LTI
Let's Solve

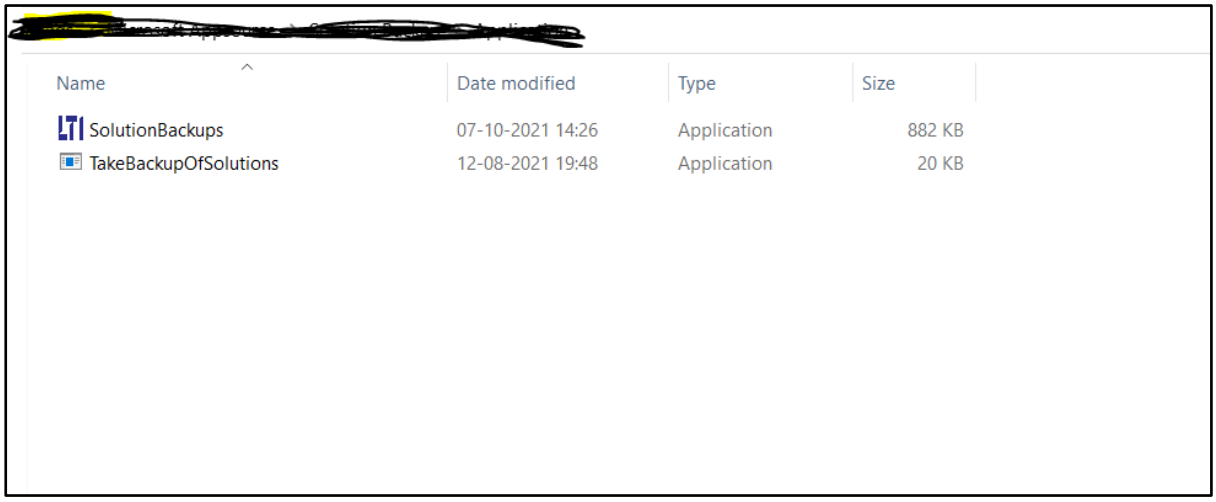
Celebrating 20 Years

Dynamics 365 Solution Backup User Guide

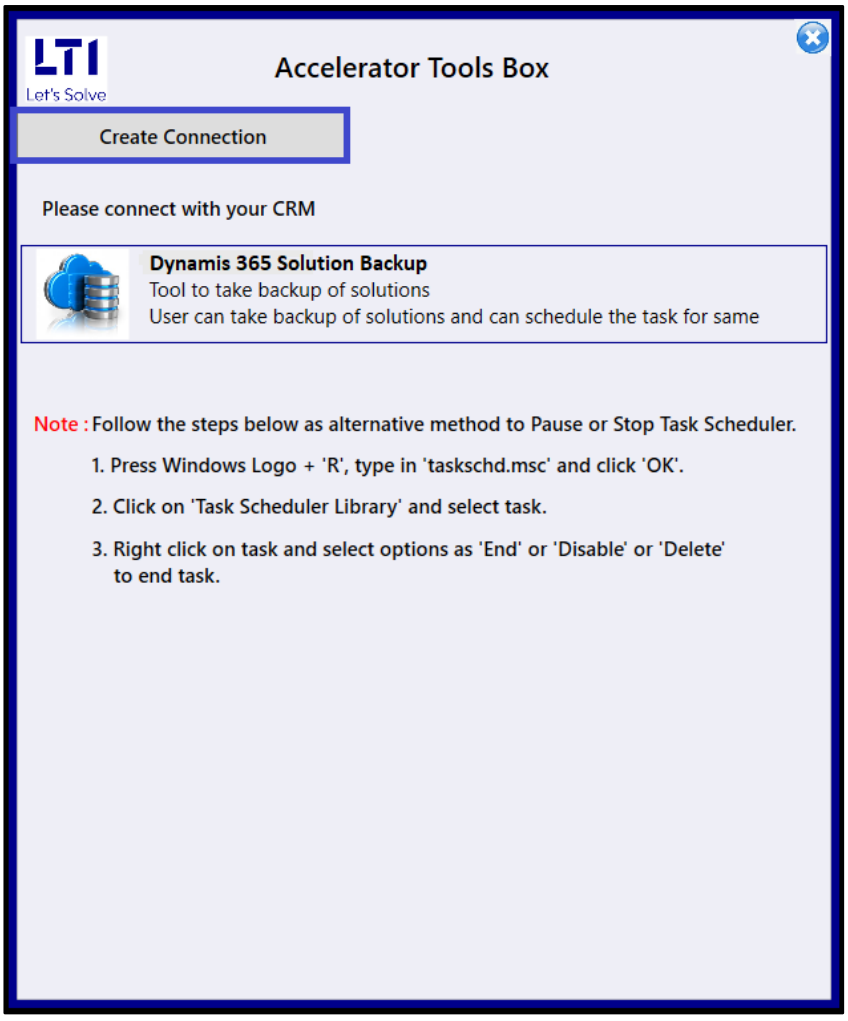
A Larsen & Toubro Group Company

User Guide

1) Download the application solution and extract it.

