



Donaubauer CRM to Online - EXE

User manual

CRM to Online - EXE – for Microsoft Dynamics 365

Versions 8.4.0/9.4.0

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1 Preface

Thank you for choosing our [Donaubauer „CRM to Online“ solution](#).

Now you can easily upload your CRM information to the Microsoft Cloud. All relationships remain unchanged during the transmission. This means, for example, that all offers stay assigned to the correct employee.

In the following pages you will find detailed instructions on using the Donaubauer tool “CRM to Online” for Microsoft Dynamics 365.

2 Requirements

2.1 Preparing the target system

2.1.1 Adjustments

Please note that the following essential requirements are necessary for the tool to work correctly:

- The target system must not contain any demo data.
- The default languages of source system and target system need to be identical.
- All adjustments in the source system to be transmitted need to exist in the target system as well.

2.1.2 Configuration

All plug-in steps of the target system need to be disabled during the upload.

All work flows of the target system are automatically disabled during implementation.

The workflows will be enabled after finishing one run.

Only users with system administrator rights can perform the migration.

Please enter a valid "CRM to Online" license in the target system.

Please note that when using a demo version, all fields will output strings with random upper and lower case.

2.1.3 Comparing the metadata

The metadata of both source and target CRM system are compared before the actual data transmission. In this process, all entities, their attributes as well as the relationships among each other are compared. This step is automatically performed with every start of the tool and can be disabled in the configuration XML.

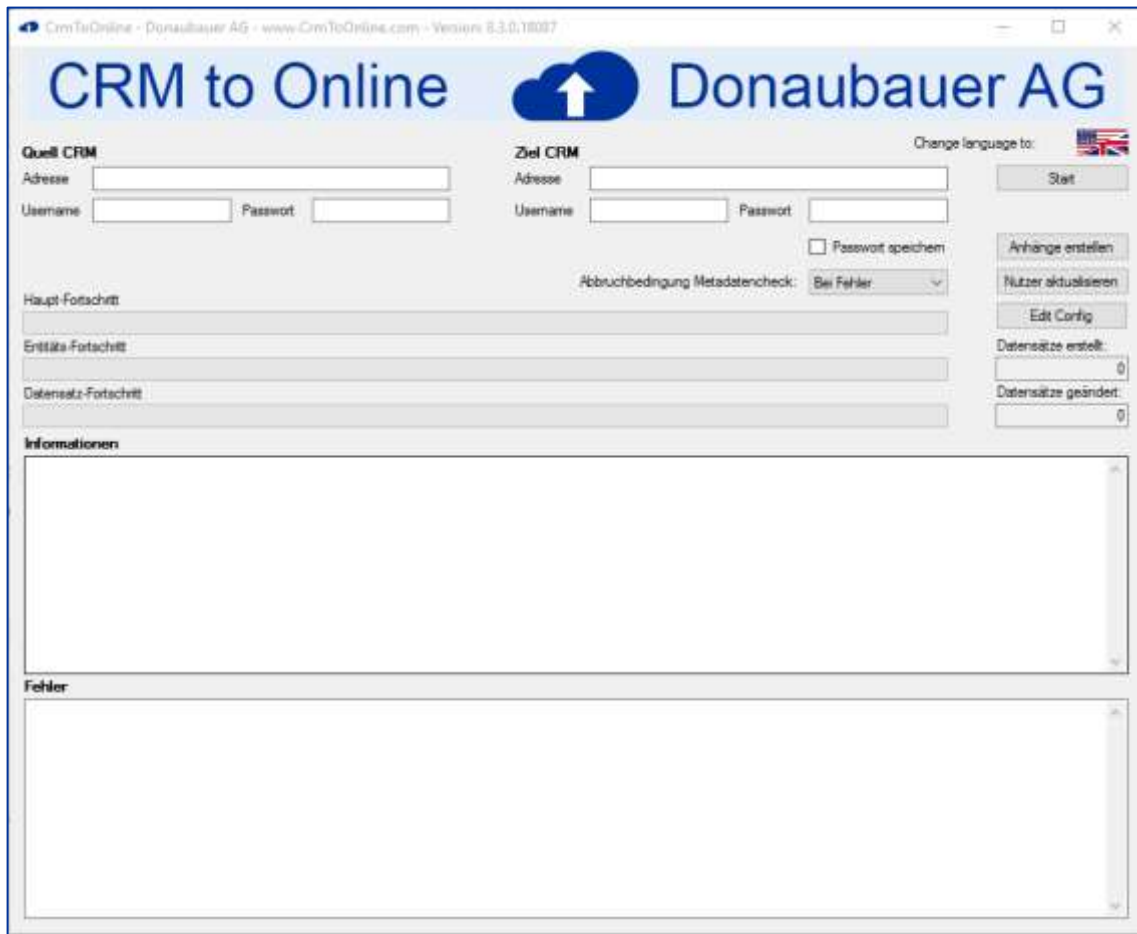
Excluded entities and attributes are not compared.

