

A scenic view of the Austin skyline featuring the JW Marriott hotel and a multi-arched bridge over a river. A semi-transparent blue banner with a geometric pattern is overlaid across the middle of the image.

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WELCOME TO
AUSTIN

A background image of the Austin skyline featuring modern skyscrapers and a bridge over a river. A semi-transparent blue hexagonal pattern is overlaid on the left side of the image.

Power up Productivity and Quality with **XrmToolBox**

extreme365

WELCOME TO
AUSTIN

Jonas Rapp

Jonas Rapp

```
jonas = (WhoAmIResponse)service.Execute(new WhoAmIRequest());
```

Enterprise Architect, Avanade

Software Developer (1994-)

100% MS Dynamics "CRM" (2009-)

XrmToolBox contributor (2014-)

Microsoft MVP (2017-)

Twitter: [@rappen](https://twitter.com/rappen)

Email: jonas@jonasrapp.net

Blog: jonasrapp.net

XrmToolBox: Tanguy Touzard

Twitter: [@XrmToolBox](https://twitter.com/XrmToolBox)

Web: www.xrmtoolbox.com



Audience

```
var you = (WhoAreYouResponse)service.Execute(new WhoAreYouRequest());
```

User?

Heard of XrmToolBox?

Administrator?

Used XrmToolBox?

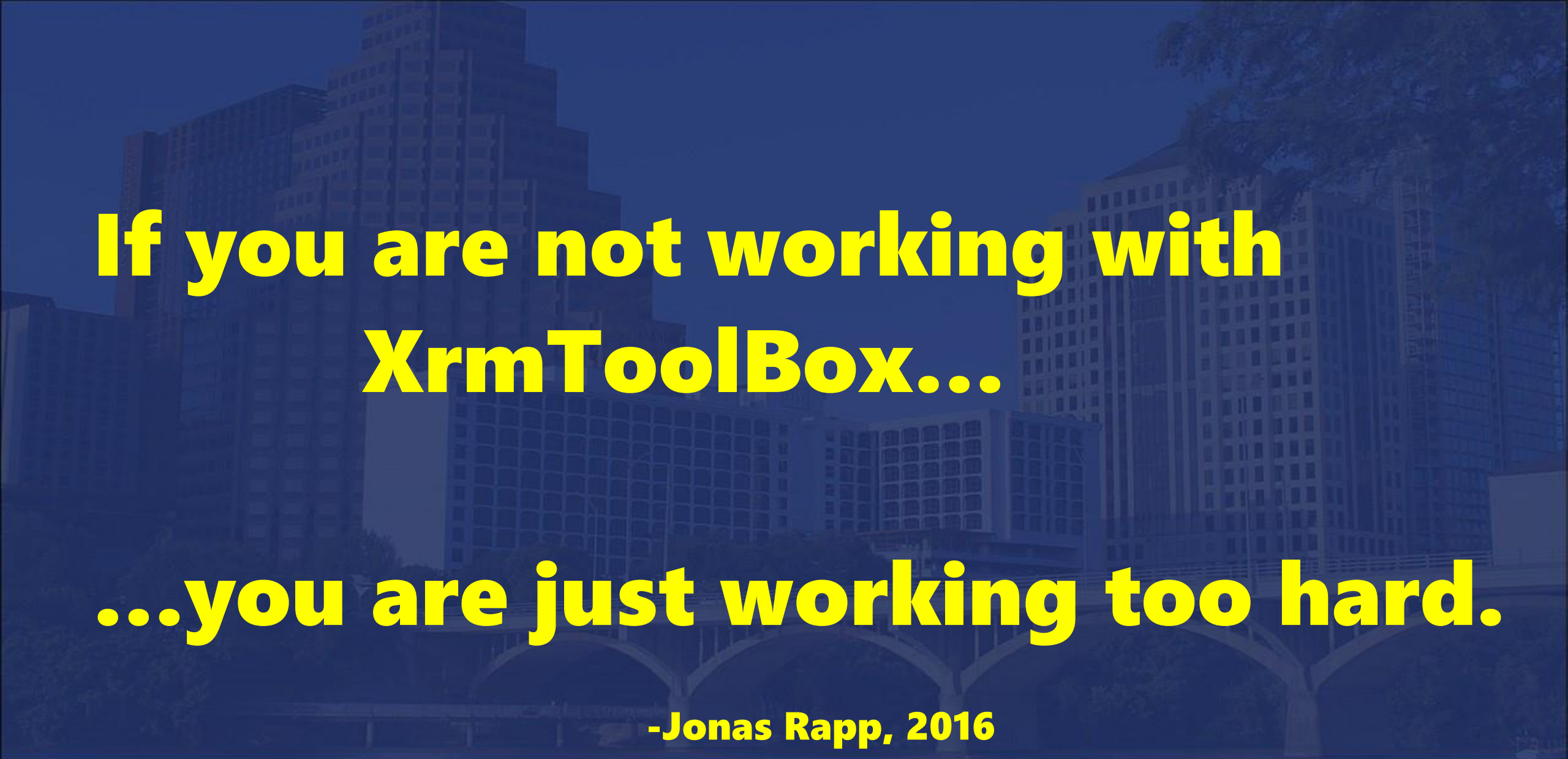
Customizer?

