

My top XrmToolBox tips

CRMUG Washington (Seattle) Chapter Meeting - Q1

Jonas Rapp

Jonas Rapp

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

Tech Lead at CRM-Konsulterna, Sweden

Software Developer (1994-)

100% MS Dynamics “CRM” (2009-)

XrmToolBox contributor (2014-)

Microsoft MVP (2017-)

Twitter: [@rappen](https://twitter.com/rappen)
Email: jonas@jonasr.app
Blog: jonasr.app

XrmToolBox: Tanguy Touzard
Twitter: [@XrmToolBox](https://twitter.com/XrmToolBox)
Web: www.xrmtoolbox.com



Audience

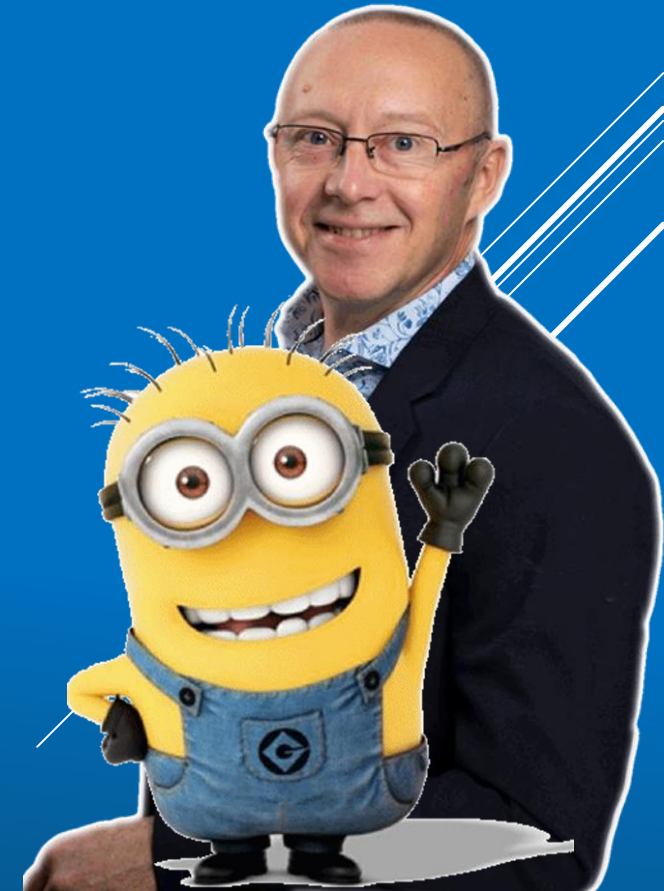
```
var you = (WhoAreYouResponse)service.Execute(new WhoAreYouRequest());
```

Heard of XrmToolBox?

Used XrmToolBox?

Using XrmToolBox regularly?

Can't live [work] without XrmToolBox?



If you are not working with
XrmToolBox...

...you are just working too hard.

-Jonas Rapp, 2017

I'm sorry...

XrmToolBox for Microsoft Dynamics 365 for CE and Power Apps Common Data Service (v1.2020.2.36)

Connect | Windows | Configuration | Help

Start page | Tools

Filter: Jonas Rapp

	Auto Number Manager Version: 1.2019.4.1 Author: Jonas Rapp, Sweden Manage Auto Number attributes in Microsoft Dynamics 365
	Bulk Data Updater Version: 1.2019.12.1 Author: Jonas Rapp, Sweden Update or touch attributes on a set of records, or bulk delete records
	FetchXML Builder Version: 1.2019.12.1 Author: Jonas Rapp, Sweden Build queries for D365, CRM, XRM, CDS and the Power Platform. Investigate data. Get code. Empower yourself to achieve more.
	Latebound Constants Generator Version: 1.2020.2.1 Author: Jonas Rapp, Sweden Generate constant classes from metadata for late bound development on CDS / Microsoft Dynamics 365
	Plugin Trace Viewer Version: 1.2019.12.1 Author: Jonas Rapp, Sweden Investigate the Plug-in Trace Log with easy filtering and display possibilities
	Power Apps Checker Version: 1.2019.12.2 Author: Jonas Rapp, Sweden Check your Power Apps solutions, Canvas Apps and Power Automate flows before they hit the build pipeline!
	Related Records Analyzer Version: 1.2019.12.1 Author: Jonas Rapp, Sweden Analyze relationships and related data to see effect of cascade behavior.
	UML Diagram Generator Version: 1.2020.2.1 Author: Jonas Rapp, Sweden Generate PlantUML diagram files from metadata in CDS / Microsoft Dynamics 365

WHAT IS XRMTOOLBOX?