Relationships referring to an excluded entity or with an excluded intermediate entity are not compared.

2.2 Configuration of the Application

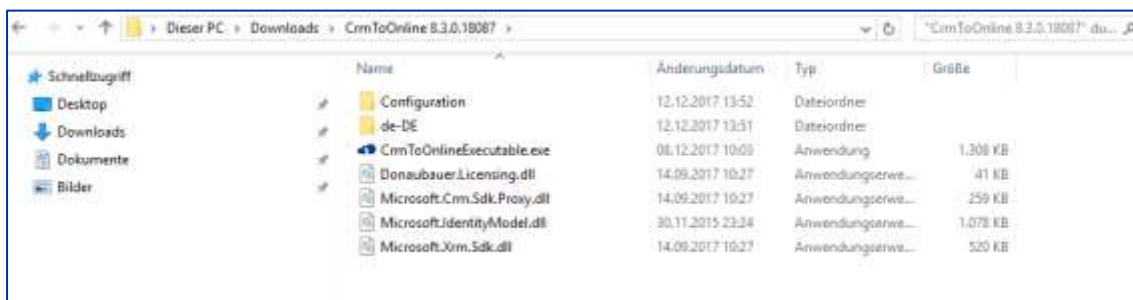
For additional adjustments please customize the "configuration.xml" file.

This file opens when initially using the tool (CrmToOnlineExecutalbe.exe) and clicking the "EditConfig" button in the tool interface.



The file automatically opens in the editor and can be customized accordingly.

Additionally, initially starting the interface creates a new folder “Configuration”, which contains the “configuration.xml” file.



The advantage of opening the “configuration.xml” file through this folder is that this application file can be used with multiple apps, for example Notepad ++.

The following section explains and describes all tags of the xml file enabled for customizing.

2.2.1 TracingLevel

In the “TracingLevel” settings the user can decide which processes should be written in the log file. The “TracingLevel” settings are saved as integers. You can chose from the following values and functions:

Wert	Name	Erklärung
1	Function calls	All function calls within the application are logged.
2	Data manipulation	All alteration of data and data comparisions are logged.
4	Server calls	All accesses are logged together with the time of accessing the CRM. .
8	Configuration	All changes to the tool interface configuration are logged.
16	File accesses	All accesses to files created by the application are logged.
32	metadata	All information on metadata comparison are logged.

If several functions are traced, the integer to be saved will be composed of the sum of the flags in question. For instance: the integer for the sum of function calls (1), server calls (4), data accesses (16) = 21. The maximum TracingLevel of all categories can not be higher than 63.

2.2.2 OutlookLostContact

If the source system references Outlook emails, which are not related to a contact in the source system (contact not available in the CRM), the target system will have to refer to a dummy contact. The GUID of this record is entered through OutlookLostContact.

<OutlookLostContact> CDF5CD06-19C8-E611-8115-00155D001BAC </OutlookLostContact>

When this is not done, an error message to the record is created (LogData will be written) and the record will be transmitted without an entry (empty).

2.2.3 UserMapping

This setting allocates the data records of the source system to the according user within the target system, as all users get a new ID when being created in the target system.

When no settings are made, the data are allocated to the user (system administrator) of the “CRM to Online” tool.

