A DYNAMICSCON PRESENTATION
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MARCH 2023
CUSTOMER ENGAGEMENT
DYNAMICSCON.COM

Top XRMToolBox Tools Every Admin Should Know

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What will we do today

- How to get the XRMToolBox
- Tool library & installation
- Setting up connections
- The Tools
  - Configuration
  - Data
  - User set up & security
  - Administration
- Extra Tools

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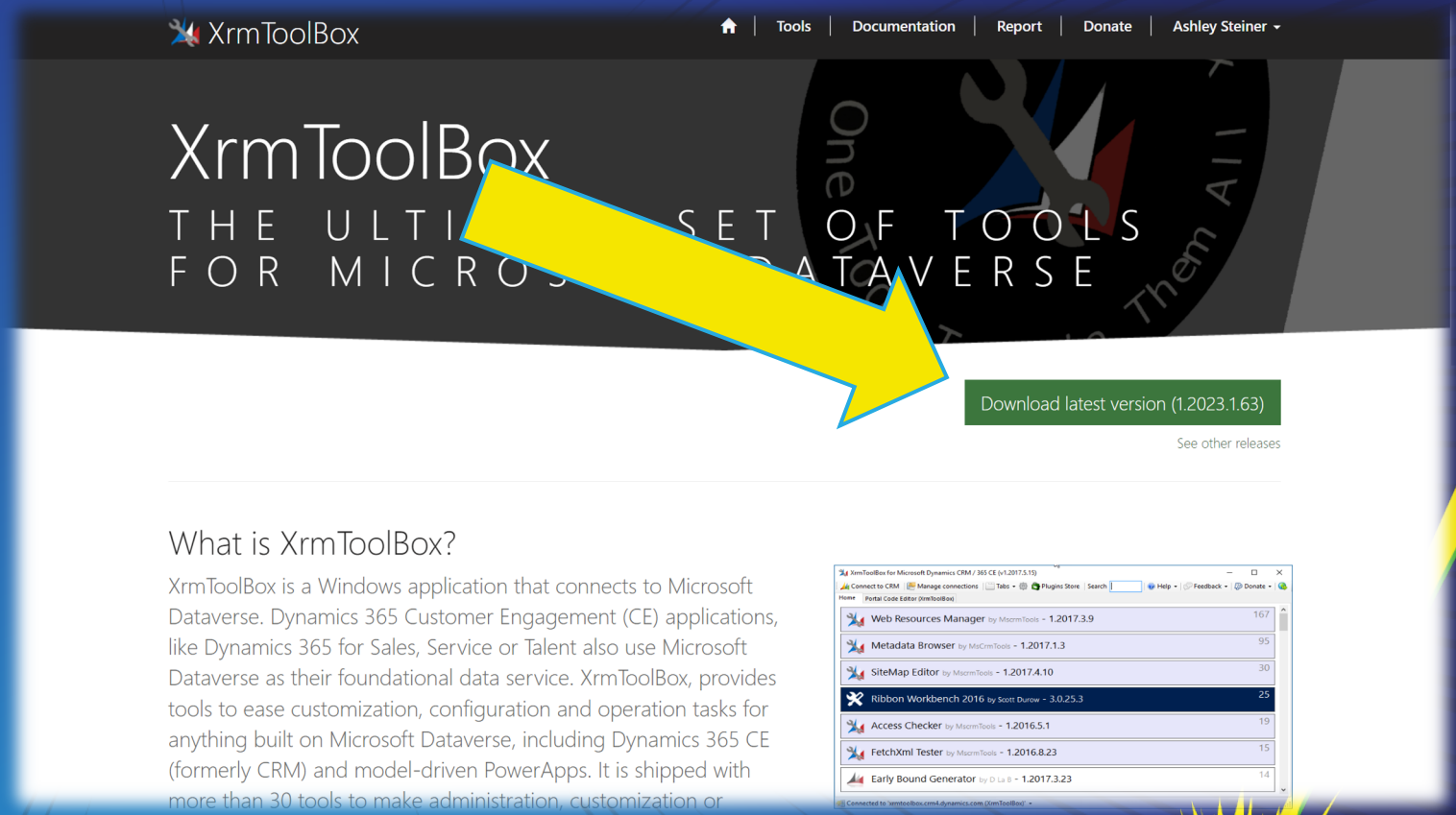
Installation