Box of Tools for XRM

Created by Tanguy Touzard

Contributions by many devs

150+ tools

Free

Open Source



WHY XRMTOOLBOX?

Administrator / User perspective

Limited CRM admin UI

Bulk actions

Advanced editors

Data investigation

Metadata investigation

Expose SDK-only features



WHY XRMTOOLBOX?

Customizer / Developer perspective

I don't like working too hard

Quality

Productivity

Documentation

Internal tools and gadgets



WHY XRMTOOLBOX?

Contributor perspective

I really don't like working too hard

Internal tools and gadgets

The toolbox is there to be filled

Open Source

Community collaboration

Visibility



XRMTOOLBOX & SECURITY

Why allow this lethal toolset at all?

Observing and Intrusive

Data and Metadata

Makes “everything” easier

- ✓ Consumes SDK
- ✓ Respects security roles
- ✓ Registry to block



HANDS-ON

INSTALLING XRMTOOLBOX

My top
XrmToolBox
tips

www.xrmtoolbox.com

Download



Unblock



Unpack



Run



Not an “installation”

TUTORIALS

jonasr.app/xtb-school



TOOL LIBRARY

My top
XrmToolBox
tips

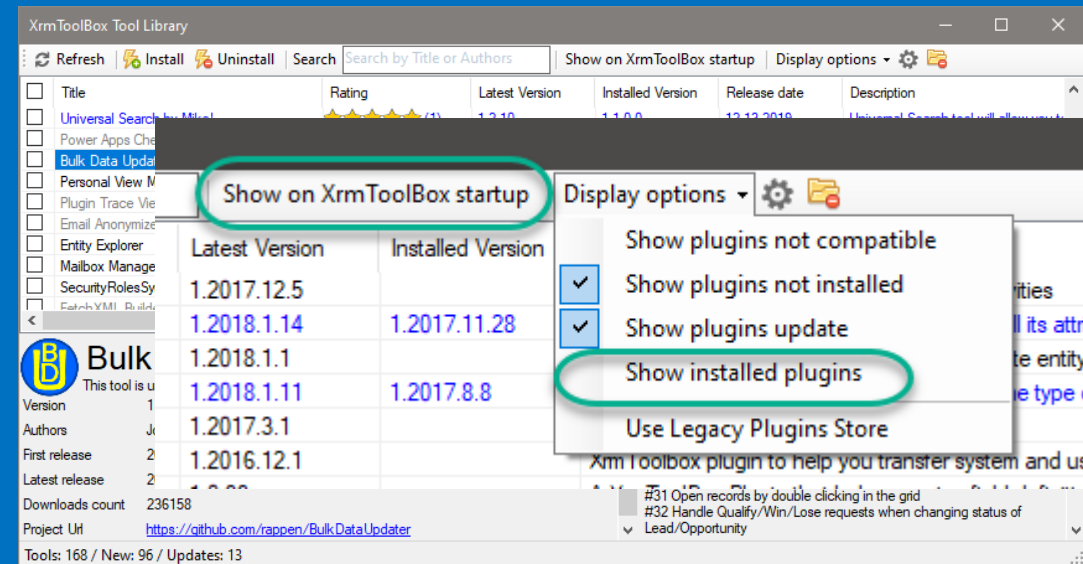
Available tools

Updated tools

Tool rating

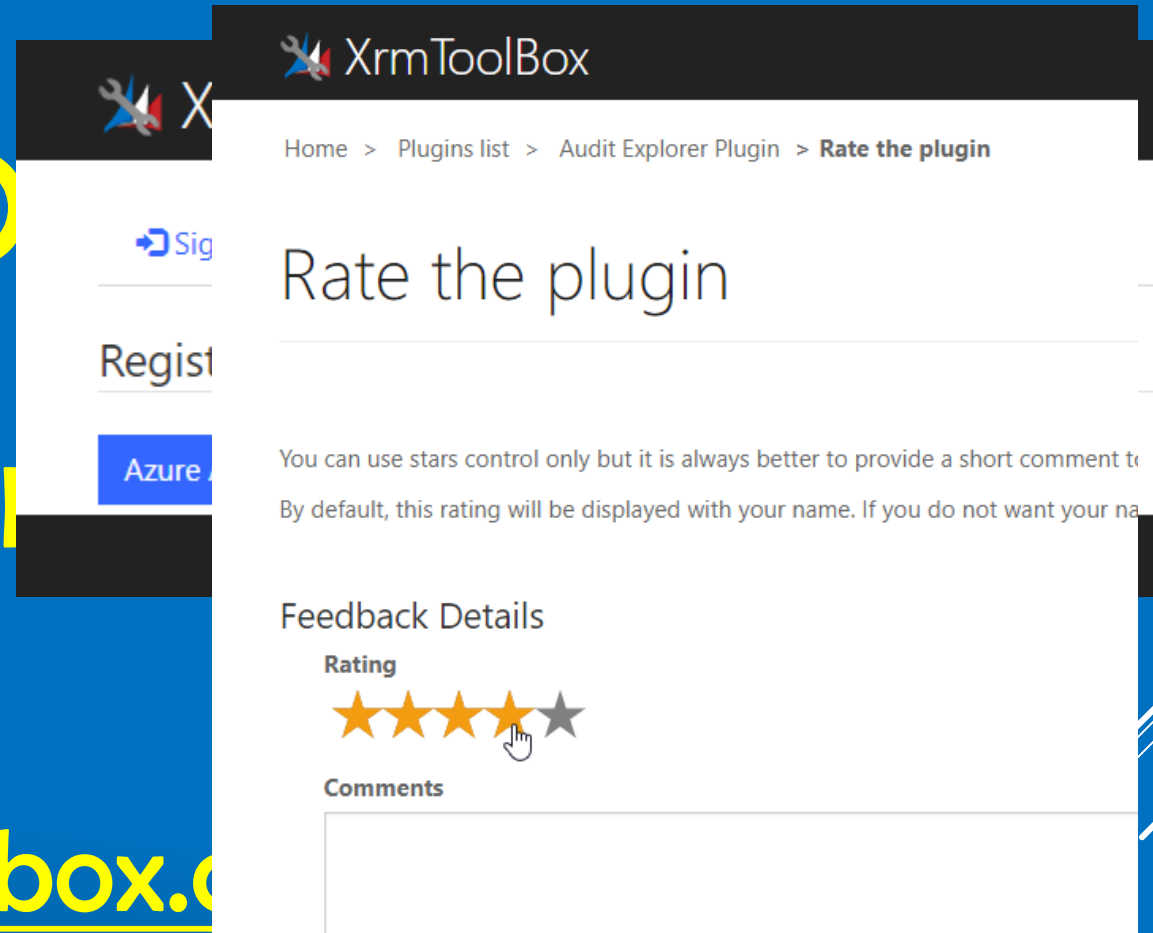
Approved tools

One-click installation
(downloaded from NuGet)