Example of two usermappings:

```
<UserMapping>
  <Mapping sourceUser="CDF5CD06-19C8-E611-8115-00155D001BAC" targetUser="5999F371-59D2-E611-8117-C4346BDC3CC1"/>
  <Mapping sourceUser="64669cb4-c3fc-e511-b923-54a888b9500c" targetUser="8119011C-C4FC-E511-80D4-00155D00F372"/>
</UserMapping>
```

The respective users IDs can be identified as follows:

1. In CRM via Settings → Security → User
2. Open “Advanced Search”
3. Delete all filters and perform “advanced search”
4. Export the result (all users) to a static Excel table
5. Show column A in the static Excel table.

Example of an ID: CDF5CD06-19C8-E611-8115-00155D001BAC

Please note: Incorrect relationships (user does not exist in source or target system) will terminate the transmission.

2.2.4 BatchSize

A defined number of data can be transmitted with one performance of the tool, depending on the system performance of target system and local computer.

The default value for the transmission is set at 250 data records.

With more or less system performance (in target CRM as well as local computer) this value can be increased or decreased accordingly.

Example: `<BatchSize>250</BatchSize>`

2.2.5 RetrieveAllMetadata

By default, all metadata is retrieved [1] before the transmission from source and target system. The value is predefined as "true" in XML.

A quicker start of the transmission can be achieved by changing the value to "false". User defined entities will, however, **not** be transmitted.

Any other metadata that are necessary for the program sequence will be loaded dynamically during the sequence. This requires additional system performance.

Example: `<RetrieveAllMetadata>>false</RetrieveAllMetadata>`

2.2.6 CompareMetadata

Before starting the transmission all metadata of source and target system are compared, to ensure that all required fields exist in the target system.

The value in xml is preset as "true".

When no error occurred in the first program sequence, this value can be changed to "false". Therefore, the comparison will not be executed and the performance for data transmission increases.

Example: `<CompareMetadata>>false</CompareMetadata>`

2.2.7 ExcludedEntities

To exclude certain entities from transmission, insert them after the tag `<ExcludedEntities>` and separate them by semicolon.

Entities that are necessary for the transmission of other entities (e.g. in 1:n relationships) cannot be excluded from transmission.

Example: `<ExcludedEntities>task;email;appointment;phonecall;</ExcludedEntities>`

2.2.8 ExcludedProperties

To exclude certain fields from transmission, insert them after the tag `<ExcludedProperties>` according to the following syntax:

Entity name, LogicalName of the excluded field (separated by a comma)

Multiple excluded fields are separated by a semicolon.

Fields that are necessary for the transmission of other entities or relationships (e.g. lookup fields) cannot be excluded from transmission.

Example: `<ExcludedProperties>account,description;account,telefon2;</ExcludedProperties>`

2.2.9 CreateEntities

When the value is set to “false”, no data records are created.

Example: <CreateEntities>true</CreateEntities>

2.2.10 AssociateRelationships

When the value is set to “false”, data records are not associated.

Example: <AssociateRelationships>true</AssociateRelationships>

2.2.11 UpdateEntities

When the value is set to “false”, data records will not be updated.

Example: <UpdateEntities>true</UpdateEntities>

2.2.12 CreateResolutions

When the value is set to “false”, data records are not closed.

Example: <CreateResolutions>true</CreateResolutions>

2.2.13 Language

The tool supports two languages. They can be configured as follows:

<Language>de-DE</Language>
<Language>en-US</Language>.

The language can be selected through the tool’s web interface as well. This will automatically overwrite the XML tag.

2.2.14 BreakTime

The interval between an incorrect query and its repetition is set through BreakTime. The interval is set in minutes; the default value is 20 minutes.

Example: <BreakTime>20</BreakTime>

2.2.15 ExceptionBreak

ExceptionBreak defines the number of connection attempts to source or target CRM, if no connection was available.

Example: <ExceptionBreak>60</ExceptionBreak>

With the settings explained above – BreakTime (20 minutes) and ExceptionBreak (60) – the waiting time until the process is completely canceled is 20 hours.

2.2.16 BreakConditionIndex

“BreakConditionIndex” defines the conditions under which the meta data check is cancelled. The user can chose from the following options:

- Never value: 0
- On Warning: value: 1
- On Error: value: 2
- Always: value: 3

The default value is set to “error”.

The BreakConditionIndex can be selected through “BreakCondition meta data check” in the tool’s web interface as well. This will automatically overwrite the XML in the “configuration.xml” file.

