365 Saturday

Jonas Rapp

Cherry Picking XrmToolBox
(and some other helpers)

Jonas Rapp

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

Head of Development, Innofactor SE

Software Developer (1994)

100% MS Dynamics CRM (2009)

XrmToolBox contributor (2014)

Microsoft MVP (2017)

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XrmToolBox – Tanguy Touzard

Twitter: @XrmToolBox

Web: www.xrmtoolbox.com

If you are not working with
XrmToolBox...
(and some other helpers)

...you are just working too hard.

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SCRIBE

ClickDimensions

CAFÉ X

riva
Riva CRM Integration

testhouse
Improving Software Quality

Links and references:

jonas@jonasrapp.net

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

Getting practical

Installing XrmToolBox

www.xrmtoolbox.com

Download

Unblock

Unpack

Run

Plugins Store

Available tools

Updated tools

Tool rating

Approved tools (soon)

One-click installation

(downloaded from NuGet)
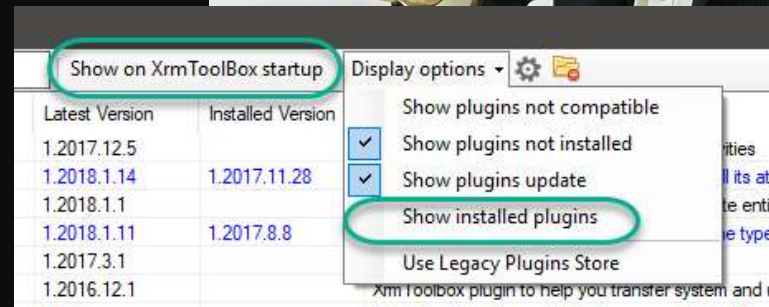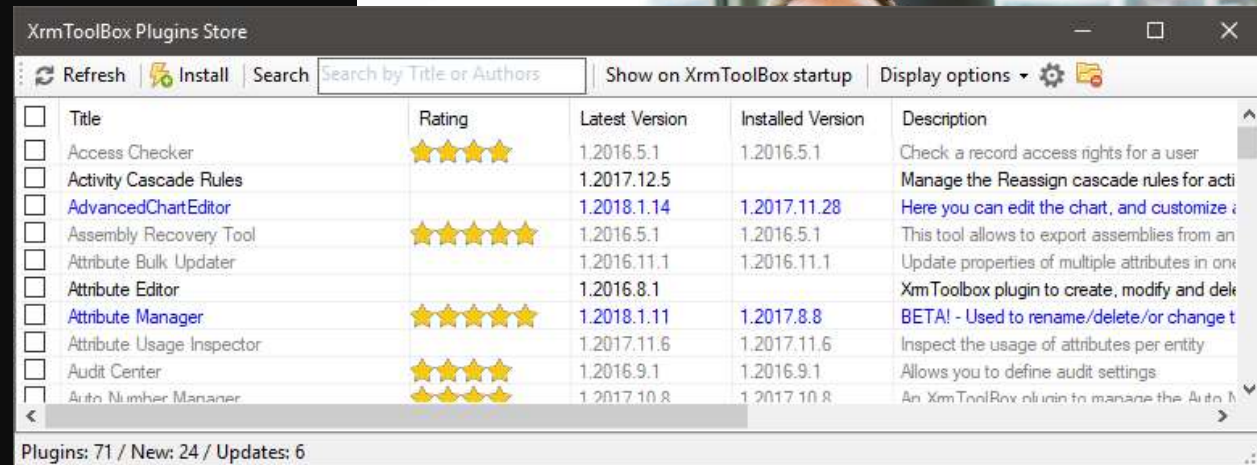
Rate plugins!

