

## Dynamics CRM 2015 Data Import Templates

Importing data using the templates within CRM makes the import process very smooth and easy. You are able to see all of the required information that needs to be filled in prior to importing the data. You are able to import data to appropriate fields within CRM since the fields also get mapped automatically to the desired fields.

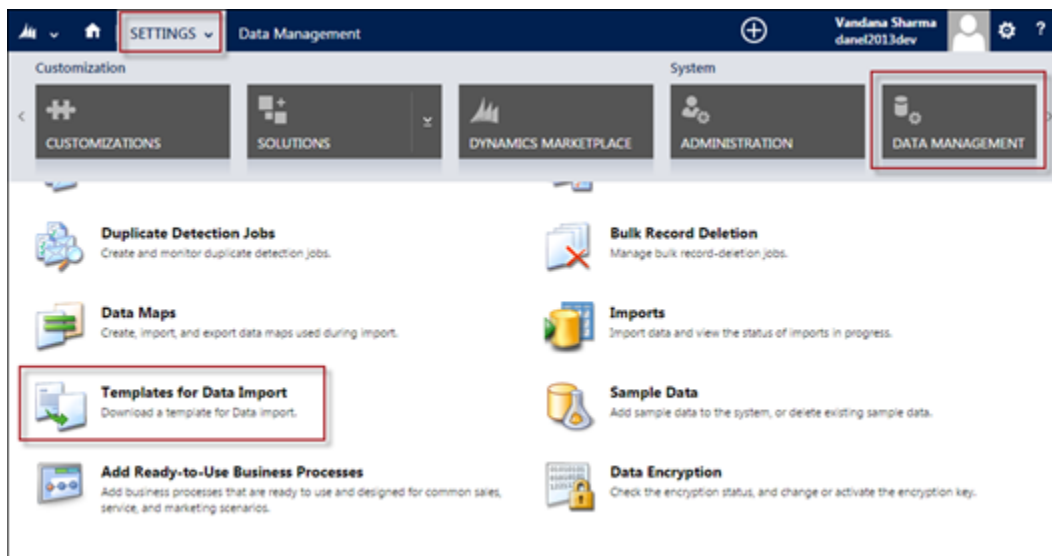
Templates are available for all entities.

You are able to access these download templates by following the steps below:

- You can find the template on the ribbon of the entity itself



- Or you can click on Settings → Data Management → Templates for Data Import

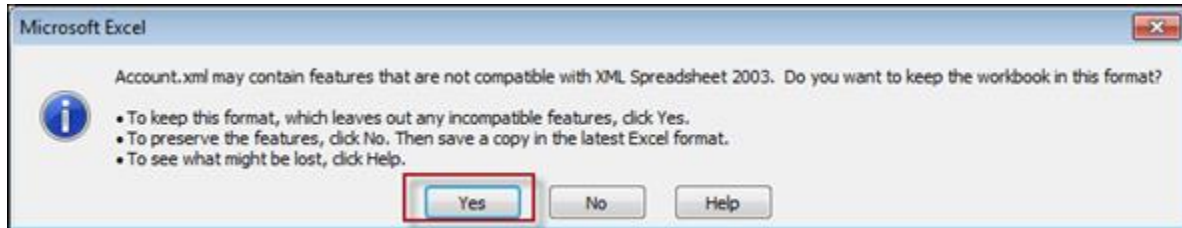


1. You are able to select the entity you want to import the data for
  2. The file saves as a .xml file on your computer
  3. Open the file and fill in the appropriate information
- All the fields that are bolded are required fields
  - You just need to fill in the information that you want to see in your CRM form when you open the entity

- As for the lookup fields, such as the Primary Contact and Parent Account, you can add them there only if they already exist in CRM

A	B	C	D
Account Name	Primary Contact	Account Number	Parent Account
Test Account 123		1234455	
Import Test File		2433242	

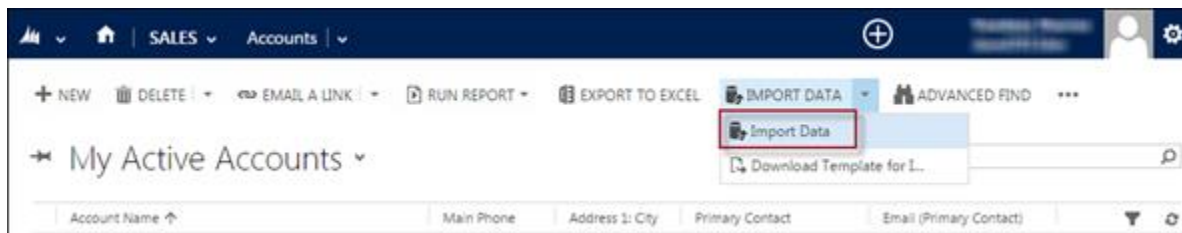
Save the file – keep the xml format because it automatically maps the correct fields



