Importing Data in Microsoft Dynamics CRM

Good data results in better long-term user adoption in Microsoft Dynamics CRM. One of the ways to get better data is to make sure your data imports are well-planned. This prevents duplicate records, reduces confusion and increases the likelihood of your Dynamics CRM implementation a success.

Data import options

There are many options for entering data into Dynamics CRM. These include:

- Manually entering data into CRM
- Tracking Outlook contacts
- Importing Outlook contacts
- Importing spreadsheets via the Data Import Wizard

Dynamics CRM import tools

Microsoft Dynamics CRM comes with several tools to help make importing data easier.

- **Import Data Wizard:** This is a tool in Microsoft Dynamics CRM that allows you to load a large number of records without having to enter them manually or turn to IT for help. This tool can be found in the Dynamics CRM ribbon and walks you through the data import process. It works well with the import templates described below.
- **Import Data Template:** This is a template file that you can download for both out-of-the-box and custom entities. Use it to format your data using the rules CRM requires for import.
- **CRM Data Maps:** Data maps take the information in your import file and map them to CRM fields.
- **Tracking Outlook Contacts in CRM:** Each contact record can be tracked in Dynamics CRM.
- **CRM Outlook Client Add Contact Wizard**: To use this feature, you must install and configure the Dynamics CRM Outlook client.

The Dynamics CRM Data Import Wizard

Best Practices for Working with the Data Import Wizard

A little preparation can go a long way to making your data import more successful. There are several things you'll want to know before you run the import data wizard:

- Know the location of the file you're importing
- Know the delimiter settings of the import file. These are characters that indicate the boundary between fields. For example, each value is separated by a comma in a comma separated file, otherwise referred to as a CSV file.
- Know how source columns match with Dynamics CRM fields. Knowing this will help with mapping the data. These are used as the basis for matching a source column header in the import file with the Dynamics CRM destination field. For example, if you have a column in the import file called Surname, it would be mapped to Last Name in Dynamics CRM.
- Know the type of record you're importing.
- Know any data type requirements and restrictions within CRM. Know if a field allows only numbers or has a maximum amount of characters.
- Since you may be associating your imported records with existing records in CRM, it pays to know the exact contents of the main field within the related file. For example, if you need to associate a contact with a parent account, then ensure the parent account name is identical to the one in the import file.
- Know the size of the import file. It cannot be greater than 8MB unzipped or 32 MB zipped.

Working with the Import Data Template

The **Import Data Template** automatically opens in Excel in XML format, which is supported by the import wizard. It provides all the fields located in the main Dynamics CRM form of the record. Each column header corresponds to a field within CRM. This means you can save time by using the automatic mapping feature of the import wizard. The template includes values for picklists as well as descriptions and data guidelines for each field.
The import template sets restrictions based on the data requirements within Dynamics CRM. This means you cannot provide a non-existent value in a picklist, exceed the character limit for fields, or enter text in a number field. This prevents import errors, saving you potentially a lot of time in troubleshooting.

You can paste existing data into this file from data sources provided by a third party or exported from another system.

Creating a Data Import Template from CRM

1. Navigate to the record type you want to upload.

2. Click on **Import Data** in the ribbon and choose **Download Template for Download.**
3. You will generate an XML file named for the chosen entity. Save it locally.

Working with the Data Import Wizard

1. Click on **Import Data** in the ribbon.
2. Browse to the file you want to import.
3. Choose your delimiter settings.
4. Choose your data map. Options include:
    1. **Default.** This will try to automatically map the import file headers with CRM field names.
    2. **Customized Data Maps.** With option, you can choose data maps you have already saved from previous imports.
5. In the **Map Record Types** screen, you can choose between two options:
    1. **Create New.** This creates a new entity.
    2. **Record Types.** This creates records in the chosen entity.
6. In the **Map Fields** screen, you can map source columns to Dynamics CRM fields.
7. In the **Review Settings and Import Data** section,
    1. Choose **Allow Duplicate Detection**. This results in the import using the duplicate detection settings to prevent the creation of duplicate records.
    2. Select **Owner for Imported Records**. If the owner isn't set in the import file, then you can set it to the same owner here.
    3. **Data Map Name:** Naming your data map allows you to save it for future use. This is recommended if you frequently get data from the same source using import files with unchanged formats from file to file.