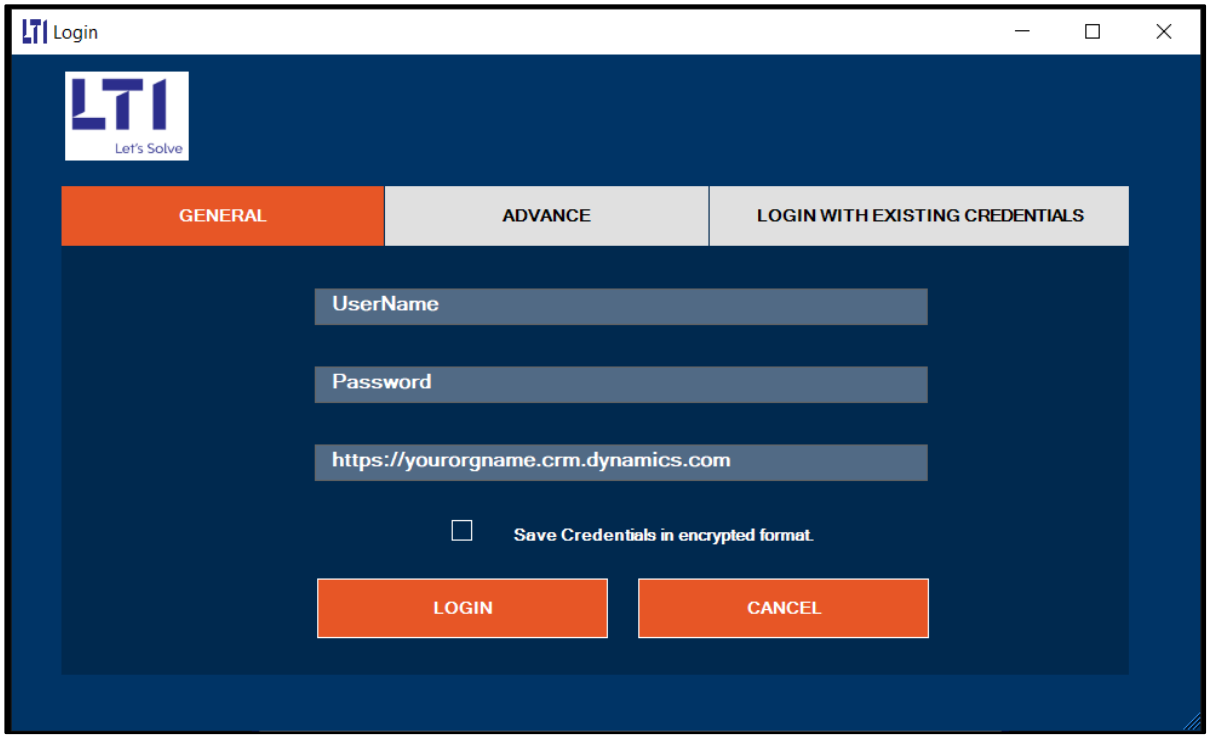


2) Click on **SolutionBackups** to run it. It will open an application as shown in below screen, click on **Create Connection**.

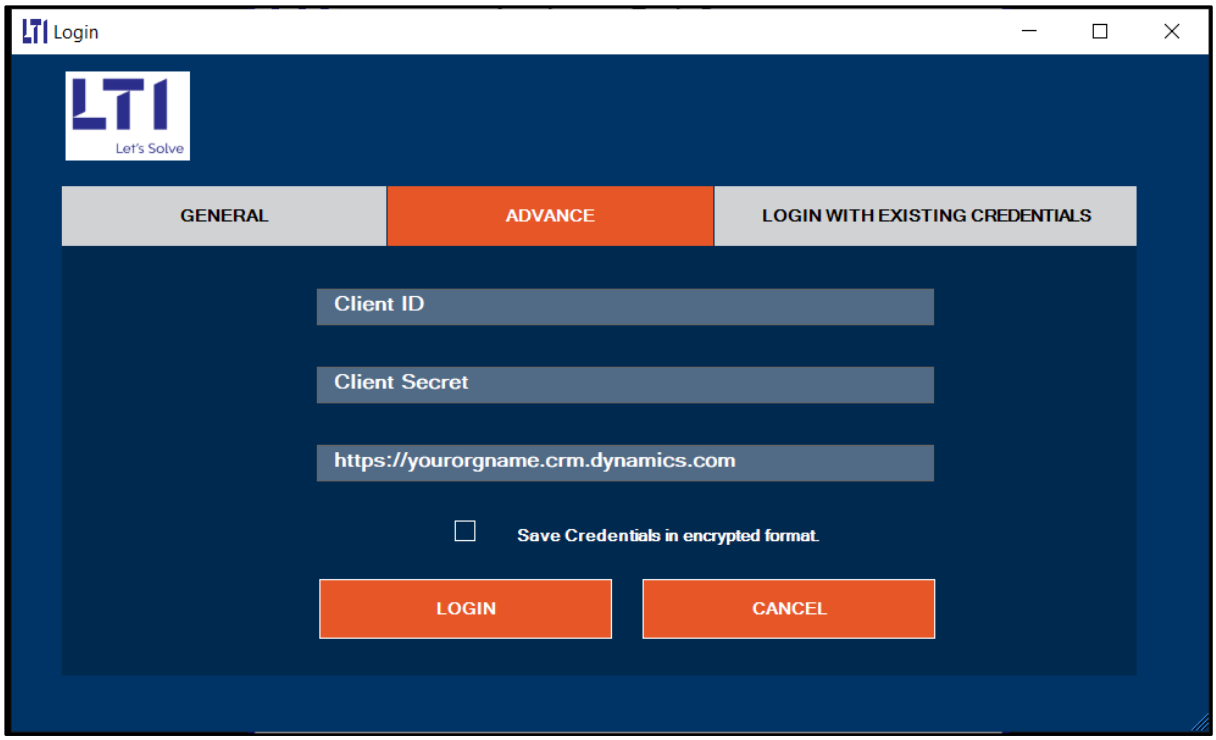


3) It will open Login screen with 3 options.

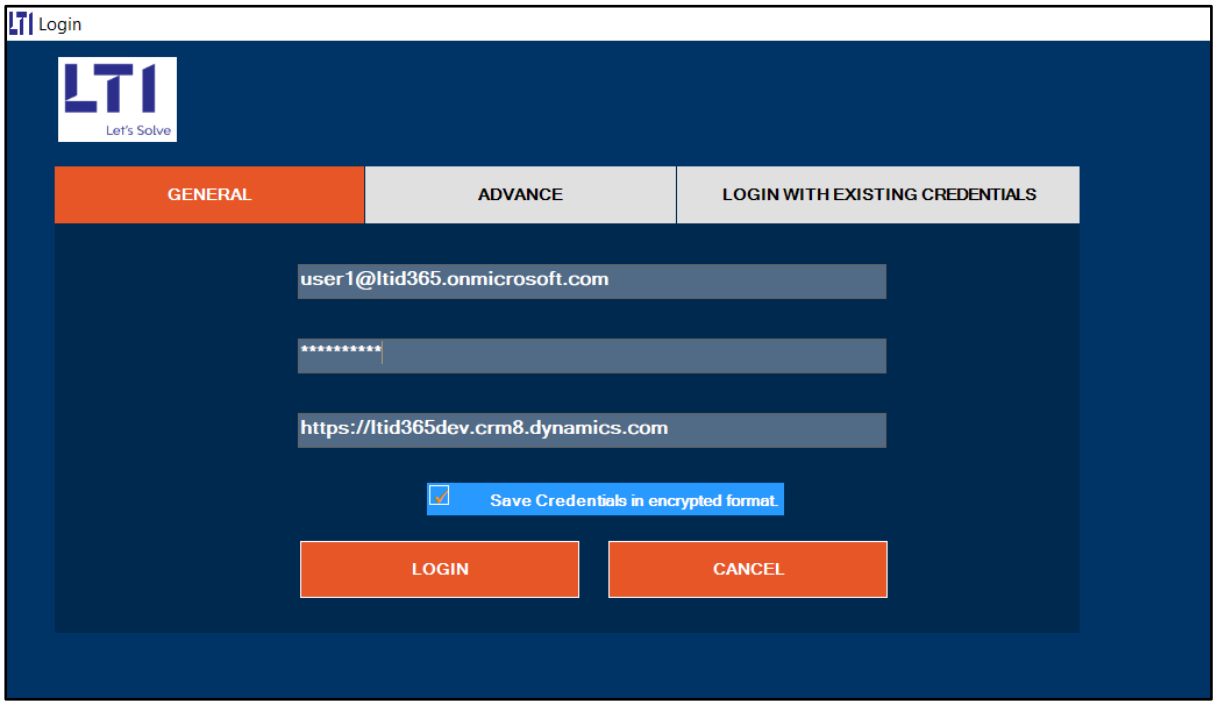
- **General**- Enter your Dynamics 365 User Name, password and Organisation URL.
  Note:- Multifactor authentication is not used in Login



