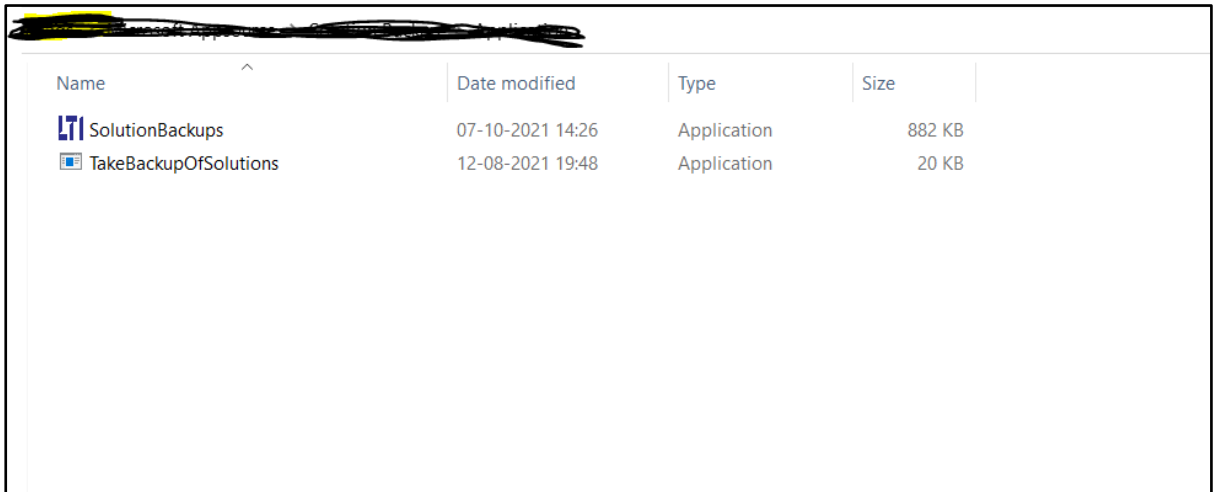




# Dynamics 365 Solution Backup User Guide



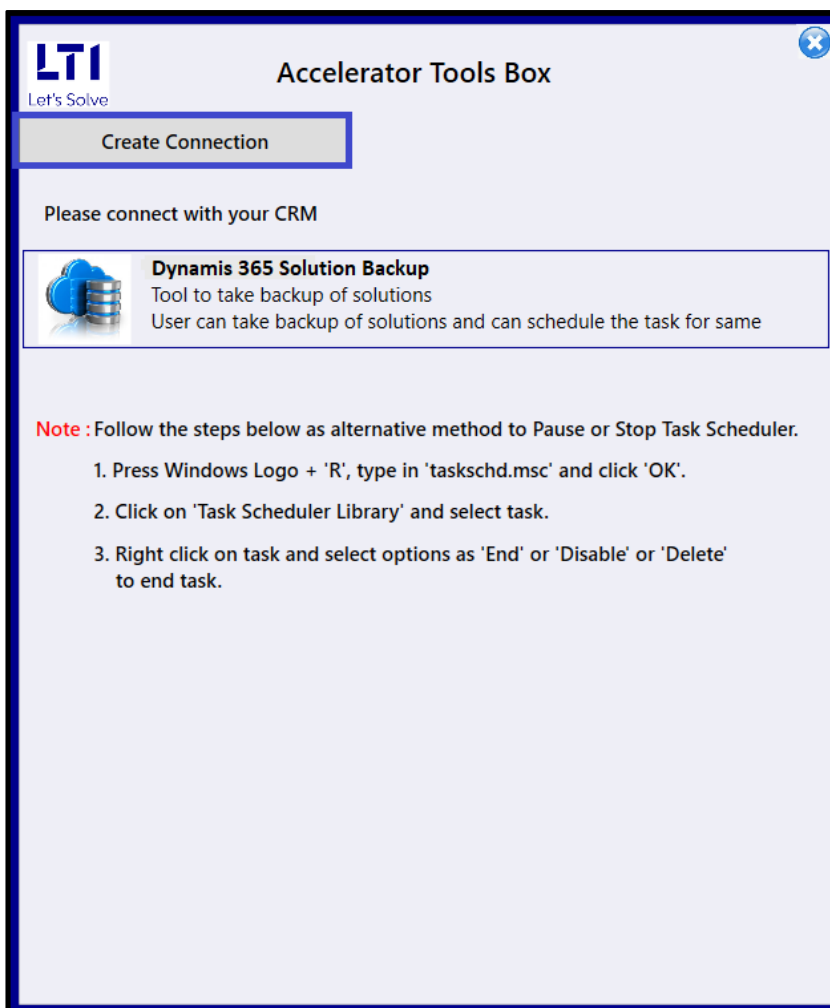
## User Guide

- 1) Download the application solution and extract it.