Had problems with XrmToolBox?

Developer?

Reported a bug?





**If you are not working with
XrmToolBox...**

...you are just working too hard.

-Jonas Rapp, 2016

Why XrmToolBox?

Administrator / User perspective

Limited CRM admin UI

Bulk actions

Data investigation

Advanced editors

Expose SDK-only features



Why XrmToolBox?

Customizer / Developer perspective

I really don't like working too hard

Internal tools and gadgets

The toolbox is there to be filled

Open Source

Community collaboration



A blue-tinted photograph of the Austin skyline, featuring several high-rise buildings and a multi-arched bridge spanning a river in the foreground.

Hands-on

AUSTIN December 3-6

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Installing XrmToolBox

www.xrmtoolbox.com

Download



Unblock



Unpack



Run



Not an "installation"



TUTORIAL

<https://jonasrapp.net/xtb-school/intro>



Plugins Store

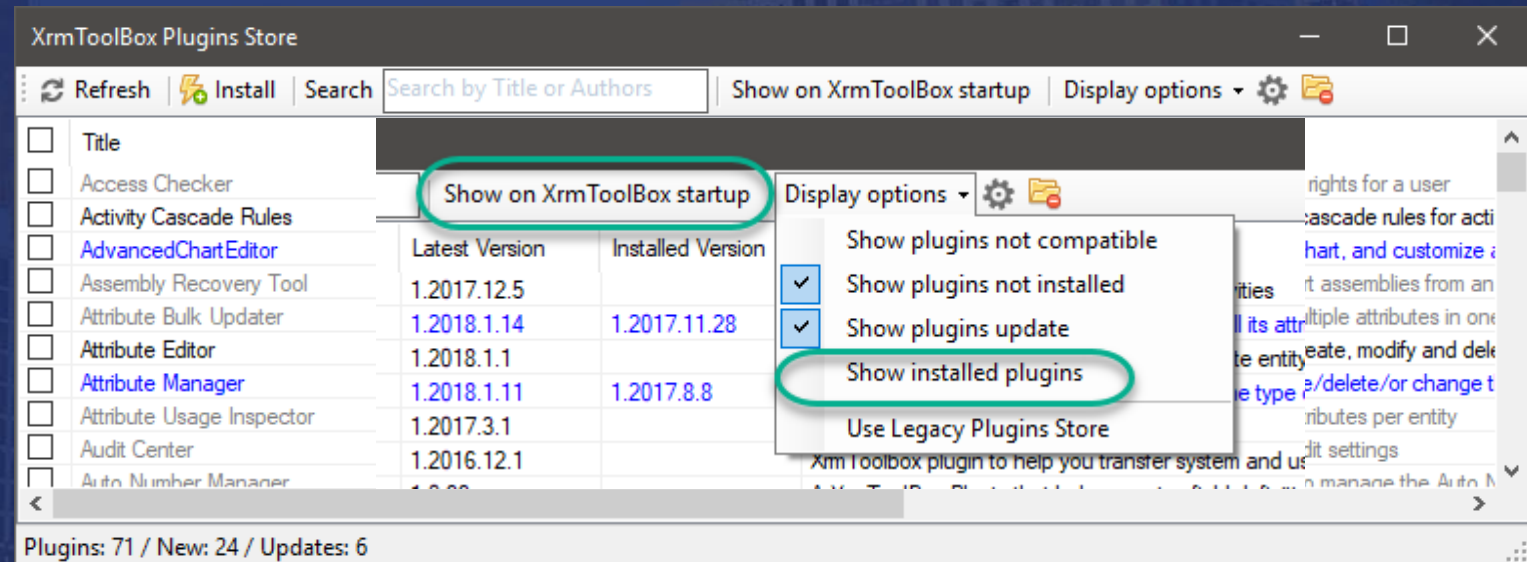
Available tools

Updated tools

Tool rating

Approved tools

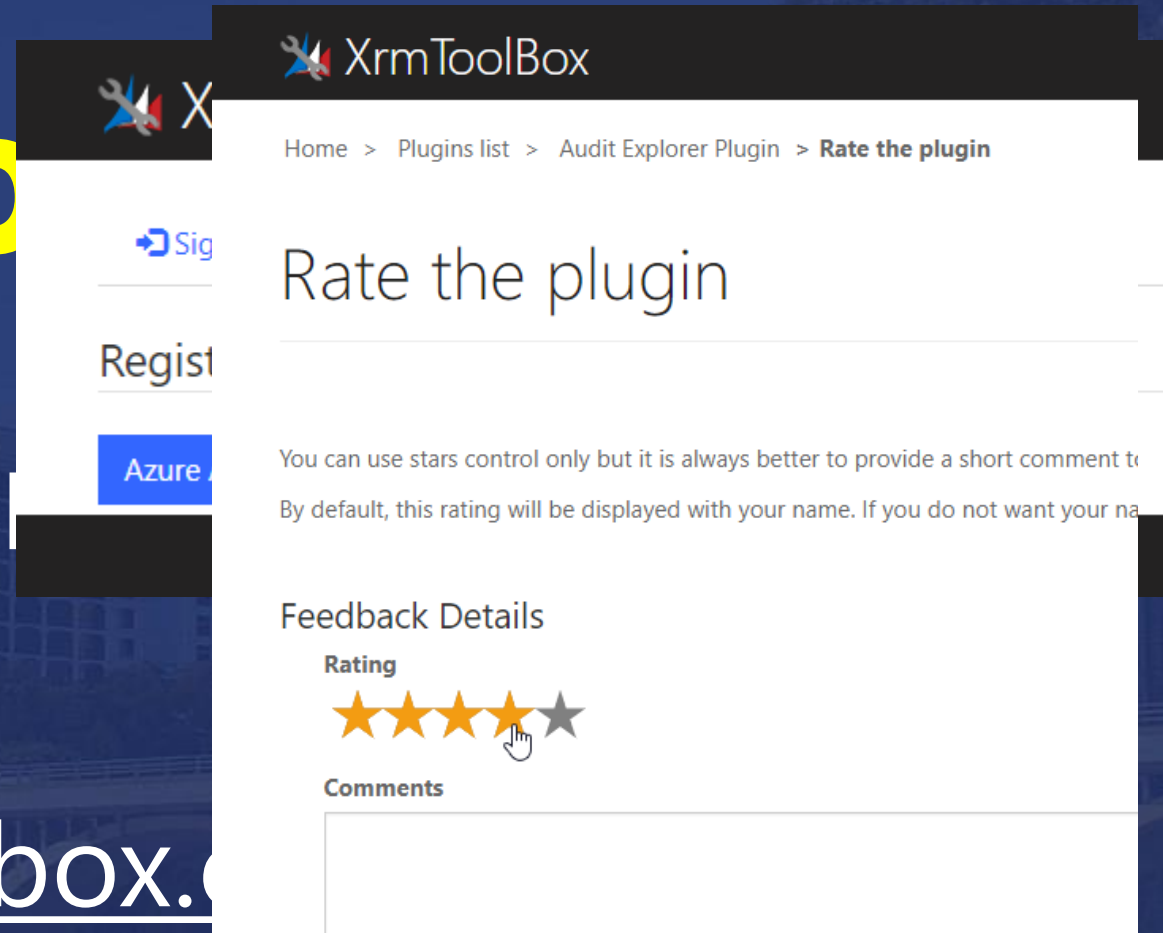
One-click installation (downloaded from NuGet)



RATE TO

CONTRIBUTE TO THE

www.xrmtoolbox.com



The screenshot shows the XrmToolBox web interface. The header includes the XrmToolBox logo and navigation links: Home, Plugins list, Audit Explorer Plugin, and Rate the plugin. The main heading is 'Rate the plugin'. Below this, a paragraph explains the rating system: 'You can use stars control only but it is always better to provide a short comment to... By default, this rating will be displayed with your name. If you do not want your name...'. The 'Feedback Details' section features a 'Rating' control with five stars; the first four are yellow and the fifth is grey, with a mouse cursor hovering over the fourth star. Below the stars is a 'Comments' text area.

