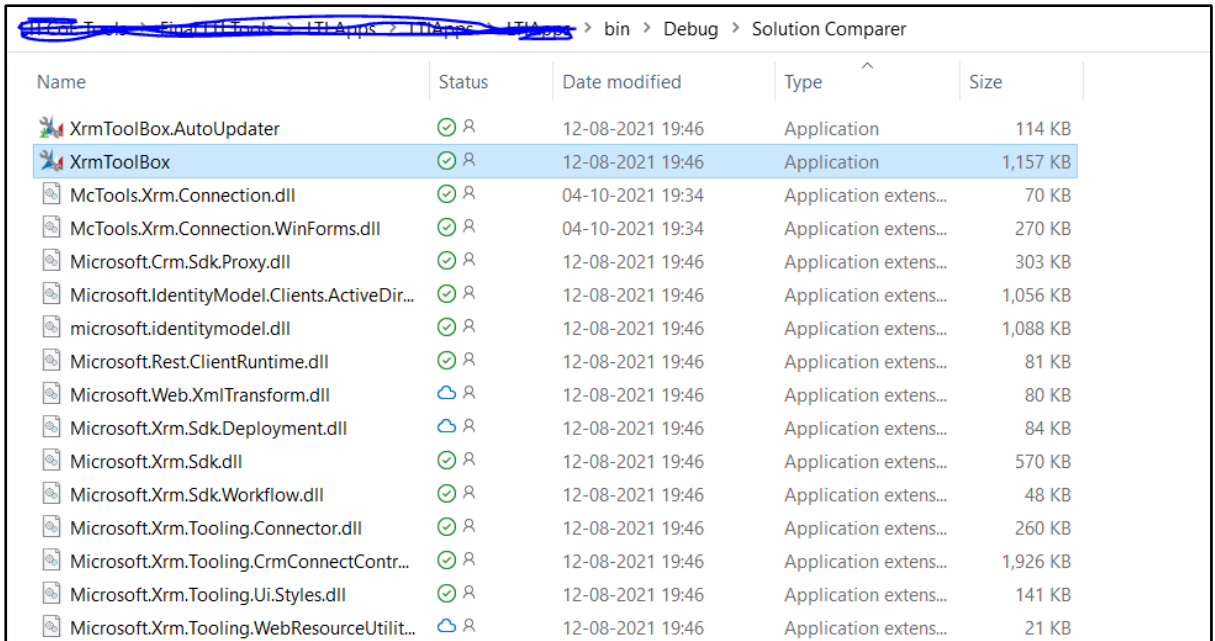


Dynamics 365 Deployment Advisor User Guide

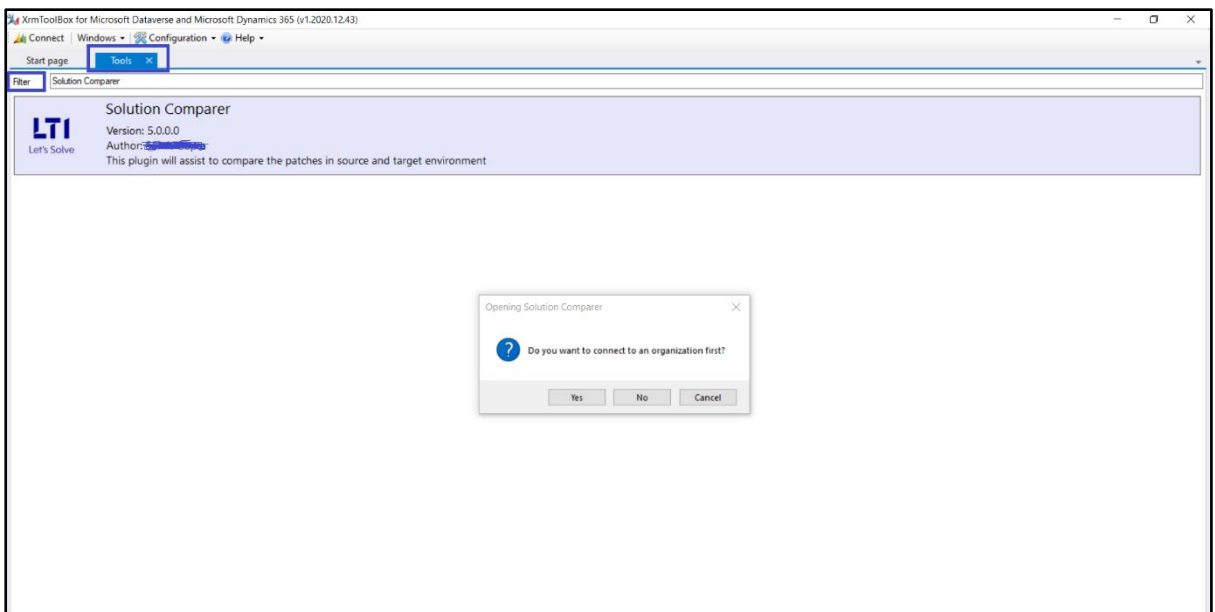


User Guide

- 1) Download the application solution and extract it.