Name	Date modified	Type	Size
 SolutionBackups	07-10-2021 14:26	Application	882 KB
 TakeBackupOfSolutions	12-08-2021 19:48	Application	20 KB

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




**LTI**  
Let's Solve

### Accelerator Tools Box

**Create Connection**

Please connect with your CRM

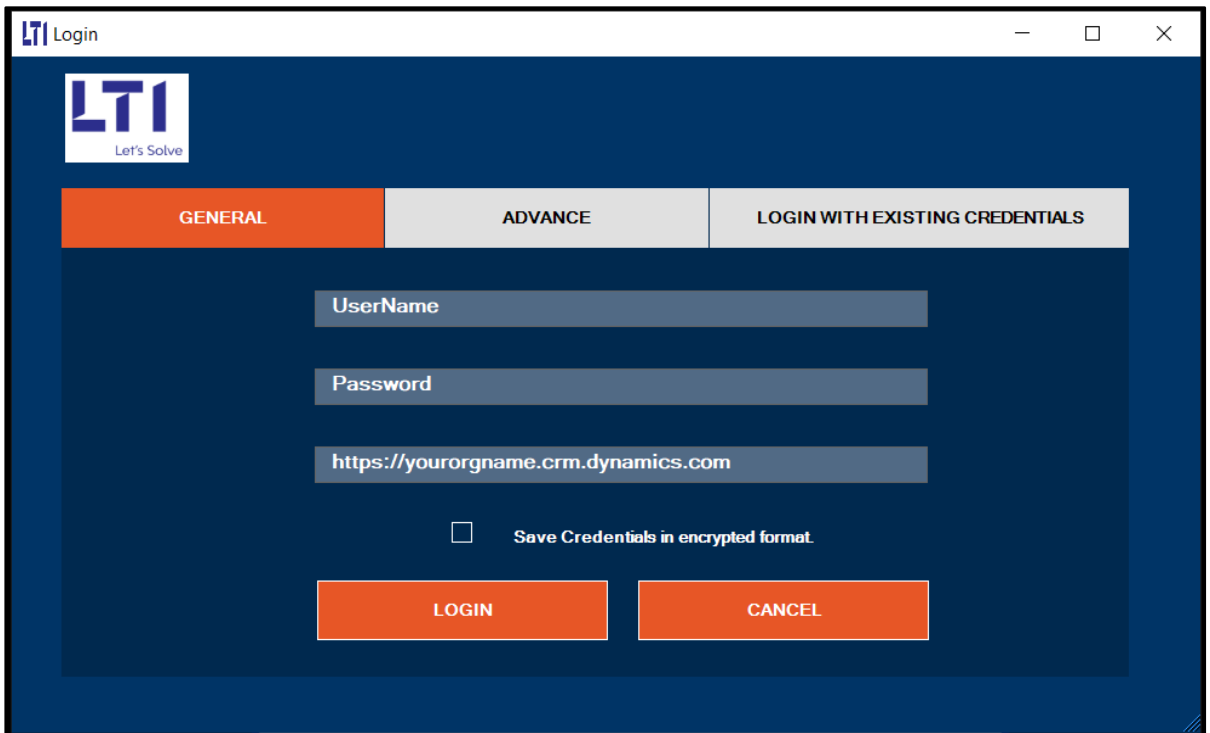
 **Dynamis 365 Solution Backup**  
Tool to take backup of solutions  
User can take backup of solutions and can schedule the task for same

**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.

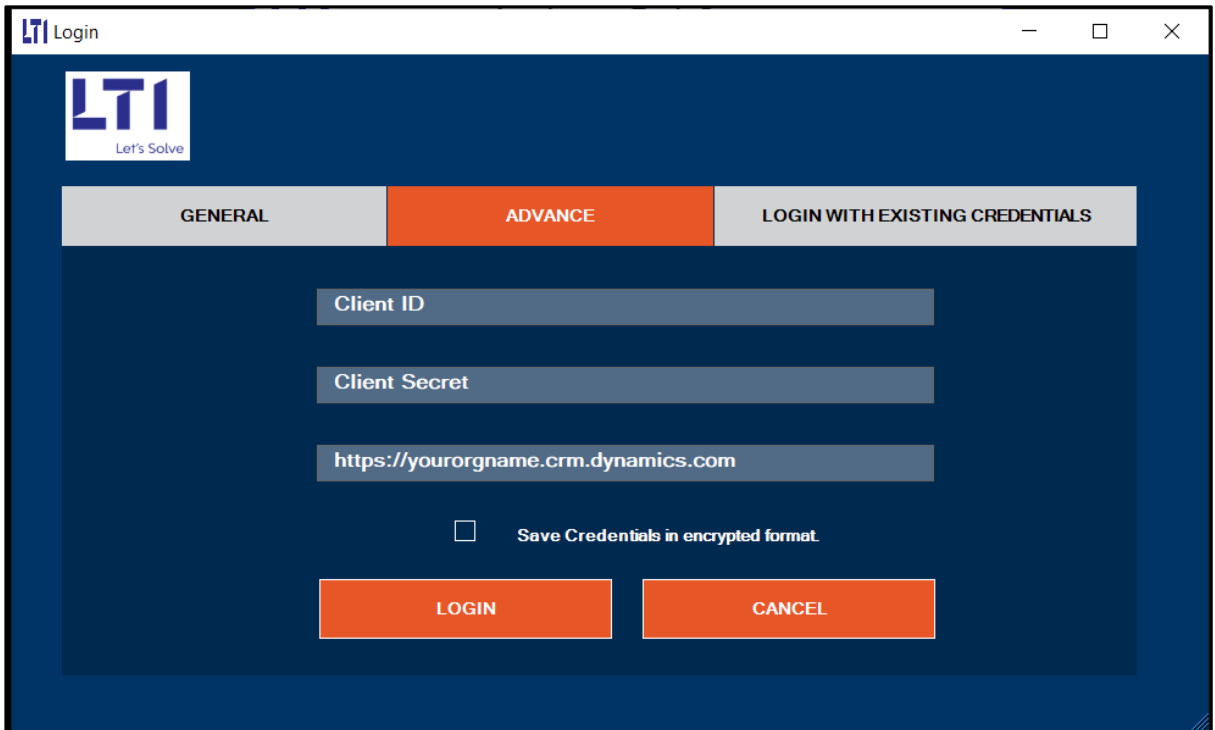
3) It will open Login screen with 3 options.

