



# ChainSys Data Loading For Microsoft Dynamics 365

## Solution Description

ChainSys Mass Data Loading automates expensive, time-consuming, and error prone manual data entry for Microsoft Dynamics 365 with its fast, accurate, secure browser-based utility to perform mass data loads from CSV or Excel files to your system. Each mass data load complies with system import routines, system security, and custom business rules. Pre-validate each load, fix data errors, and keep a detailed audit trail.

## Use Cases, Key Features and Highlights

- Mass Load Additions or Changes to Master Data, such as Customers, Contacts, Suppliers, Products, Assets, Employees
- Mass Load Additions or Changes to Reference Data, such as Lookup Values, Geo Codes, Planner Codes, Sourcing Rules, etc.
- Mass Load Additions or Changes to Orders, such as Purchase Requisitions, Quotations, Orders, Work Orders, etc.
- Mass Load Transactions, such as Inventory Transactions, GL Transactions, FA Depreciations, Timecard Entries, etc.
- Require User Authentication and Stamp Inserts and Updates with System Username, Date and Time
- Pre-Validate against System Constraints and Configurable Business Rules, and Resolve Errors for Each Load before Committing
- Provide Row and Column-Level Audit Trail of Each Load, Insert / Update Performed by a User
- Support Ad Hoc CSV and Excel Data Loads, or Automate Bulk Data Loads from a File System through a Scheduler

## Why ChainSys

- Time for repetitive data entry tasks is reduced.
- User errors for repetitive data entry tasks are reduced through pre-validation.
- System security is enforced.
- Centralized load monitoring and row and column-level audit trails are supported.

## ChainSys Approach

Upon signing into the ChainSys Mass Data Loading tool, users can connect to file shares where CSV or Excel files are stored. Users then create a Loader and map the CSV or Excel files to the Loader through a drag-and-drop interface. In addition to the target system constraints, users can configure business rules to validate or transform data prior to loading to the target.

During execution, each loader will perform pre-validation against business rules configured in advance. Any validation failures can be fixed and re-submitted to the pre-validation engine. After pre-validation and data fixes are complete, the loader will execute the load against the target system. Successes and failures returned by the target system are also logged.

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