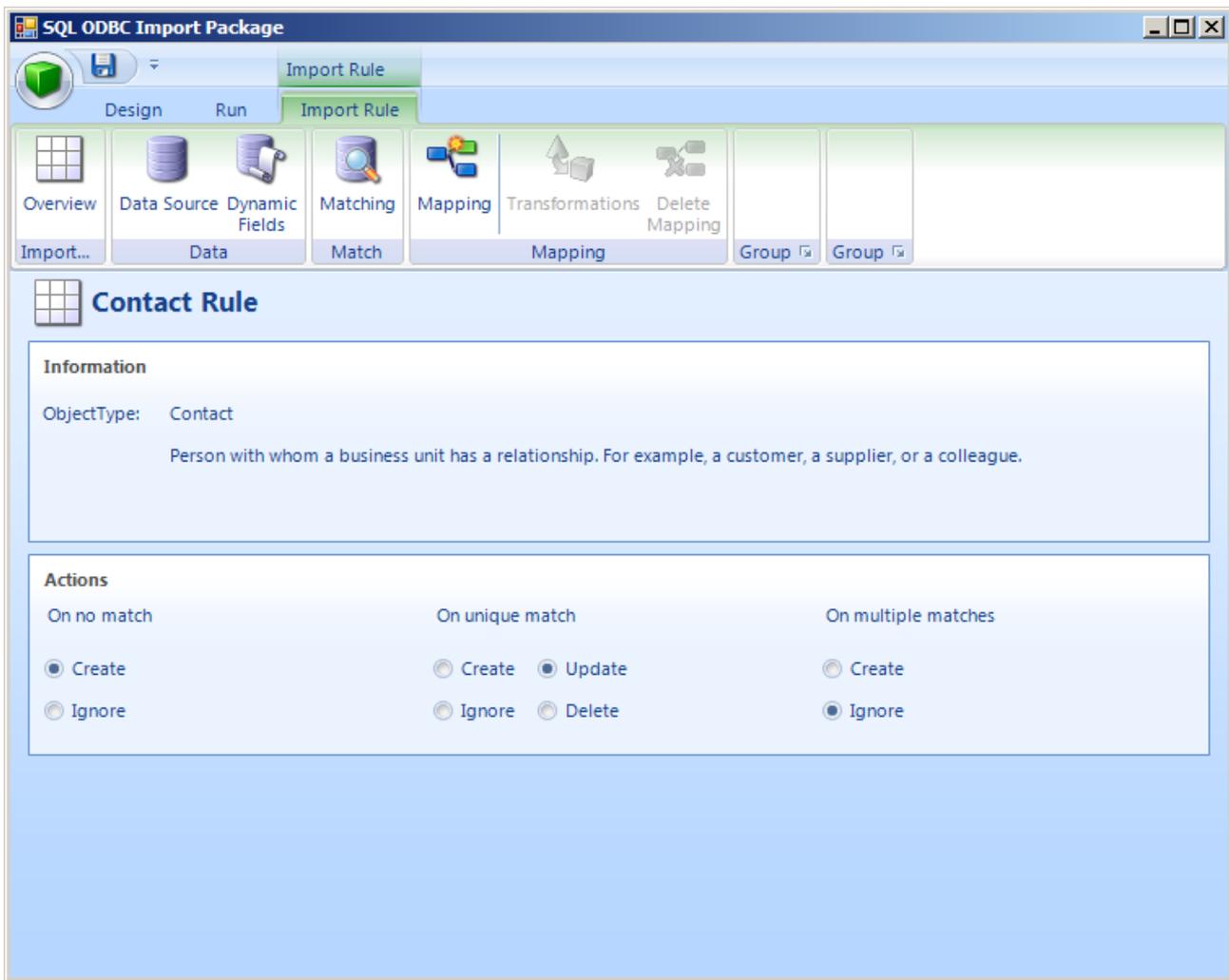
⊟ **6. Create Rule.**
Click Import Rules in the top menu and give your new rule a name. Select the data source created earlier and an appropriate CRM entity type to import into.

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.

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* from the data source.