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

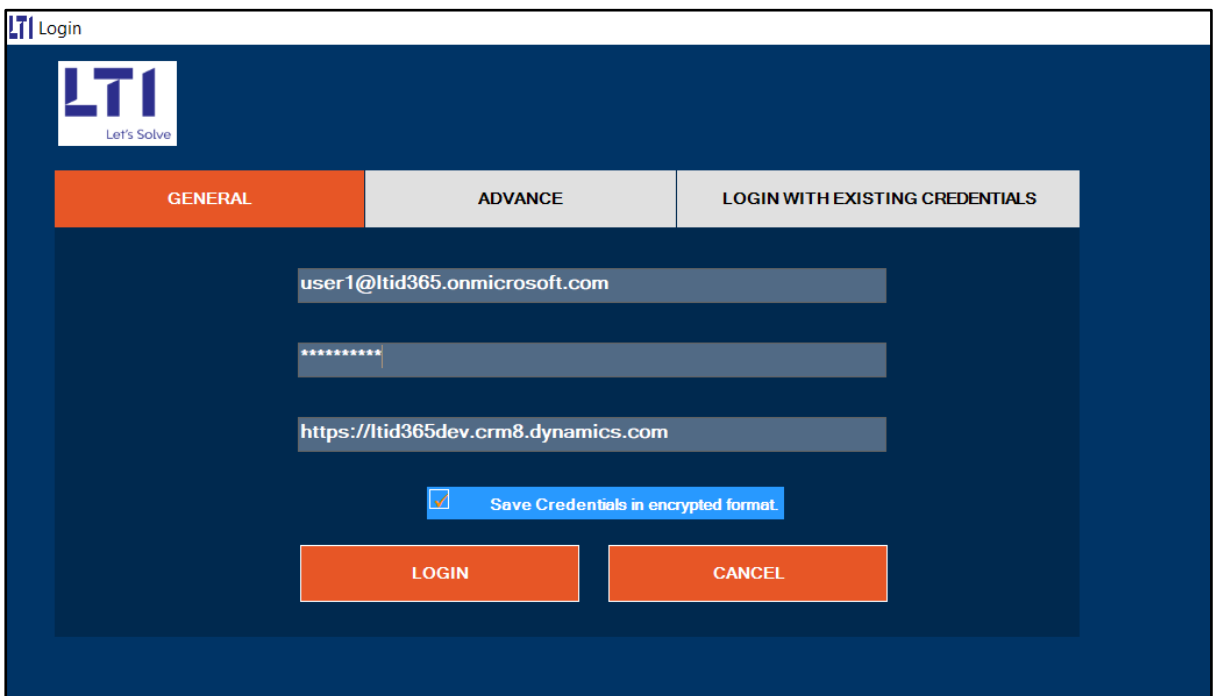


The screenshot shows a web browser window titled "LTI Login". The page has a dark blue background. In the top left corner, there is the LTI logo with the tagline "Let's Solve". Below the logo, there are three tabs: "GENERAL" (highlighted in orange), "ADVANCE", and "LOGIN WITH EXISTING CREDENTIALS". Under the "GENERAL" tab, there are three input fields: "UserName", "Password", and "https://yourorgname.crm.dynamics.com". Below these fields is a checkbox labeled "Save Credentials in encrypted format". At the bottom of the form, there are two buttons: "LOGIN" and "CANCEL", both in orange.

