

HOW TO Import data into MS CRM 3.0 from a Custom Application(web or windows)

-

Out of process call

CRiMport

Index:

1. Introduction	3
2. Setup CRiMport	4
2.1. Parameters settings	4
2.2. Click on "Load Entity" to connect CRM Server	5
2.3. Save the project	6
3. Setup SQL Server	7
4. Custom Application Setup	9
WEB APPLICATION / WINDOWS APPLICATION .NET (1.0, 1.1, 2.0)	9

1. Introduction

Requirements:

- a Custom Application
- SQL Server
- MS CRM 3.0

You need this infrastructure:

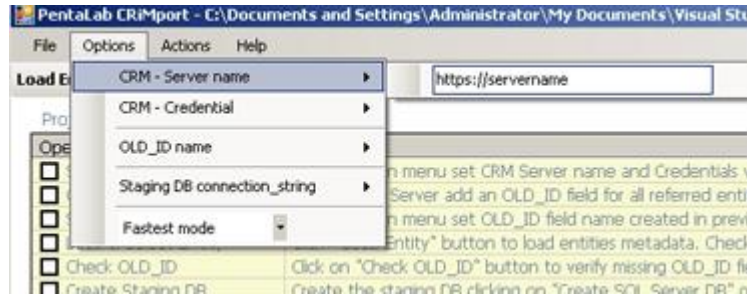
- Network connectivity between:
 - o Custom Application
 - o SQL Server
- Network connectivity between:
 - o MS CRM 3.0
 - o Custom Application

Needed steps:

- a) Set up CRiMport
- b) Set up SQL Server
- c) Set up Application

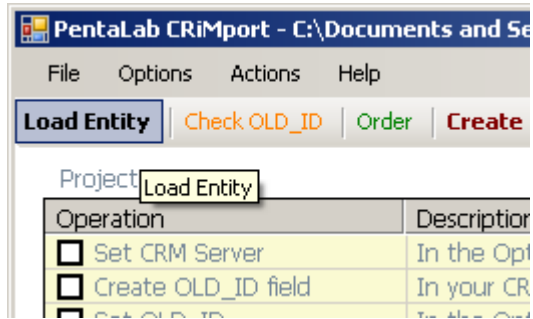
2. Setup CRiMport

2.1. Parameters settings

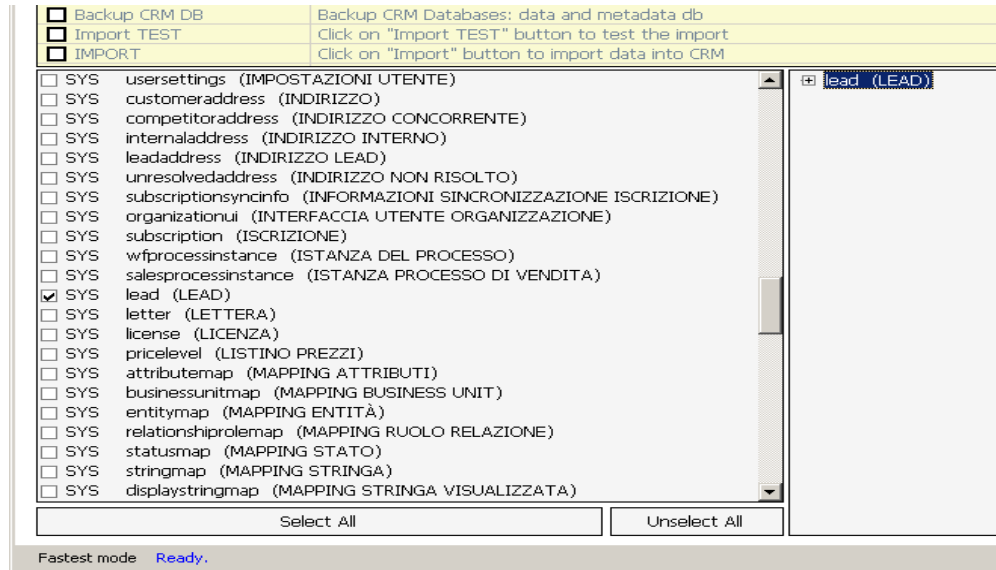


- a) Option → CRM Server name → set the CRM Server address (HTTP/HTTPS) (f.e. HTTPS://myCRM.domain.com);
- b) Option → CRM Credential → set the credentials for CRM Server, Username/Password/Domain (is better if you provide administrative credentials);
- c) Option → Staging DB connection_string → set the SQL Server connection string (f.e.:
Provider=SQLOLEDB.1;Password=pw;User ID=username;Initial Catalog=dbname;Data Source=test);

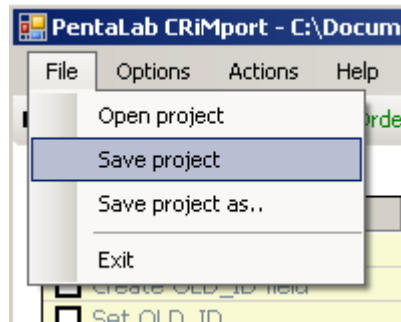
2.2. Click on “Load Entity” to connect to CRM Server



