How to Prep and Import Demo Data

1. Open the Excel spreadsheet “Data Generation Tool.xlsx”
2. Navigate to the “Account Generator” tab/sheet
   1. Add/Edit/Delete any rows desired
   2. Select and copy all columns and rows on the sheet
3. Navigate to the “Account Import” tab/sheet
   1. Delete any existing rows (leaving the column headers in place)
   2. Use the “Paste Values” option to copy the records from the previous sheet into the current sheet
   3. Right click on the “Account Import” sheet and choose “Move or Copy”
      1. Choose “new book” and “Create a copy” options, then click OK
      2. From the new Excel window that opens, choose File>Save As> and name it something appropriate to be used for the import wizard later.
4. Repeat steps 2 and 3 for the remaining entities: Contact, Opportunity, Case, Appointment, and Task
5. Open the Power Platform Maker Experience (make.powerapps.com) and select the environment you will be importing into
6. ***Create custom field for “Opportunity Number” on the Opportunity Table\****
   1. *\*Use solutions in accordance with your internal COE/ALM standards and practices*
7. Delete native Duplicate Detection Rules for Accounts and Contacts
8. Create Demo Environment DDRs for Accounts, Contacts, Opportunities, and Cases
   1. Account – Base it on Account Number
   2. Contact – Base it on External User Identifier
   3. Opportunity – Base it on Opportunity Number
   4. Case – Base it on Case Number
9. Import and Activate Data Maps for Accounts and Contacts, Opportunities, Cases, Appointments, Tasks, and Phone Calls
10. ***Manually create “Standard Price List” record\*\****
    1. *\*\*Alternatively, if a price list is already created in D365, copy the name of that value and use Find & Replace in the Data Generation Tool.xlsx spreadsheet to replace “Standard Price List” with the existing price list record’s name.*
11. Import Accounts
12. Import Contacts
13. Import Opportunities
14. Import Cases
15. Import Appointments
16. Import Tasks