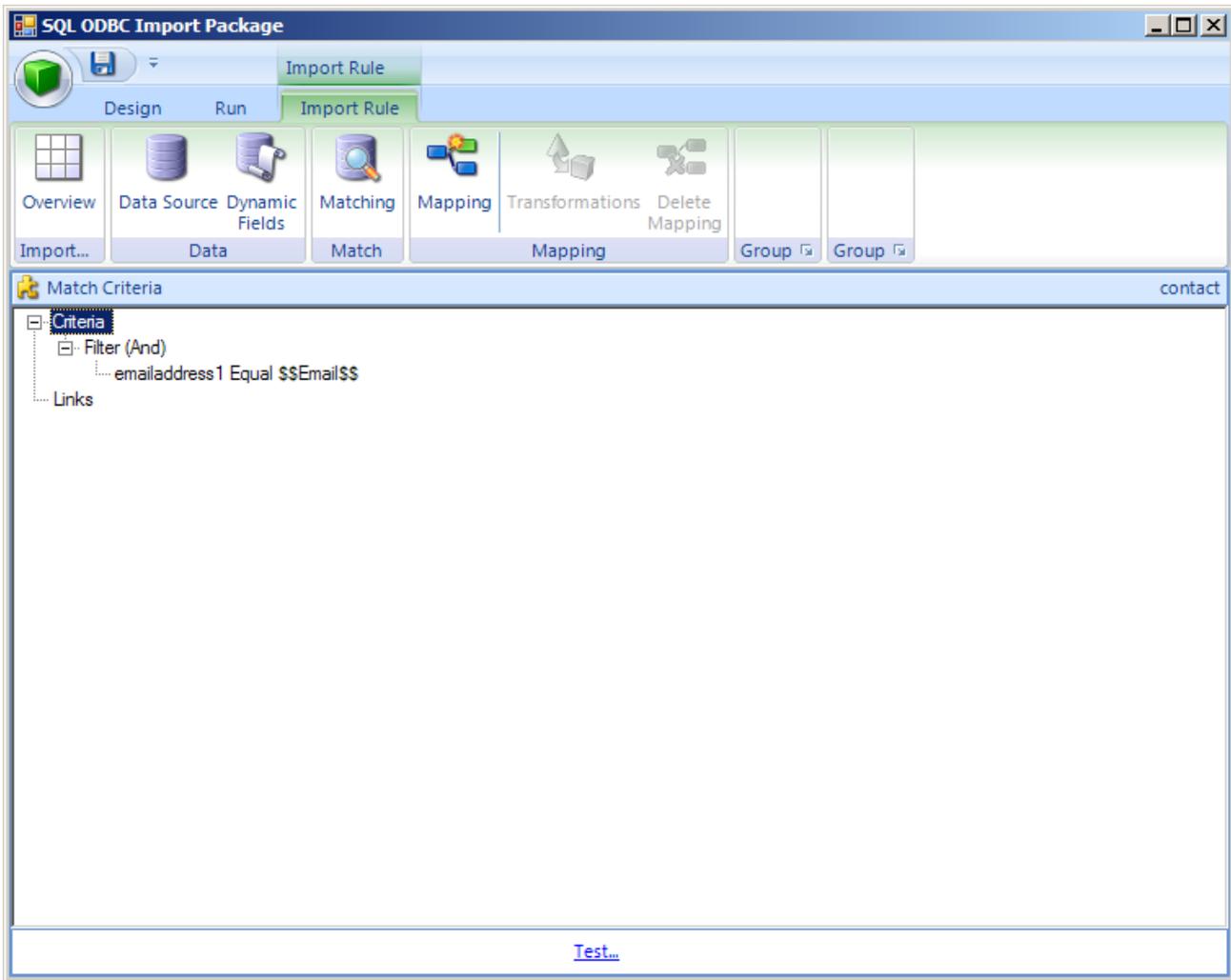
□ **9. Field Mappings.**

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.