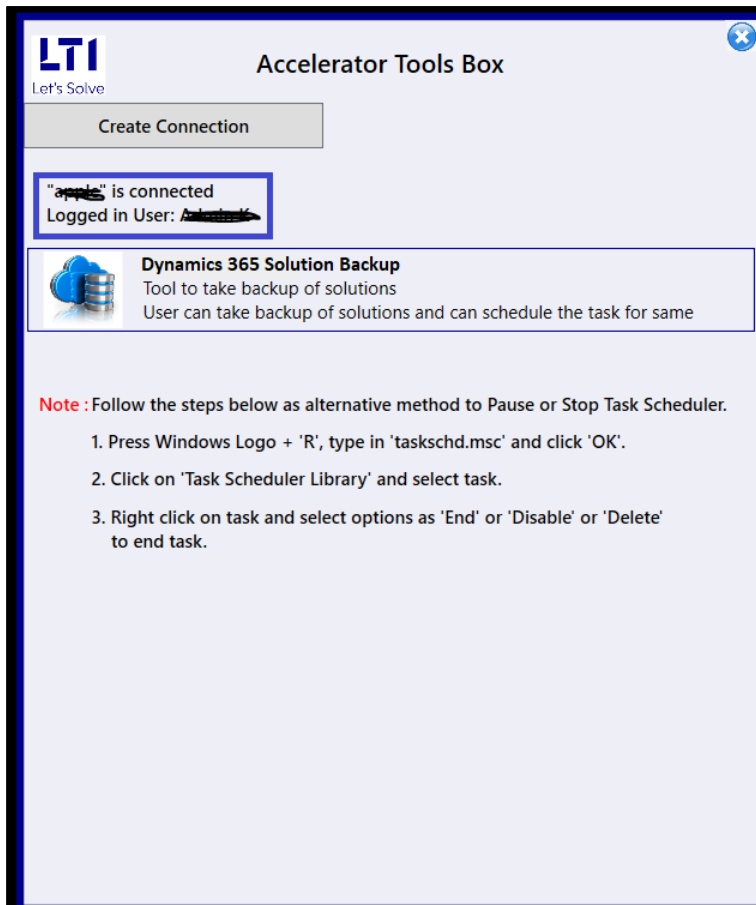
- **Advance**- For Login through AAD(Azure active directory) Enter Client ID, Client Secret and Organisation URL  
**Note**:- Multifactor authentication is not used in Login



- **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.

**Dynamics 365 Solution Backup**

Task Name: SalesCRM\_SolutionBackup

FilePath: Downloads\backup

	Solution Names	Publisher	Version
<input checked="" type="checkbox"/>	Crcaaec	CDS Default Publisher	1.0.0.0
<input type="checkbox"/>	SupportPortalInteractedashboard	Lnt Infotech Publisher	1.0.0.0
<input type="checkbox"/>	BTDIframe	PowerAppsToolsPublisher_btd	1.0.0.2
<input type="checkbox"/>	ReportSchedulerDemo	Ingram Micro	1.0.0.0

OneTime | Daily | Weekly | Monthly

StartDate: Select a date 15 12 : 22 : 19 Up Down

EndDate: Select a date 15 12 : 22 : 19 Up Down

Repeat task every: 05 minutes

Take Manual Backup | Create Scheduler Task

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.

**Export Solution**

Export System Settings (Advanced)

Settings

Package Type

Type

Target CRM Version

Source Version: 9.2

Target Version

Export

- All
- Auto-numbering
- Calendar
- Customization
- Email tracking
- General
- ISV Config
- Marketing
- Outlook Synchronization
- Relationship Roles
- Sales

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

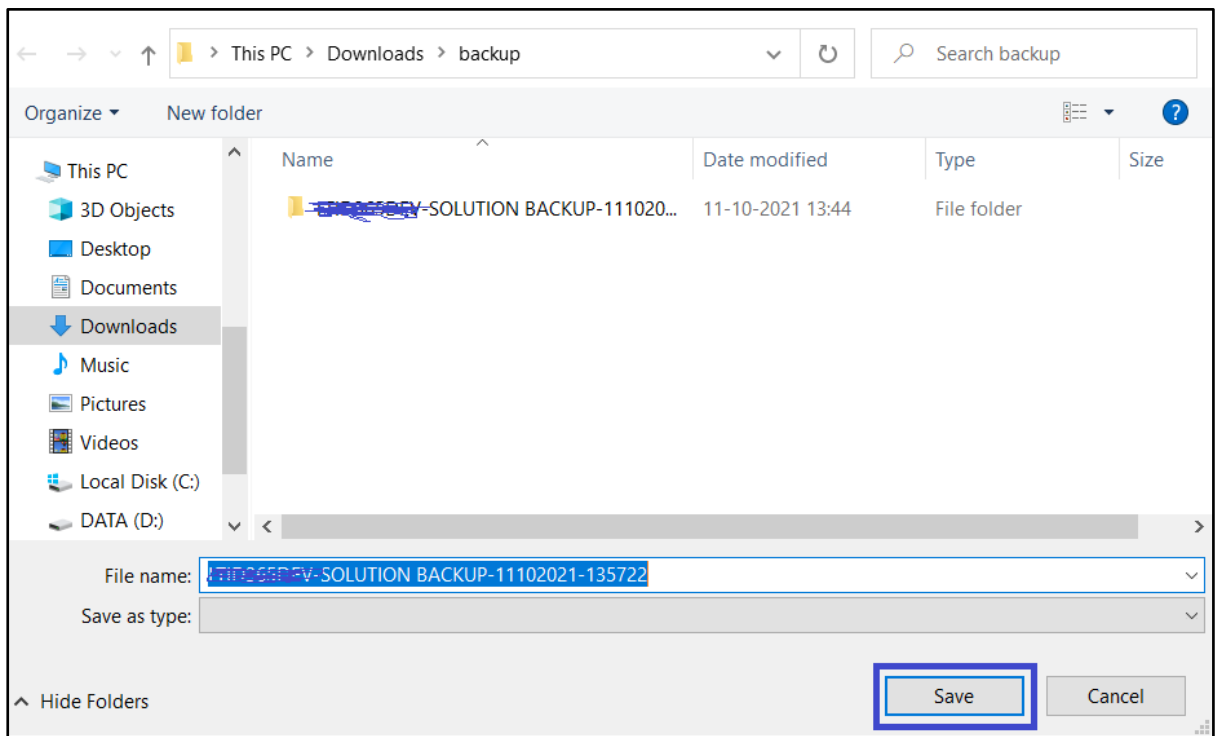
The screenshot shows the 'Dynamics 365 Solution Backup' application window. The 'Task Name' is 'SalesCRM\_SolutionBackup' and the 'FilePath' is 'C:\Users\10654536\Downloads\backup'. The 'Solution List' table has 'Crcaaec' selected. The 'Export Solution' dialog box is open, showing the following configuration:

- Export System Settings (Advanced):** Settings: All
- Package Type:** Type: Both
- Target CRM Version:** Target CRM Version: 9.2, Source Version: 9.2
- Target Version:** 9.2
- Export:** Export button is highlighted.

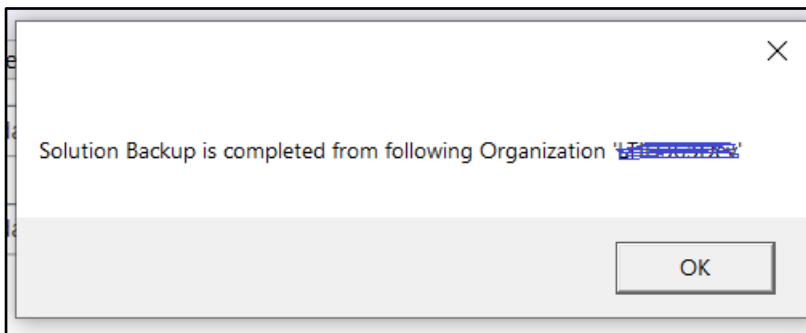
6) Click on Export

This screenshot is identical to the previous one, showing the 'Export Solution' dialog box with the 'Export' button highlighted. The configuration remains the same: Settings: All, Package Type: Both, Target CRM Version: 9.2, Target Version: 9.2.

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

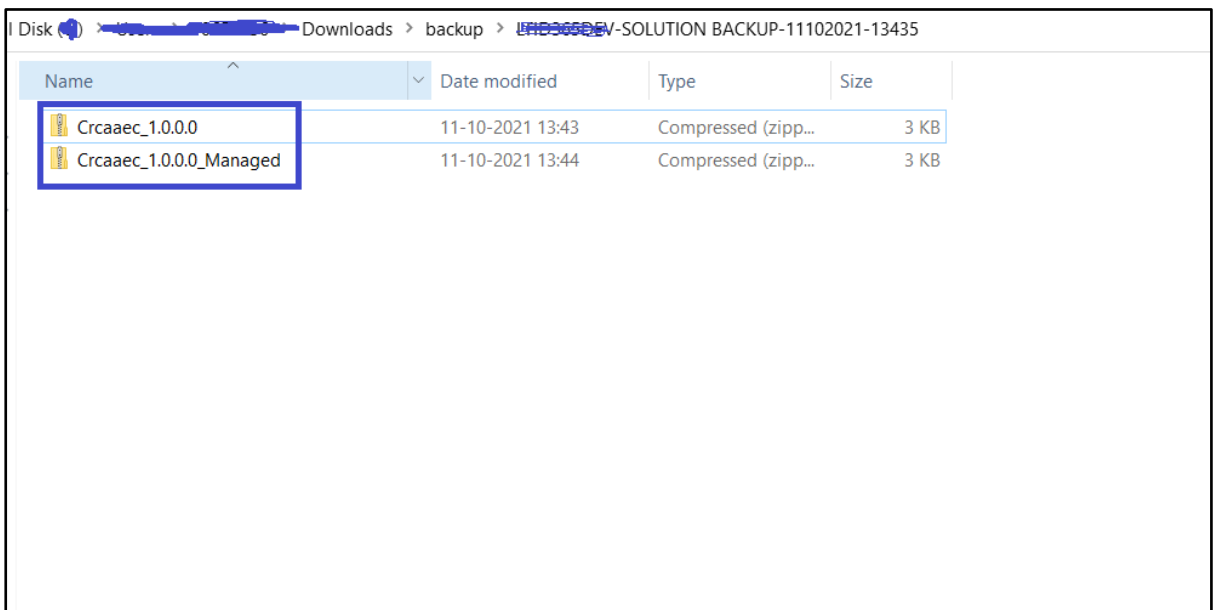
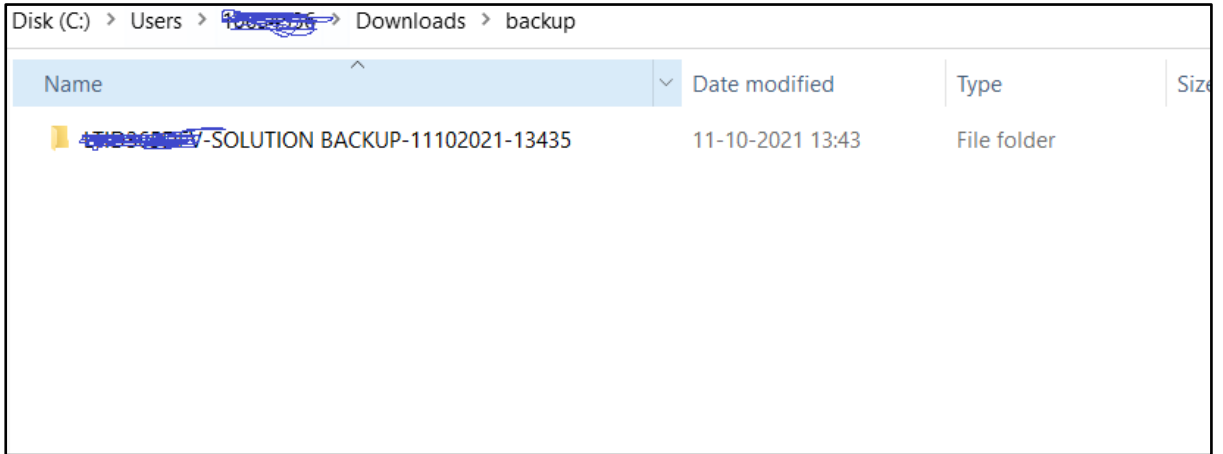