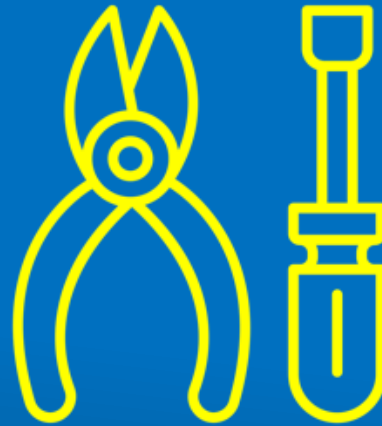


**RATE TO
CONTRIBUTE TO THE**

www.xrmtoolbox.com



MY FAVORITE TOOLS



MY FAVORITE TOOLS



Users

FetchXML Builder

Bulk Data Updater

Export to Excel

Personal Artefact Manager

Related Records Analyzer

Universal Search

Entity Image Updater

Deduplicator

Manage N:N Relationships

MY FAVORITE TOOLS



Admins

FetchXML Builder

Bulk Data Updater

Metadata Browser

User Settings Utility

Easy Translator

Solution History

Plugin Trace Viewer

Shuffle Builder / Runner

Audit Center

Attribute Audit Explorer

UML Diagram Generator

MY FAVORITE TOOLS



Customizers

FetchXML Builder

Metadata Browser

View Layout Replicator

Easy Translator

Iconator

Solution History

UML Diagram Generator

Web Resources Manager

Ribbon Workbench

Attribute Manager

Solution Installer

Security Role Merge

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

Portal Code Editor

Portal Records Mover

SQL 4 CDS

MY FAVORITE TOOLS



Users

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

Entity Image Updater
Deduplicator
Manage N:N Relationships

MY FAVORITE TOOLS



Admins

FetchXML Builder
Bulk Data Updater
Metadata Browser
User Settings Utility
Easy Translator
Solution History

Plugin Trace Viewer
Shuffle Builder / Runner
Audit Center
Attribute Audit Explorer
UML Diagram Generator

MY FAVORITE TOOLS



Customizers

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

UML Diagram Generator
Web Resources Manager
Ribbon Workbench
Attribute Manager
Solution Installer
Security Role Merge

MY FAVORITE TOOLS

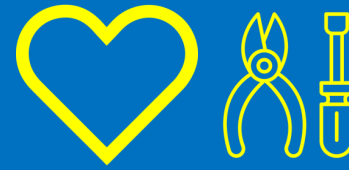


Developers

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

Early Bound Generator
Latebound Constants Generator
Code Now
Portal Code Editor
Portal Records Mover
SQL 4 CDS

YOUR FAVORITE TOOLS



Audience



XRMTOOLBOX BASICS

FILE STORAGE

My top
XrmToolBox
tips

Managed storage area

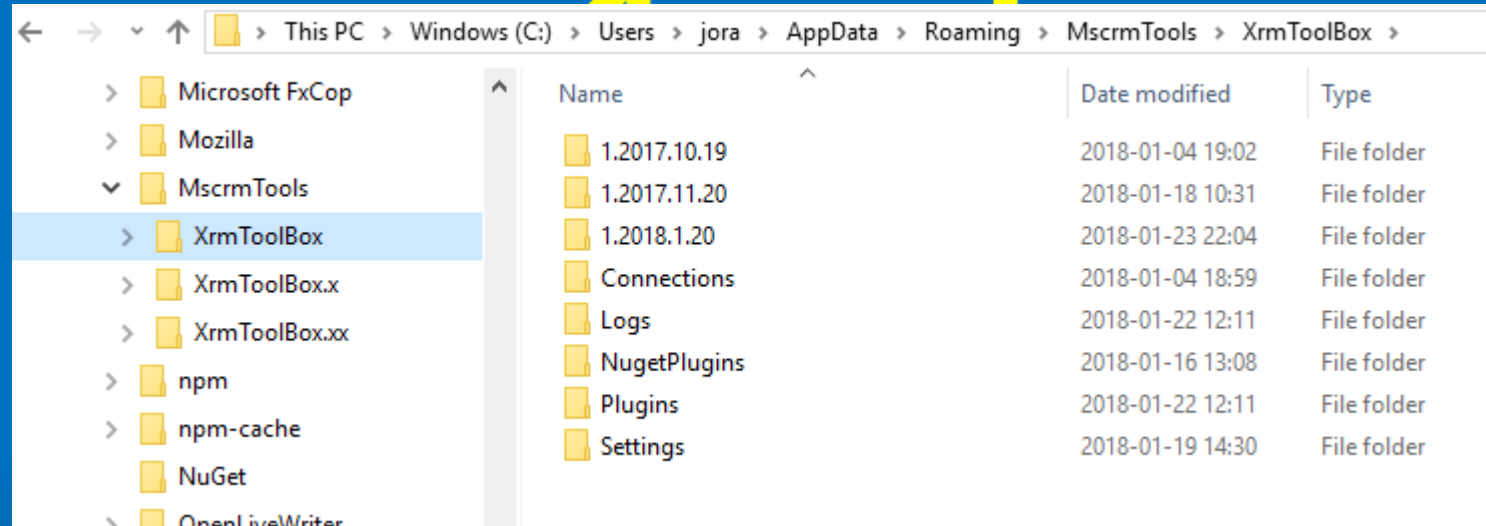
Tools (Plugins)