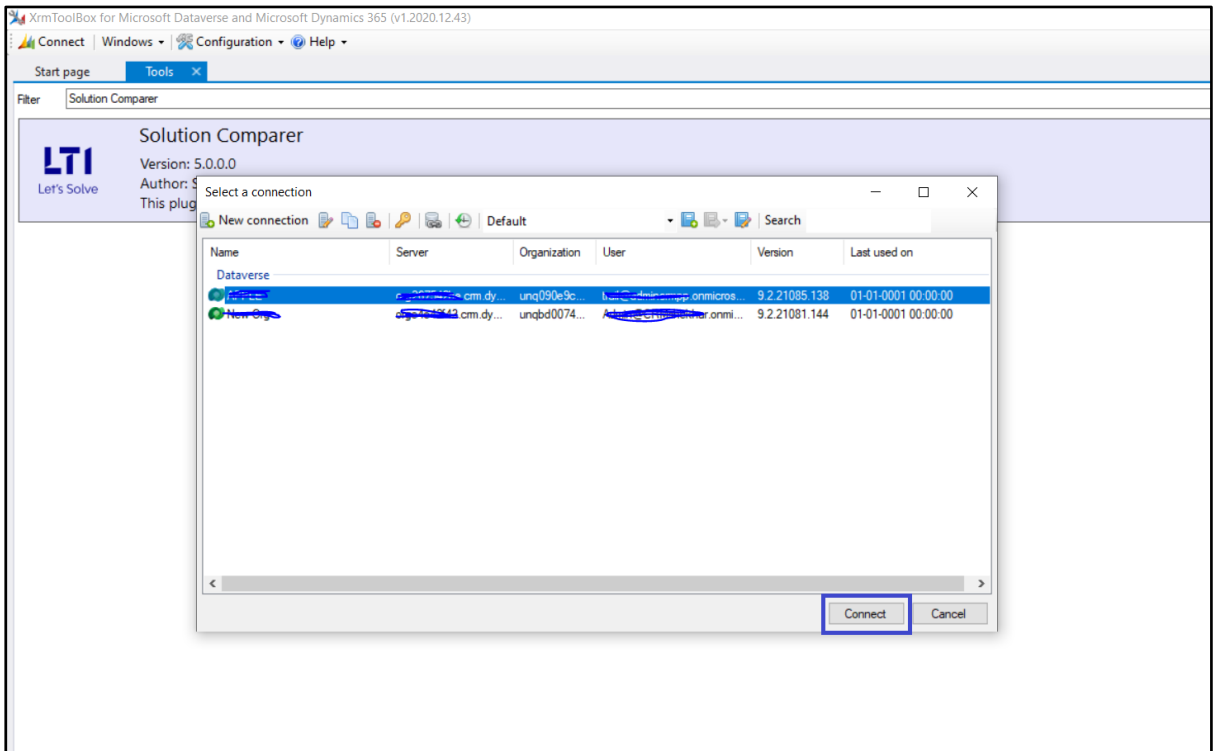


- 2) Click on **XrmToolBox** to run it. There is need of settings in Visual studio code folder, to run this application with XrmToolBox, attaching document below.
- 3) It will open an application as shown in below screen, click on **Tools** and search for Solution comparer in filter. Pop up message will be displayed to connect organization, click on **Yes**.



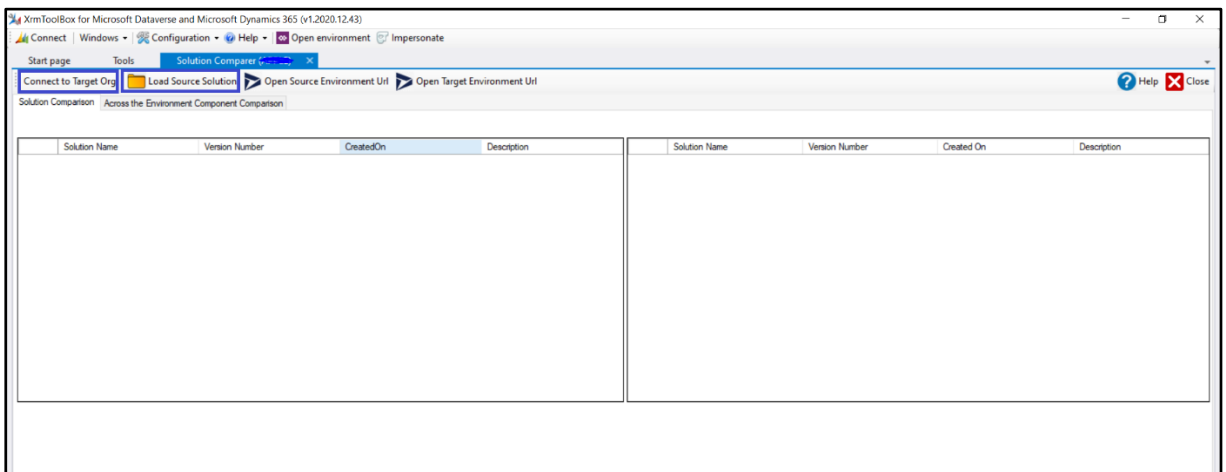
- 4) Click on **Connect**.

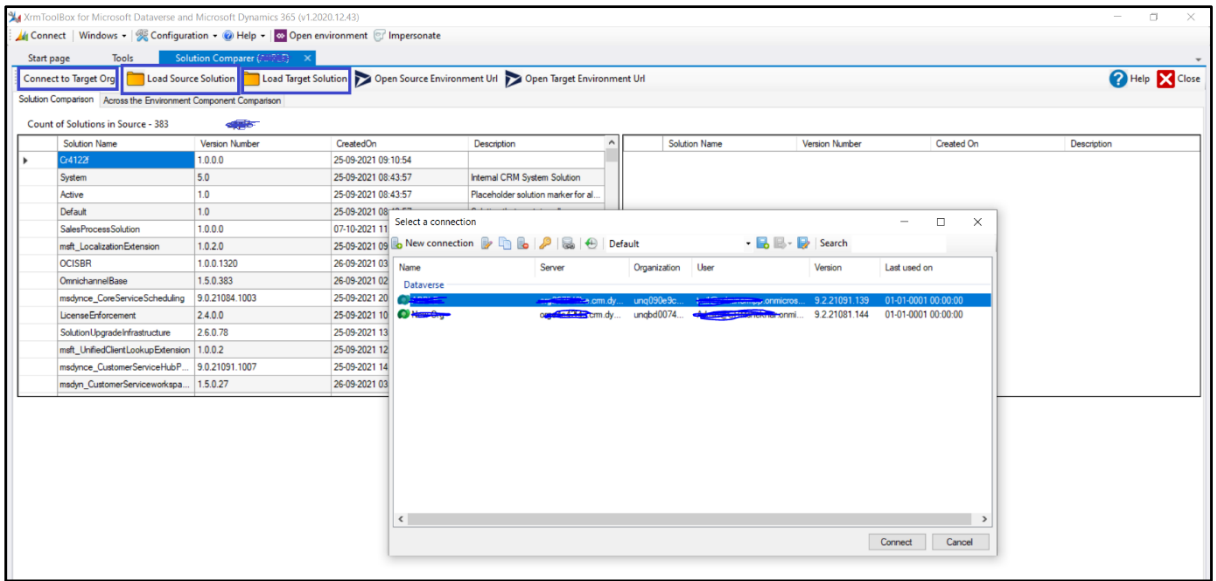
Create connection if CRM organisation is not added before, if its already added then use the existing one and **Connect**.