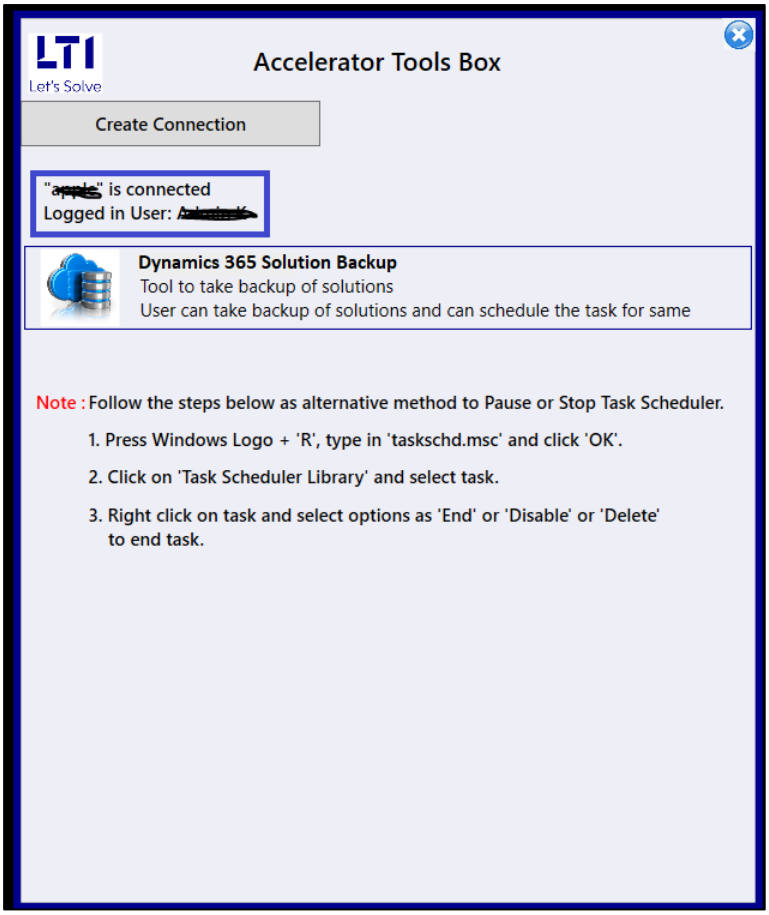
- **Advance**- For Login thorught AAD(Azure active directory) Enter Client ID, Client Secret and Organisation URL
  Note:- Multifactor authentication is not used in Login



- Login with existing credentials- If you have saved above credentials, then you can utilize this option. It will use your last credentials entered.
  Note:- Multifactor authentication is not used in Login
- Select checkbox to save your entered credential, credentials are saved in encrypted format in 'CRMConnection' file which resides in Debug folder.

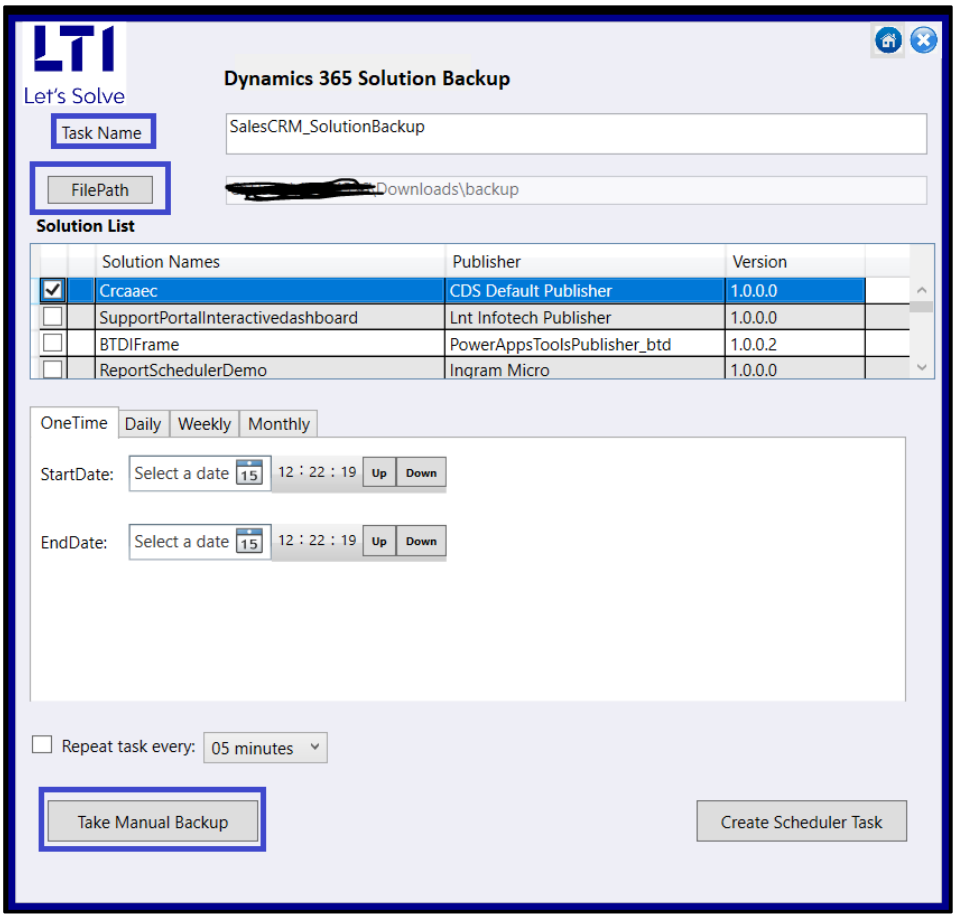


4) Once login is successful, below screen will be displayed with Organization name and Username. Click on Solution Backup as shown highlighted in below screen.

