

Bulk Delete Tool for Dynamics CRM



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Why Bulk Delete Tool?

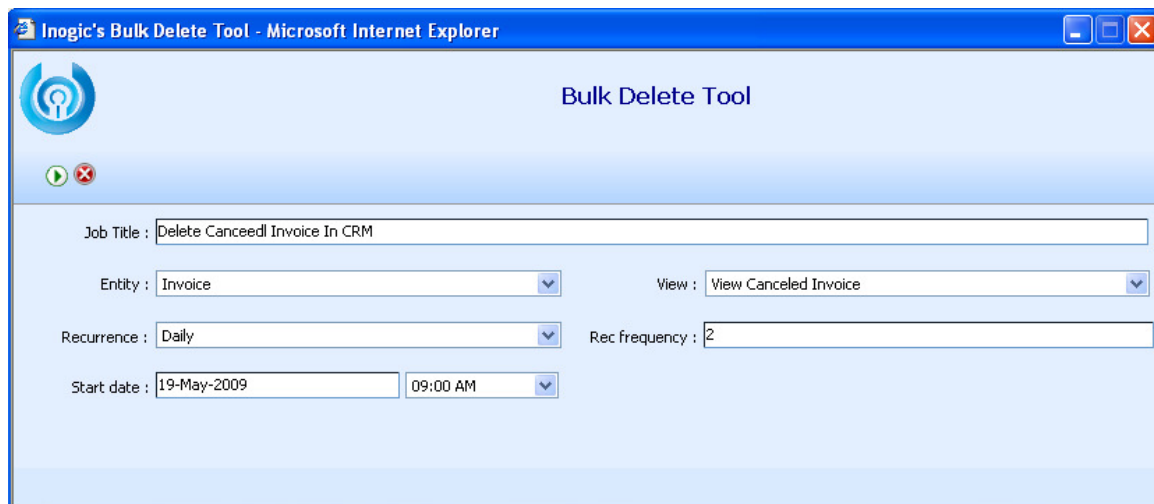
You often need a tool that will help you regularly clear the clutter out of your CRM database. The option presently available within Dynamics CRM is to manually select the records to be deleted and delete them. This has its own limitation of not being able to select more than 250 records at one go.

Aim:

This utility allows you to delete old/un-required data on a regular basis from CRM with great ease by creating Asynchronous jobs in Dynamics CRM.

Dynamics CRM has provided the users with a very powerful tool in Advanced Find. Using advanced search you can define the selection criteria for a set of records. Bulk Delete Tool leverages on the capabilities of the Advanced Find by allowing users to define the selection criteria for deleting records by creating views.

Working:



The screenshot shows a web browser window titled "Inogic's Bulk Delete Tool - Microsoft Internet Explorer". The page content is titled "Bulk Delete Tool" and features a logo on the left. Below the logo is a play button and a red 'X' icon. The main form contains the following fields:

- Job Title : Delete Canceled Invoice In CRM
- Entity : Invoice (dropdown)
- View : View Canceled Invoice (dropdown)
- Recurrence : Daily (dropdown)
- Rec frequency : 2
- Start date : 19-May-2009 and 09:00 AM (dropdown)

The Bulk Delete tool allows you to create Bulk Delete Jobs that can be scheduled to run regularly.

The Tool allows you to select the Entity that you wish to delete. The selection criteria can be provided by choosing one of the views available for the selected entity.

Using the scheduling options you can schedule the job to be run at a specific date/time/interval.

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Features:

1. **Easy to use:** No need for spending time on learning how to use the utility.
2. **Scheduling:** It provides for scheduling the bulk delete jobs.
3. **Supports Advanced Find Views:** This provides greater control to the users to define the selection criteria
4. **Entities Supported:** It supports deleting of all customizable entities.
5. **Security:** Only users having System Administrator Role can run the tool.
6. **Related Records deleted:** It supports standard Dynamics CRM 4 delete functionality. So if deleting a parent results in deleting of all child records in CRM, the same functionality is available here.
7. **Error Reporting:** If a record cannot be deleted from CRM you would be provided with appropriate error message in the Bulk Delete Job created.

Contact Inogic:

India (Corporate Headquarters)

Mumbai – New Bombay

305,Devarata,
Sec-17,Next to HDFC Bank,
Vashi, Navi Mumbai-400705

Via email

CRM: crm@inogic.com