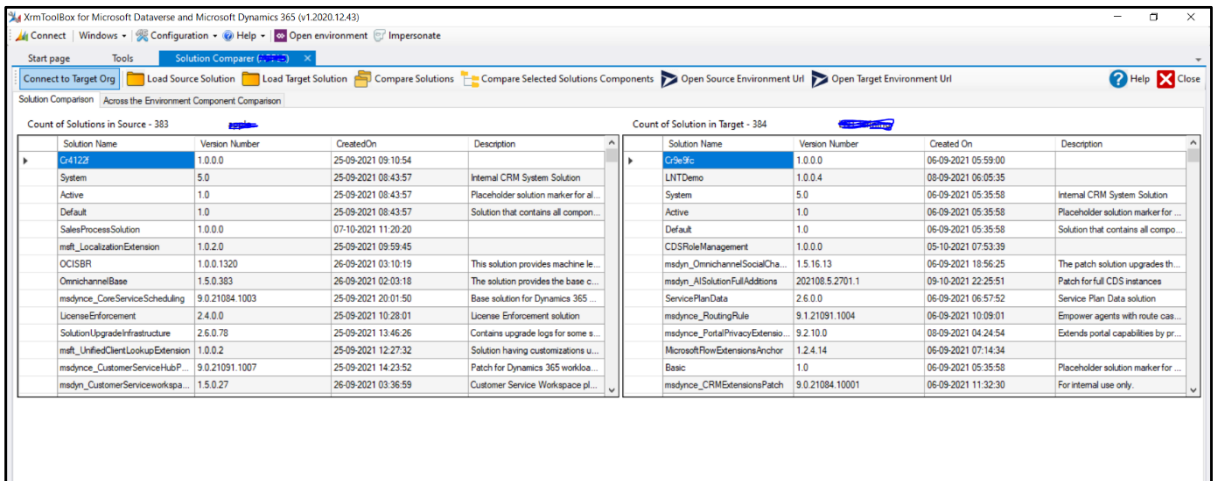
- Now, you need to connect with Target Organization by clicking on **Connect to Target Org** button as shown below. It will again open the list of organization available; you can find your required organization in the list or create new connection.

Click on **Load Source solution** button once you are connected with both 'Source' and 'Target' organization. It will load all solutions available in connected source organization.





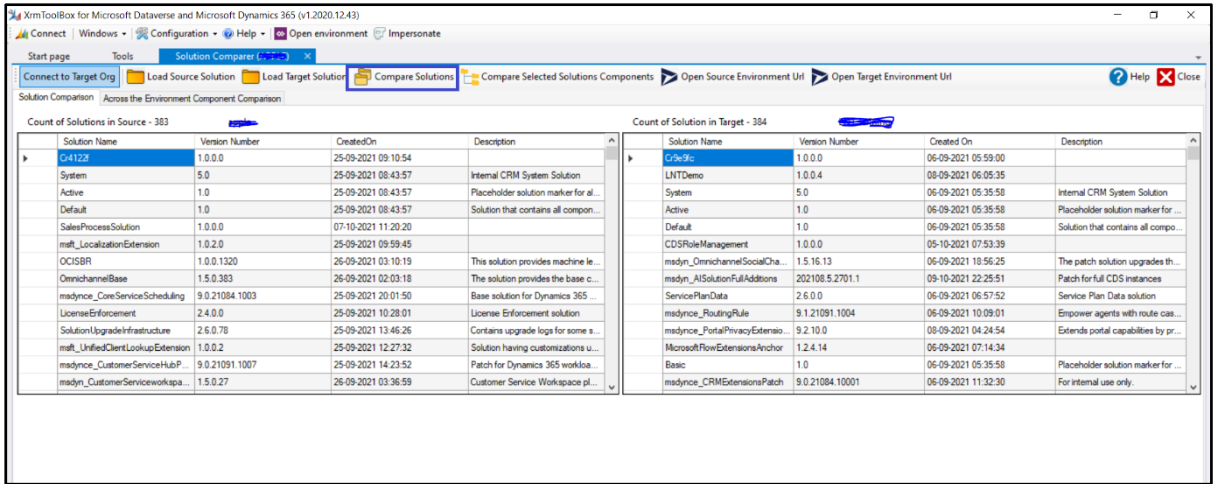
6) Click on **Load Target Solution** to load all solutions from target environment.



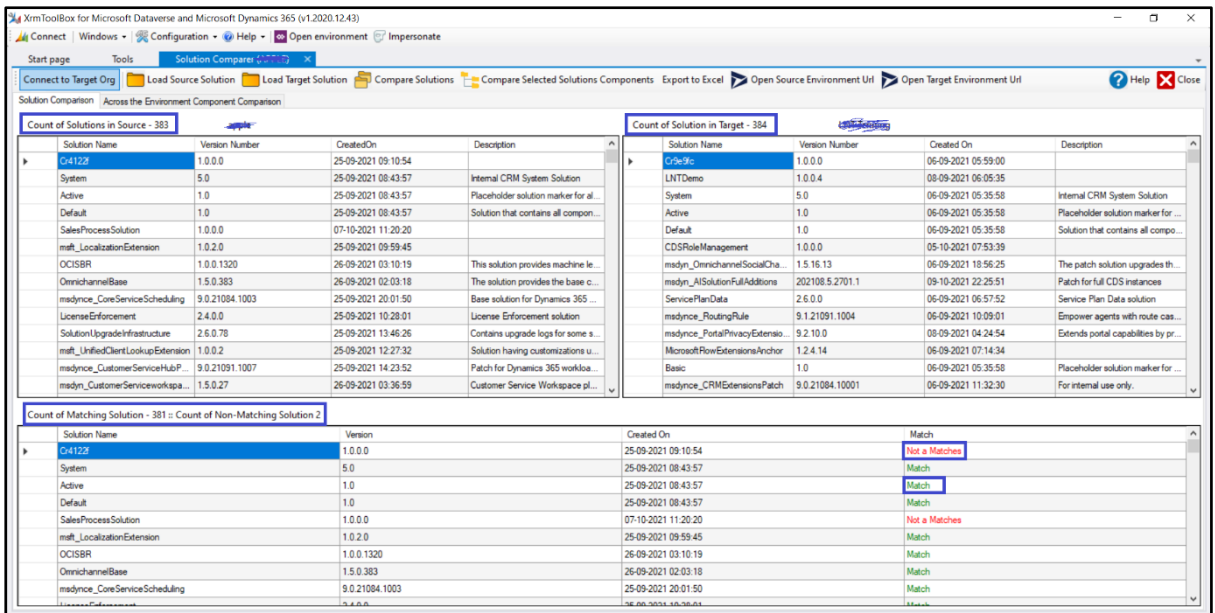
This tool offers 3 functionalities, Compare 2 solutions, Compare Selected Solutions Components between 2 solutions and Across the Environment Component Comparison

7) **Compare Solutions-**

When you want to compare solutions from 2 different organizations then you can go with this option. This gives you list of solutions available in source and target environments connected. This comparison is done based on name of solutions.