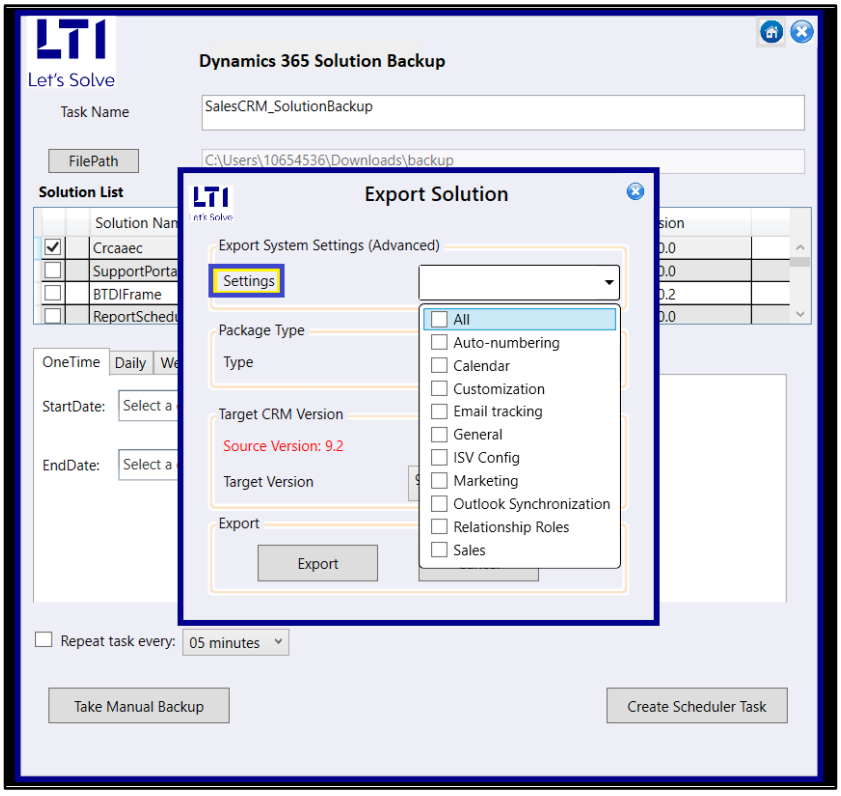


Follow the steps for **Manual backup** process: -

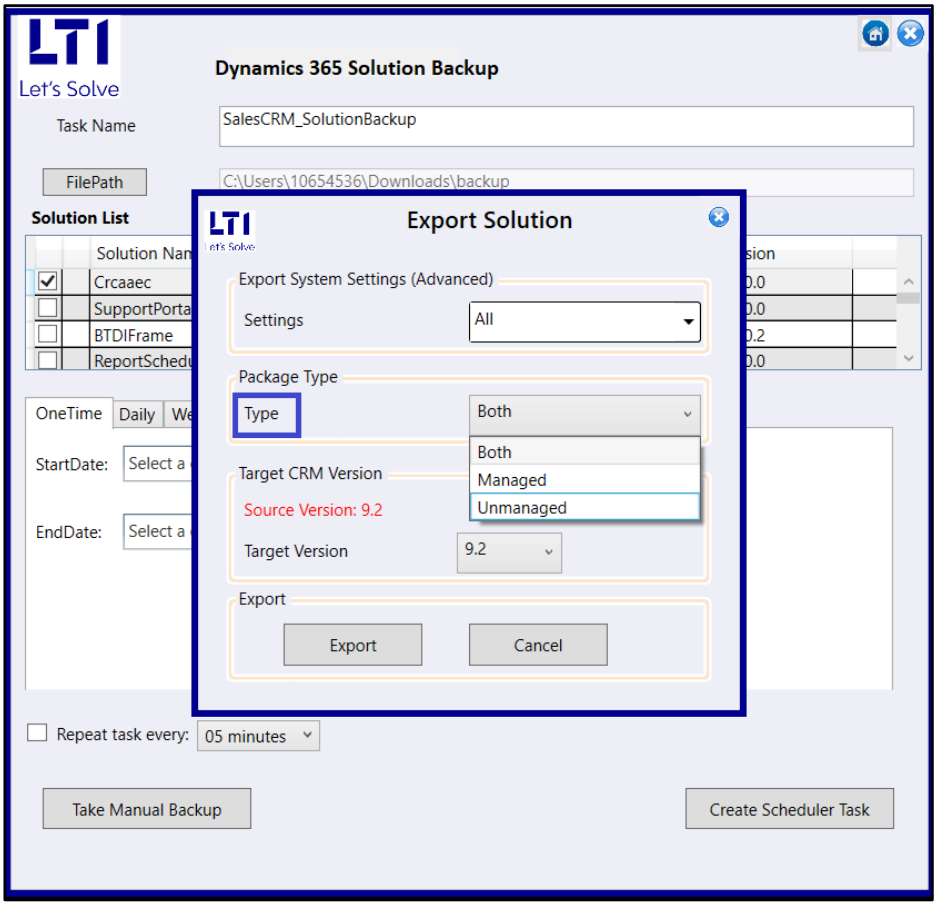
1) You need to enter task name, browse the path where you want to save the backup file.
2) **Task Name**- Enter your backup process name, here you can add name of your solution as a task.
   File Path- Browse the local path from your PC where you wish to save your backup files.
   Solution List- It shows all available solution in your Dynamics CRM organization. Select a solution (one at a time) which you wish to backup
3) Click on **Take Manual backup** if you want to go with manual backup.



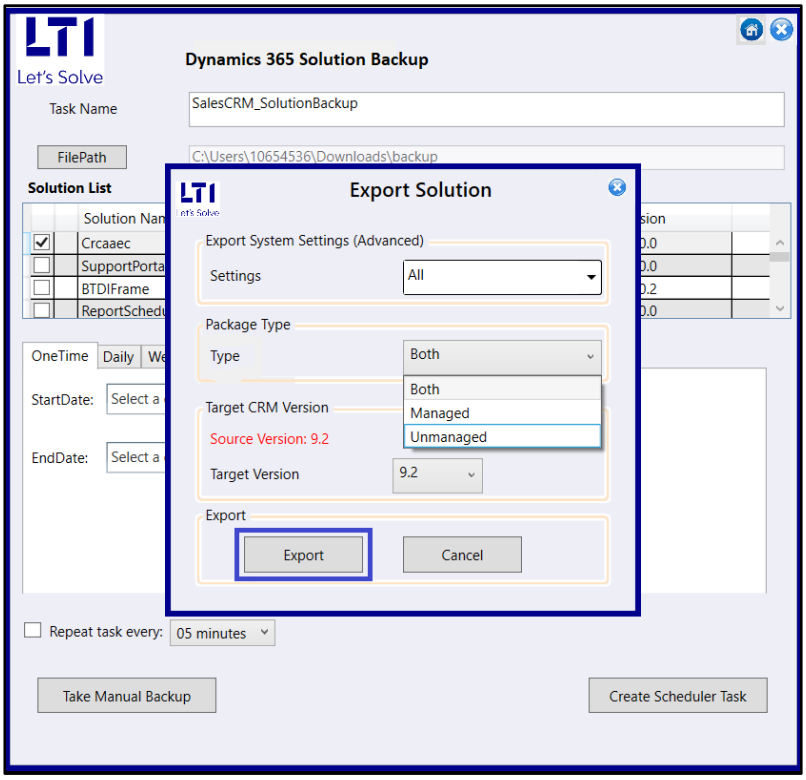
4) Select the setting options you wish to export from solutions, you can select All or select specific options from the list as shown in below screen.