8) You will get message from application on successful backup as shown in below screen.



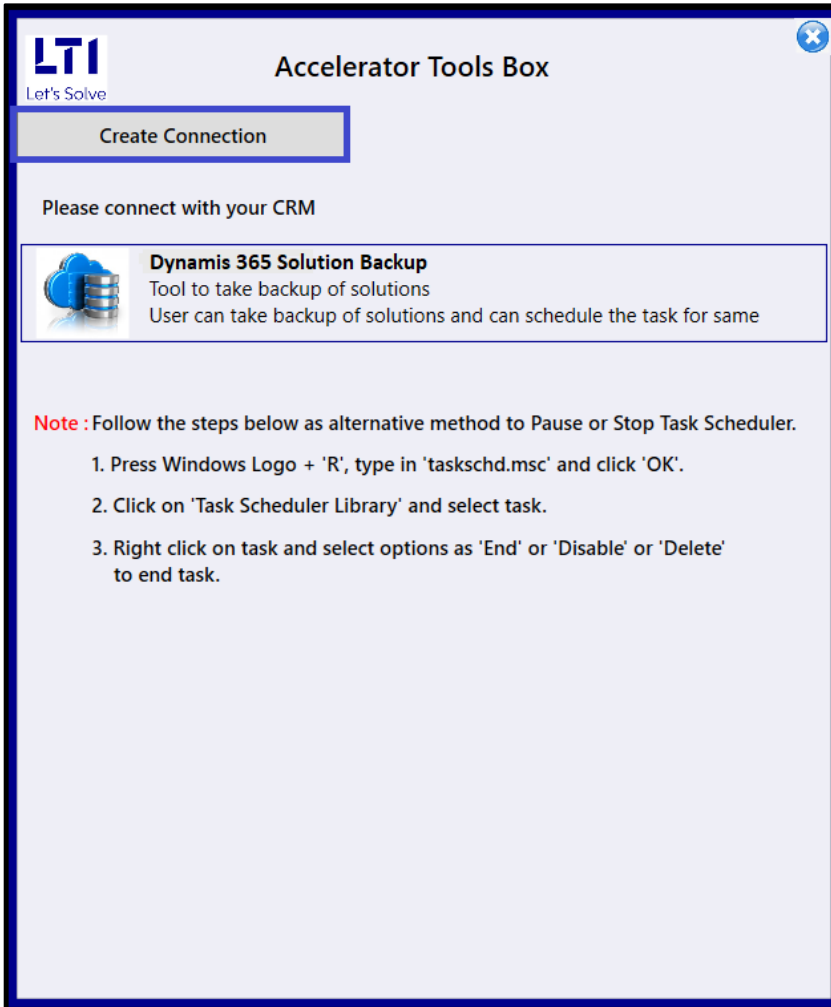
9) Folder with your organization name will be auto created with current date and time and backup file will be saved with the solution name by postfixing version number.





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

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



The screenshot shows a window titled "Accelerator Tools Box" with the LTI logo and "Let's Solve" tagline. A "Create Connection" button is highlighted. Below it, a message says "Please connect with your CRM". A card for "Dynamis 365 Solution Backup" is shown, describing it as a tool to take backups of solutions and schedule tasks. A note provides instructions on how to pause or stop the task scheduler.