FEEDBACK



docs.microsoft.com

XrmToolBox Basics

File Storage

Managed storage area

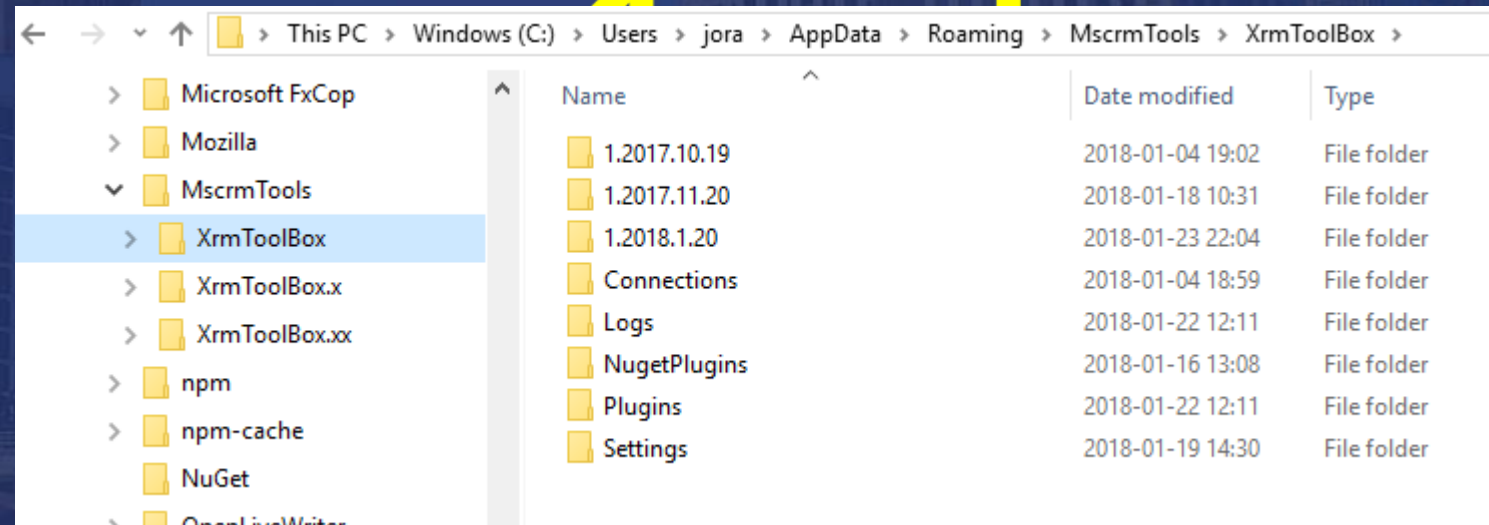
Tools (Plugins)

Settings

Logs

(Default) Connections

NuGet downloads



File Storage

Managed storage area

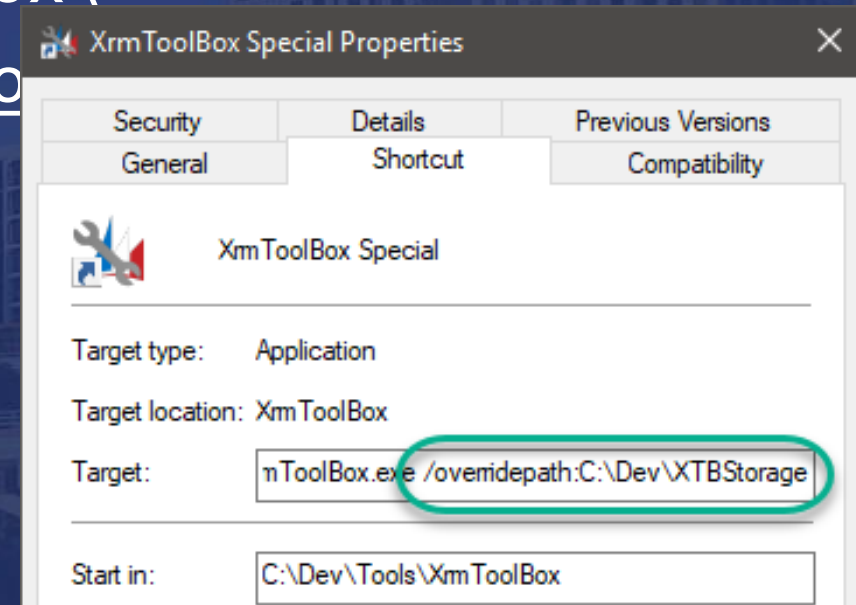
%AppData%\MscrmTools\XrmToolBox\
c:\Users\jonas.rapp\AppData\Roaming\XrmToolBox\

Override default location

/overridepath:[mypath]

Custom shortcut

Project specific setup



Connection Files

Use them!

