



## **c360 Import Manager Roadmap**

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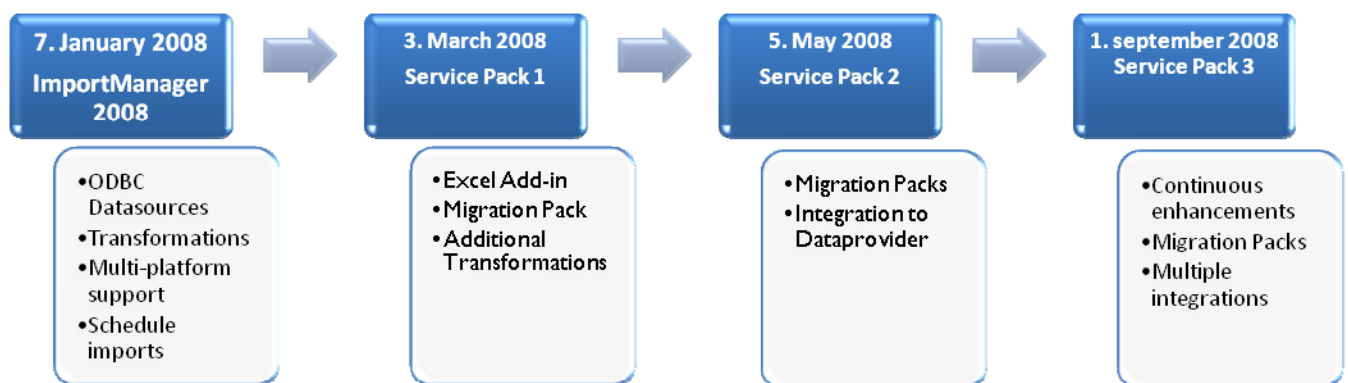
The purpose of this roadmap is to highlight the future for Import Manager and the continuous development of the product. The roadmap shows the dedication we put into delivering innovative technology based on the Microsoft platform.

### Import Manager in CRM 3.0

The current version of Import Manager for Dynamics CRM 3.0 delivers great value to partners and end-customer in terms of easy imports from any data source into Microsoft CRM. This is delivered through ease-of-use and flexible imports to any entities in Microsoft CRM. Import Manager Studio gives full flexibility and the opportunity to schedule imports.

### Import Manager in CRM 4.0

The next version of Import Manager (Import Manager 2008) offers a significant change in the basic architecture of Import Manager. This version is designed using a client/server architecture which gives increased flexibility in terms of scheduling and user experience.



To utilize the full flexibility of Microsoft CRM 4.0 and its freedom of choice with regards to deployment we have made significant changes to Import Manager. This means Import Manager 2008 can be deployed with Microsoft CRM 4.0 whether you choose to use the Live, Hosted or On-premise version.



## Import and data management comparison map

	Microsoft Dynamics CRM 3.0	c360 Import Manager for Microsoft CRM 3.0	Microsoft Dynamics CRM 4.0	c360 Import Manager for Microsoft CRM 4.0
<b>All Customizable entities</b> Import into all entities and attributes in CRM including custom entities and attributes		✓	✓	✓
<b>Relationships</b> Manage relationships between objects		✓	Partly	✓
<b>Save Import</b> Save import mappings as a template for later use		✓	✓	✓
<b>Duplicate checking</b> Update records instead of creating duplicates when a given match criterion is met		✓		✓
<b>Update records</b> Update records based on a given key		✓	Partly (only available through Excel export/import )	✓
<b>Delete</b> Delete records based on a given match criterion				✓
<b>Schedule Imports</b> Schedule imports on a daily basis		✓		✓
<b>Data sources</b> Connect and collect data from other sources	CSV	CSV, ODBC, Custom plugins	CSV	CSV, ODBC, Excel, Access, Custom plugins
<b>Transformations</b> Transform, combine and manipulate data on-the-fly when importing				✓
<b>CRM-to-CRM data migration (multi tenant)</b> Import data from other Microsoft Dynamics CRM systems				✓
<b>Advanced Ownership</b> Set the ownership of any given object in the system based on data from the data source or inherit from related objects		✓		✓
<b>Advanced match criteria</b>		✓		✓



Create advanced match criteria based on multiple fields from the data source			
<b>Command line tools</b> Execute, stop, log imports from the Command Prompt			✓
<b>Office 2007 UI</b> Consistent Office 2007 Look-and-feel experience		✓	✓
<b>Multiple CRM installations</b> Manage multiple CRM installations within one Import Manager instance			✓
<b>Entity specific actions</b> Execute platform specific logic like "Set State", "Add to marketing list", "Add User to Security Role" etc.		Partly	✓

## Import and data management comparison map (Continued)

	Microsoft Dynamics CRM 3.0	c360 Import Manager for Microsoft CRM 3.0	Microsoft Dynamics CRM 4.0	c360 Import Manager for Microsoft CRM 4.0
<b>CRM 3.0 Support</b> Connect to and manage Microsoft Dynamics CRM 3.0 installations	✓	✓		✓
<b>CRM 4.0 On-premise support</b> Connect to and manage Microsoft Dynamics CRM 4.0 installations using Window Integrated Security			✓	✓
<b>CRM 4.0 Hosted Support</b> Connect to and manage Microsoft Dynamics CRM 3.0 installations using Forms-Based Authentication			✓	✓
<b>CRM 4.0 Live Support</b> Connect to and manage Microsoft Dynamics CRM 3.0 installations using Microsoft Live ID			✓	✓