**LTI**  
Let's Solve

**Accelerator Tools Box**

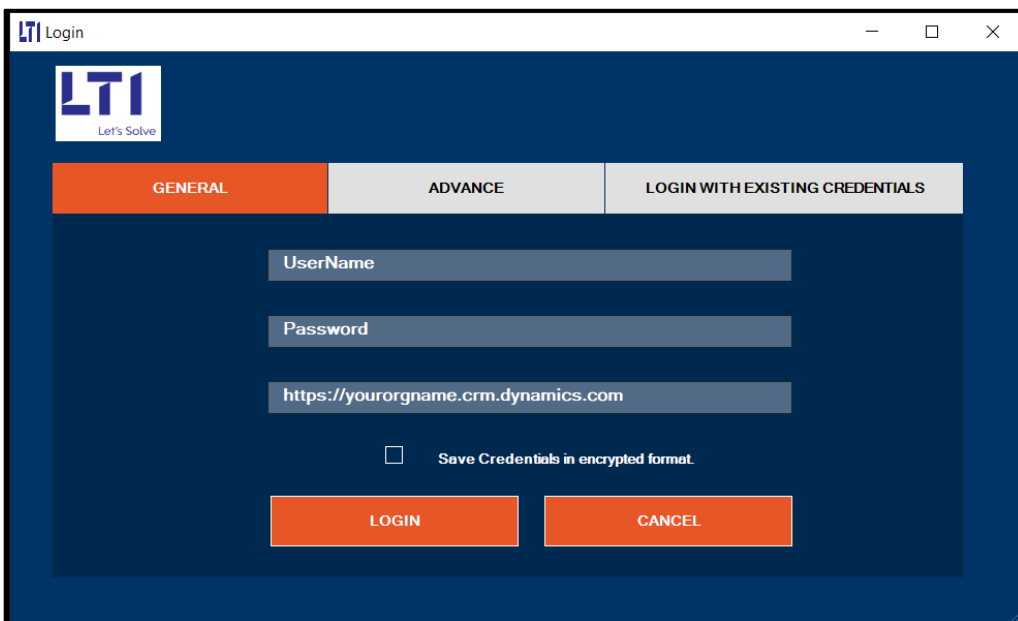
Create Connection

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.



The screenshot shows the "LTI Login" window. It has a dark blue background with the LTI logo and "Let's Solve" tagline. There are three tabs: "GENERAL" (selected), "ADVANCE", and "LOGIN WITH EXISTING CREDENTIALS". The "GENERAL" tab contains input fields for "UserName", "Password", and a URL "https://yourorgname.crm.dynamics.com". There is a checkbox for "Save Credentials in encrypted format." and two buttons: "LOGIN" and "CANCEL".

LTI Login

**LTI**  
Let's Solve

GENERAL ADVANCE LOGIN WITH EXISTING CREDENTIALS

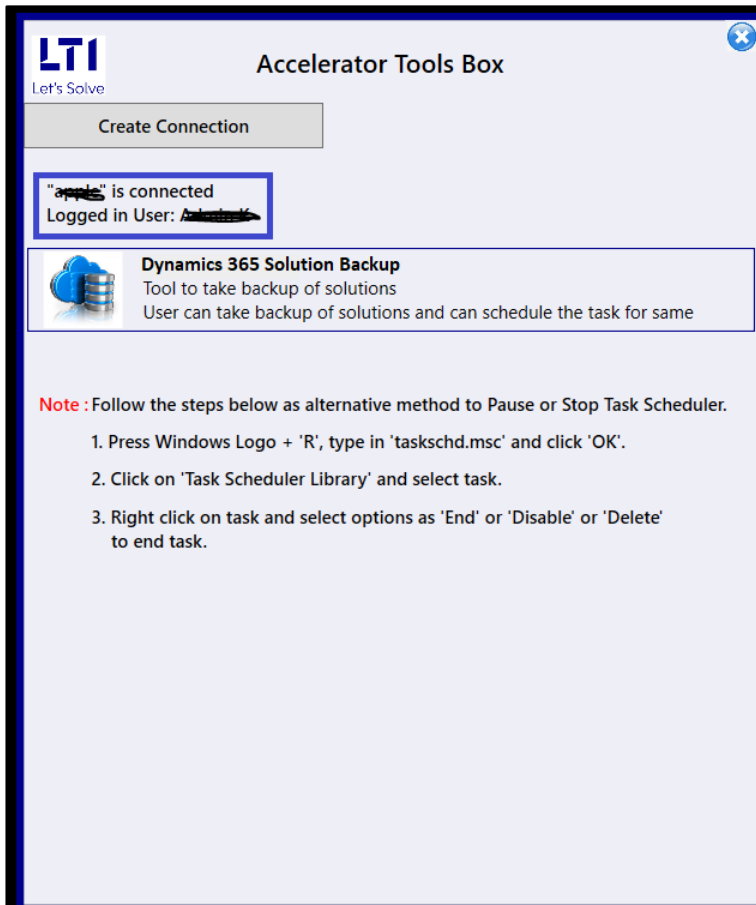
UserName

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.