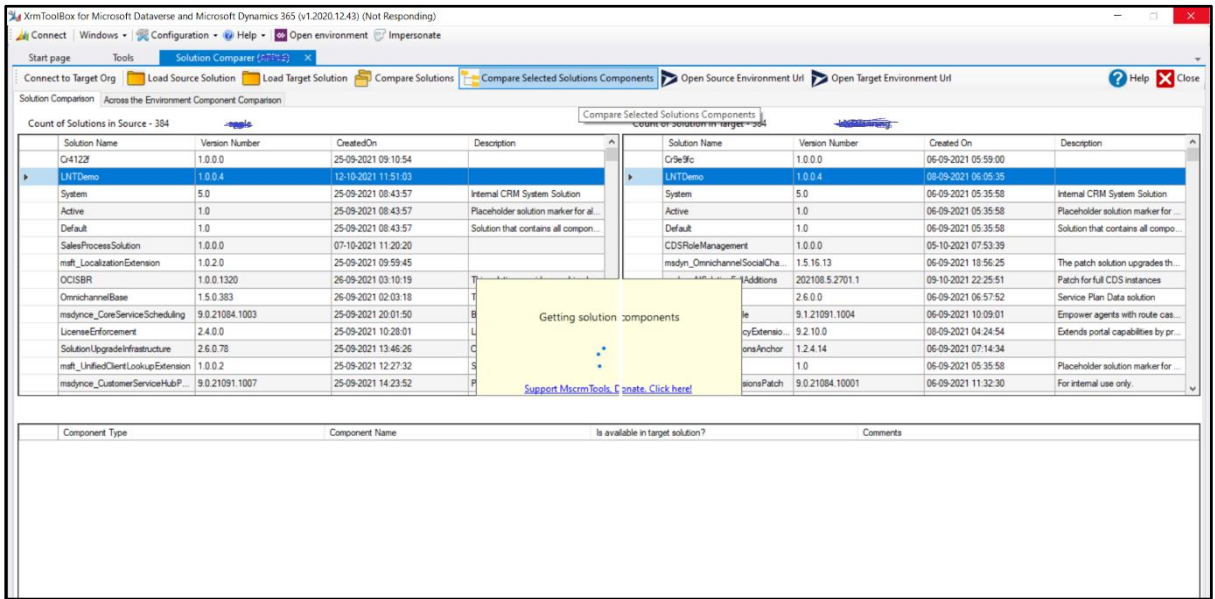
Click on **Compare Solutions** button and then you can see another grid with solution result. It shows “Match” when solution is available in Target instance and “Not a Match” when solution is not available in Target instance. Also, this application displays count of solutions available in both organizations.



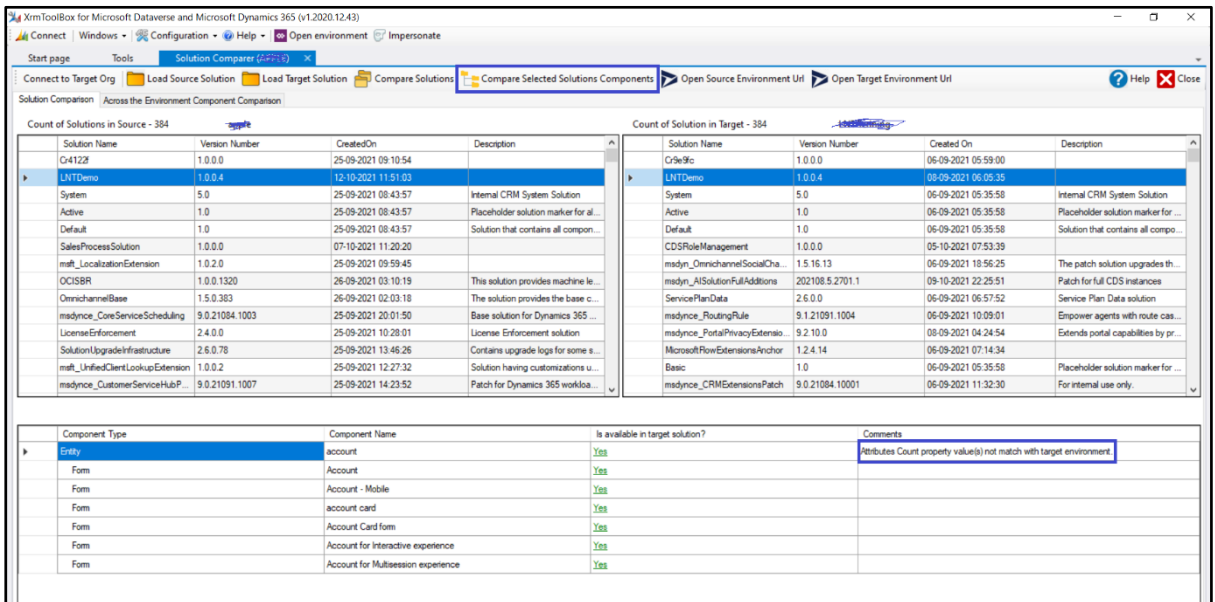
8) **Compare Selected Solutions**

When you want to compare 2 solution components-wise from different environments then you can click on Compare selected solutions button.

9) It gives, component wise presence report.



10) As you can see in below picture, it has component type as category where results are shown based on component type, for e.g. Entity, form, fields, views, relationships etc. Also, it displays in Comment if component is present in target environment or not. You can click on “Yes” (hyperlink) from “Is available in target solution?” column. This gives you detailed information of component selected.



11) As shown in below screen, you can check the properties of the specific component. We have captured important and relevant properties for all component types. For e.g. Entity, Form, View, Attribute, Relationships (1:N, N:1, N:N), Chart etc.

12) Entity properties: -

The screenshot shows the XrmToolbox Solution Comparer interface. The main window displays two tables: 'Count of Solutions in Source - 384' and 'Count of Solution in Target - 384'. A modal window titled 'Account Entity Properties' is open, comparing source and target values for various properties. The 'Attributes Count' property shows a mismatch: Source is 174 and Target is 173, with a 'No' in the 'Is match with target?' column. Other properties like Name, Display Name, and Ownership are marked as 'Yes'.