All CRM entities will be displayed: **select Entities you need to import**



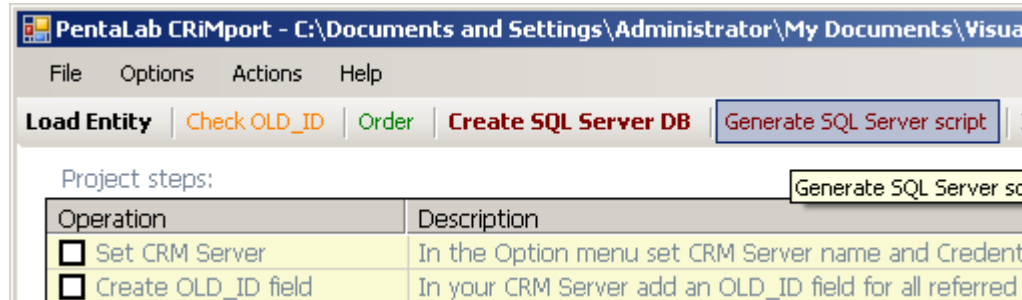
2.3. Save the project



Don't exit from CRiMport Application

3. Setup SQL Server

Click on "**Generate SQL Server script**" to generate a script for DB structure creation.



With this script you can generate the Staging DB.

```
Untitled - Notepad
File Edit Format View Help
CREATE DATABASE [CRIMPORTDB]
GO
USE [CRIMPORTDB]
GO

CREATE TABLE [import_lead]
(
  [IdImport] uniqueidentifier NOT NULL DEFAULT(NEWID()),
  [CRM_GUID] uniqueidentifier NULL,
  [accountid] ntext NULL,
  [address1_adresstypecode] int NULL CHECK ([address1_adresstypecode] IN (1))
  [address1_city] ntext NULL,
  [address1_country] ntext NULL,
  [address1_county] ntext NULL,
  [address1_fax] ntext NULL,
  [address1_latitude] decimal(18,5) NULL,
  [address1_line1] ntext NULL,
  [address1_line2] ntext NULL,
  [address1_line3] ntext NULL,
  [address1_longitude] decimal(18,5) NULL
)
```

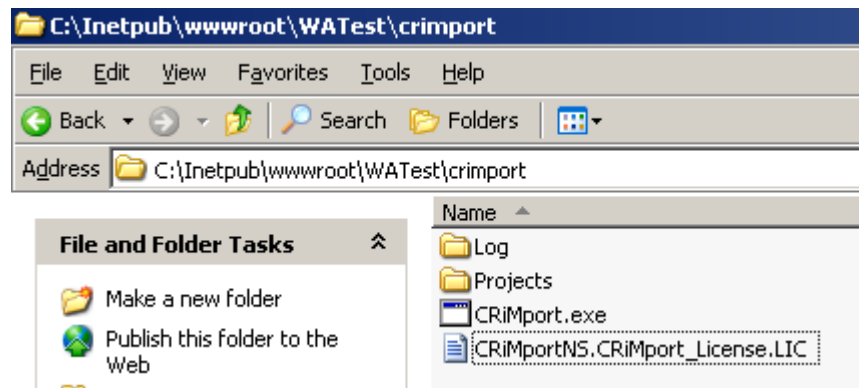
If you have to use an existing Database you can create only the tables in the existing Database.

4. Custom Application Setup

You can execute CRiMport.exe from any application (ASP, ASP.NET 1.0, ASP.NET 2.0, Windows application, Console Application, BAT, VBScript.. and so on) by running an out of process call.

WEB APPLICATION / WINDOWS APPLICATION .NET (1.0, 1.1, 2.0)

- copy CRiMport.exe file in the custom application folder(or any folder in your filesystem);
- copy the license file in the same folder where you have copied CRiMport.exe;
- create "Log" and "Project" folders;
- in "Project" folder copy the project file created in "Setup CRiMport" step;
- The user in which security context's the application run, must have write permissions for "Log" folder. This folder is used by CRiMport to create log file.



It's now possible to write the code below in any .Net Application (C#)

CODE (C#)

```
//INSERT INTO DB
string cnString = "Password=pw;User ID=username;Initial Catalog=dbname;Data Source=test";
System.Data.SqlClient.SqlConnection cn = new System.Data.SqlClient.SqlConnection(cnString);

string sql ="INSERT INTO import_lead(firstname,statuscode) VALUES('" + txtFirstName.Text + "',3)";

System.Data.SqlClient.SqlCommand cm = new System.Data.SqlClient.SqlCommand(sql, cn);
cn.Open();
cm.ExecuteNonQuery();
cn.Close();

//CRiMport execution
string crimportFolder=Server.MapPath("crimport");
string crimportPath= crimportFolder + "\\crimport.exe";

//ATTENZIONE: la stringa seguente deve contenere un path, delimitato da doppio apice! Es. "C:\dir\sub dir\file.crimport"
string projectPath="\" + crimportFolder + "\\projects\\importLead.crimport\"";

System.Diagnostics.ProcessStartInfo psi=new System.Diagnostics.ProcessStartInfo(crimportPath,projectPath);

psi.WorkingDirectory = crimportFolder;
System.Diagnostics.Process.Start(psi);
```

For more informations, visit <http://www.pentalab.com/CRiMport/documentation/full.htm>