Contribute to the community

www.xrmtoolbox.com

Feedback

XrmToolBox

basics

File Storage

Managed storage area

Plugins

Settings

Logs

(Default) Connections

NuGet downloads
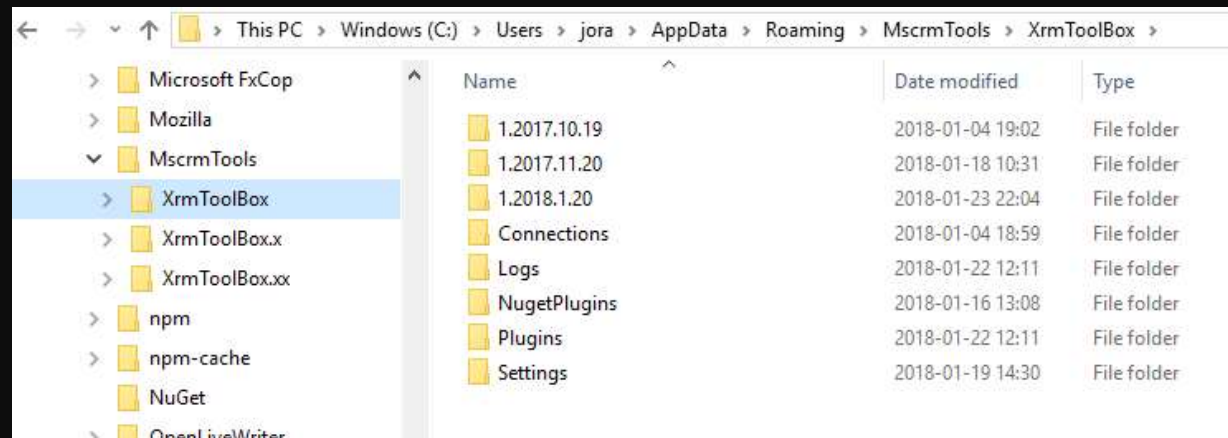
File Storage

Managed storage area

    %AppData%\MscrmTools\XrmToolBox\

    c:\Users\jora\AppData\Roaming\MscrmTools\XrmToolBox\

Override default location

    /overridepath:[mypath]

    Custom shortcut

    Project specific setup
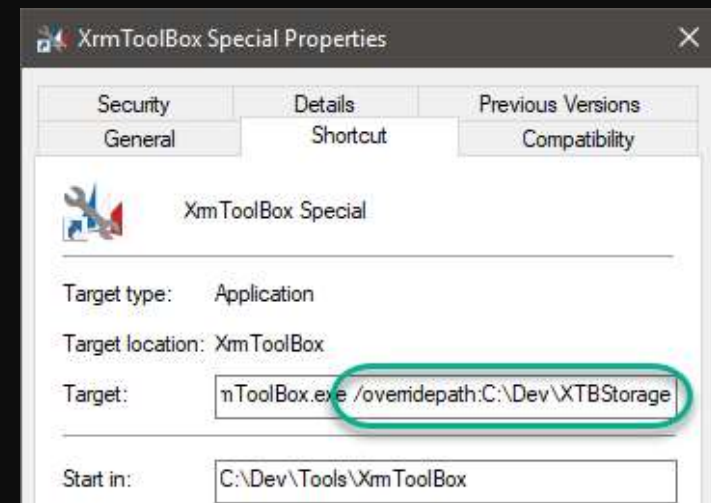
Connection Files

Use them!

