



## Interact with Dataverse through Powershell





With this quick tutorial will you learn how to interact with dataverse through powershell.

You can run CRUD operations as well as updating system settings.





## Prerequisites

- Windows Management Framework (WMF) version 5.1 or later

```
# Check WMF version
```

```
$Host
```

```
Version: 5.1.19041.1682
```

- Module Microsoft.Xrm.Data.PowerShell

```
Install-Module Microsoft.Xrm.Data.PowerShell
```





## Create and test Connection

```
# Generate connection using interactive login
$conn = Get-CrmConnection -InteractiveMode

# Generate WhoAmI request
$request = new-object Microsoft.Crm.Sdk.Messages.WhoAmIRequest

# Executing request
$conn.Execute($request)

# Dispose Connection
$conn.Dispose()
```





## Create Account

```
# Create Account - The code can also be inline
$accountId = New-CrmRecord `
-conn $conn `
-EntityLogicalName account `
-Fields @{"name"="account name";"overriddencreatedon"=[datetime]"2000-01-01"}
```





## Retrieve Account

```
$account = Get-CrmRecord `  
-conn $conn `  
-EntityLogicalName account `  
-Id $accountId -Fields name, createdon
```





## Delete Account

```
# All three ways work  
Remove-CrmRecord -conn $conn -CrmRecord $account  
Remove-CrmRecord $account  
Remove-CrmRecord -conn $conn -EntityLogicalName "account" -Id $accountId
```

Note: If you don't specify any value for the -conn parameter it will by default try to use \$Conn. If you have created the connection with a different name i.e \$Service you will have to **always** specify the -conn parameter





## Manipulate System Settings

```
# Retrieve system settings
Get-CrmSystemSettings # Omitting parameter names
Get-CrmSystemSettings -conn $conn

# Update system settings
Set-CrmSystemSettings -conn $conn -GlobalHelpUrl https://www.bing.com
```







## Helpful Commands

```
# Get all commands available for a specific module  
Get-Command -Module Microsoft.Xrm.Data.Powershell
```

```
# Get Installed Modules  
Get-InstalledModule  
  #Filter by Name  
  Get-InstalledModule *Microsoft*
```

```
# Get Command details - I found this command the be the most useful since it provides  
# examples and detail parameters of the functions  
Get-Help Get-CrmEntityRecordCount -Detailed
```





## Final thoughts

Well some of you may be thinking "Ok, but how's that helpful?".

I think automation is the key here. If you've worked with CI/CD before you are probably aware that you can automate pretty much anything. With that in mind, you can leverage those functions to ease repetitive/timeconsuming tasks.

The command below may give you some insights. You will find functions that range from creating records to exporting solutions

```
Get-Command -Module Microsoft.Xrm.Data.Powershell
```





I hope you found this content somehow useful.

Thank you