www.xrmtoolbox.com

Download the zip file, extract and run the EXE file



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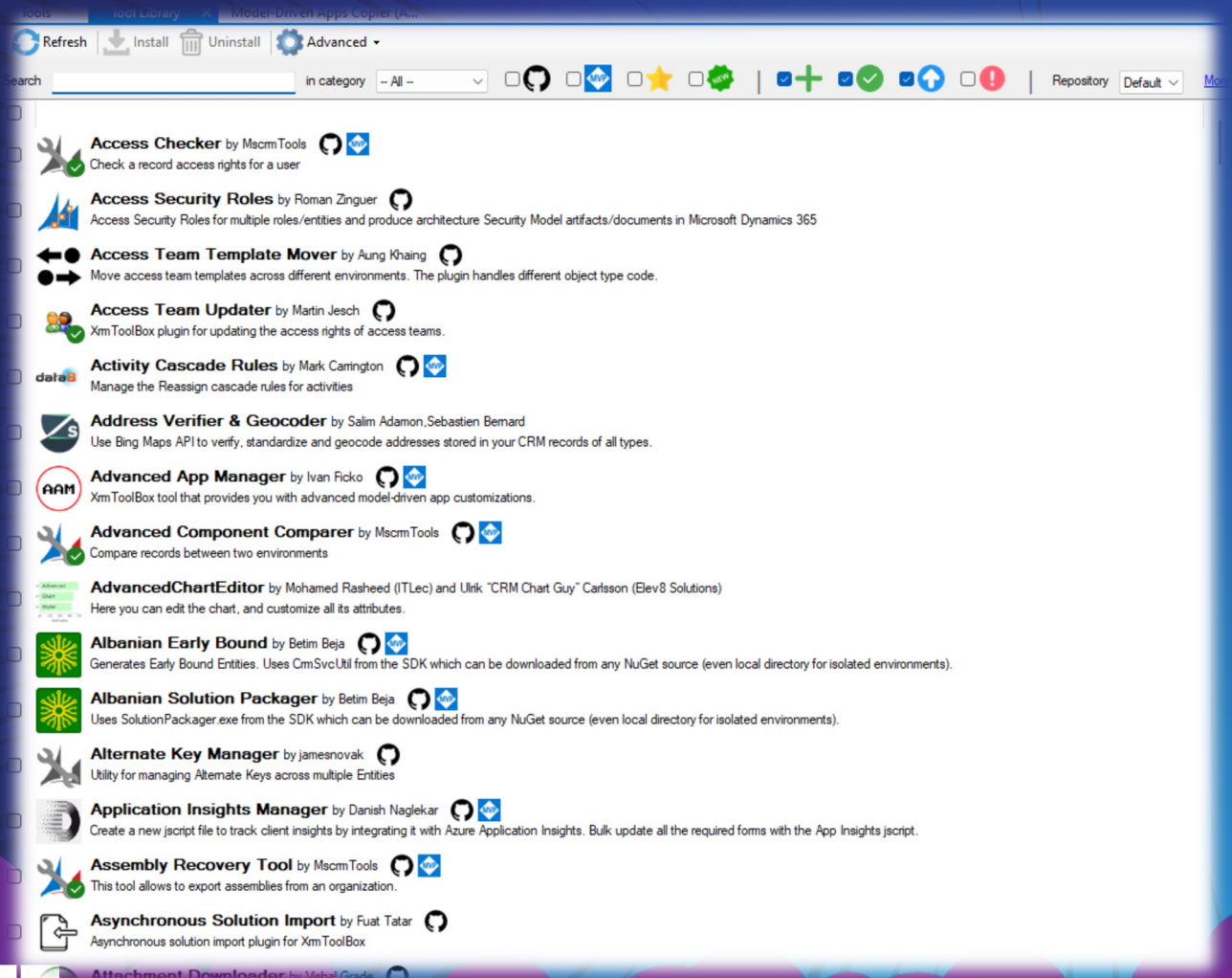
Tool Library



Updated and modern look!