Constant pain

Separate files

Custom storage

Commit to your repo

Store on your OneDrive
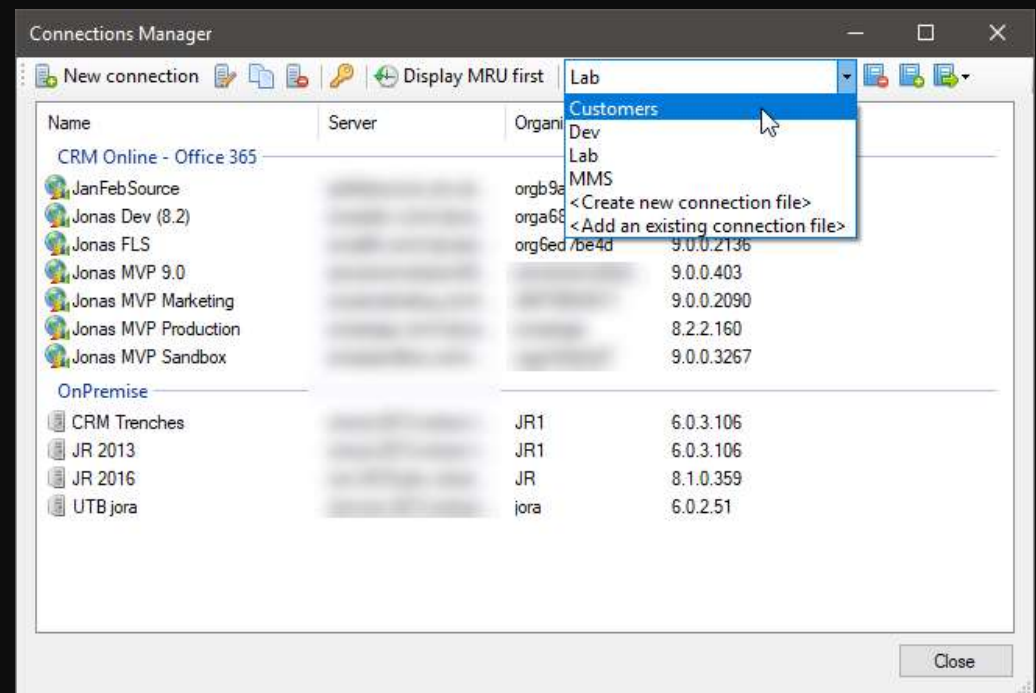
Settings

Sort plugins

Hide plugins

Quit prompting

Find file storage
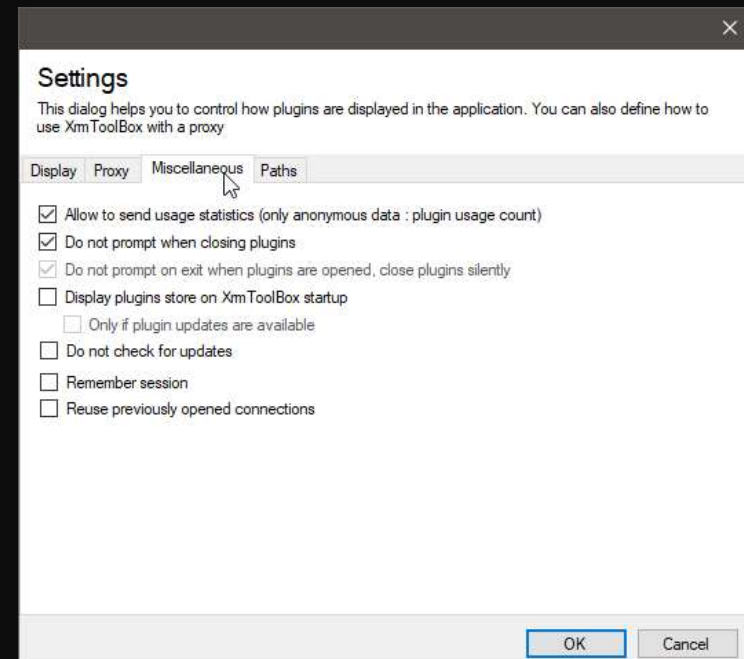
Updating XrmToolBox

Just say Yes

File conflicts

Connections ~~lost~~ Saved!