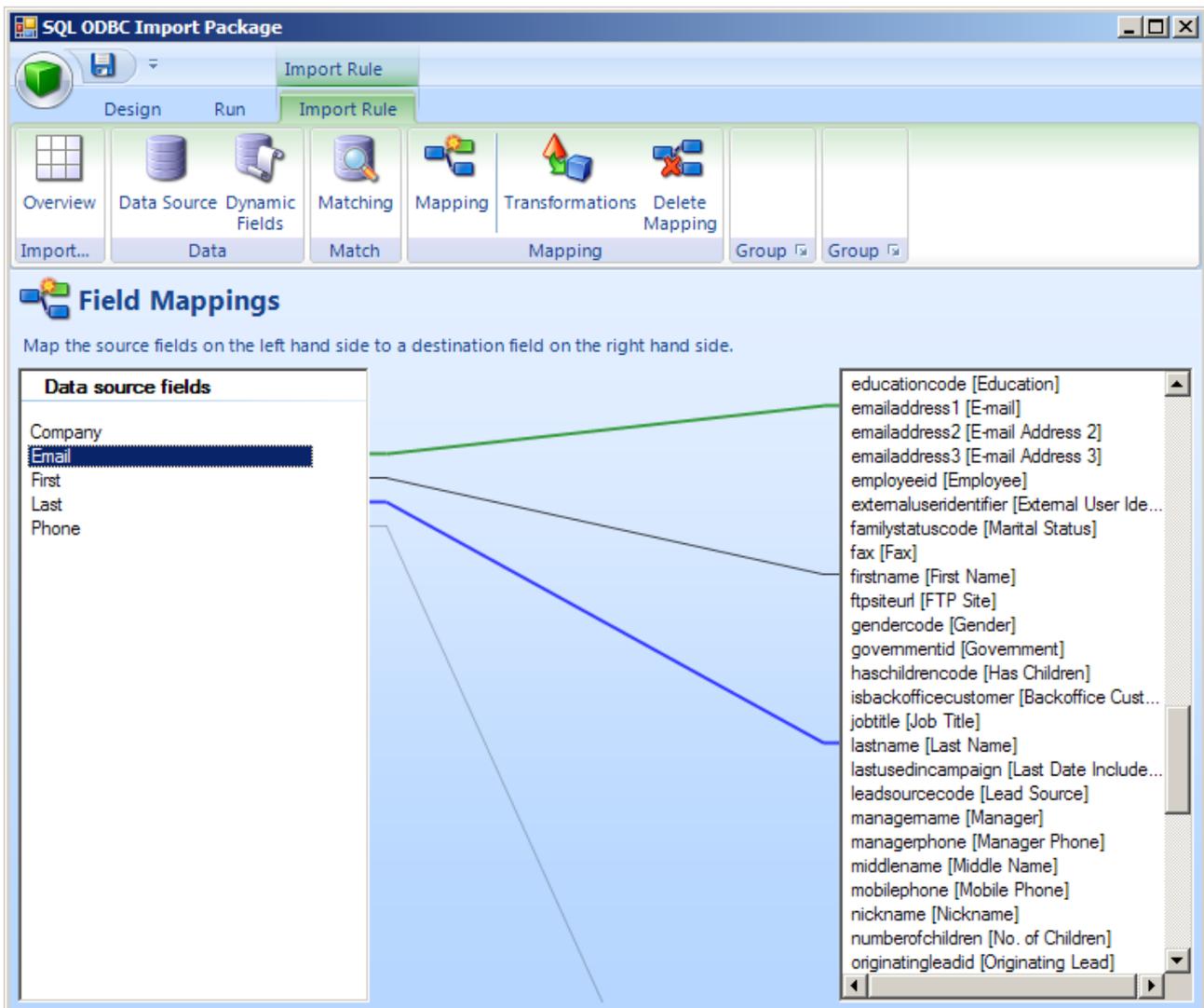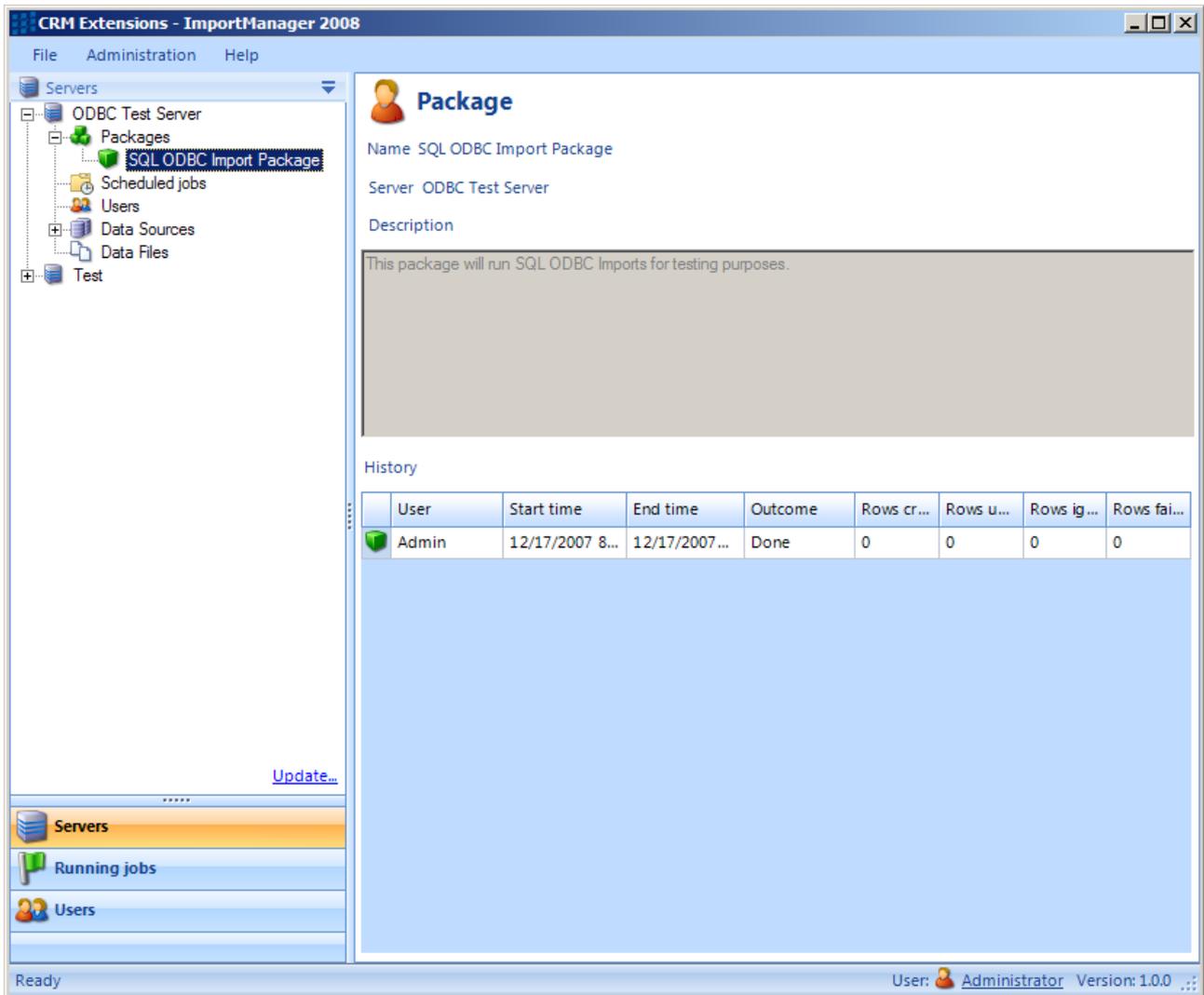
□ **10. Save & Run.**
Click the *"Run"* tab and then *"Save & Run"* to save and run your rule.