Settings

Logs

(Default) Connections

NuGet downloads



FILE STORAGE

Managed storage area

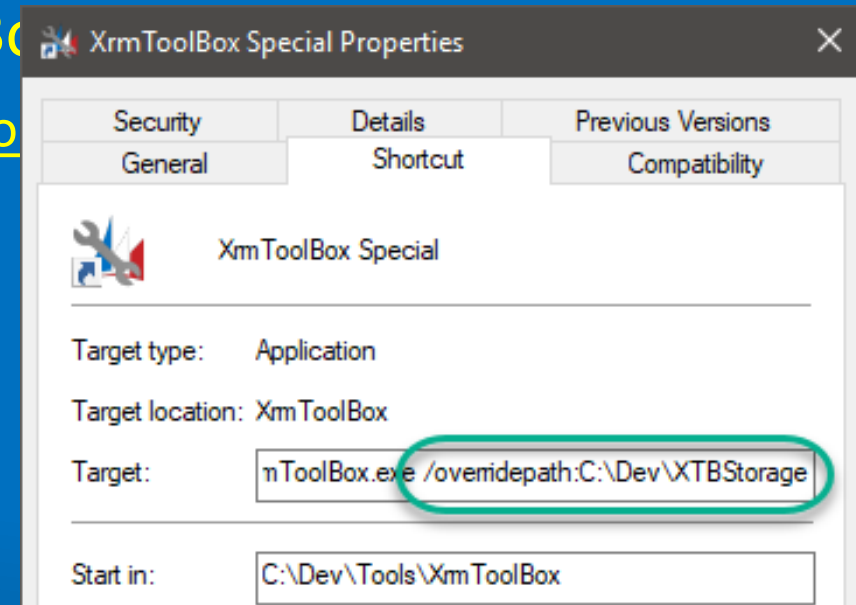
%AppData%\MscrmTools\XrmToolBox
c:\Users\jonas\AppData\Roaming\MscrmTo

Override default location

/overridepath:[mypath]

Custom shortcut

Project specific setup



CONNECTION FILES

My top
XrmToolBox
tips

Use them!