Browse and search through the available utilities to add to your toolbox

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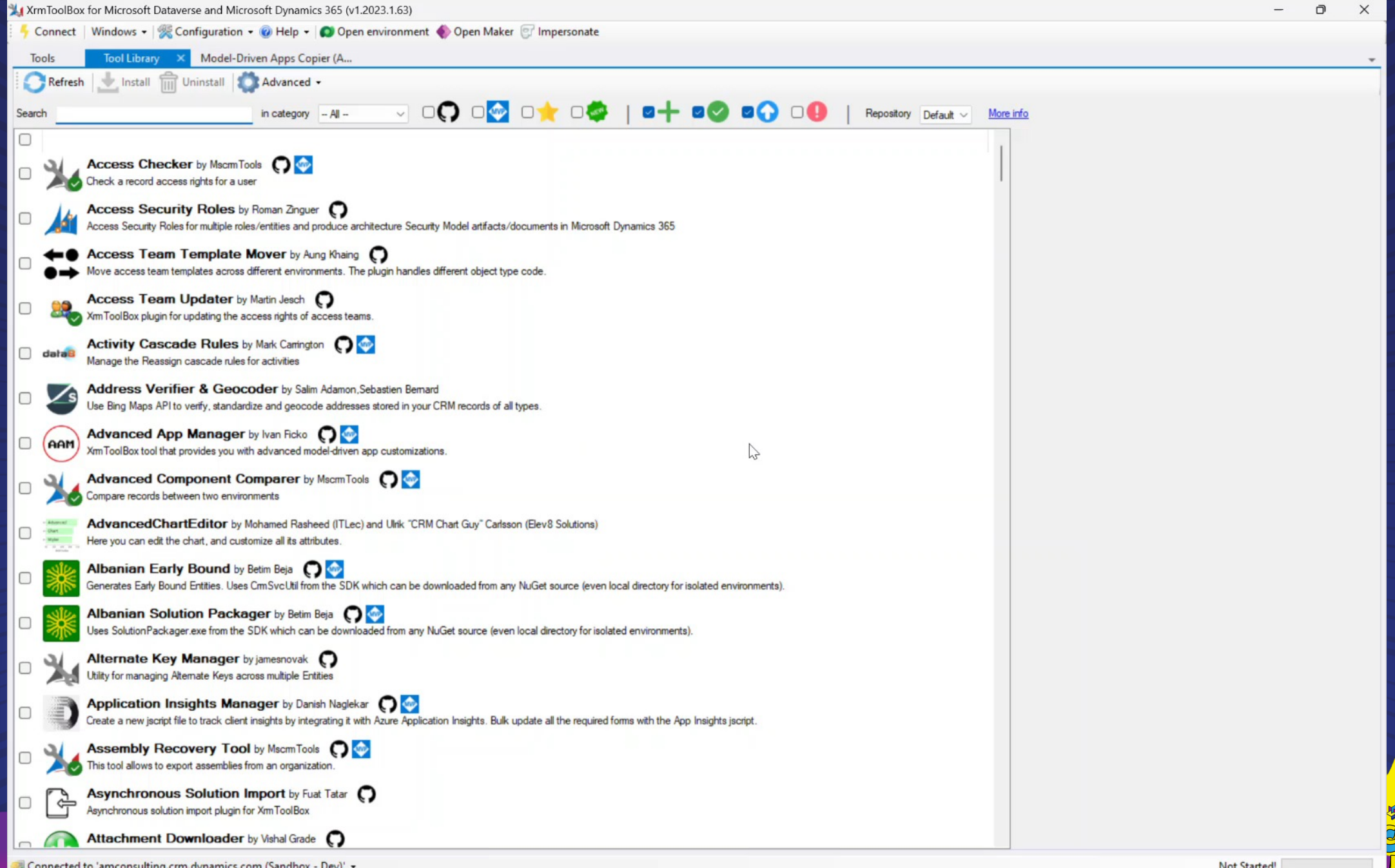

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The Tools

Configuration

- Model-driven app copier
- View layout replicator
- Personal view manager
- Personal artefact manager

Data

- Record lookup by GUID
- Bulk data updater
- Record counter
- Bulk workflow execution
- Recycle bin

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The Tools

User set up & security

- User settings utility
- User security manager
- Role documenter

Administration

- Attribute usage inspector
- Reduce storage space usage

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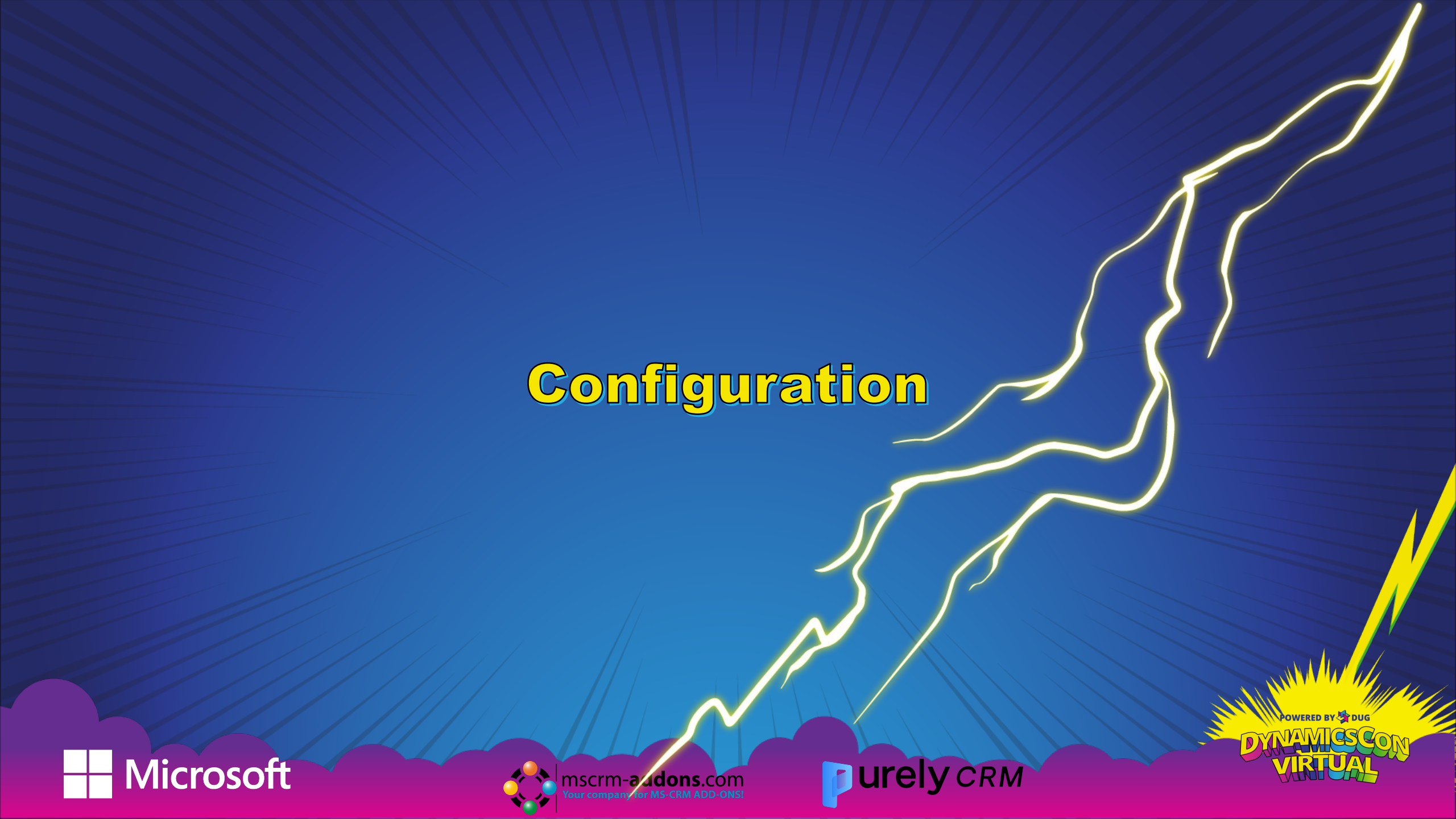
Configuration