Constant pain

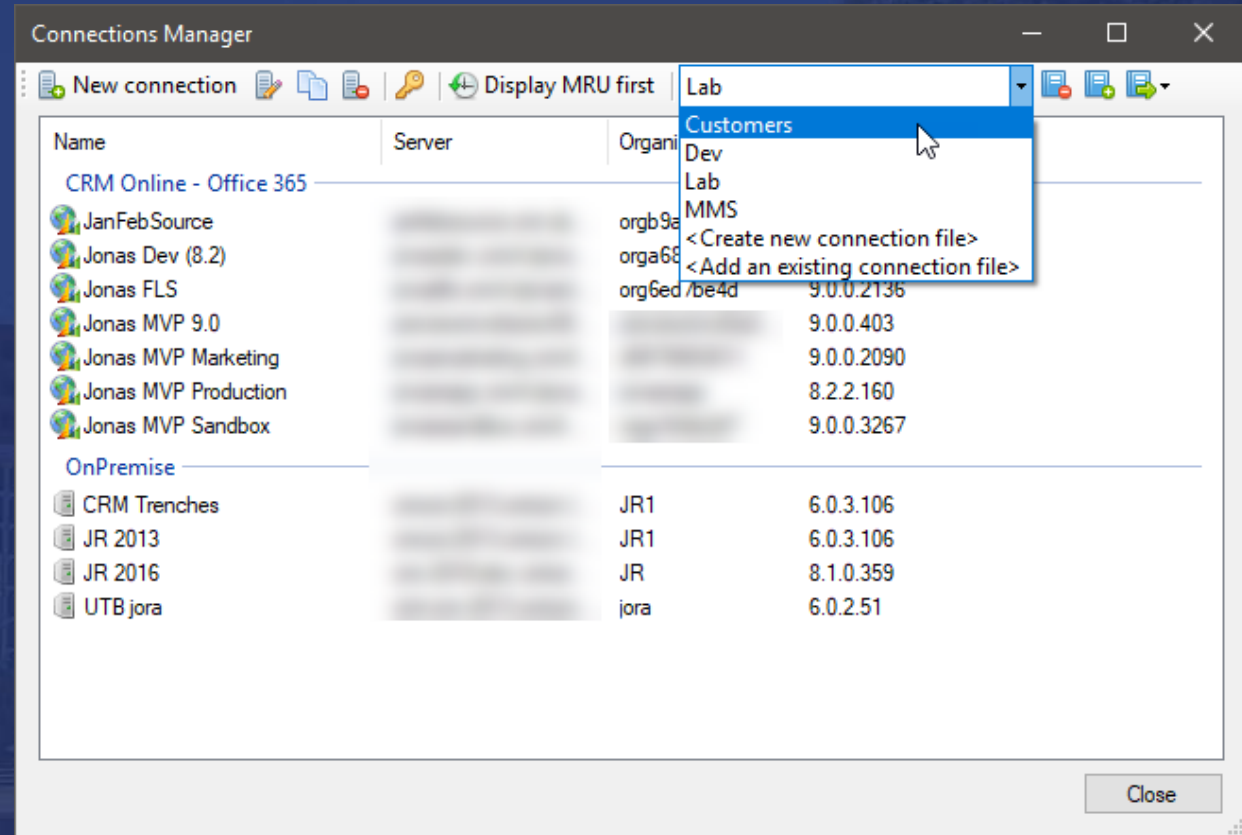
Separate files

Custom storage

Commit to your repo

Store on your OneDrive

<https://jonasrapp.net/xtb-school/conn>



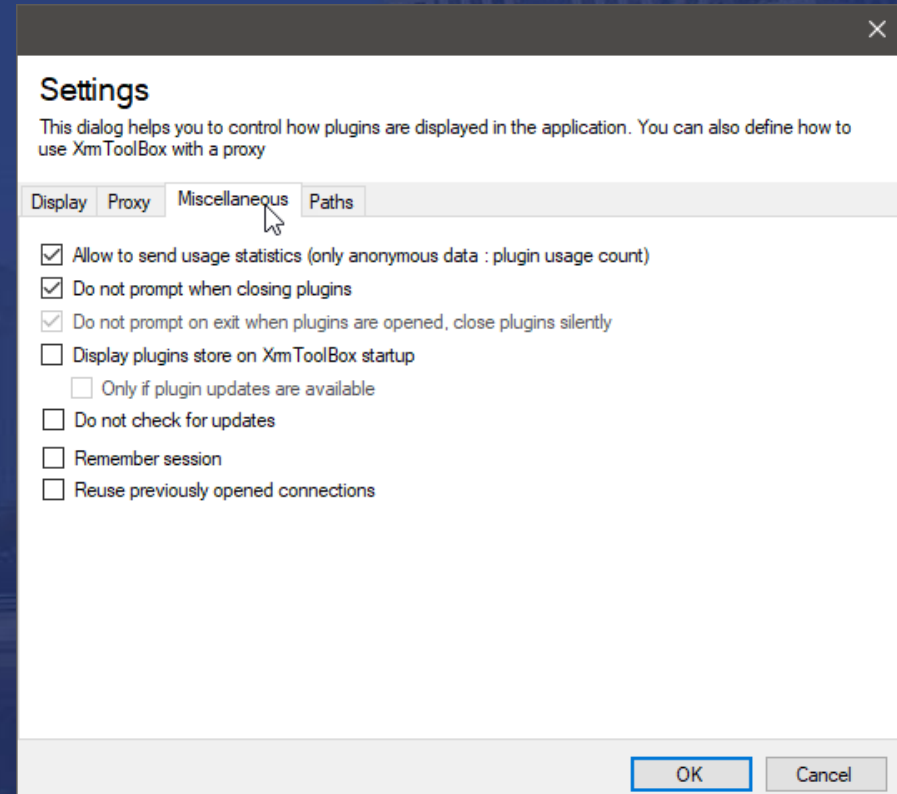