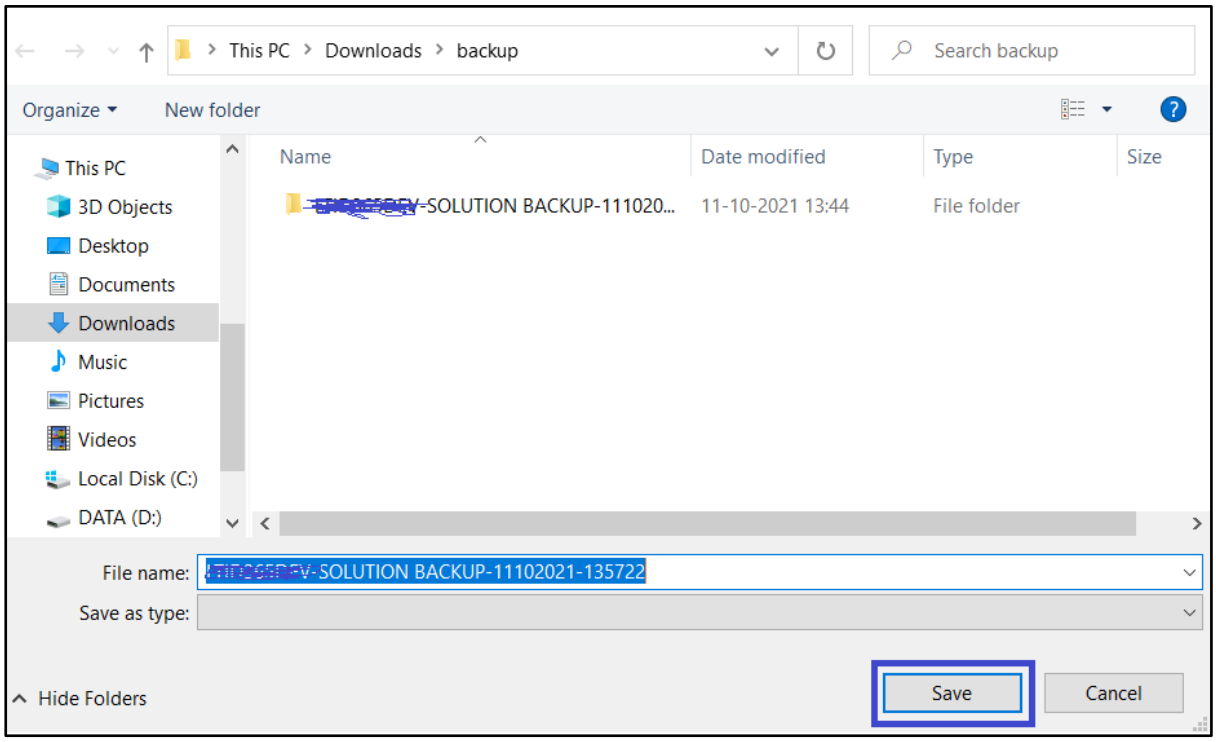
5) You can export solution package in both Managed and Unmanaged way.



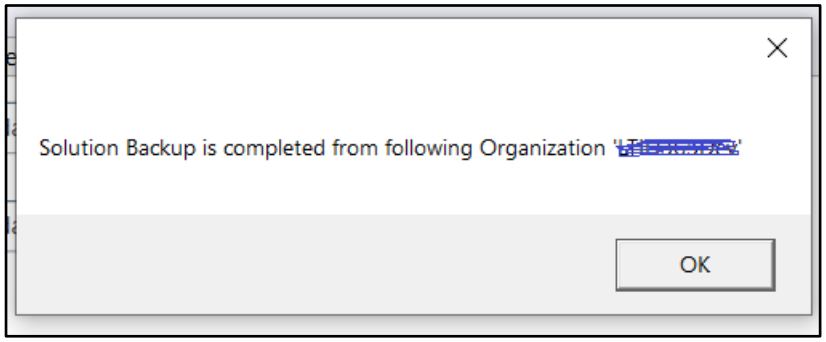
6) Click on Export



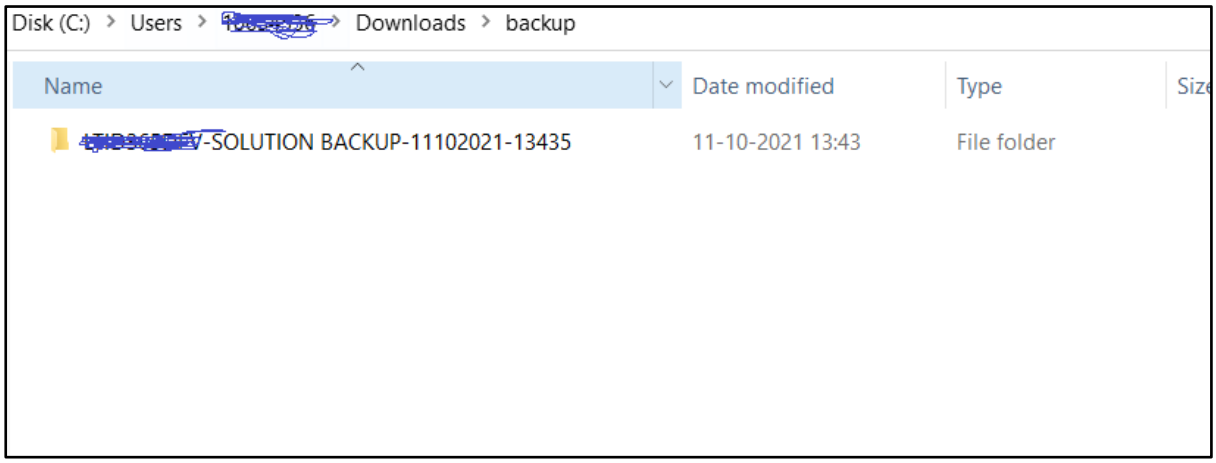
7) For Manual backup, you will be asked to save file in designated folder. Click on **Save**.

