[1.1 Import CSVs 1](#_Toc422740349)

[1.2 Export XML 1](#_Toc422740350)

[1.3 Import XML 1](#_Toc422740351)

This features is designed for simplifying bulk data imports and migrating data between environments

## Import CSVs

This feature allows the user to select a folder to import multiple csv files of data to the target environment

* The user may select top match records by Name in which case if the record is matched it will update the record which matches its name, if there is no match (or Match By Name) was not selected new records will be created
* Each CSV file should be name according the target types label or collection name
* Each column in a CSV should have a heading with the label of the target field in that column
* Note the import allows the user to specify either American (mm/dd/yyyy) or English (dd/mm/yyyy) format dates as when data exported from crm and saved as a csv by default I found it saved the dates in US format
* NN Relationship Associations may be imported however the notes above do not apply in this case
  + Use the relationship entity name as the name of the csv file
  + Use the reference field schema name (e.g. accountid or new\_testentityid or new\_testentityidone)

## Export XML

This feature is designed to be used in combination with the Import XML feature. The user may select one or more record types and the application will export records of the type into xml files

The Import XML feature may then be used to migrate those records to a different environment

## Import XML

This feature is designed to be used in combination with the Export XML feature

The user may select a folder containing xml files of exported records and the application will import them into a target environment

If the record already exists in the target environment (matching by primary key) it will be updated, otherwise a new record will be created