Property Name	Source Property Value	Target Property Value	Is match with target?
Name	account	account	Yes
Display Name	Account	Account	Yes
Attributes Count	174	173	No
Ownership	UserOwned	UserOwned	Yes
Is Activity?	False	False	Yes
Is audit enabled?	False	False	Yes
Is Business Process Enabled?	True	True	Yes
Is child entity?	False	False	Yes
Is customizable?	True	True	Yes
Is Managed?	True	True	Yes

13) Attribute properties: -

The screenshot shows the XrmToolbox Solution Comparer interface. The main window displays two tables: 'Count of Solutions in Source - 229' and 'Count of Solution in Target - 424'. A table at the bottom compares attribute properties. The 'new_employeeed' attribute shows a mismatch: Source is 'Yes' and Target is 'Length property value(s) not match with target environment', with a 'No' in the 'Is available in target solution?' column. Other attributes like 'createdby' and 'createdonbehalfby' are marked as 'Yes'.

Attribute	Source Value	Target Value	Is available in target solution?	Comments
createdby	Yes	Yes	Yes	
createdonbehalfby	Yes	Yes	Yes	
createdon	Yes	Yes	Yes	
new_empid	Yes	Yes	Yes	
new_employeeed	Yes	Length property value(s) not match with target environment	No	
importsequencenumber	Yes	Yes	Yes	
modifiedby	Yes	Yes	Yes	
modifiedon	Yes	Yes	Yes	

The screenshot shows the Solution Comparer tool interface. The main window displays two tables: 'Count of Solutions in Source - 229' and 'Count of Solution in Target - 424'. A modal window titled 'EMP ID Attribute Properties' is open, comparing properties between the source and target environments. The comparison table is as follows:

Property Name	Source Property Value	Target Property Value	Is match with target?
Schema Name	new_EMPID	new_EMPID	Yes
Name	new_empid	new_empid	Yes
Display Name	EMP ID	EMP ID	Yes
Data Type	String	String	Yes
Is Customizable?	True	True	Yes
Is AuditEnabled?	True	True	Yes
Is Managed?	False	False	Yes
Is Searchable?	False	False	Yes
Is Valid For Advanced Find?	True	True	Yes
Length	100	150	No

The screenshot shows the Solution Comparer tool interface with a comparison table for various attributes. The table is as follows:

Component Type	Component Name	Is available in target solution?	Comments
Attribute	modifiedonbehalfby	Yes	
Attribute	modifiedon	Yes	
Attribute	new_name	Yes	Is Valid For Advanced Find? property value(s) not match with target environment.
Attribute	ownard	Yes	
Attribute	owningbusinessunit	Yes	
Attribute	owningteam	Yes	
Attribute	owninguser	Yes	
Attribute	owninguser	Yes	
Attribute	owninguser	Yes	

The screenshot shows the Solution Comparer tool interface with a modal window titled 'Name Attribute Properties' comparing properties between source and target environments. The comparison table is as follows:

Property Name	Source Property Value	Target Property Value	Is match with target?
Schema Name	new_Name	new_Name	Yes
Name	new_name	new_name	Yes
Display Name	Name	Name	Yes
Data Type	String	String	Yes
Is Customizable?	True	True	Yes
Is AuditEnabled?	True	True	Yes
Is Managed?	False	False	Yes
Is Searchable?	True	True	Yes
Is Valid For Advanced Find?	False	True	No
Length	100	100	Yes

14) Form Properties: -

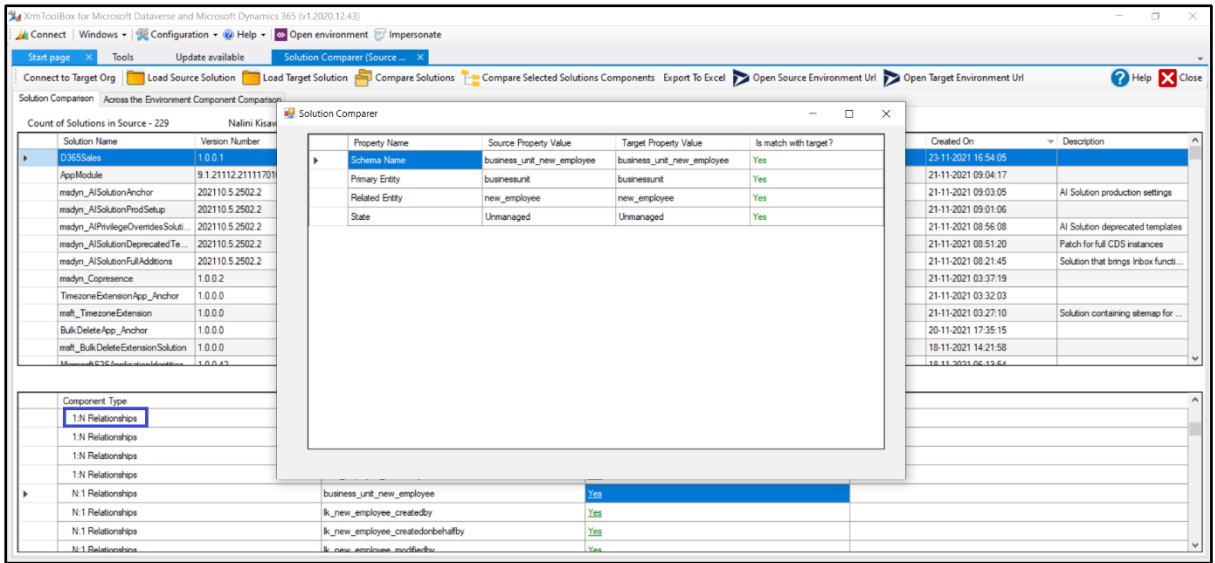
Component Type	Component Name	Is available in target solution?	Comments
Entity	new_employee	Yes	Attributes Count property value(s) not match with target environment.
Form	Information	Yes	
Form	Information	Yes	
Form	Information	Yes	
View	Active Employees	Yes	
View	Employee Advanced Find View	Yes	
View	Employee Associated View	Yes	
View	Employee Lookup View	Yes	

Property Name	Source Property Value	Target Property Value	Is match with target?
Name	Information	Information	Yes
Form State	Active	Active	Yes
Form Type	Main	Main	Yes
State	Unmanaged	Unmanaged	Yes
Version	1.0	1.0	Yes

