

Data Shipper

Seamless Data Transfers for Dynamics 365 CE

Guide

Introduction

Welcome to the **Data Shipper** guide. This application is designed to streamline data transfers between Dynamics 365 CE environments, ensuring efficiency and reliability. Whether you are moving data for testing, deploying updates, or managing system migrations, Data Shipper provides a powerful and customizable solution.

Core Features

Data Ships

Data Ships form the backbone of the application, acting as the configuration hub for defining which tables and columns to transfer between environments. Each Data Ship is highly customizable to meet specific needs.

Key Configurations:

- **Name:** A descriptive title for the Data Ship.
- **Target Environment:** Specifies the destination Dynamics 365 CE environment.
- **Use Authentication Profile:** “Yes” to use a predefined authentication profile or “No” to manually specify credentials.
- **Source Table:** Identifies the table containing records for transfer.
- **Select All Columns:** Choose “Yes” to transfer all columns (not recommended) or “No” to specify selected columns.
- **Selected Columns:** When "Select All Columns" is set to “No,” specify which columns to include in the transfer.
- **Filter Option:**
 - **Existing View:** Utilize an existing view of the source table for record filtering.
 - **Fetch XML:** Input custom FetchXML to define specific filtering criteria.
- **Is Create:** Specify whether new records should be created in the target environment.
- **Is Update:** Specify whether existing records should be updated.
- **Is Delete:** Specify whether records should be deleted.
- **Continue On Error:** If “Yes,” the transfer continues even if errors occur.
- **Bypass Plugin Logic:** “Yes” to skip triggering plugins in the target environment.
- **Match Lookup on Guid:** Attempts to match lookup fields based on their unique ID.
- **Match Lookup on Name:** Attempts to match lookup fields based on their name.

Form Overview:

The Data Ship form is the user’s primary interface for configuring these options. Detailed and well-organized fields ensure an intuitive setup process.

Dynamics 365 | Data Shipper

Search

SANDBOX

Home Recent Pinned General Data Fleets Data Ships

Verify Setup Preview Transfer Reco... Transfer Records Save Save & Close New Deactivate Delete Refresh Share

Active Accounts (Sample) - Saved

Data Ship

General Related

Do not allow Faxes Email Follow Email Activity Main Phone Number of Employees Owner Primary Contact Website

Filter

Filter Option Existing View

Selected View Active Accounts

Settings

Is Create	Yes	Continue On Error	No
Is Update	Yes	Bypass Plugin Logic	Yes
Is Delete	Yes		
		Match Lookup On Guid	Yes
		Match Lookup On Name	Yes

History

Last Transferred On	1/10/2025	12:49 AM	Last Verified On	1/10/2025	1:04 AM
---------------------	-----------	----------	------------------	-----------	---------

Data Fleets

Data Fleets simplify the management of multiple Data Ships by enabling batch operations. Instead of running Data Ships individually, group them into a Data Fleet for simultaneous execution, saving time and reducing effort.

Benefits:

- **Batch Processing:** Execute multiple Data Ships in one go.
- **Custom Order:** Specify the sequence for transferring tables to ensure dependencies are met.
- **Centralized Control:** Manage all your Data Ships from a single location.

Form Overview:

The Data Fleet form allows users to:

- Add connections to multiple Data Ships.
- Define the execution order for each Data Ship.
- Start batch transfers with a single action.

The screenshot displays the Dynamics 365 Data Shipper interface. The top navigation bar includes 'Dynamics 365', 'Data Shipper', a search bar, and a 'SANDBOX' environment indicator. The left sidebar shows navigation options: Home, Recent, Pinned, General, Data Fleets (selected), and Data Ships. The main content area shows the 'Second Data Fleet (Sample)' form, which is saved. The form includes a 'General' tab and a 'History' section. The 'General' tab shows the name 'Second Data Fleet (Sample)'. The 'History' section shows the last verified on date as 1/10/2025 at 2:30 AM and the last run on date as 1/10/2025 at 1:49 AM. Below the history, there is a table for 'Data Ships' with columns for 'Order' and 'Data Ship'. The table lists three data ships: 1. Active Accounts (Sample), 2. Active Contacts (Sample), and 3. Moving Leads (Sample). Each row has a trash icon for deletion. A '+ Add Data Ship' button is located at the top right of the table.

Order	Data Ship
1	Active Accounts (Sample)
2	Active Contacts (Sample)
3	Moving Leads (Sample)

Authentication Profiles

Authentication profiles securely store credentials (client ID, client secret, and tenant ID) for connecting to target environments. This feature enhances security and simplifies configuration by eliminating the need to repeatedly input credentials.

Key Features:

- Centralized credential management.
- Support for multiple target environments.
- Streamlined integration with Data Ships.

Form Overview:

The Authentication Profile form includes fields for:

- **Client ID**
- **Client Secret**
- **Tenant ID**

The screenshot shows the Dynamics 365 interface for creating an Authentication Profile. The top navigation bar includes 'Dynamics 365', 'Data Shipper', a search bar, and 'SANDBOX' mode. The left sidebar shows the navigation menu with 'Authentication Profiles' selected. The main form area displays the 'Authentication Profile (Sample)' form, which is saved. The form includes a 'General' tab and a 'Related' tab. The 'General' tab contains the following fields:

Field	Value
Name	Authentication Profile (Sample)
Client Id	734d4854- XXXXXXXXXX -a9883038c
Client Secret	wt58Q-G- XXXXXXXXXX -DXCS8eXU6-jIRbH-
Tenant Id	9ae0b165-801d- XXXXXXXXXX -i34f

Best Practices

1. **Avoid Transferring All Columns:** Select only the necessary columns to optimize performance and minimize errors.
2. **Use Authentication Profiles:** For enhanced security and ease of use, create and reuse authentication profiles.
3. **Test in a Sandbox Environment:** Before transferring data to production, test your configurations in a sandbox environment to identify and resolve any issues.
4. **Leverage Data Fleets:** For large-scale transfers involving multiple tables, use Data Fleets to maintain order and efficiency.
5. **Monitor Logs:** Regularly review transfer logs to ensure accuracy and troubleshoot any issues promptly.

Summary

Data Shipper is a comprehensive solution for managing data transfers in Dynamics 365 CE. Its intuitive interface, robust features, and flexibility make it an essential tool for Dynamics administrators and developers. By following this guide and adhering to best practices, you can achieve seamless and efficient data migration.