**Dynamics 365 Solution Backup**

Task Name: SalesCRM\_SolutionBackup

FilePath: C:\Users\...Downloads\backup\...-SOLUTION BACKUP-11102021-135722

	Solution Names	Publisher	Version
<input checked="" type="checkbox"/>	Crcaaec	CDS Default Publisher	1.0.0.0
<input type="checkbox"/>	SupportPortalInteractedashboard	Lnt Infotech Publisher	1.0.0.0
<input type="checkbox"/>	BTDIFrame	PowerAppsToolsPublisher_btd	1.0.0.2
<input type="checkbox"/>	ReportSchedulerDemo	Ingram Micro	1.0.0.0

OneTime | Daily | Weekly | Monthly

StartDate: 01-01-2021 10:00:00

EndDate: 31-12-2021 00:00:00

Repeat task every: 05 minutes

Take Manual Backup | **Create Scheduler Task**

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

**Dynamics 365 Solution Backup**

Task Name:

FilePath:

	Solution Names	Publisher	Version
<input type="checkbox"/>	Crcaaec	CDS Default Publisher	1.0.0.0
<input type="checkbox"/>	SupportPortalInteractedashboard	Lnt Infotech Publisher	1.0.0.0
<input type="checkbox"/>	BTDIFrame	PowerAppsToolsPublisher_btd	1.0.0.2
<input type="checkbox"/>	ReportSchedulerDemo	Ingram Micro	1.0.0.0

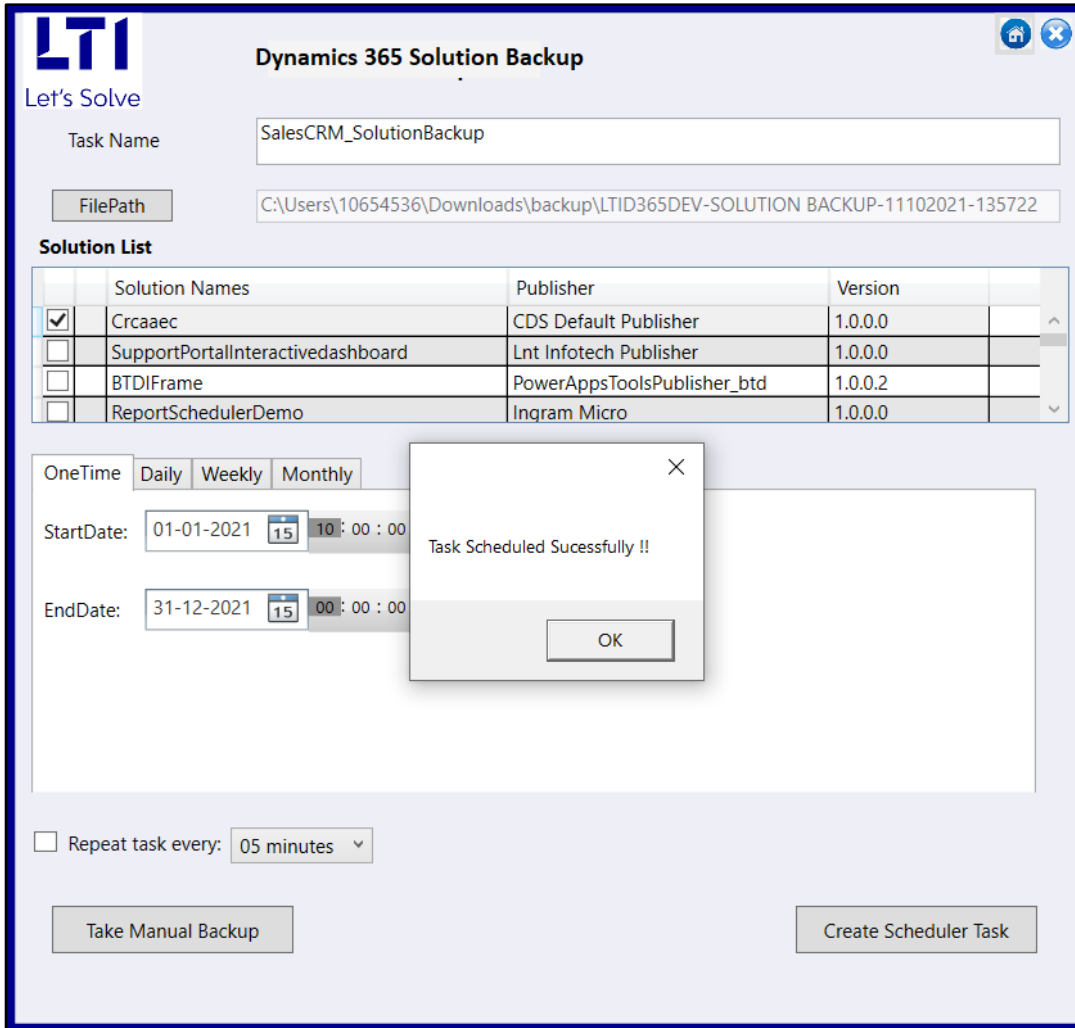
OneTime | Daily | Weekly | Monthly

StartDate: Select a date 18:53:30

EndDate: Select a date 18:53:30

Repeat task every: 05 minutes

Take Manual Backup | **Create Scheduler Task**



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.