Settings

Sort tools

Hide tools

Quit prompting

Find file storage



Updating XrmToolBox

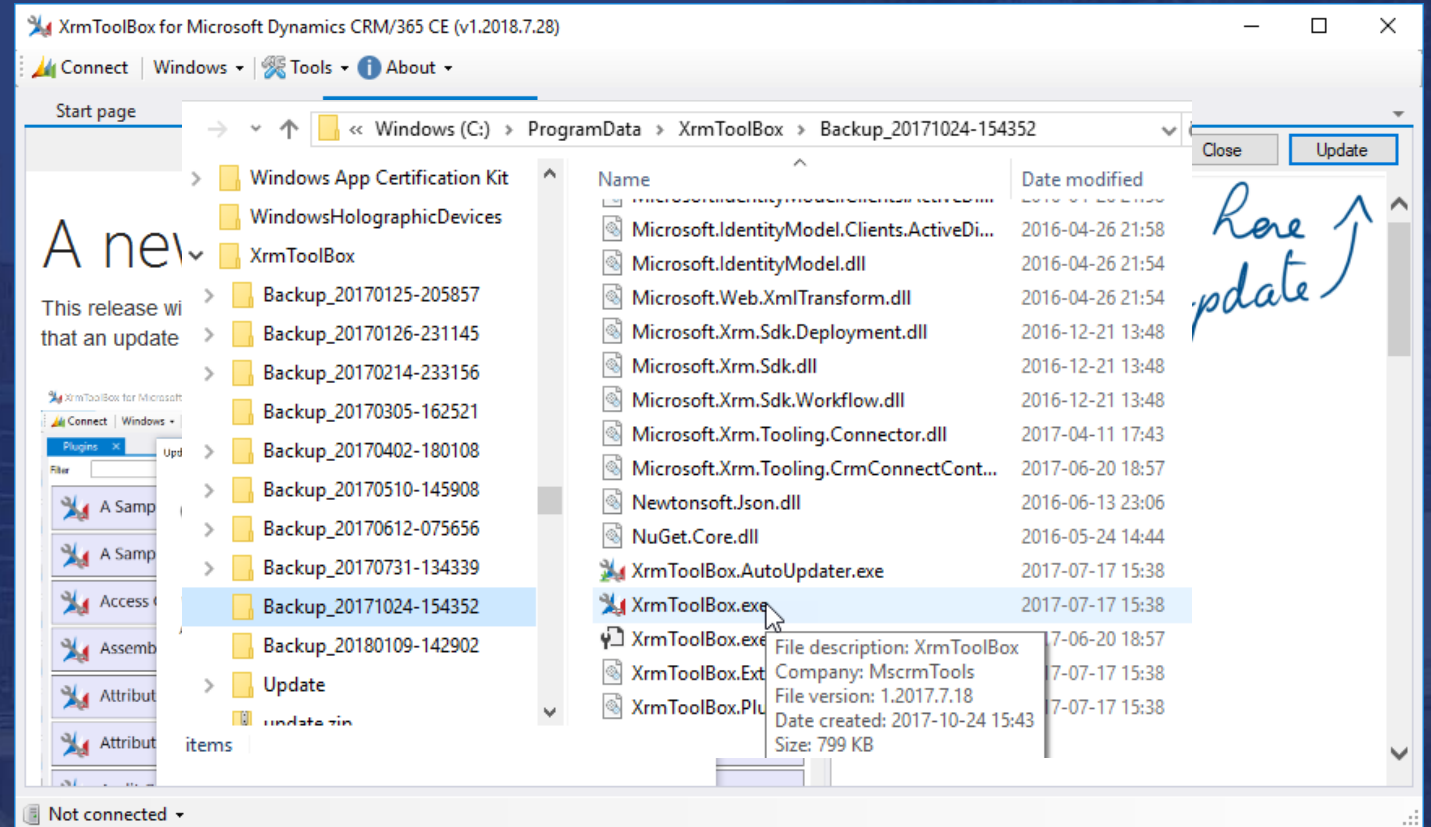
Just say Yes

File conflicts

Delete tools

Connections ~~lost~~ Saved!