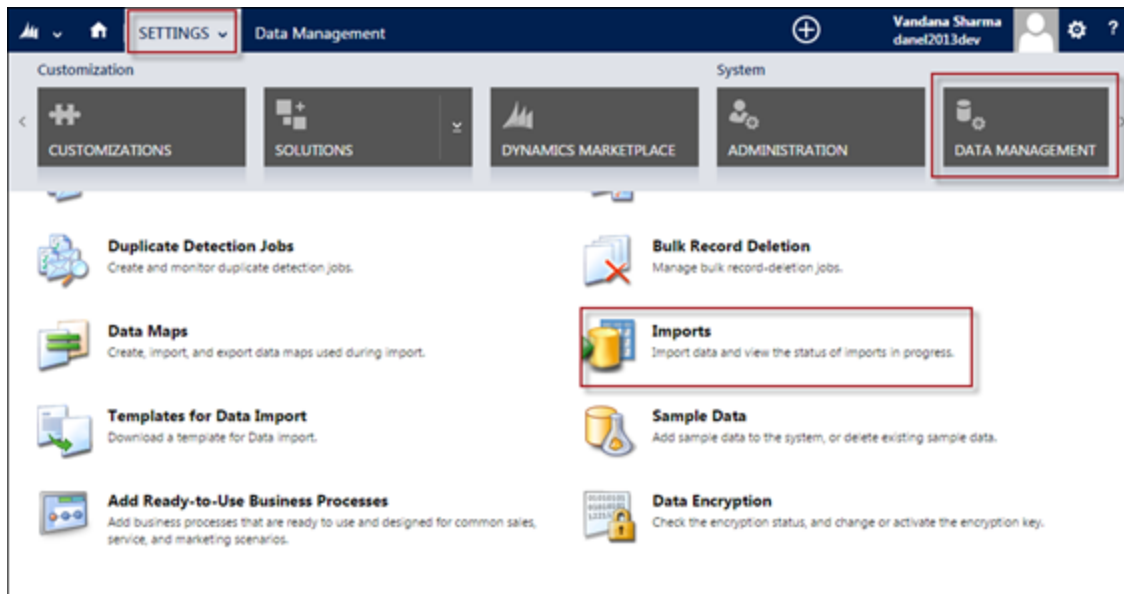
The file formats that are supported by CRM are Comma-separated values (.csv), Text (.txt), Compressed (.zip), and Excel Spreadsheet 2003 (.xml)

You can import the file by clicking the import button from the ribbon or by digging into the settings area:

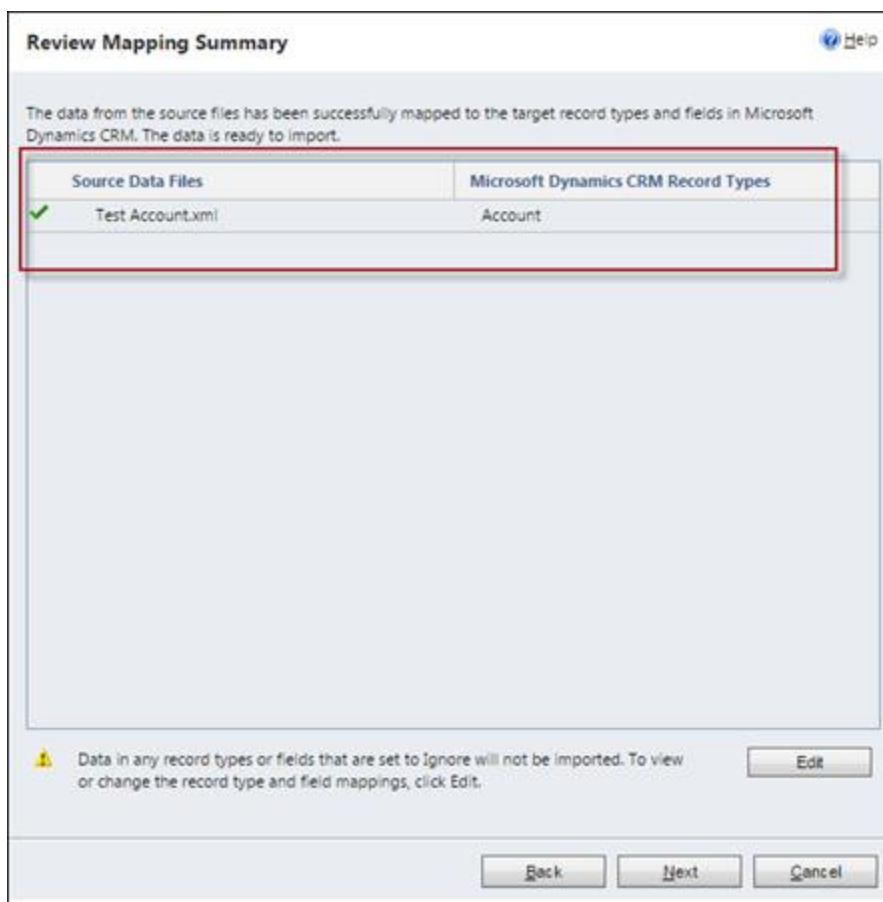
Click on the import button on the ribbon



Click on Settingsà Data Managementà Importsà Import Data



Select the file – if you do the .xml format, the entity and the fields will map automatically



You can find your imported file within the imports section

✕	DELETE ▾	📧	EMAIL A LINK ▾	📄	EXPORT TO EXCEL	📁	IMPORT DATA ▾	🏠	ADVANCED FIND
✈️	My Imports ▾	<input type="text" value="Search for records"/>							
✓	Import Name	Status Reason	Successes	Partial Failures	Errors	Total Proc...	Created On		
	Test Account.xml	Completed	2	0	0	2	10/21/2014 1:42...		

You can now import your files rather than entering endless amount of data manually one by one.