The screenshot shows the 'CRM to Online' web interface for Donaubauer AG. It features two main sections: 'Quell CRM' and 'Ziel CRM', each with fields for 'Adresse', 'Username', and 'Passwort'. A 'Passwort speichern' checkbox is located between the two sections. Below these, there are progress indicators for 'Haupt-Fortschritt', 'Entitäts-Fortschritt', and 'Datensatz-Fortschritt'. A dropdown menu labeled 'Abbruchbedingung Metadatencheck:' is highlighted with a red box and set to 'Bei Fehler'. On the right side, there is a 'Change language to:' selector with a flag icon, a 'Start' button, and several other buttons: 'Anhänge erstellen', 'Nutzer aktualisieren', and 'Edit Config'. At the bottom right, there are two counters: 'Datensätze erstellt:' with a value of 0 and 'Datensätze geändert:' with a value of 0.

2.2.17 SetStateDemo

This setting allows the user to set the state of records in the **demo mode** of the interface. Entering “false” stops this setting; “false” is set as default value.

Note: Records created this way cannot be updated with a valid license.

2.2.18 CacheTrace

By default, this value is set to “true”. This setting saves the log data to the hard drive’s cache. If the value is higher than one million characters, it will be entered in the log to increase performance. This value is fixed and cannot be changed.

If the value is set to “false” the log data will be written immediately, which requires additional system performance.

2.2.19 ParallelExecuteMultiples

The number of parallel relationships is set here. They are used to send data to the target CRM. This number is unlimited. Entering a large number of relationships requires high system performance: Too little performance can lead to cancellation of the transmission, if this process takes too long (timeout). The default value is set to “2”.

This feature is at present in Beta test and can result in problems and terminations, if other than the default value is set.

Example: <ParallelExecuteMultiples>2</ParallelExecuteMultiples>

2.2.20 AllowInactiveUserMapping

During a migration procedure the system checks whether all assigned users are active in the target CRM. When the value is set to “false”, this check does not take place. Therefore, inactive users as record owners can be transmitted in the target CRM.

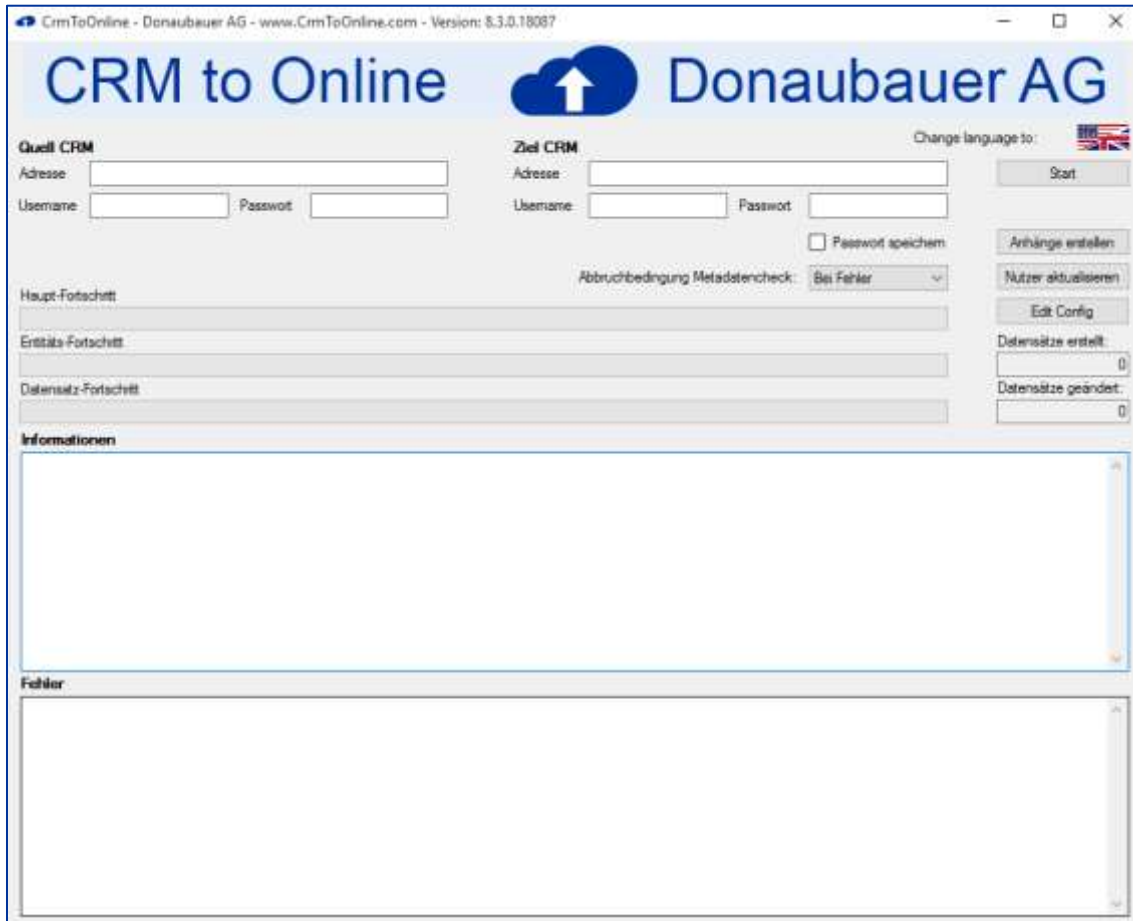
Exampe: <AllowInactiveUserMapping>>false</AllowInactiveUserMapping>