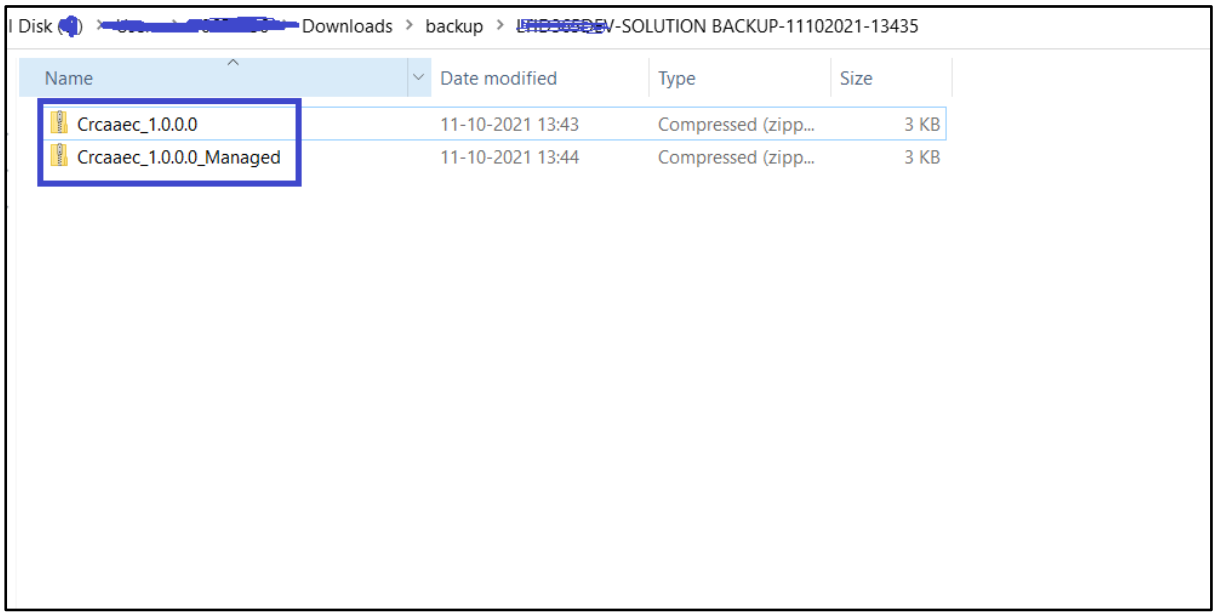


8) You will get message from application on successful backup as shown in below screen.



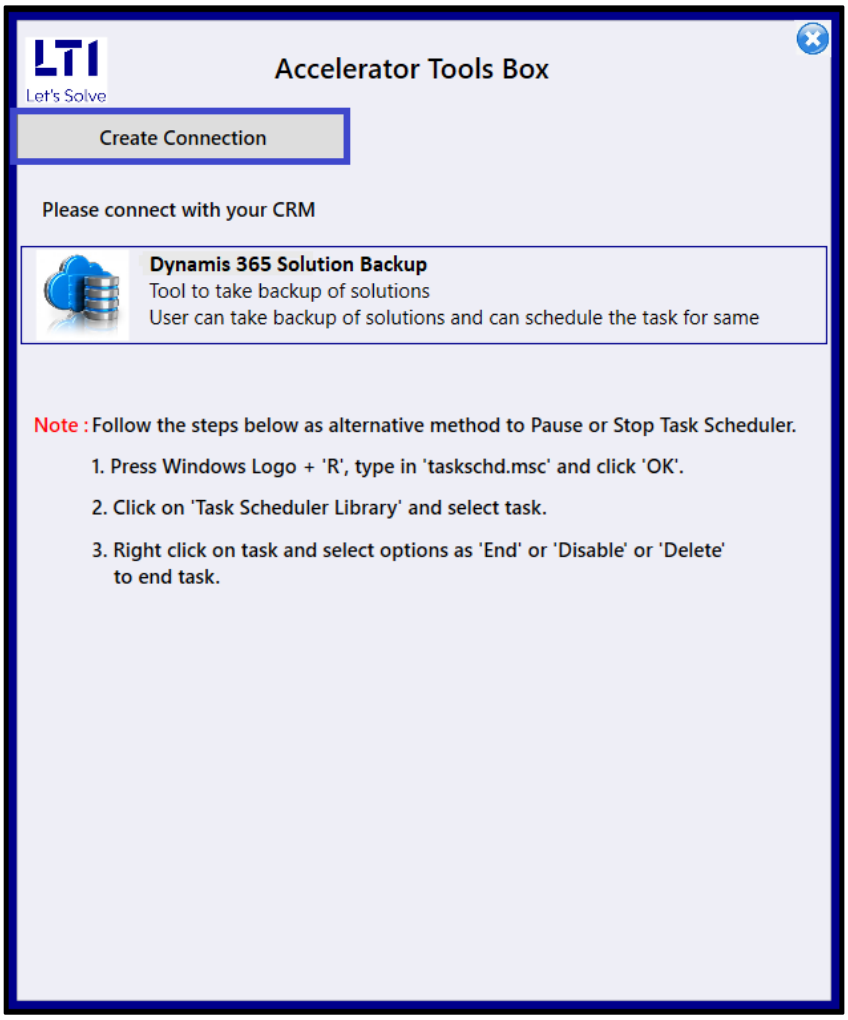
9) Folder with your organization name will be auto created with current date and time and backup filed will be saved with the solution name by postfixing version number.