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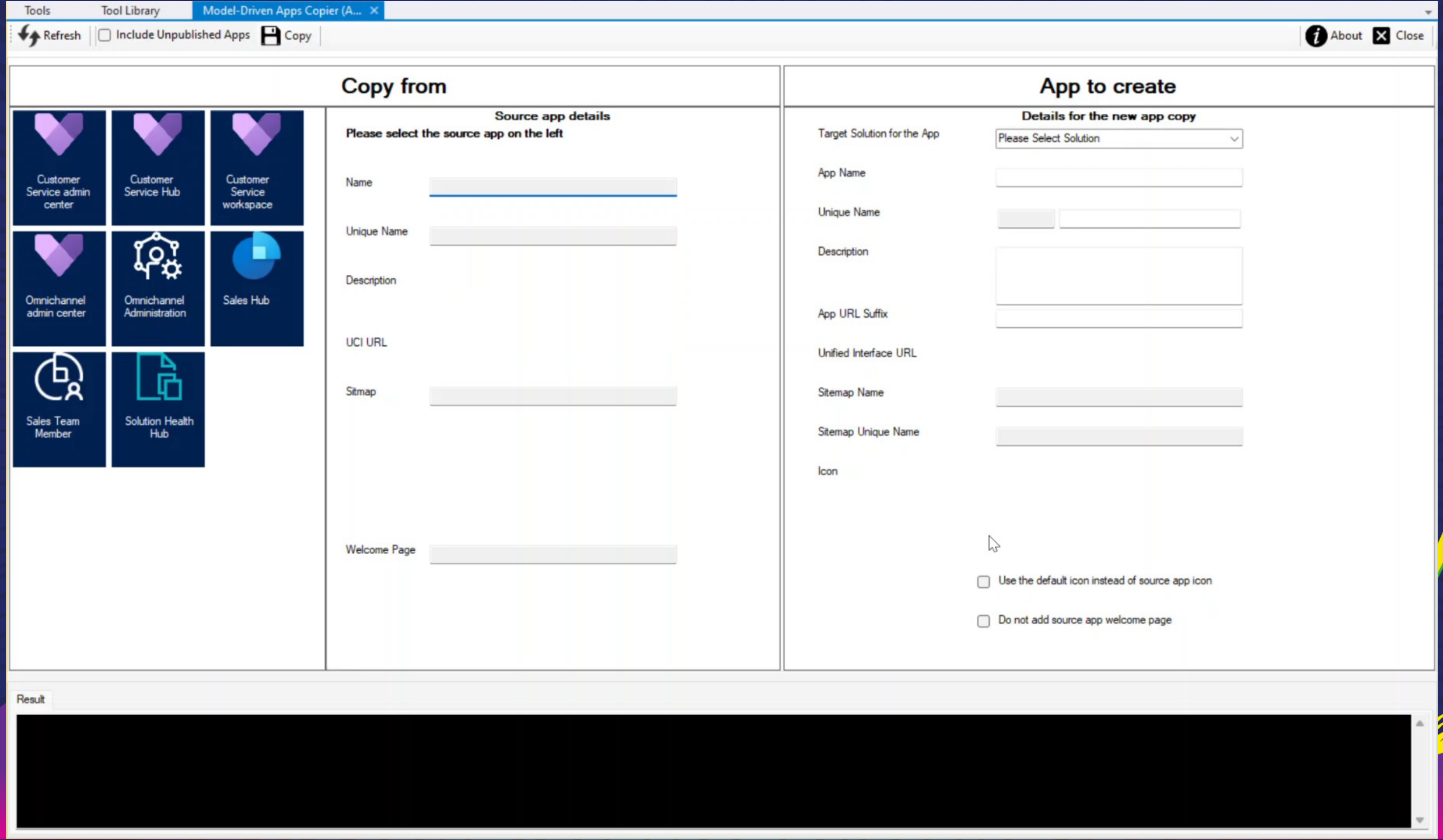
Model-driven app copier