This feature is in Beta test and can result in various errors at different entities.

3 Using the Application

3.1 Data migration

Start the exe-file "CRMtoOnlineExecutable".



Entries are made in the following order:

3.1.1 Change language using the flag



3.1.2 Enter user data of the source CRM with URL

Example URL: <https://instanz.domain.de>

The screenshot shows the 'CRM to Online' application window. The title bar reads 'CrmToOnline - Donaubauer AG - www.CrmToOnline.com - Version: 8.3.0.18087'. The main header contains the 'CRM to Online' logo and the 'Donaubauer AG' logo. Below the header, there are two main sections: 'Quell CRM' (Source CRM) and 'Ziel CRM' (Target CRM). The 'Quell CRM' section is highlighted with a red box and contains input fields for 'Adresse', 'Username', and 'Passwort'. The 'Ziel CRM' section contains input fields for 'Adresse', 'Username', and 'Passwort'. To the right of the 'Ziel CRM' section, there is a 'Change language to:' dropdown menu with a flag icon and a 'Start' button.

3.1.3 Enter user data of the target CRM with URL

Example: URL: <https://instanz.crm4.dynamics.com>
Username: user@domain.onmicrosoft.com

For Germany's Microsoft Cloud data may differ as follows:

URL: <https://instanz.crm.microsoftdynamics.de>
Username: user@domain.onmicrosoft.de

The screenshot shows the 'CRM to Online' application window. The title bar reads 'CrmToOnline - Donaubauer AG - www.CrmToOnline.com - Version: 8.3.0.18087'. The main header contains the 'CRM to Online' logo and the 'Donaubauer AG' logo. Below the header, there are two main sections: 'Quell CRM' (Source CRM) and 'Ziel CRM' (Target CRM). The 'Ziel CRM' section is highlighted with a red box and contains input fields for 'Adresse', 'Username', and 'Passwort'. The 'Quell CRM' section contains input fields for 'Adresse', 'Username', and 'Passwort'. To the right of the 'Ziel CRM' section, there is a 'Change language to:' dropdown menu with a flag icon and a 'Start' button.

3.1.4 Save the password.

The screenshot shows the 'CRM to Online' application window. The title bar reads 'CrmToOnline - Donaubauer AG - www.CrmToOnline.com - Version: 8.3.0.18087'. The main header contains the 'CRM to Online' logo and the 'Donaubauer AG' logo. Below the header, there are two main sections: 'Quell CRM' (Source CRM) and 'Ziel CRM' (Target CRM). The 'Ziel CRM' section is highlighted with a red box and contains input fields for 'Adresse', 'Username', and 'Passwort'. Below the 'Ziel CRM' section, there is a checkbox labeled 'Passwort speichern' which is highlighted with a red box. To the right of the 'Ziel CRM' section, there is a 'Change language to:' dropdown menu with a flag icon and a 'Start' button. Below the 'Start' button, there are buttons for 'Anträge erstellen', 'Nutzer aktualisieren', and 'Edit Config'. At the bottom of the window, there is a 'Haupt-Fortschritt' section and a 'Abbruchbedingung Metadatencheck' dropdown menu set to 'Bei Fehler'.