Backup



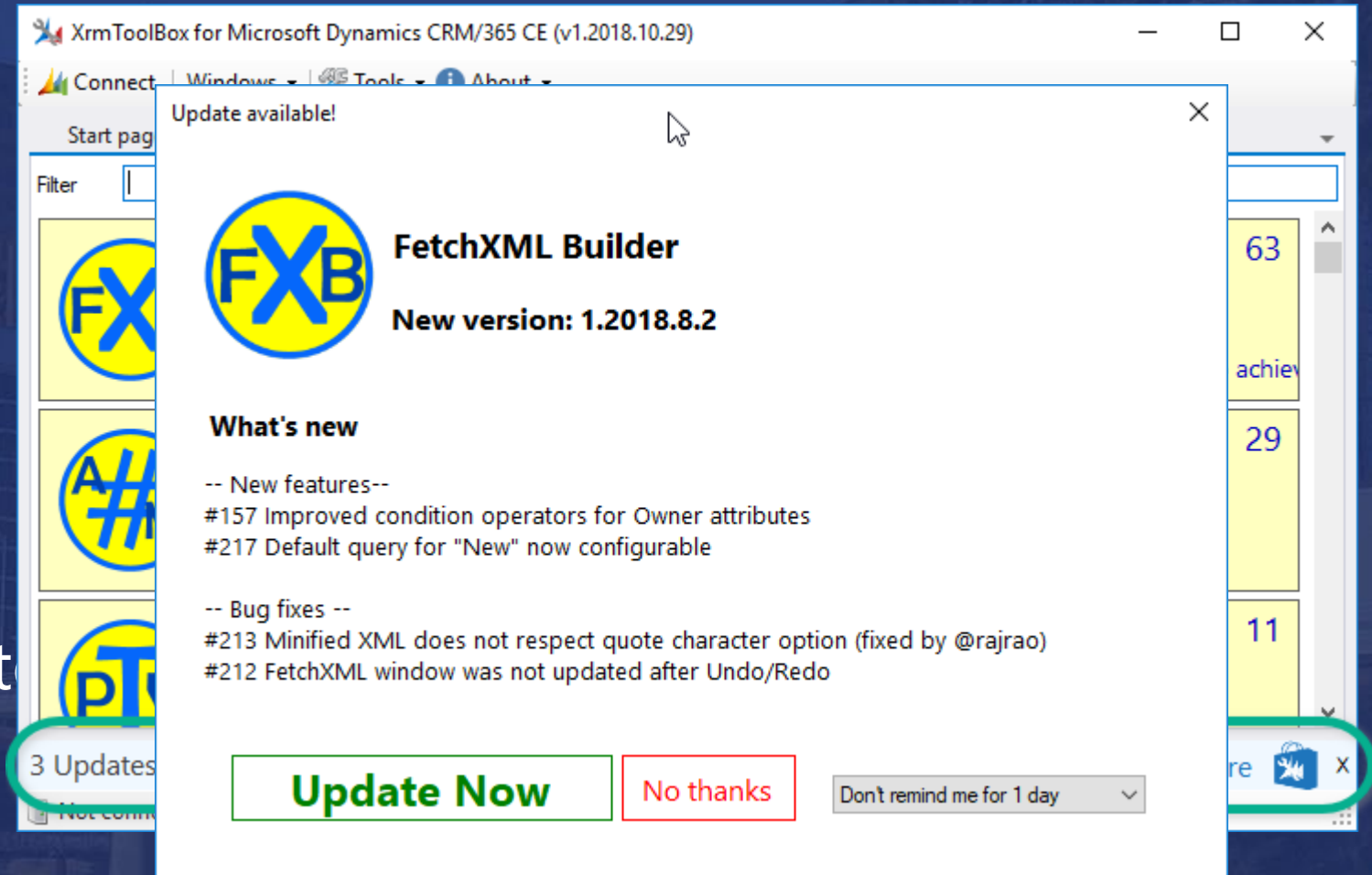
Updating Tools

Just say Yes

Improvements

Bug fixes

New: Prompt to update



LATEST IS GREATEST



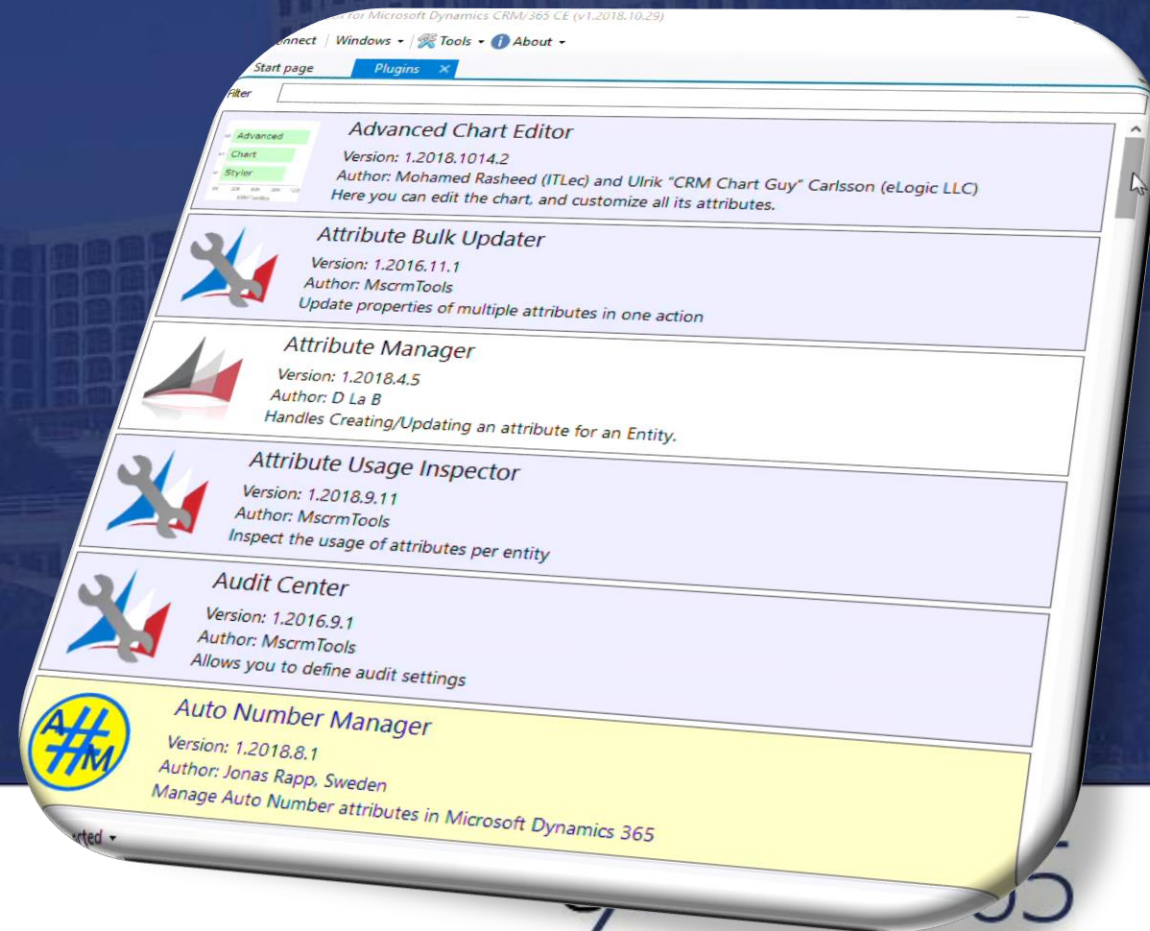
My favorite tools



**Users
Admins**



**Customizers
Developers**



My favorite tools



Users

FetchXML Builder

Bulk Data Updater

Export to Excel

Personal Artefact Manager

Related Records Analyzer

Universal Search

My favorite tools



Admins

FetchXML Builder
Bulk Data Updater
Metadata Browser
View Layout Replicator
Easy Translator
View Designer

Solution History
Plugin Trace Viewer
Shuffle Builder / Runner
Audit Center
User Settings Utility

My favorite tools



Customizers

FetchXML Builder
Metadata Browser
View Layout Replicator
Easy Translator
View Designer
Solution History

Web Resources Manager
Sitemap Editor
Ribbon Workbench
Attribute Manager
Auto Number Manager
Solution Installer

My favorite tools



Developers

FetchXML Builder
Web Resources Manager
Metadata Browser
Plugin Trace Viewer
Plugin Registration
Plugin Auto Deployer

Early Bound Generator
Latebound Constants Generator
Code Now

My favorite tools



Users