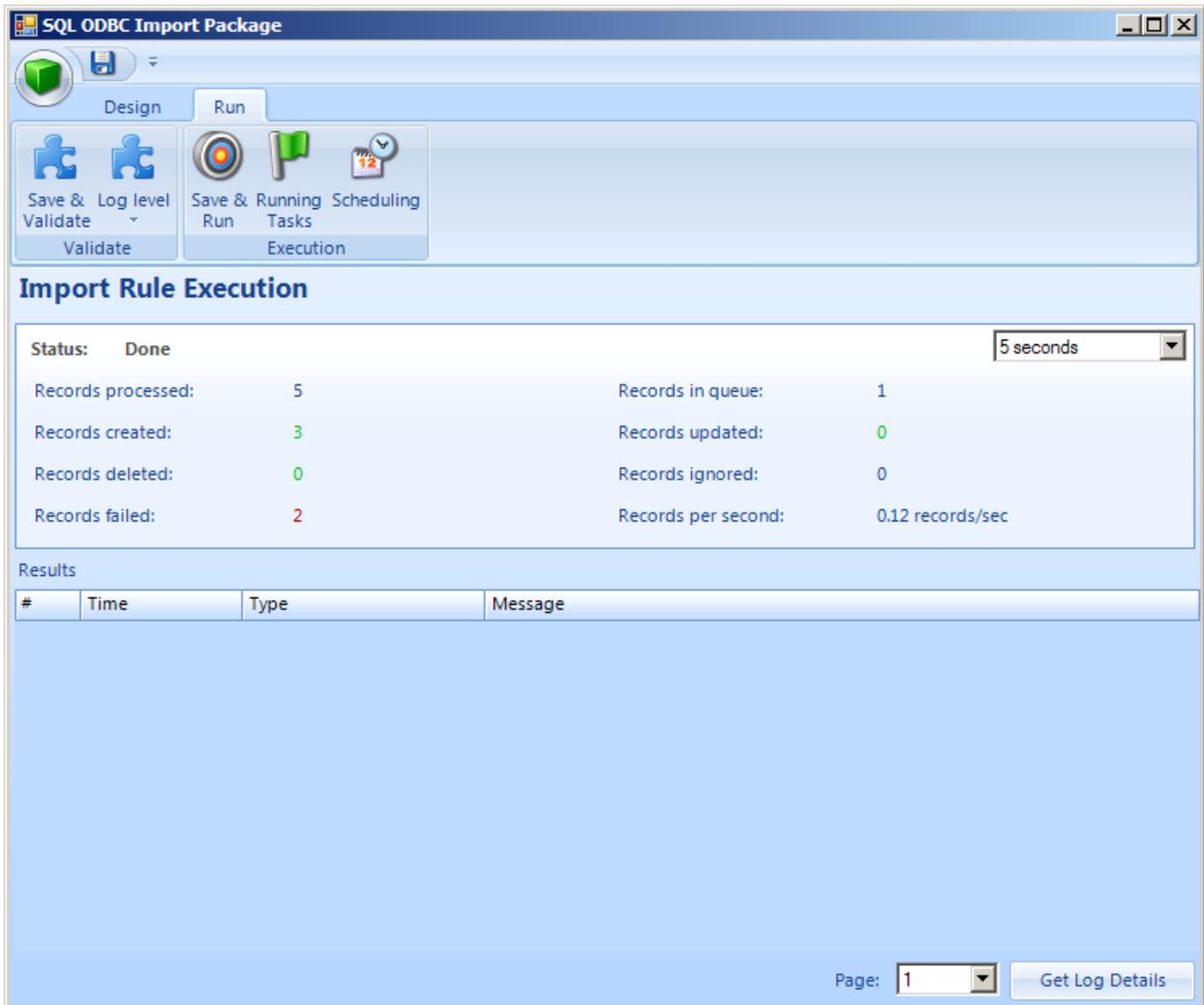
☐ **11. Finished.**
Once the import is done and you've closed down the window you can see the jobs under a particular pa
selecting the package as seen in the screen below.

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.