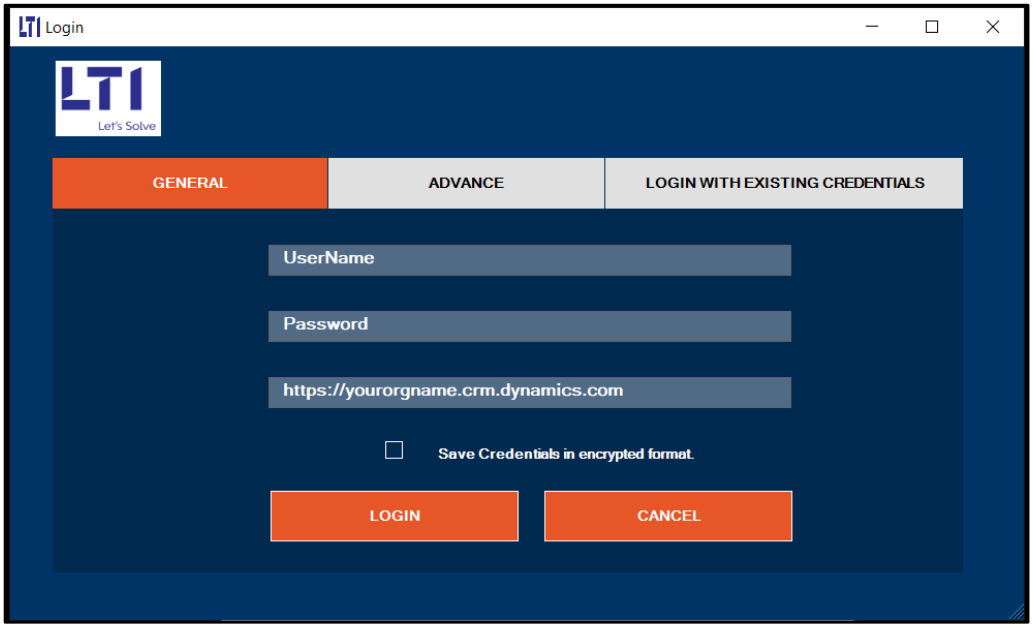


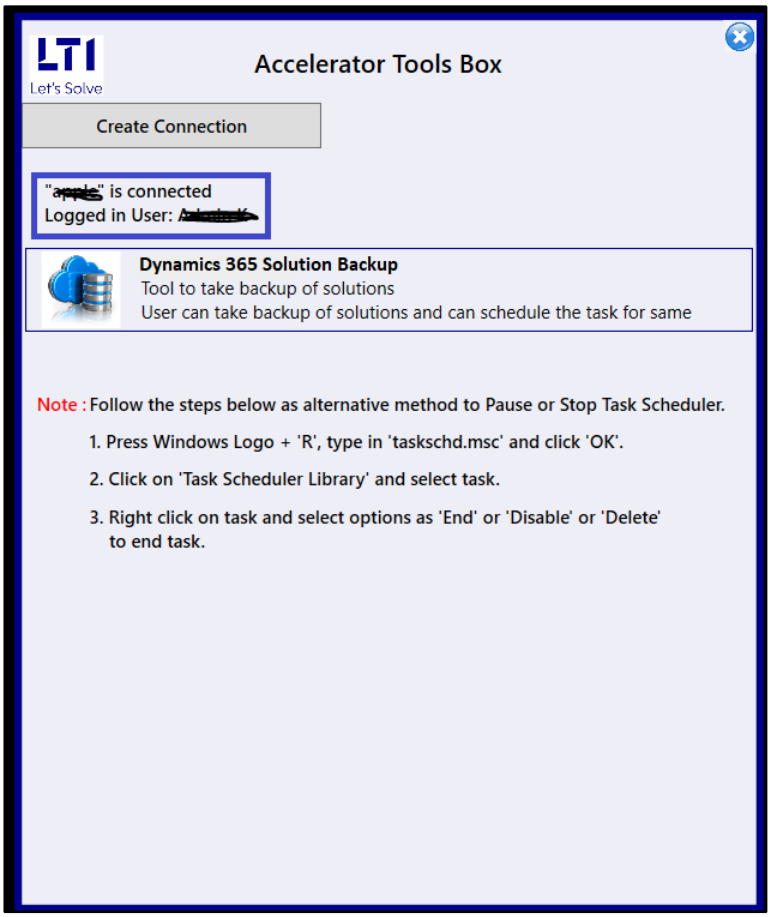


10) For **Scheduled backup** follow the below given steps: -

Same application will be opened by entering the valid D 365 credentials.

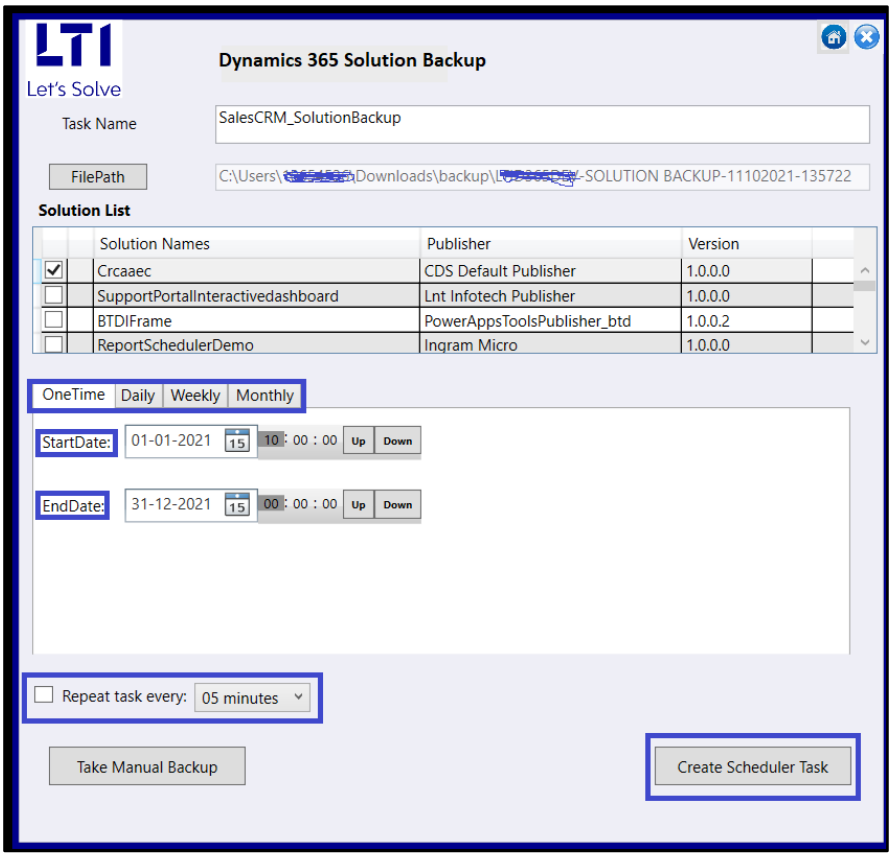

Accelerator Tools Box
Let's Solve
Create Connection
Please connect with your CRM
Dynamis 365 Solution Backup
Tool to take backup of solutions
User can take backup of solutions and can schedule the task for same
Note : Follow the steps below as alternative method to Pause or Stop Task Scheduler.
1. Press Windows Logo + 'R', type in 'taskschd.msc' and click 'OK'.
2. Click on 'Task Scheduler Library' and select task.
3. Right click on task and select options as 'End' or 'Disable' or 'Delete' to end task.


Login
Let's Solve
GENERAL
ADVANCE
LOGIN WITH EXISTING CREDENTIALS
UserName
Password
https://yourorgname.crm.dynamics.com
Save Credentials in encrypted format.
LOGIN
CANCEL