FetchXML Builder
Bulk Data Updater
Export to Excel
Personal Artefact Manager
Related Records Analyzer
Universal Search

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My favorite tools



Admins

FetchXML Builder
Bulk Data Updater
Metadata Browser
View Layout Replicator
Easy Translator
View Designer
Solution History
Plugin Trace Viewer
Shuffle Builder / Runner
Audit Center
User Settings Utility

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My favorite tools



Customizers

FetchXML Builder
Metadata Browser
View Layout Replicator
Easy Translator
View Designer
Solution History
Web Resources Manager
Sitemap Editor
Ribbon Workbench
Attribute Manager
Auto Number Manager
Solution Installer

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My favorite tools



Developers

FetchXML Builder
Web Resources Manager
Metadata Browser
Plugin Trace Viewer
Plugin Registration
Plugin Auto Deployer
Early Bound Generator
Latebound Constants Generator
Code Now

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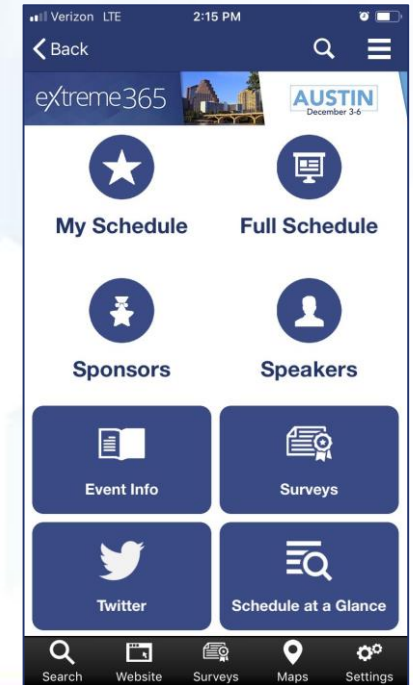
-Jonas Rapp, 2016

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