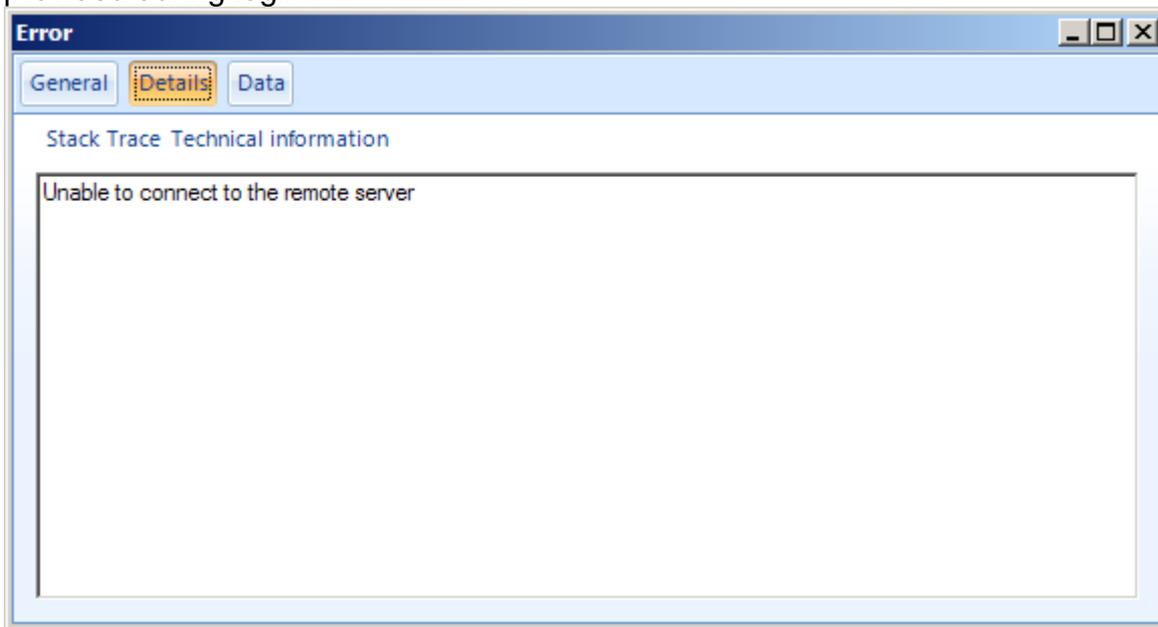
- **1. Login failed.**
  The error seen in the screen below is encountered when either your login or your password or both are incorrect when trying to log in (as seen in step 22).