Saved passwords are only entered in the computer used at this time. If the application is executed with the same configuration file on a different computer or with a different user, the password has to be entered again. All passwords are saved in the configuration in encrypted form and are bound to computer and user.

3.1.5 Set cancellation of meta data check

The user can set the conditions under which the process of checking the metadata is cancelled. We recommend setting the value to "error" for the first program sequences. Otherwise the transmission may lack of potential adjustments. For any further sequences, however, the value can be set to "Never", since the adjustments will not change again.

Bei der Überprüfung der Metadaten kann festgelegt werden, wann der Prozess abbricht. Es wird empfohlen bei den ersten Durchläufen „Bei Fehler“ abbrechen zu lassen, da sonst potentiell Anpassungen für die Übertragung fehlen. Bei weiteren Durchläufen kann dann auch die Option „Nie“ gewählt werden, da sich die Anpassungen nicht mehr ändern.

The user can chose from the following options

- Never
- On Warnings
- On Errors
- Always



This entry can be made manually in the "configurations.xml" file.

3.1.6 Open the configuration file "Edit Config"



Opening the configuration file for the first time automatically generates a "Configuration" folder within the application.

3.1.7 Start the key process



3.1.8 Further transmissions (Delta)

Since this process takes some time, changes in the source system may take place. To transfer these changes into the target system, the process will be performed again. Only data changed after the last error-free transmission of the entity's records are transmitted. If there was no successful transmission of the entity, all records of this entity are transmitted.

3.1.9 Create attachments

Creates email attachments.

This is a rather time-consuming process and can be parallelized if applicable. This process can only take place after all email records were transmitted.



3.1.10 Update users (onyl with valid license)

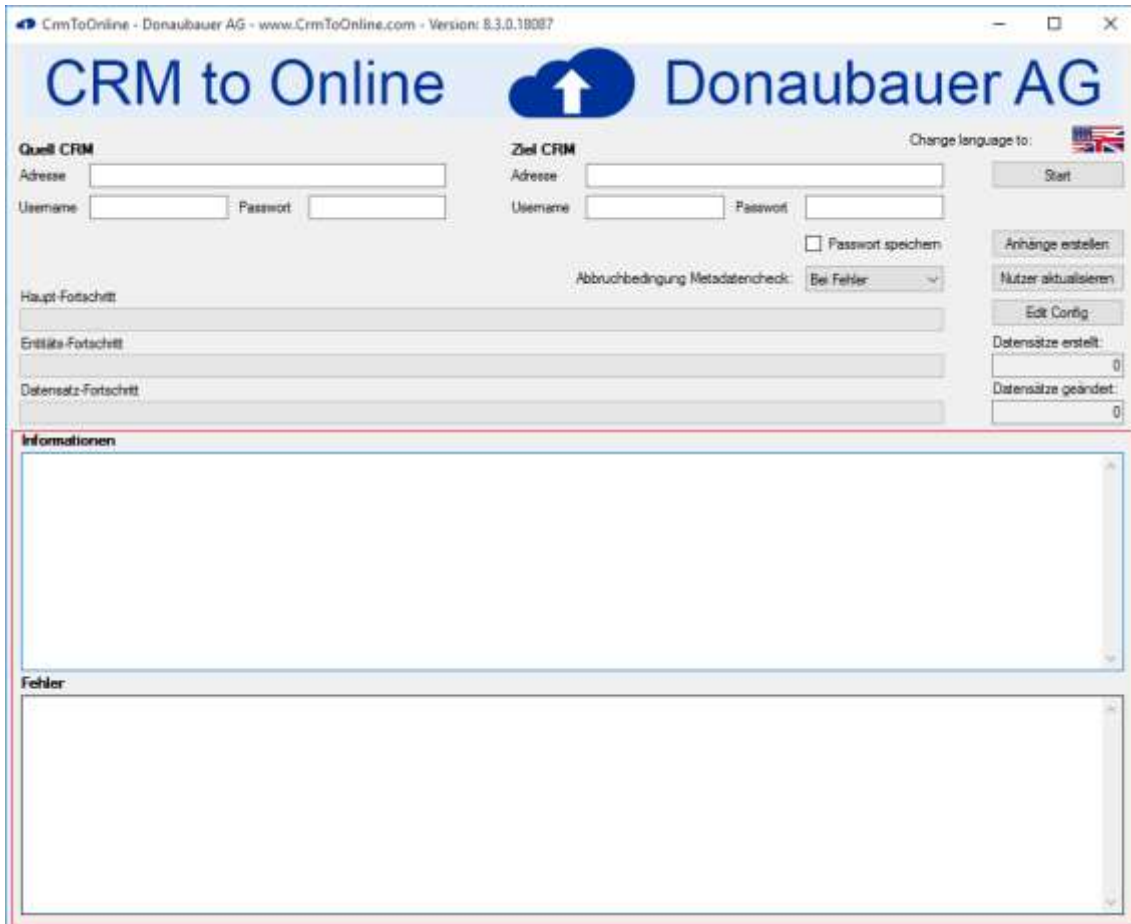
As soon as all other processes are fully completed, you can start to assign the users to the correct business units and update all data.