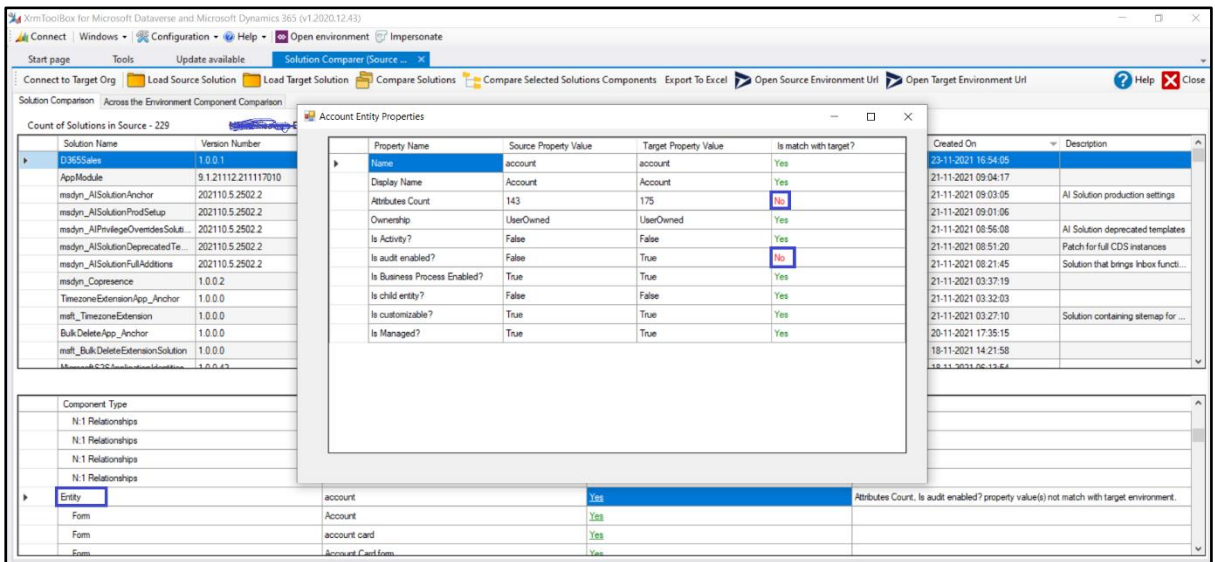
15) View properties: -

Property Name	Source Property Value	Target Property Value	Is match with target?
Name	Employee Lookup View	Employee Lookup View	Yes
View Type	Lookup	Lookup	Yes
State	Unmanaged	Unmanaged	Yes