Constant pain

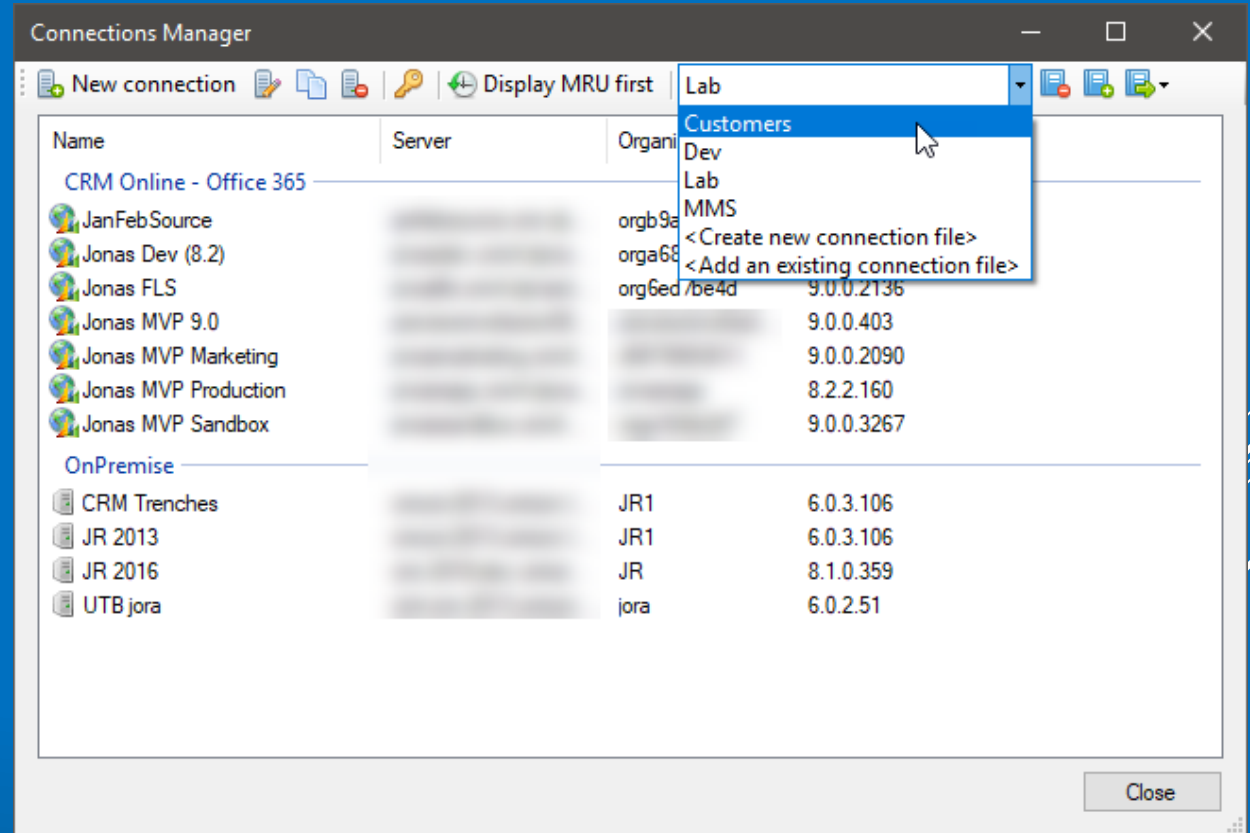
Separate files

Custom storage

Commit to your repo

Store on your OneDrive

jonasr.app/xtb-school/conn



SETTINGS

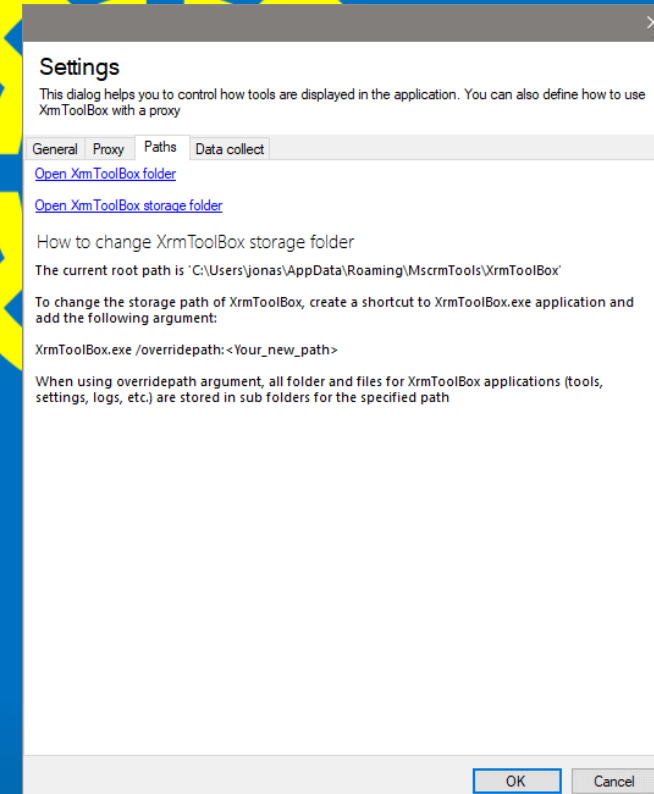
My top
XrmToolBox