Make copies of
Model-Driven Apps
with one click

Configuration


Tools
Tool Library
Model-Driven Apps Copier (A...
Refresh
Include Unpublished Apps
Copy
About
Close
Copy from
Customer Service admin center
Customer Service Hub
Customer Service workspace
Omnichannel admin center
Omnichannel Administration
Sales Hub
Sales Team Member
Solution Health Hub
Source app details
Please select the source app on the left
Name
Unique Name
Description
UCI URL
Sitmap
Welcome Page
App to create
Details for the new app copy
Target Solution for the App
Please Select Solution
App Name
Unique Name
Description
App URL Suffix
Unified Interface URL
Sitemap Name
Sitemap Unique Name
Icon
Use the default icon instead of source app icon
Do not add source app welcome page
Result

View layout replicator

Apply same layout to multiple views in the same table in a single operation (both system & personal views)

Configuration

Tools | Tool Library | View Layout Replicator (AMC)

Load Entities | Save views | Publish entity | Publish all | Settings

Entities

Search:

Display name	Logical name

Source Views

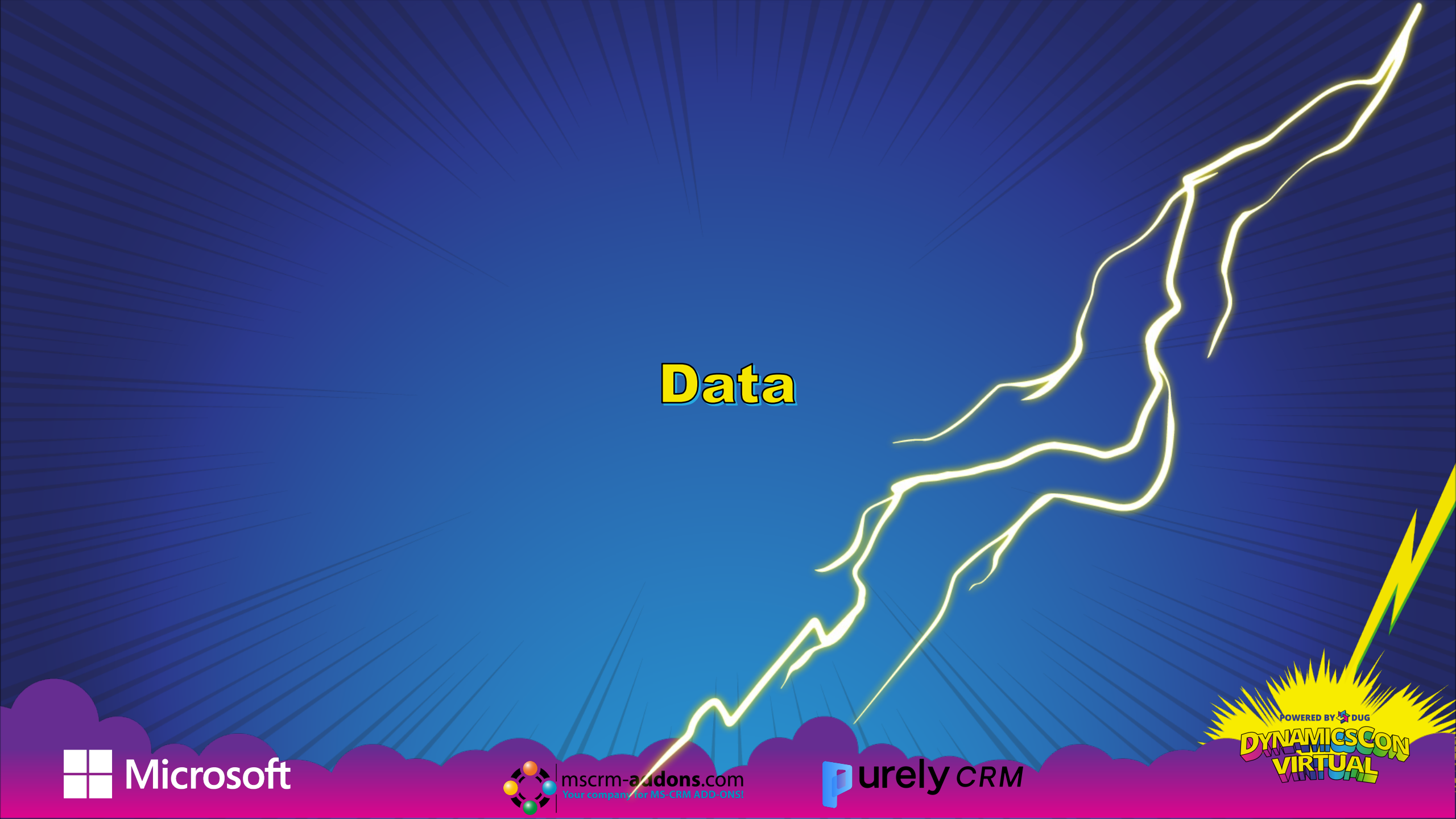
View Name	View Type

Target Views

Show system views | Show user views

View Name	View Type

Data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Personal View Manager / Personal Artefact Manager

Duplicate, assign or delete the personal views, dashboards, charts for CRM users

Configuration

Tools | Tool Library | Personal View Manager (AMC)

Close this tool | Cancel | Select All Users | Deselect All Users | Select All Views | Deselect All Views

User Options: Enabled