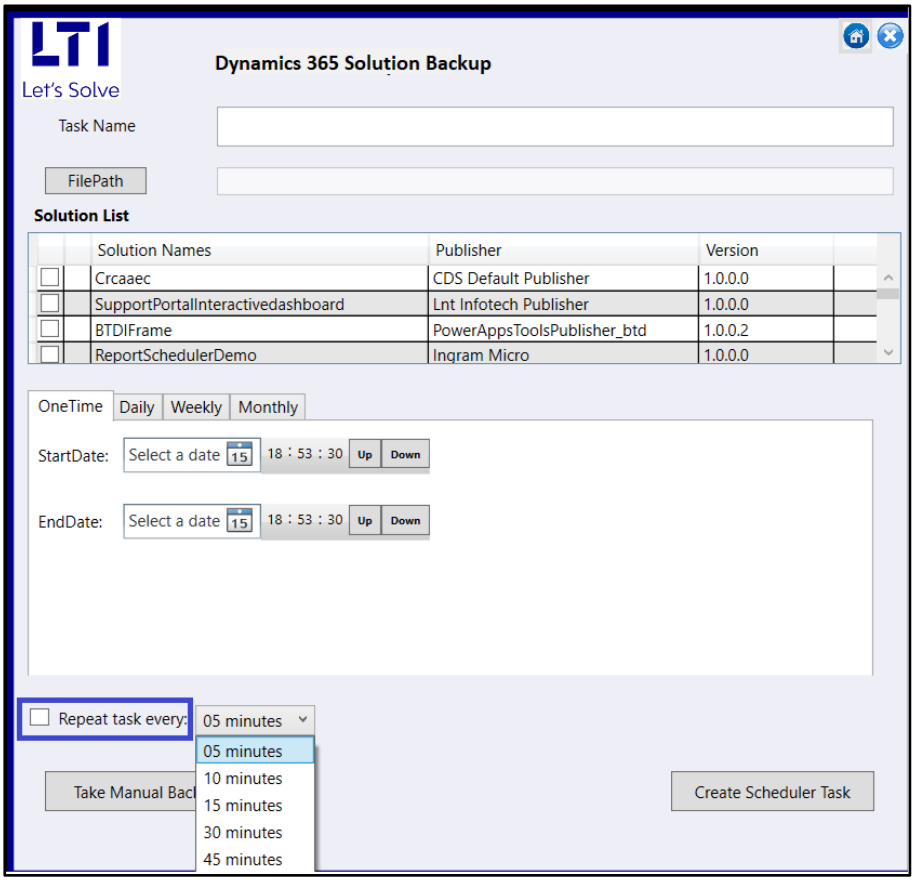


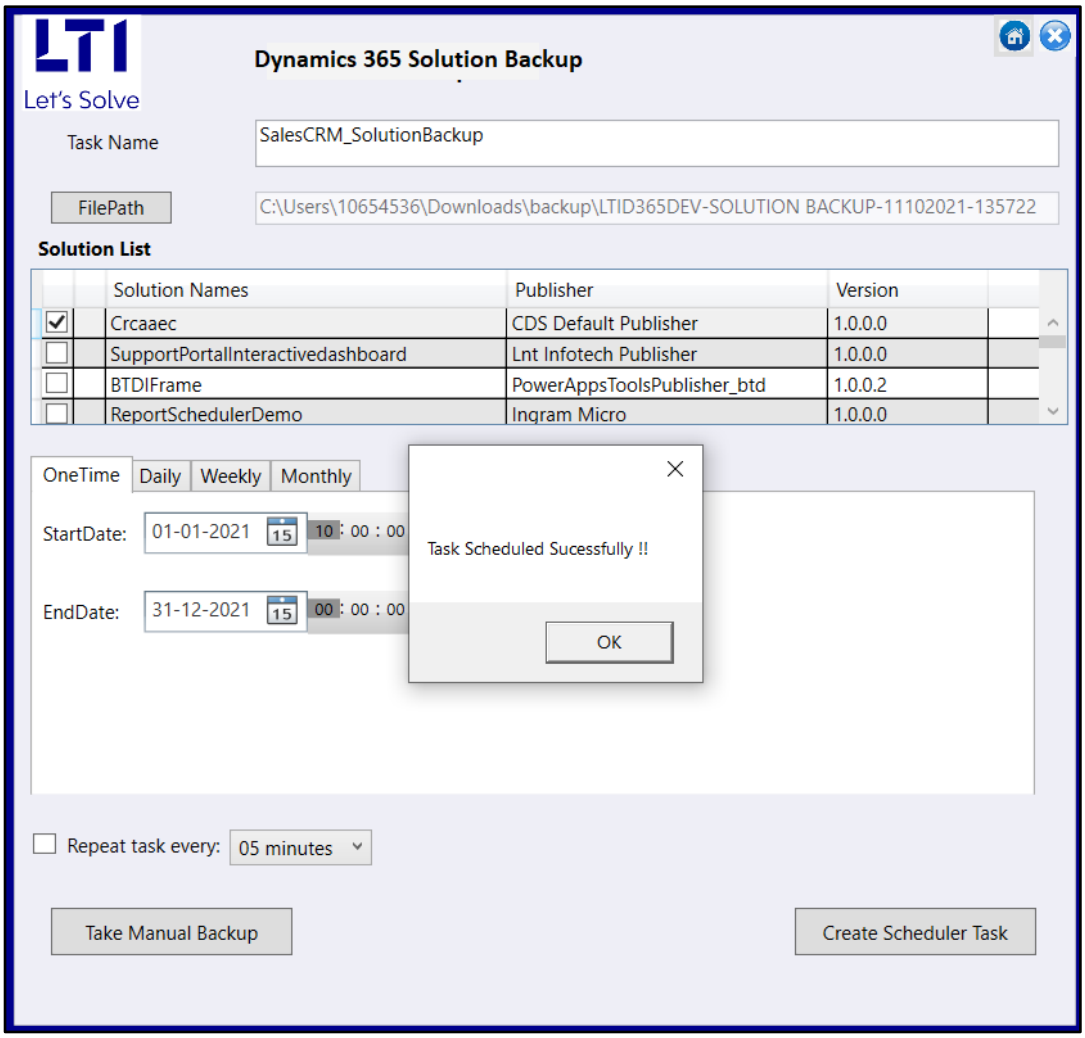
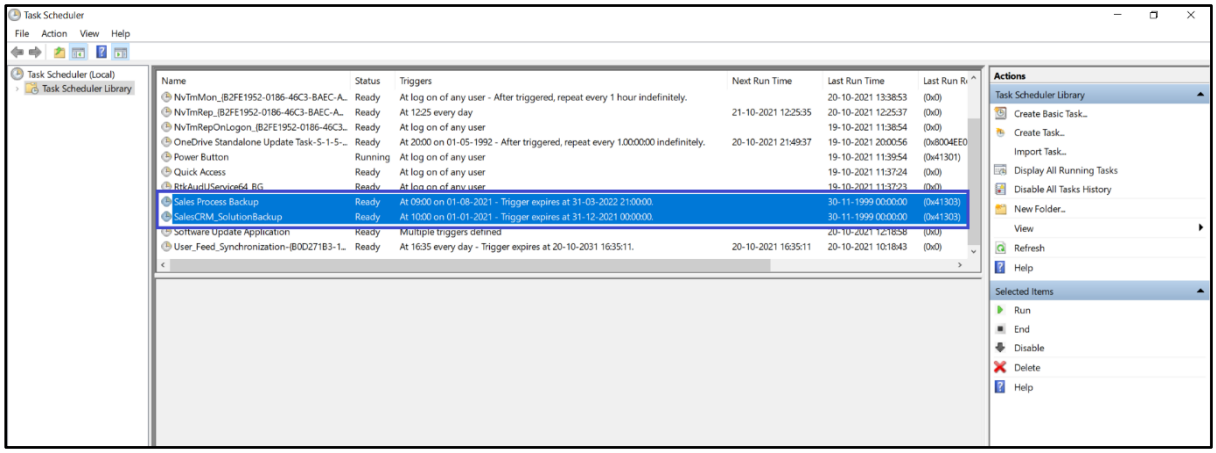
11) After successful connection, add Task Name, File Path, select solution from the solution list.
12) You need to enter task name, browse the path where you want to save the backup file.
13) Task Name- Enter your backup process name, here you can add name of your solution as a task.
    File Path- Browse the local path from your PC where you wish to save your backup files.
    Solution List- It shows all available solution in your Dynamics CRM organization. Select a solution (one at a time) which you wish to backup

14) Set frequency as One time, Daily, Weekly and Monthly to schedule backup of your selected solution. Enter Start date, End date in correct tab based on your requirement of frequency of Backup.



15) You can repeat your scheduled backup with specific intervals as shown in below screen.





16) You can cross check whether your task is scheduled or not in task scheduler of your local machine. You can see the scheduled task under Task scheduler Library as shown in below screenshot. You can enable or disable your schedule task from task scheduler.