

# Importing Data into SideKick 365 CRM



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Created and Built in California by SkyLite Systems  
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## Importing Data in SideKick 365 CRM

We have created a utility to let you quickly import data into SideKick 365 CRM. The utility runs on your PC and uses .CSV templates that we have supplied to make sure the data is formatted properly. This guide describes how to use the utility to easily import data into SideKick 365 CRM.

### Overview

Data for Accounts, Opportunities, and Contacts can be imported into SideKick 365 CRM with our import utility. Here are some important concepts to keep in mind as you ready the data to be imported into SideKick 365 CRM

- Opportunities are always associated with Accounts, so you always import Accounts before you import Opportunities.
- An Account can have many Opportunities, but an Opportunity always belongs to one Account.
- SideKick 365 CRM needs a way to associate an Opportunity with an Account. If you have a unique ID in your old CRM system associated with an account, make sure that ID is also included in the Opportunity records so we can make sure to associate the Opportunity with the proper Account.
  - REQUIRED - Put the unique ID in the column called "Account ID" in the Account.CSV and the "Account ID" in the Opportunity.CSV templates.

NOTE - If the old CRM system does not have a unique ID for each Account, please contact us and we will help you ensure your Opportunities associate with the proper Accounts in SideKick 365 CRM.

- **IMPORTANT** - SideKick 365 CRM launches a workflow for each Account, Opportunity, and Contact that you import. Microsoft limits (throttles) the number of concurrent workflows a user can run simultaneously. For this reason do the following when setting up your input data set
  - Break data into batches ( Spreadsheets) of 25 items if you want to apply security profiles,
  - Break data into batches (spreadsheets) of 50 if you do not want to use Security profiles at import.

### Getting started

We have created 3 Excel templates – Accounts, Opportunities, and Contacts that are saved as .csv files. Use these templates to ensure your data is properly formatted to import into the appropriate lists in SideKick 365 CRM. These files are included within the zip file we have supplied and they are automatically added into the folder that holds the import utility when it is unzipped. Let's get started....

### Preliminary Software

Let's get started. We need to install some components on your PC to make the add-ins run. This section walks through how to install these three components.

#### **.NET 4.7.2**

Please navigate to the link below and install .NET 4.7.2

<https://www.microsoft.com/net/download/dotnet-framework-runtime>

#### **Visual Studio 2010 Tools for Office Runtime**

Please navigate to the link below and install Visual Studio 2010 Tools for Office Runtime

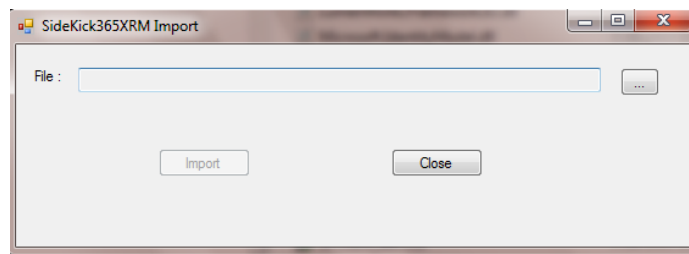
<https://www.microsoft.com/en-us/download/details.aspx?id=48217>

## SharePoint 2013 Client Runtime SDK

Now, go to <http://www.microsoft.com/en-US/download/details.aspx?id=35585> and download and run the SharePoint Client runtime library. Download and install the file “sharepointclientcomponents\_15-4711-1001\_x86\_en-us.msi” if you are running a 32 bit version of Windows. Download and install “sharepointclientcomponents\_15-4711-1001\_x64\_en-us.msi” if you are running a 64 bit version of Windows

**IMPORTANT** - Restart your computer after you install these updates.

1. Next, unzip the file called SideKick365CRM\_ImportSetup.zip that was sent to you by SkyLite Systems. Run the MSI file called SideKick365CRM\_Import.msi and install the import utility and associated files in a folder on your local drive. Now you are ready to import data into SideKick 365 CRM.
2. Next you need to get the data from your old system formatted and ready to import. The import utility expects data in a certain order for Accounts, Opportunities, and Contacts. Export the data from your old systems and arrange the data so it matches the order within the import templates for Accounts, Opportunities, and Contacts included within the zip file.
3. Important - Microsoft limits (throttles) the number of concurrent workflows a user can run simultaneously. For this reason do the following when setting up your input data set.
  - Break data into batches (spreadsheets) of 25 items if you want to apply security profiles,
  - Break data into batches (spreadsheets) of 50 if you do not want to use Security profiles at import.
4. Remember to include the proper Account ID within each Opportunity so the Opportunity will be associated with the proper account after import.
5. Once you have finished arranging the data into the proper order within the import templates, you are ready to import. Open up the exe called “SideKick365XRM\_Import.exe”. You will see a dialog that asks you which file to import as shown below. Import each spreadsheet .csv file by selecting it within this dialog screen. The utility is “smart enough” to know if selected an Account, Opportunity, or Contact .CSV file.



Use the button with three dots (...) to find the .csv files to import into SideKick 365 CRM. Remember the following rules...