tips

Sort tools

Hide tools

Quit prompting

Find file storage



UPDATING XRMTOOLBOX

My top
XrmToolBox
tips

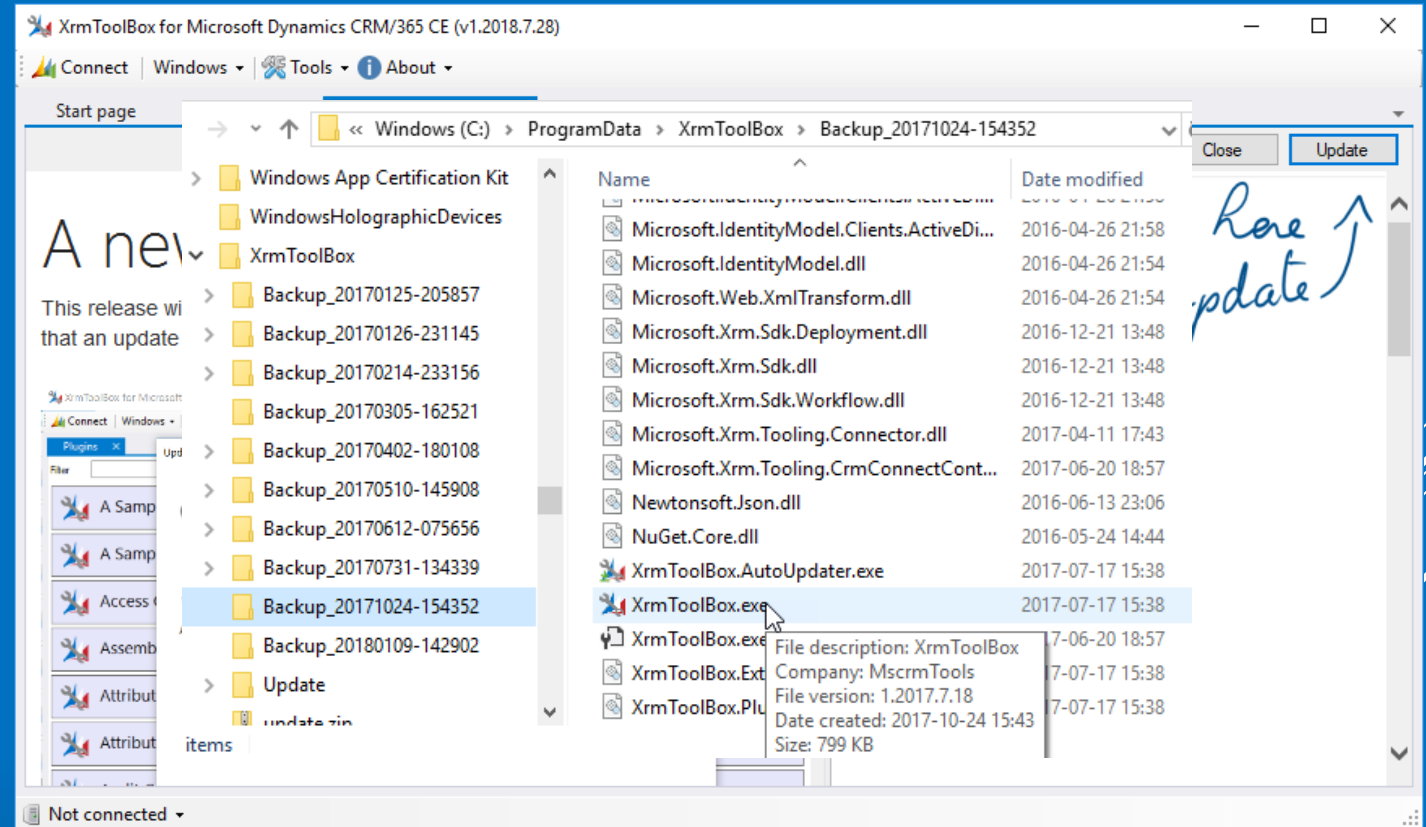
Just say Yes

File conflicts

Delete tools

Connections ~~lost~~ Saved!

