Microsoft

Dynamics 365 Nonprofit Accelerator How to Import Sample Data Packages

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Microsoft

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Document purpose

This document details the process of importing data into the Microsoft Dynamics 365 Nonprofit Accelerator.

Data Migration Utility (Configuration Migration)

The document explains how to import data to Dynamics 365 using the "Data Migration Utility", which should be downloaded before starting the import process.

To download the tool please refer to the following link:
https://www.nuget.org/packages/Microsoft.CrmSdk.XrmTooling.ConfigurationMigration.Wpf

To run the tool, once downloaded, extract the files and double click on the application named "DataMigrationUtility.exe".

Name ^	Date modified	Type	Size
CrmUII.svclog	3/19/2019 4:50 PM	WCF Trace File	0 KB
DataMigrationUtility.exe	2/14/2019 1:39 AM	Application	739 KB
DataMigrationUtility.exe.config	7/10/2019 5:20 PM	XML Configuratio...	10 KB
DataMigrationUtility.tokens.dat	7/10/2019 5:20 PM	DAT File	115 KB
LicenseTerms.docx	2/22/2019 9:48 AM	Microsoft Word D...	39 KB
Microsoft.Crm.Sdk.Proxy.dll	2/14/2019 1:41 AM	Application extens...	275 KB
Microsoft.IdentityModel.Clients.ActiveDirectory.dll	4/27/2018 11:14 AM	Application extens...	187 KB

Sample Data Packages to Import

The Microsoft Dynamics 365 Nonprofit Accelerator contains multiples solutions that could be use based on the customer needs. Each solution can be install to provide more functionalities to the system. Next, we are providing a list of the solutions and the data package needed to test or review each solution functionalities.

Nonprofit Core Solution

The following packages should be imported in order for the Nonprofit Core Solution:

1. NonprofitAccelerator_NonprofitCore_DataPackage_2_3_3_0

Nonprofit Measurement Solution (Optional)

The following packages should be imported in order for the Nonprofit Measurement Solution.

1. NonprofitAccelerator_NonprofitCore_DataPackage_2_3_3_0
2. NonprofitAccelerator_Measurement_DataPackage_2_3_3_0

Nonprofit Sales Solution

The following packages should be imported in order for the Nonprofit Sales Solution:

1. NonprofitAccelerator_MicrosoftDynamics365_CE_DataPackage_2_3_3_0

Nonprofit Solution

The following packages should be imported in order for the Nonprofit Solution:

1. NonprofitAccelerator_MicrosoftDynamics365_CE_DataPackage_2_3_3_0

IATI Solution

The following packages should be imported in order for the IATI Solution:

1. NonprofitAccelerator_MicrosoftDynamics365_CE_DataPackage_2_3_3_0
2. NonprofitAccelerator_MicrosoftDynamics365_IATI_DataPackage_2_3_3_0
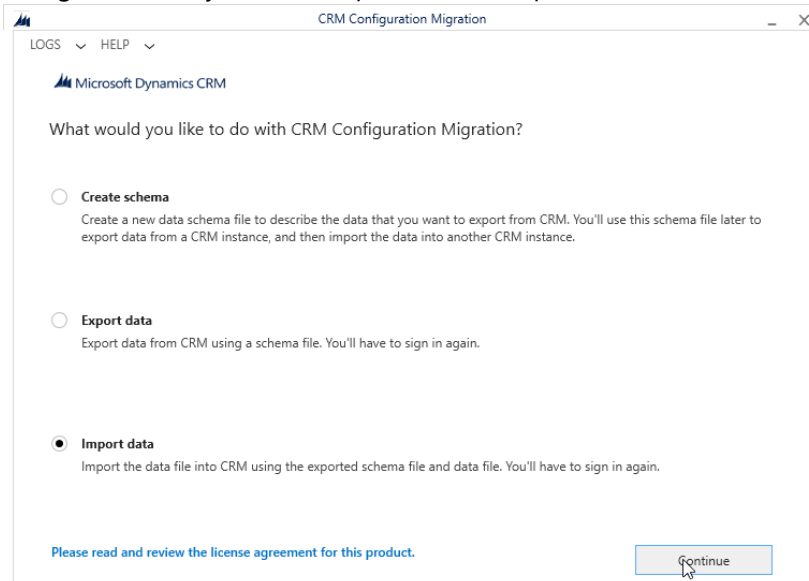
Volunteer Management Solution

The following packages should be imported in order for the Volunteer Management Solution:

1. NonprofitAccelerator_MicrosoftDynamics365_CE_DataPackage_2_3_3_0
2. NonprofitAccelerator_MicrosoftDynamics365_VolunteerManagement_DataPackage_2_3_3_0
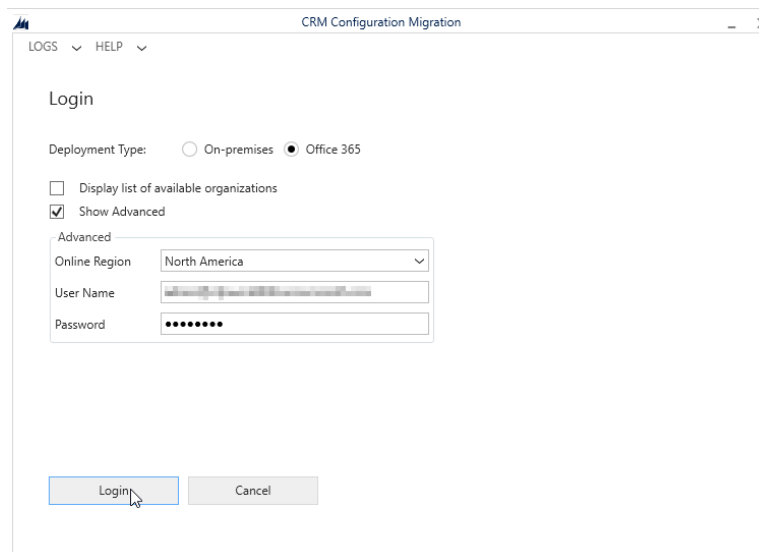
Step by step to import packages

The following steps explains how to install the sample data package for any solution:

1. Download and save the data package.
2. Open the "Data Migration Utility", select "Import data" and press "Continue".

3. Provide the user and password for the environment that you want to import the data and press "Login". Note that you may need to change the "Deployment Type" and "Online Region" based on the environment that you are using.
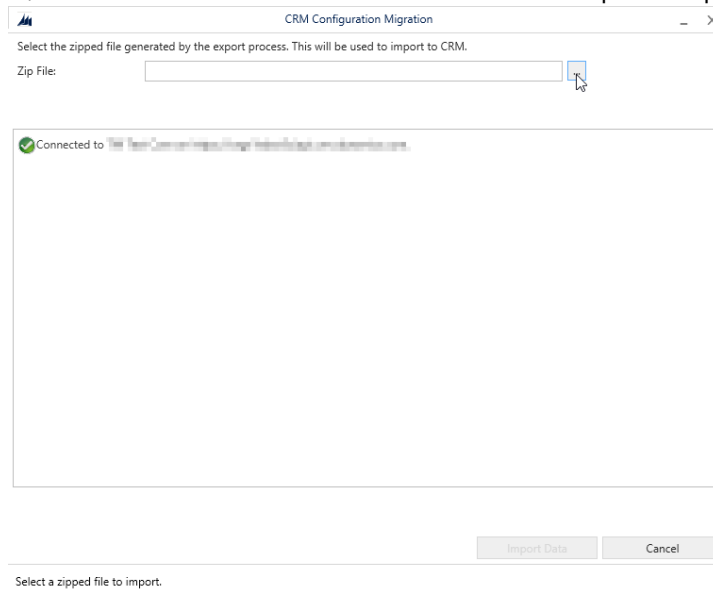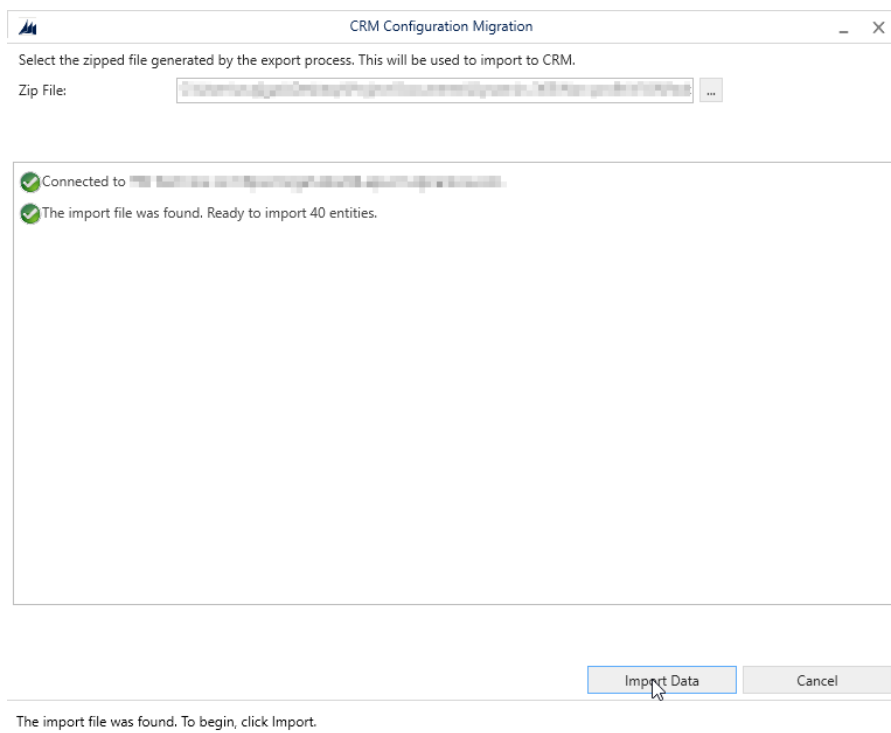
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4. Once authenticated, click on the search button to search for the sample data package.

5. A search window will appear. Locate and select the previously downloaded data package and press "Import Data" to begin the import process.

6. After the process is complete, a message will be display in the system notifying "The import to CRM is complete".