Checking the Import Status

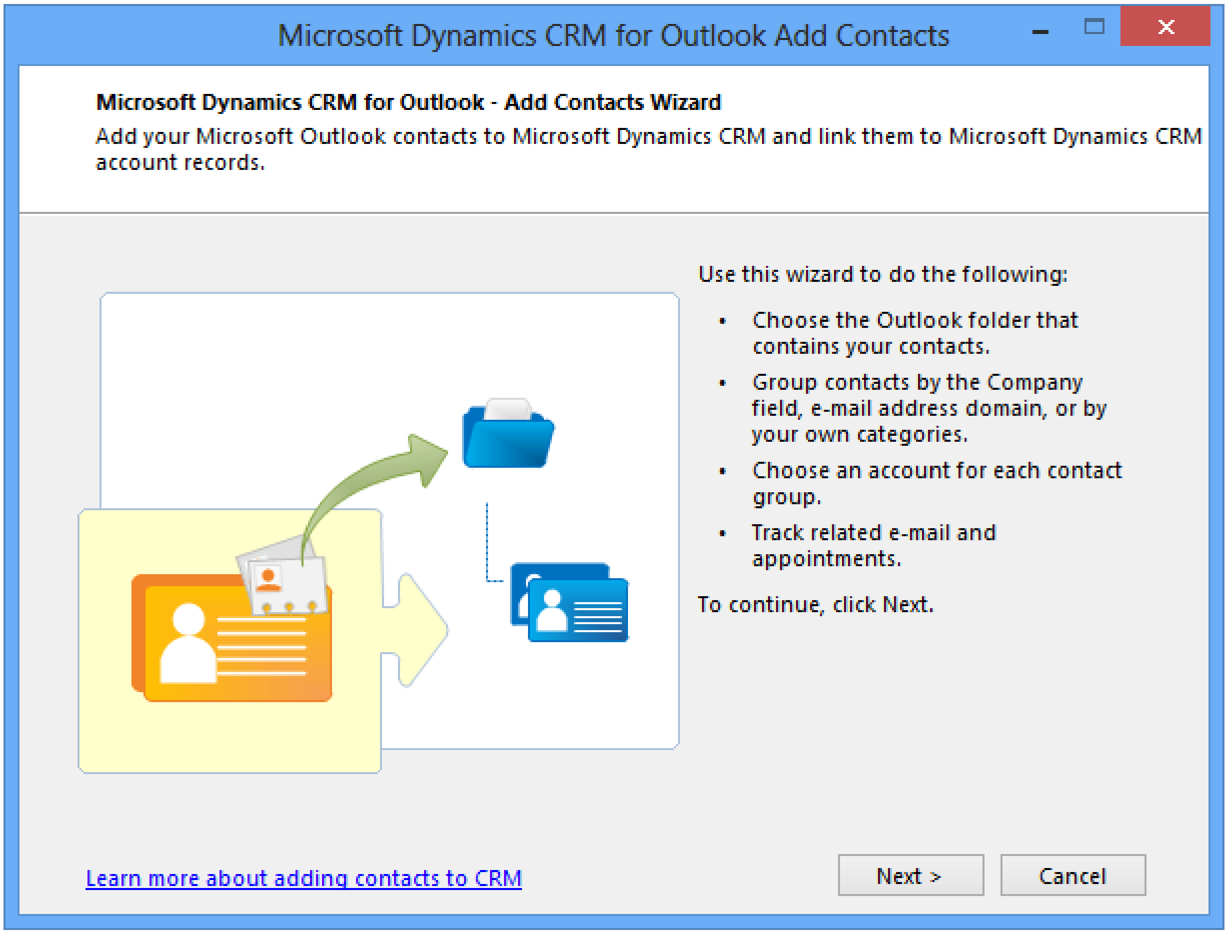
1. Navigate to Workplace and in the Navigation Pane, click Imports.
2. In the grid, double-click on the name of the file you just imported.

Working with the Add Contacts Wizard in Outlook Client

One of the ways you can import data into Dynamics CRM is using the Import Contacts Wizard in Outlook. This tracks contacts from Outlook using the Dynamic CRM Outlook client.

Here are the steps for adding contacts using the Add Contacts Wizard in Outlook:

1. To navigate to the wizard, in the Outlook client, navigate to the **Dynamics CRM Options**. Click **File**,**CRM**, **Import Contacts**, and **Add Contact Wizard**.



2. Click **Next** in the dialog box. The wizard will analyze your contacts and present some results. You will need to choose the group type and groupings.
3. Click **Add Contacts**. This will import your Outlook contacts according to your specifications.

Using Excel Reimport

If you want to make changes to your data, one method is to exporting data into an Excel file, clean it up your data locally, and then reimport the data back into Dynamics CRM. If you do this, there are a few things you should keep in mind:

- Even though you'll save the file you export from CRM to your local drive, do not reuse it. Make a new export for each import you plan to do. The exports are for one-time use only.
- All the unique identifiers for a record are stored in the first three columns of the Excel sheet. These are hidden. Do not attempt to change data in these columns, or CRM will not know which record to update.