The screenshot shows the 'CRM to Online' interface for Donaubauer AG. It features two main sections: 'Quell CRM' (Source CRM) and 'Ziel CRM' (Target CRM). Each section has input fields for 'Adresse', 'Username', and 'Passwort'. A 'Start' button is located to the right of the 'Ziel CRM' fields. Below the 'Ziel CRM' fields, there is a checkbox for 'Passwort speichern' and a dropdown menu for 'Abbruchbedingung Metadatencheck' set to 'Bei Fehler'. On the right side, there are buttons for 'Anhänge erstellen', 'Nutzer aktualisieren' (highlighted with a red box), and 'Edit Config'. At the bottom right, there are two progress indicators: 'Datensätze erstellt: 0' and 'Datensätze geändert: 0'. The top of the window displays the company logo and name 'Donaubauer AG'.

The user's security roles in the source system will be assigned in the target system as well. After completing all steps the transmitted records can be found in the target system. If any errors occurred, please correct them and restart the current process. Correctly transmitted records are not changed when restarting.

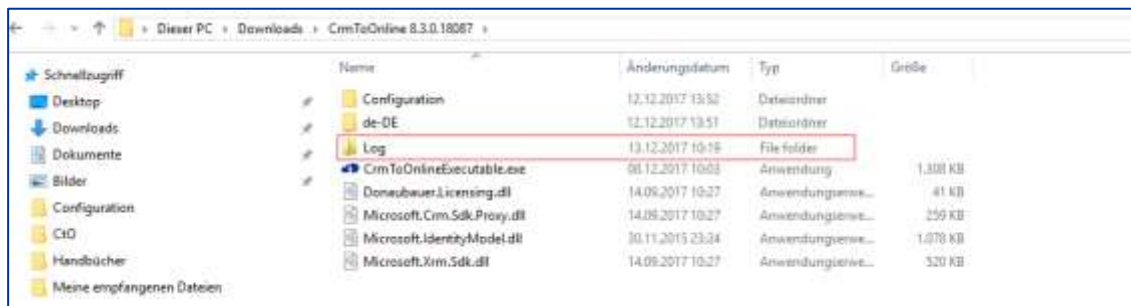
3.2 Monitoring Migration

Information and state of the migration can be found in the “information” field in the tool’s web interface. Occurring errors are logged in the “errors” [12][BP3]field.



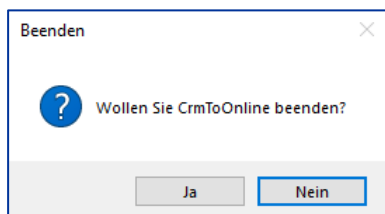
An error message creates a corresponding log file with a maximum file size of 100 MB. Higher amounts of data will create another file.

The log file is created in the application’s “log” folder.



3.3 Closing the “CRM to Online” application

The application closes, in compliance with the Microsoft philosophy, in the upper right corner of the window. The application’s final termination only happens after answering the save prompt.



If the application is closed before completing the migration, all steps explained above have to be carried out again.

If you have any questions concerning our solution or need additional support, do not hesitate to contact us.



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