Backup



UPDATING TOOLS

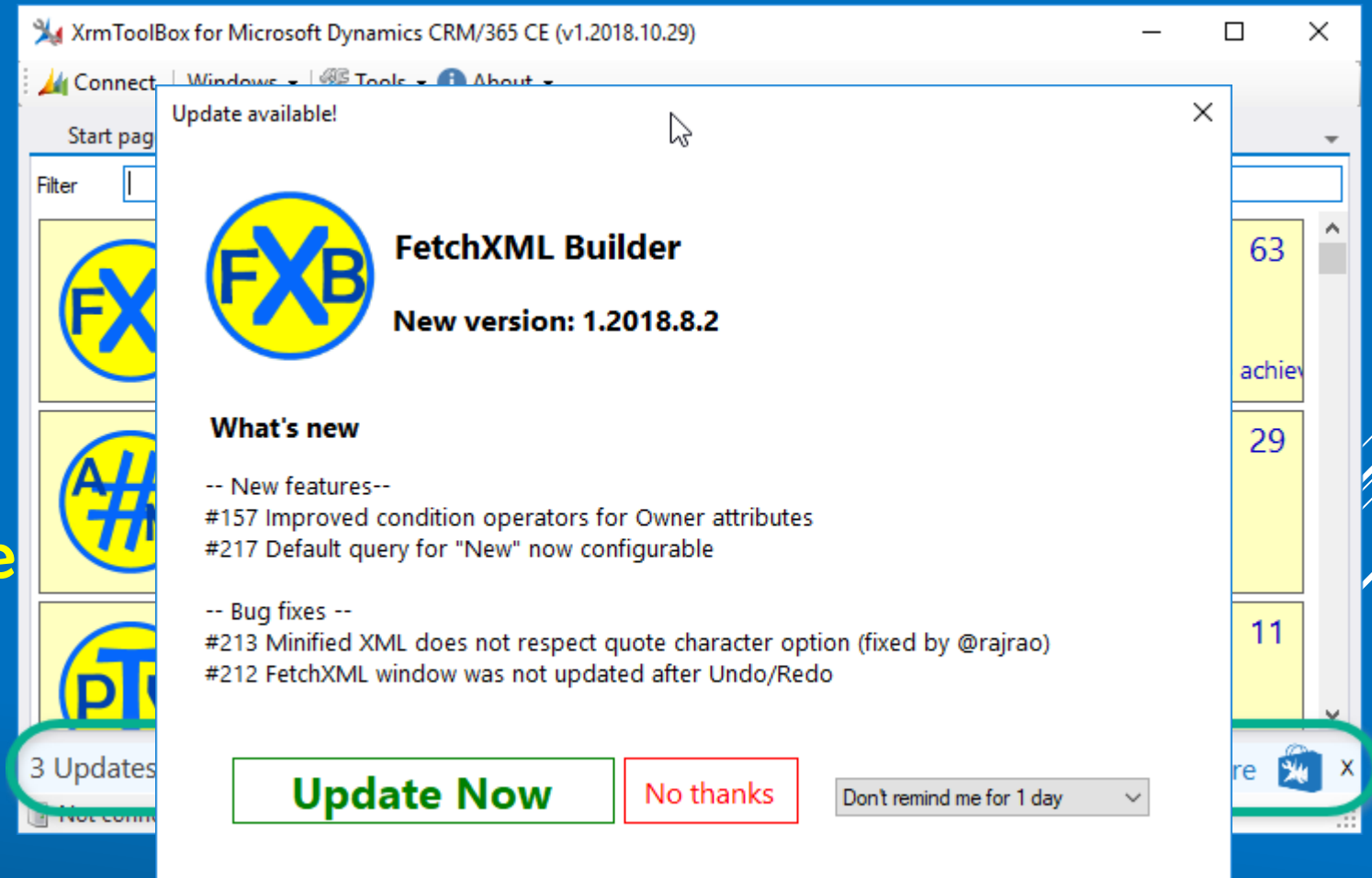
My top
XrmToolBox
tips

Just say Yes

Improvements

Bug fixes

New: Prompt to update



LATEST IS GREATEST



DEMO TIME!

What would you like to see?

Hit me!

If you are not working with
XrmToolBox...

...you are just working too hard.

-Jonas Rapp, 2017