Hide Users Without AAD ID

Get Users

View Options: Missing Fields | My Access

View Type: Owner

Security Role:

Get Views

Share Options: Read | Write | Delete | Append | Assign | Share | Full Access | None

Share With / Assign To:

Share | Assign

Selected	First Name	Last Name	UserLicenseType	AzureActiveDirectoryObjectId	View Count

Selected	Name	AssociatedUsers	Missing Attributes	My Access Rights

Record lookup by GUID

A plugin to open your records in your browser

Data

Tools | Tool Library | Record Lookup by Guid (AMC)

Reload Entities

Record Guid:

Search 499 Entities

Format: 00000000-0000-0000-0000-000000000000

Settings

To improve performance it is a good idea to limit the number of entities that has to be searched.

Entity Filter:

*

Entity Exclude Filter:

msdyn*, msfp*

Custom Entities Only

Exclude Managed Entities

Bulk data updater

Update / Assign /
Set State / Delete
for any number of
data rows

Data

Tools | Tool Library | Bulk Data Updater (AMC)

Options | Cancel | Documentation | by Jonas Rapp

Select records to update

FetchXML Builder | Edit FetchXML | Open View | Open File

Records not loaded

Records

Include all records returned | Include selected records only | 0 records

Update | Assign | Set State | Delete

Update [nn] [collection]

Select attribute to update

Set fixed | Calculate | Touch | Set null

Only when change is needed | Add attribute

Verify attributes to update

Name	Action	Value	OC

Remove

Execution

Wait betw. calls 0 seconds

Batch size 1 | Ignore errors

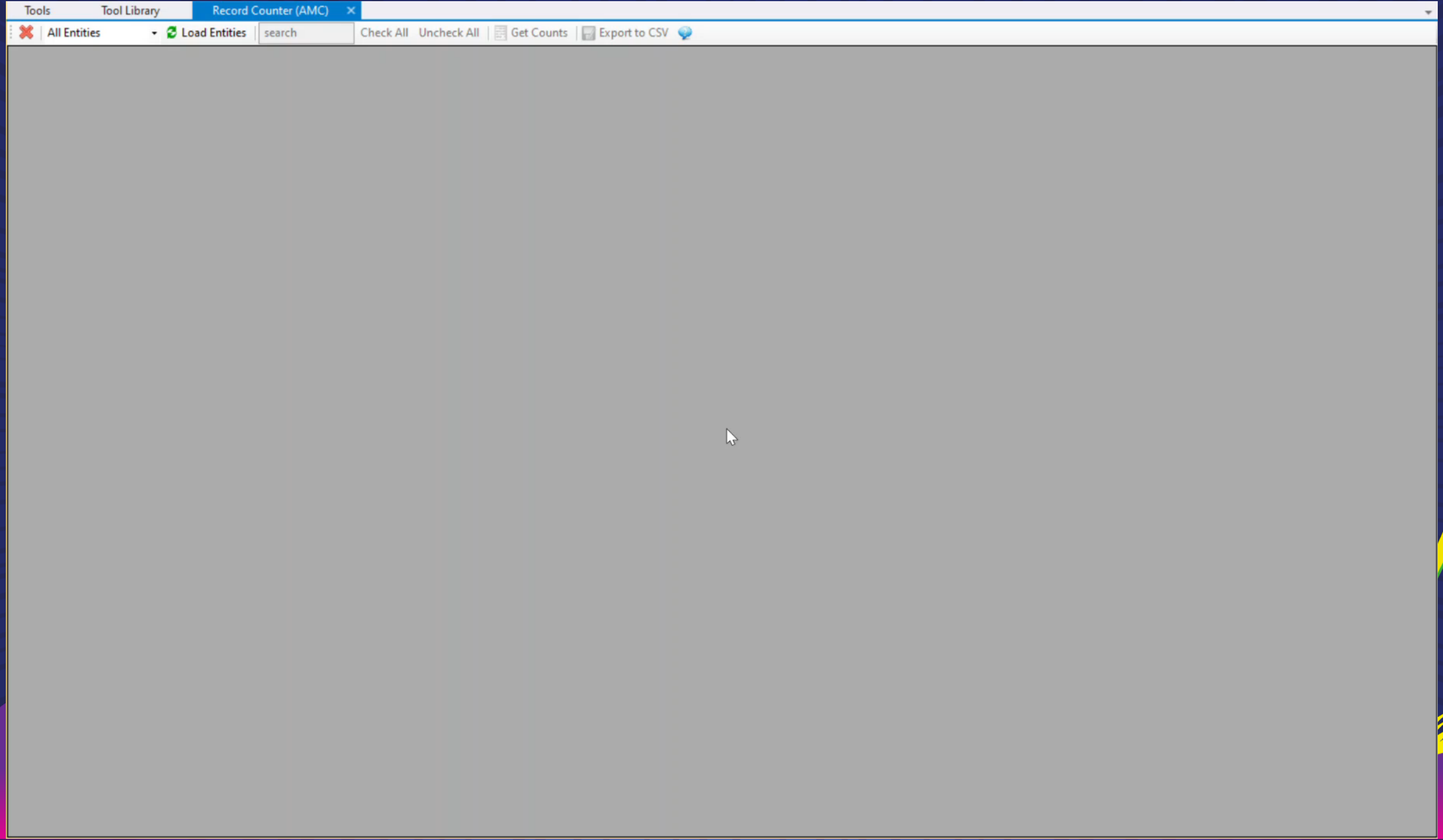
Bypass Custom Business Logic | Read the Docs!