16) Relationship properties: -

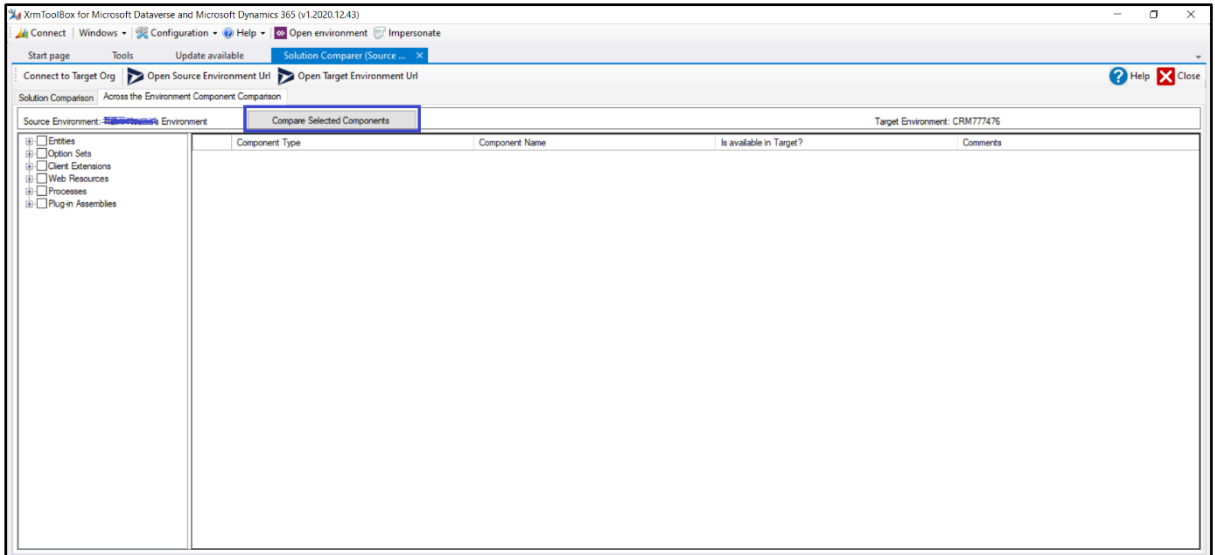


17) Entity Properties: -

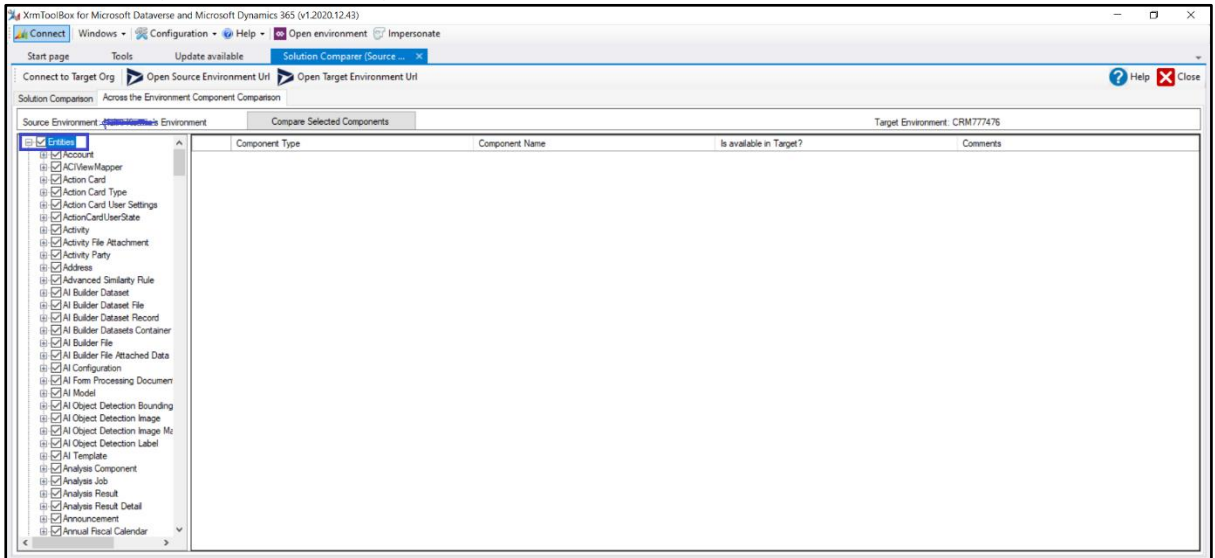


18) Across the Environment component comparison: -

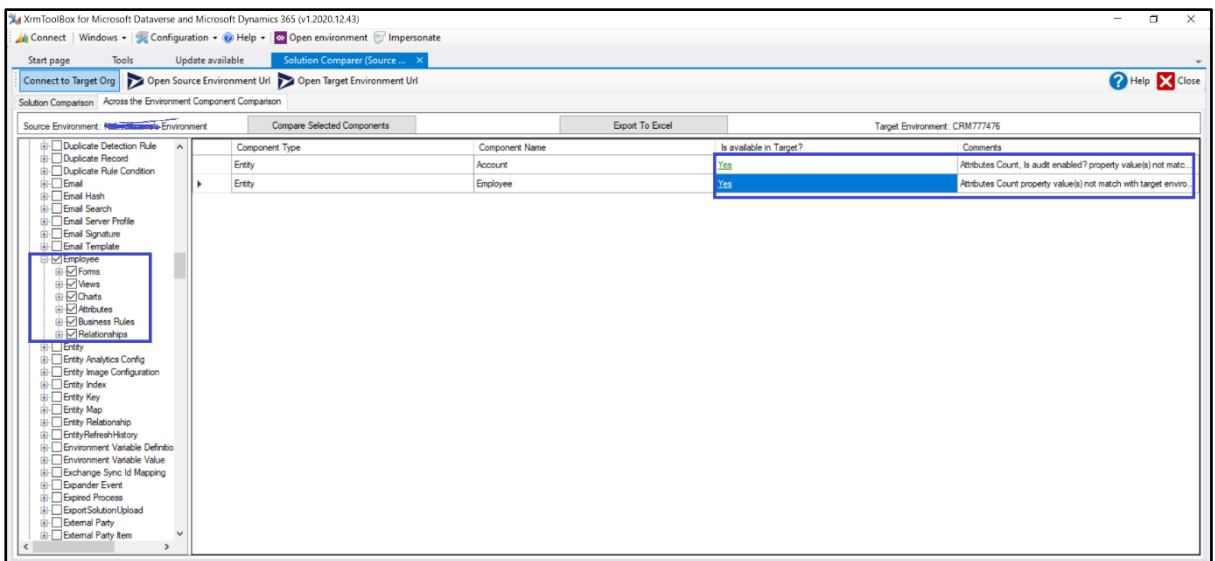
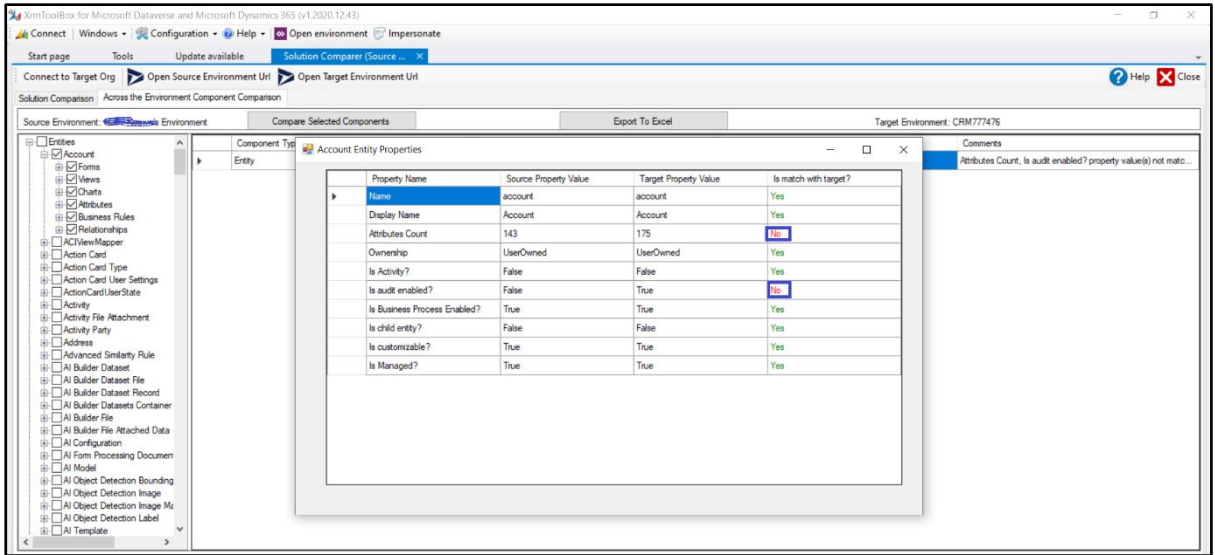
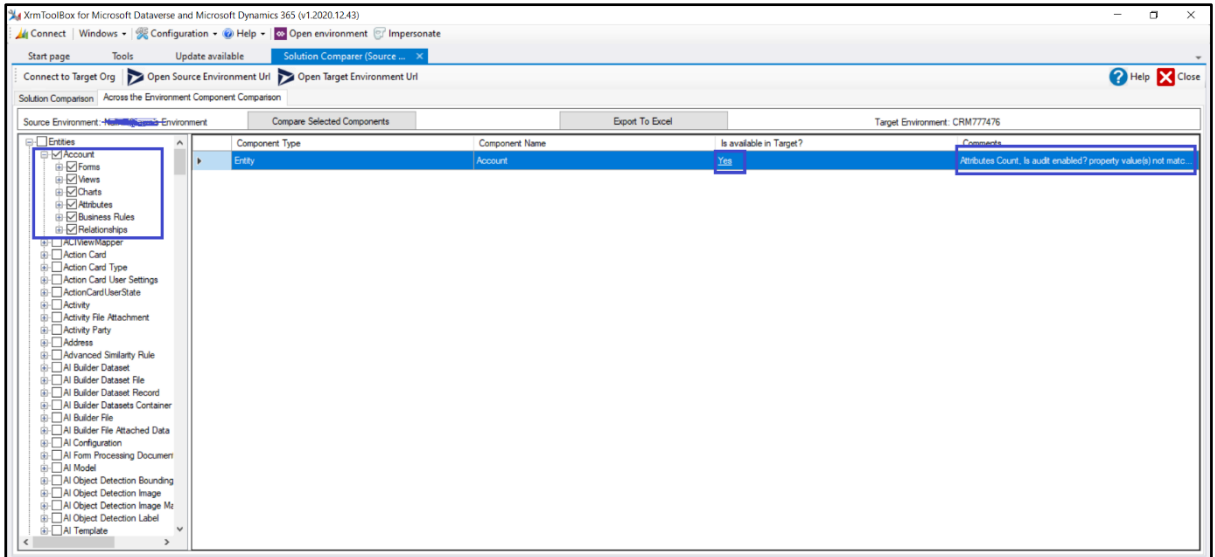
This option gives you tree wise structure of all dynamics CRM solution components which you can then compare one by one with your targeted organization.