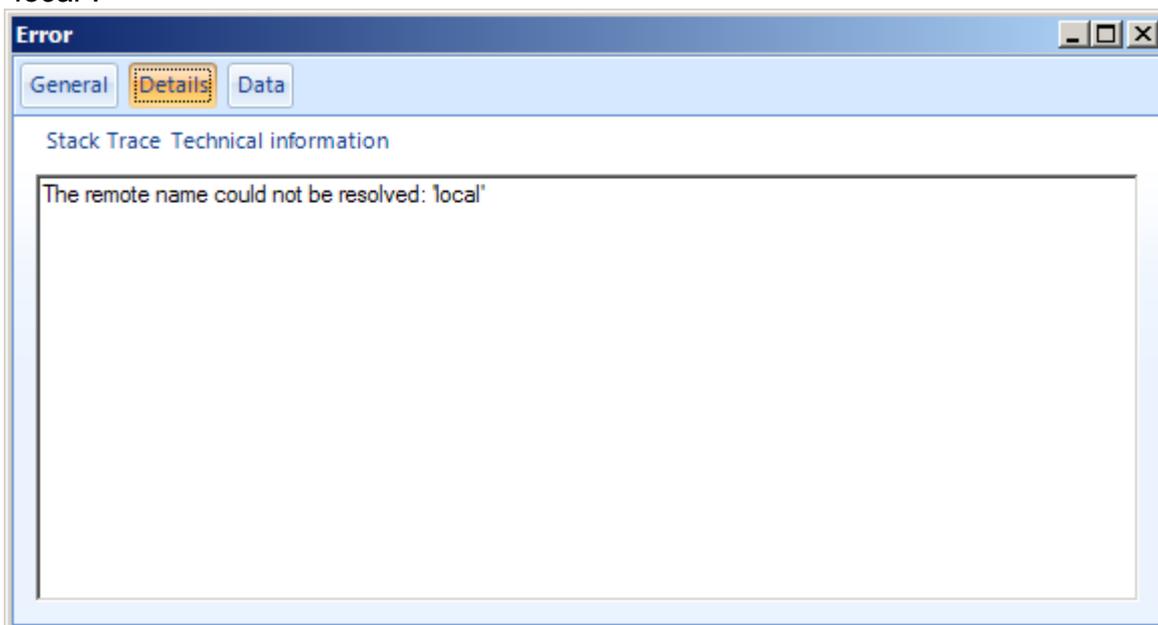
2. Unable to connect to remote server.
This error message will likely pop up
when the wrong port number is
provided during login.


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/
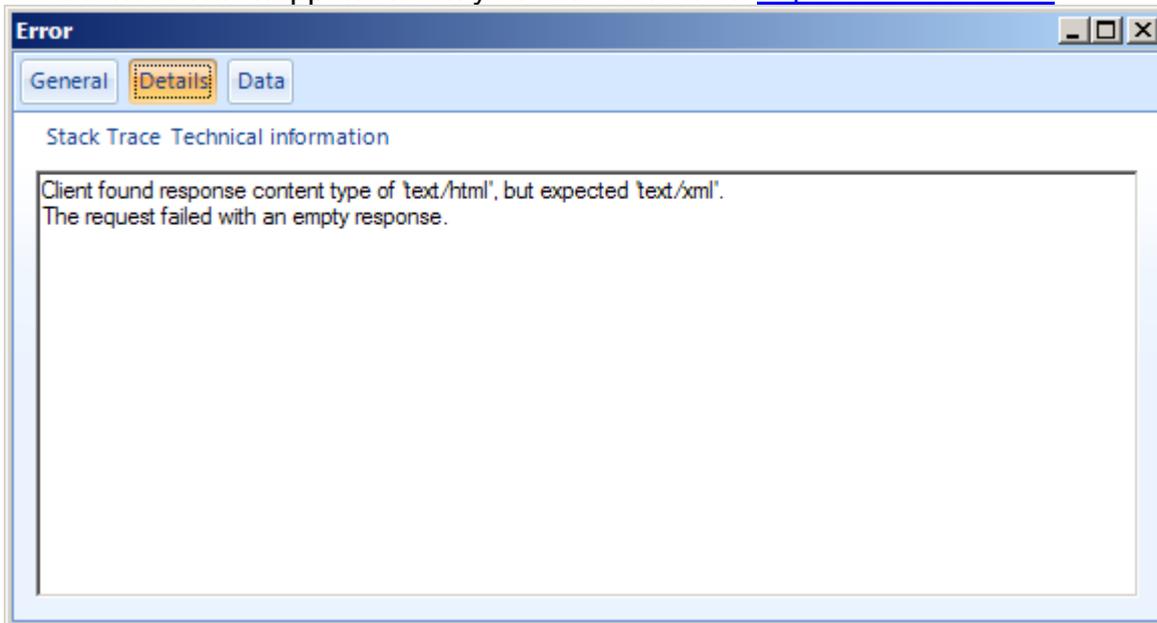
- ☐ **5. Error 27502.**

  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.
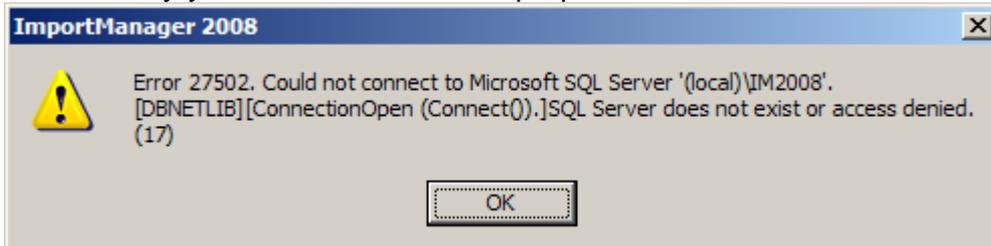
Appendix A - Installing SQL

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.