Status | Update records

Record counter

Easily count
records per entity
for multiple entities

Data


Tools
Tool Library
Record Counter (AMC)
All Entities
Load Entities
search
Check All
Uncheck All
Get Counts
Export to CSV

Bulk workflow execution

Execute workflows in bulk using CRM views or FetchXML queries

Data

Tools | Tool Library | Bulk Workflow Execution (A...

Refresh | Validate Query | Start Workflows | Help

Workflow

Select an On-Demand Workflow:

Select a Workflow to run

Info

Record Count:

Batch Size: 200 (0-1000)

Interval Delay: 0 seconds

View

Select a Source Type:

- Use Custom FetchXML Query
- Use CRM View FetchXML Query

FetchXML Query

Recycle bin

Review and restore the deleted records for entities with auditing enabled

Tools | Tool Library | Recycle Bin (AMC)

Load Entities and Users | Restore Record(s)

Select Entity

Select User

Date Range

1/20/2023 to 2/20/2023

Show Deleted Records

Sele	Record	Entity	Deleted Date	Deleted By

Field	Value

User set up & security

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User settings utility

Manage users personal settings in bulk

User set up & security

Tools | Tool Library | User Settings Utility (AMC)

Load Users and settings | Choose users from FXB | Update User(s) Settings | Reset

View

Check all | Check none | Invert selection

Filter

Last name	First name	Business unit

General

Default Pane
Default Tab
Records per page
Time zone
Show startup pane
Advanced Find mode
Default currency
Default Dashboard
Default Search

Activities

Calendar
Start time
End time

Email Settings

Allow emails on my behalf
Track email messages
Create records
Show emails not tracked in Activities list
Show emails as conversation on Timeline

Privacy

Error notifications

Languages

UI language
Help language

Outlook Forms

Use CRM form for appt.
Use CRM form for contact
Use CRM form for email
Use CRM form for task

Formats

Format
Number

User security manager

Efficiently manage user's security in Dynamics 365

User set up & security

Tools | Tool Library | User Security Manager (AMC)

Close | Load Users | User Security Report | User Manual

Users: 0

Name	Business Unit

User Details

Teams

Assigned: 0

Name

>>

<<

Available: 0

Name

General

Business Unit:

User Name:

Name:

Primary Email:

Access Mode:

Remove All Teams | Remove All Roles | Remove All FSP

Roles

Assigned: 0

Name

>>

<<

Available: 0

Name

All Assigned Roles (Direct and Team): 0

Name	Team	Team BU

Field Security Profile

Assigned: 0

Name

>>

<<

Available: 0

Name

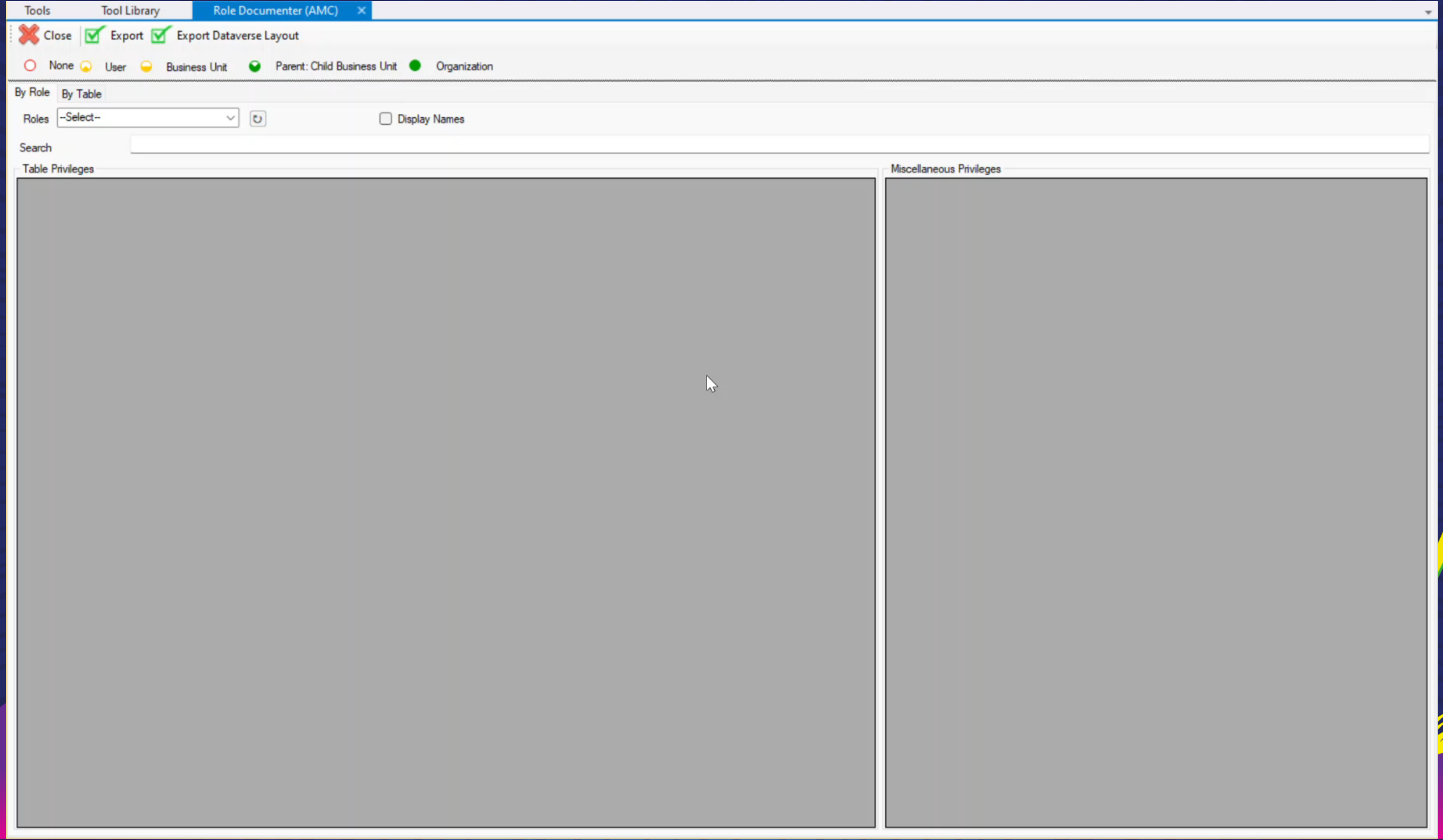
All Assigned Field Level Security (Direct and Team): 0

Name	Team	Team BU

Role documenter

Create Excel
document for roles
in the Dataverse/CE

User set up & security


Tools
Tool Library
Role Documenter (AMC)
Close
Export
Export Dataverse Layout
None
User
Business Unit
Parent: Child Business Unit
Organization
By Role
By Table
Roles
--Select--
Display Names
Search
Table Privileges
Miscellaneous Privileges

Administration

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Attribute usage inspector

Identify the usage of Dataverse/CE columns

Administration

Tools | Tool Library | Attribute Usage Inspector (A...

Load Entities | Export To Excel

Entities

Search

Display Name	Logical Name

Data

You can filter attributes displayed by enabling attributes filtering in settings, then selecting an entity.

	Display Name	Logical Name	Attribute Type	On Form(s)	Data Usage

Reduce storage space usage

Reduce storage space by removing or deleting different types of information

Tools | Tool Library | Reduce Storage Space Usage ...

Close | Calculate Records | Initiate Bulk Delete

Data older than

Attachment file size filter (in KB) 20480

Usage information

Bulk Email and Workflow	0 records
Suspended Jobs	0 records
Email with Attachments	0 records
Notes with Attachments	0 records
Bulk Import Jobs	0 records
Bulk Delete Logs	0 records

Additional Recommended Tools

- Merge Permissions
- In-app notification builder
- Ribbon workbench
- Bulk delete tool
- BPF to Visio builder
- Flow to Visio
- Search data in PrincipalObjectAccess (POA)

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Questions?

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Dynamics Hotdish: https://dynamicshotdish.com/

TechFluent: https://www.techfluentacademy.org/