Delete plugins

Backup
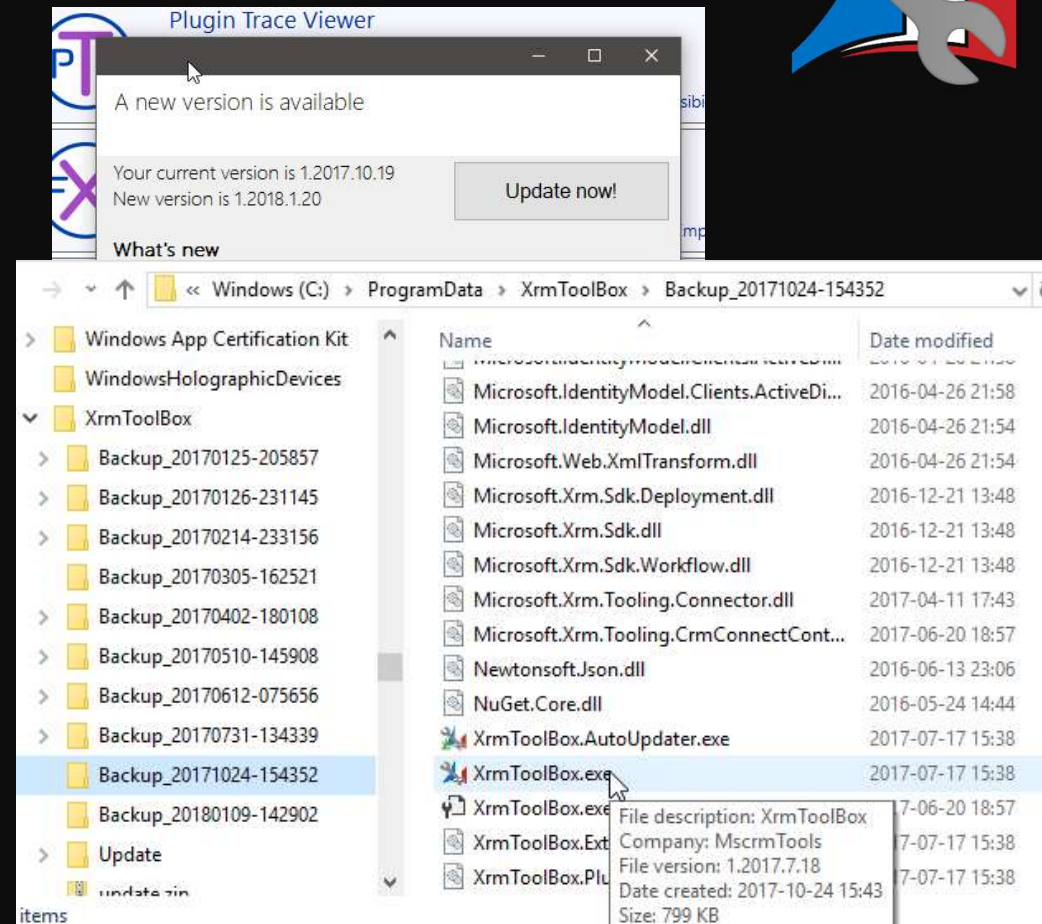
Latest IS greatest

My favorite XTB tools

http://tiny.cc/XTBstat

Ribbon Workbench   MVP Scott Durow

Why?

    Editing RibbonDiffXml manually is inhumane

    Legacy overkill inherited from SharePoint

How?

    Graphical UI to layout buttons

    Connect buttons to commands

    Connect commands to enable- and display rules

    Connect commands to actions

    Connect actions to js-functions

Remember

    One small solution

Auto Number Manager

Why?

- Auto Numbers are finally possible to customize
- But only through SDK

How?

- Identify existing Auto Number attributes
- Facilitate creating new and updating existing

Dynamics 365 UI Limitations

- Just not possible in IU

Auto Number Manager – Features

Create new Auto Number attributes

Update existing

Change current value

Snippets

Show sample result

Retrieve existing values (using F

FetchXML Builder

Why?

FetchXML is the query language for Dynamics CRM

Advanced Find is the only "editor"

How?

Represent query in hierarchical UI

Generate corresponding FetchXML

Dynamics 365 UI Limitations

Not-in queries

Aggregate queries

System/internal entities

Attributes from linked entities

…and so on…

FetchXML Builder – Features

Solution to OOB limitations

Join on other fields than relationships

Generate C# QueryExpression code

Generate OData query string
  WebAPI coming soon!

Convert to SQL

Easy to use UI to compose queries for reports in CRM

Easy integration with other tools

http://fxb.xrmtoolbox.com
@FetchXMLBuilder

Plugin Trace Viewer

Why?

    Monitor plugin behavior

    Development "debugging"

How?

    Initialize Tracing Service

    Write to trace

    Throw exceptions

Dynamics 365 UI Limitations

    Filtering, Column set, Form design

Plugin Trace Viewer – Features

Filter by almost anything

Retrieve > 250 records

Quick view message / exception

Group / filter by correlation id

Aggregated stats

Identify related traces

Show related Plugin Statistics

Update log setting

http://ptv.xrmtoolbox.com
@PluginTraceView

Non-XrmToolBox Tools

xrm.tools

Microsoft Dynamics 365 Online

Colorado Tech

MVP David Yack

xrm.tools

Azure Region Latency

Still in beta

https://xrm.tools/AzureRegion

SDK Download Helper

Still in beta

http://xrm.tools/SDK

SDK distributed through NuG

CRM REST Builder

Microsoft Dynamics CRM/365

All versions and deployments

MVP Jason Lattimer

CRM REST Builder

{ REST }

CRM Solution

https://github.com/jlattimer/CRMR

GUI to compose WebAPI queries

Thank You!

Questions?

Find me during Hackathon!

(I've got stickers!)

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