19) You can select all component group wise or you can select individual component and then click on 'Compare Selected Comparison'.



20) You will get appropriate comment for selected component, you can click on 'Yes' if component is present in another environment to know what are the matching properties.



21) This tool also helps to compare web resource code.

Component Type	Component Name	Is available in Target?	Comments
Web Resources HTML	SLA Item Advanced Pause Config feature message	Yes	Created On, Modified On property value(s) not match with tar...
Web Resources HTML	SLA Item Condition Control Notification message	Yes	Created On, Modified On property value(s) not match with tar...
Web Resources HTML	SLA KPI Advanced Pause Config feature message	Yes	Created On, Modified On property value(s) not match with tar...
Web Resources HTML	SLA preview feature message	Yes	Created On, Modified On property value(s) not match with tar...
Web Resources HTML	Xm.RESTBuilder.htm	No	It's not available in target environment
Web Resources CSS	codemirror.css	No	It's not available in target environment
Web Resources CSS	jqueryui.1.10.3.custom.min.css	No	It's not available in target environment
Web Resources CSS	jaortree.css	No	It's not available in target environment
Web Resources CSS	Xm.RESTBuilder.css	No	It's not available in target environment
Web Resources JavaScript	beauty.min.js	No	It's not available in target environment
Web Resources JavaScript	clipboard.min.js	No	It's not available in target environment
Web Resources JavaScript	codemirror.js	No	It's not available in target environment
Web Resources JavaScript	esprima.js	No	It's not available in target environment
Web Resources JavaScript	javascript.js	No	It's not available in target environment
Web Resources JavaScript	jquery.blockUI.js	No	It's not available in target environment
Web Resources JavaScript	jquery.1.9.1.min.js	No	It's not available in target environment
Web Resources JavaScript	jqueryui.1.10.3.min.js	No	It's not available in target environment
Web Resources JavaScript	json2.js	No	It's not available in target environment
Web Resources JavaScript	jaortree.js	No	It's not available in target environment
Web Resources JavaScript	msdyn_AppointmentRTEconfig_referenceonly.js	Yes	Created On, Modified On property value(s) not match with tar...
Web Resources JavaScript	msdyn_EmailRTEconfig_referenceonly.js	Yes	Created On, Modified On property value(s) not match with tar...

Property Name	Source Property Value	Target Property Value	Is match with target?	Comments
Name	SLAManagement/msdyn_advanced/pause_fea...	SLAManagement/msdyn_advanced/pause...	Yes	Created On, Modified On property value(s) not match with tar...
Display Name	SLA Item Advanced Pause Config feature mes...	SLA Item Advanced Pause Config feature ...	Yes	Created On, Modified On property value(s) not match with tar...
Type	HTML	HTML	Yes	It's not available in target environment
Content	<html><head><link href="/uclient/resources/ist...	<html><head><link href="/uclient/resource...	Yes	It's not available in target environment
Created On	31-07-2021 22:40:54	02-10-2021 07:13:52	No	It's not available in target environment
Modified On	31-07-2021 22:40:54	02-10-2021 07:13:52	No	It's not available in target environment

22) You can open source and target environments directly from the below highlighted options. Click on these buttons and this will open dynamics organization in browser.

Count of Solutions in Source - 383					Count of Solution in Target - 384				
Solution Name	Version Number	CreatedOn	Description		Solution Name	Version Number	Created On	Description	
Cr412zf	1.0.0.0	25-09-2021 09:10:54			Cr412zf	1.0.0.0	06-09-2021 05:59:00		
System	5.0	25-09-2021 09:43:57	Internal CRM System Solution		LNITDemo	1.0.0.4	08-09-2021 06:05:35		
Active	1.0	25-09-2021 09:43:57	Placeholder solution marker for al...		System	5.0	06-09-2021 05:35:58	Internal CRM System Solution	
Default	1.0	25-09-2021 09:43:57	Solution that contains all compon...		Active	1.0	06-09-2021 05:35:58	Placeholder solution marker for ...	
SalesProcessSolution	1.0.0.0	07-10-2021 11:20:20			Default	1.0	06-09-2021 05:35:58	Solution that contains all compo...	
msft_LocalizationExtension	1.0.2.0	25-09-2021 09:59:45			CDSRoleManagement	1.0.0.0	05-10-2021 07:53:39		
OCISBR	1.0.0.1320	26-09-2021 03:10:19	This solution provides machine le...		msdyn_OmnichannelSocialCha...	1.5.16.13	06-09-2021 18:56:25	The patch solution upgrades th...	
OmnichannelBase	1.5.0.383	26-09-2021 02:03:18	This solution provides the base c...		msdyn_AISolutionFullAdditions	202108.5.2701.1	09-10-2021 22:25:51	Patch for full CDS instances	
msdynce_CoreServiceScheduling	9.0.21084.1003	25-09-2021 20:01:50	Base solution for Dynamics 365 ...		ServicePlanData	2.6.0.0	06-09-2021 06:57:52	Service Plan Data solution	
LicenseEnforcement	2.4.0.0	25-09-2021 10:28:01	License Enforcement solution		msdynce_RoutingRule	9.1.21091.1004	06-09-2021 10:09:01	Empower agents with route cas...	
SolutionUpgradeInfrastructure	2.6.0.78	25-09-2021 13:46:26	Contains upgrade logs for some s...		msdynce_PortalPrivacyExtensio...	9.2.10.0	08-09-2021 04:24:54	Extends portal capabilities by pr...	
msft_UnifiedClientLookupExtension	1.0.0.2	25-09-2021 12:27:32	Solution having customizations u...		MicrosoftFlowExtensionsAnchor	1.2.4.14	06-09-2021 07:14:34		
msdynce_CustomerServiceHubP...	9.0.21091.1007	25-09-2021 14:23:52	Patch for Dynamics 365 workloa...		Basic	1.0	06-09-2021 05:35:58	Placeholder solution marker for ...	
msdyn_CustomerServiceWorkspa...	1.5.0.27	26-09-2021 03:36:59	Customer Service Workspace u...		msdynce_CRMEExtensionsPatch	9.0.21084.10001	06-09-2021 11:32:30	For internal use only.	