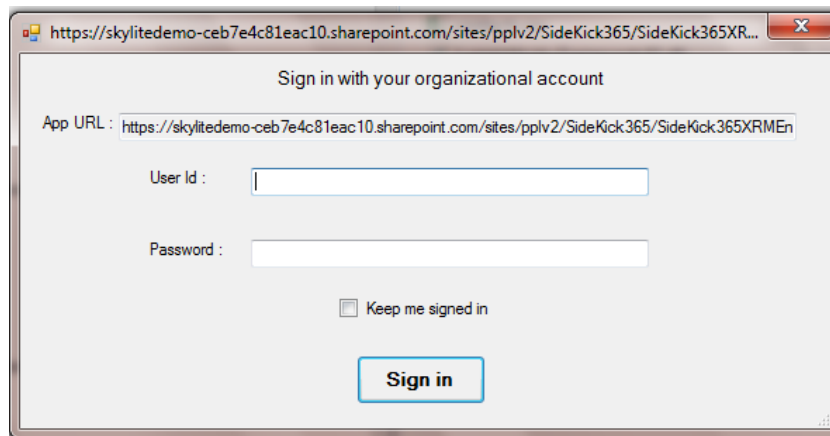
A. Import Accounts first - Requirements for accounts import file are the following:

- a. “Owner” – should contain valid user’s login to Office 365 (for ex [someone@company.onmicrosoft.com](mailto:someone@company.onmicrosoft.com));
- b. Choices for “Account Type”: Lead, Prospect, Customer – Or the equivalent in your local language – Make sure these match the options defined in the dropdown choice list for type in account
- c. “Account Id” – unique identifier for account;
- d. Choices for “Billing Address Same”: true, false - Or the equivalent in your local language;
- e. If there is information for main contact, a new contact will automatically be created in “Contacts” list and associated with account – you don’t need to import the contact again if you include the contact info in the account record in the .CSV file.

B. Requirements for Opportunities import file are the following:

- a. "Account Id" must be populated with valid unique identifier for existing account that you want to associate the account with;
- b. "Owner" – should contain valid user's login to Office 365 (for ex. [someone@company.com](mailto:someone@company.com));
- c. Choices for "Probability": Make sure they match the choices in the dropdown for the Probability you defined in the Sales Stage
- d. Choices for "Outcome": N/A, Won, Lost - Or the equivalent in your local language; Make sure they Match the choices in the dropdown for the Outcome in Opportunity
- e. Choices for "Status" in Opportunity: Make sure they match the choices the names in the Sales Stage Entries
- f. Territory – Make sure the values in the import data set match the values in the dropdowns in Account.

5. Next, you will be presented with a screen asking you supply values that are used to log into SideKick 365 CRM and import the data. You need to supply the web address of SideKick 365 CRM and username and password of a user that can add data (contribute permissions) to SideKick 365 CRM. You will see a screen that is similar to the one shown below:



Put your App URL into the configuration screen – a sample of an appropriate url follows:  
<https://skylite-7e5d5cbb746a07.sharepoint.com/sites/crmdemo1/SideKick365CRM>

Then type in the user name and password. Select the checkbox "Keep me signed in" if you want the system to remember your username and password. Selecting me "Keep me signed in" will bypass this screen for all future imports.

6. Finishing up the import – Now you can import data using any .CSV template that is properly formatted. You can always import more data into SideKick 365 CRM using the templates and running the utility called SideKick365CRM\_Import.exe. The utility has error checking, so you cannot import the same record that uses the same unique identifier twice. It also has a log file that records what was imported and when if error checking or auditing is required.
7. Security – You can also use security profiles so that permissions are automatically applied when the Contact, Opportunity or Account is imported. Make sure to set up a security profile BEFORE you import the data and then make sure the security profile has the exact same name within the .CSV file as the name used in the profile in SideKick 365 CRM. NOTE – if you don't include a security profile in the row of a data element in the .CSV files, then no security profile is applied and all users can see that row of data in Accounts, Opportunities or Contacts.

## Appendix

The following is a complete list of all the fields in each spreadsheet template for Accounts, Contacts, and Opportunities. You must supply at least the required fields for a record to be created for each type of record described below. The (\*) indicates the field is required.

### Account

Account Id (\*)  
Account Name (\*)  
Owner (\*)  
Account Type (\*)  
Phone  
Fax  
Website  
Address  
City  
State  
Zip  
Country  
Billing Address  
Same *(True or False - If True then billing address is the same as address of the Account)*  
Billing Address Street  
Billing Address City  
Billing Address Zip  
Billing Address State  
Billing Address Country  
Notes  
Main Contact Name *(If values are supplied for a main contact, then a Contact record is also created)*  
Main Contact  
Company  
Main Contact Job Title  
Main Contact Email  
Main Contact Business Phone  
Main Contact Mobile Phone  
Main Contact Fax  
Main Contact Address  
Main Contact City  
Main Contact State  
Main Contact Zip  
Main Contact Country  
Main Contact Notes  
Profile

**Opportunity** – Make sure to import Opportunities AFTER you import Accounts

Opportunity Name (\*)  
Account Id (\*)  
Owner (\*)  
Amount  
Probability  
Expected Close Date  
Close Date  
Outcome  
Reason for Outcome  
Status (\*)  
Notes  
Main Contact Name  
Main Contact Company  
Main Contact Job Title  
Main Contact Email  
Main Contact Business Phone  
Main Contact Mobile Phone  
Main Contact Fax  
Main Contact Address  
Main Contact City  
Main Contact State  
Main Contact Zip  
Main Contact Country  
Main Contact Notes  
Profile

**Contacts** – Note the import utility does not associate contacts imported within the Contact .CSV file with an account. You must associate a Contact with an Account within SideKick365.

Name (\*)  
Company  
Job Title  
Email  
Business Phone  
Mobile Phone  
Fax  
Address  
City  
State  
Zip  
Country  
Notes  
Profile