



User Manual

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Introduction

Attach2Dynamics is a productivity app for Microsoft Dynamics 365 CRM which enables users to use document management systems within Dynamics 365 CRM.

The primary function of Attach2Dynamics is to store files/folders in cloud storages. Currently it supports three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

Salient Features:

- Supports all types of entities
- Multiple files and folders can be dragged and dropped at one time to the configured cloud storage
- Single as well as multiple files or folders can be uploaded
- Users can download documents from configured cloud storage
- Email with file's link or file as attachment can be sent
- Files/Folders can be renamed
- Bulk copy/move Note/Email/Sales Literature Attachments to cloud storage
- Move/Copy Email/Note Attachment/Sales Literature Attachment to Cloud Storage
- Sharable links of files/folders can be created which can also be copied for external use
- Deep search can be done for the entered keyword
- Support for uploading files from home page
- Access control of user actions on Attach2Dynamics
- Delete files from cloud storages
- View files before downloading
- Support for configuring multiple connectors
- Support for single sign-on
- Support for setting default from, to, cc and bcc for email using Email Configuration
- Support for hierarchy structure to store attachments/documents in SharePoint

Available for:

Microsoft Dynamics 365 CRM: 2016 and above, Dynamics 365 CRM. **Deployment:** On-Premises with IFD and Dynamics 365 Online

Dropbox: Dropbox and Dropbox for Business

SharePoint: Online

Azure Blob Storage

Configuring Connectors

In Attach2Dynamics the user can configure multiple connectors for all three cloud storages – SharePoint, Dropbox and Azure Blob Storage. For example: The user can create multiple connectors such as SharePoint_1, SharePoint_2, SharePoint_3, etc. for SharePoint. Similarly, multiple connectors can also be created for Dropbox and Azure Blob Storage. To configure connectors follow the given steps:

Navigate to **Attach2Dynamics** App and then click **'Connector'** Entity. Next, click **'New'** to create a new **'Connector**.'

| Dynamics 365 | Attach2Dynamics | Attach2Dynamics > Connectors | | ০ ঔ | 3 Q | + | Y | ¢; (| ? | San | nr R |
|--|-------------------------------------|------------------------------------|-----------------|---------------|-------------|-------|-----------|-----------|-------------|---------|------|
| = | 🖾 Show Chart 🕂 New 🗓 |] Delete 🗸 💍 Refresh 🕉 Detail N | Nap 🕉 Heat Ma | o 🖾 Em | nail a Linl | k ~ | ₀∕ª Flow | ✓ II R | un Report 🚿 | · | |
| ☆ Home ③ Recent ∨ | ං Active Con | nectors ~ | | | | | | | Search for | records | Q |
| 🖈 Pinned 🗸 🗸 | | | | | | | | | | | |
| Attach2Dynamics | Connector Type | ↑↓ 🛛 Auth-Type | ↑↓ 🛛 Maximu | m file size (| (in kilo | . 17 | Status Re | ason ↑↓ 🦷 | Created (| Dn ↓ | V |
| ං Connectors | | | | | | | | | | | |
| Entity Configurations | | | | | | | | | | | |
| Bulk Migration Jobs | | | | | | | | | | | |
| ■ Bulk Migration Job S | | | | | | | | | | | |
| 🗟 Error Logs | | | No data availa | ble. | | | | | | | |
| 🗟 License Registration | | | | | | | | | | | |

Configuring SharePoint Connector

- a) Name: Give name to the connector
 Connector Type: Choose SharePoint from the drop-down.
 Default Connector: If required, enable the checkbox to set SharePoint_1 as default connector.
- **b) SharePoint Site:** This is valid only for SharePoint. It is the location of SharePoint, where files and folders will be stored. Select the valid SharePoint site here. This field is not visible for Dropbox and Azure Blob Storage.

| | Attach2Dynamics – User Manual |
|--------------------|---|
| | ector |
| eneral Credentials | Additional Settings Entity Configurations |
| General | |
| Name | * SharePoint_1 |
| Connector Type | * SharePoint |
| Default Connector | |
| Chara Dailet Cit | Look for SharePoint Site |
| SharePoint Site | Default Site |
| | - https:// sharepoint.com |

Note: The user has to create new SharePoint site for each new connector.

c) Auth-Type: You can select the value 'App' or 'Credential' here. This indicates whether Authetication with the connector is done through App or Credential.

For SharePoint both App and Credential are supported.

For **Dropbox** only **App** is valid.

For Azure Blob Storage only Credential is valid.

| | _1 | | |
|---------------------|---------------------|-----------------------|------------|
| General Credentials | Additional Settings | Entity Configurations | Related |
| General | | | |
| Name | * SharePoint_1 | | |
| Connector Type | * SharePoint | | |
| Default Connector | V | | |
| SharePoint Site | * 💮 Default Site | | |
| Auth-Type | * Credential | | $ $ \sim |
| | Select | | |
| | Credential | | |
| | Арр | | |

d) Credentials: This indicates that Authentication with the connector is done through Credential i.e. id and password. It is mandatory to enter credentials in order to create a new Connector. For authentication through credentials, for any attachment action, the name of user appears who has authenticated the Connector. Enter value for Id and Password/Secret. Next authenticate the credentials.

| CANNECTOR SharePoint | | | |
|-------------------------|---------------------|-----------------------|---------|
| General Credentials | Additional Settings | Entity Configurations | Related |
| Id | * samp@caonb.onm | icresoft.com | |
| Password/Secret | * ZZZZZ HVPNF CRQ | UX VWAQM NBJSW PLOEU | SDS |

Note:

The Id/Password origin differs for SharePoint, Dropbox and Azure Blob Storage.

- Id and Password for SharePoint: In the Id field enter your username and in Password enter password. It can be your normal Dynamics 365 CRM credentials.
- Id and Password/Secret for Dropbox: Enter your 'Developer' App Key and App secret for the app you are developing.
- Id and Password for Azure Blob Storage: Enter your Storage Account Name and Access Key as password.
- e) App: This is to provide authentication with App. In App authentication, if any action is performed then the name of logged-in user appears.

| New Connector | | | Unauthenticated Status Reason |
|---------------------|---|---------|---|
| General Credentials | Additional Settings Entity Configurations | Permiss | ions |
| Id | × | | Create Azure Active Directory App |
| Password/Secret | × | | In order to get Id and Secret Key please follow this blog |
| | | | |

In order to know how to generate Id and Password/Secret for App click here.

After you have generated the Id and Password enter them in the fields provided.

| SharePoint_1 Connector | | Unauthenticated Status Reason |
|---------------------------|---|----------------------------------|
| General Credentials | Additional Settings Entity Configurations Permissions Related | |
| ld | * HoY2qe1MKnc+TvAQTNdTButy4KrAyhvnYYNDvP Create Azure Active Directory Ap | p |
| Password/Secret | * ZZZZZ BRSXF NXBIM QBNEU UCXSG LEURT UGSKJ | ease follow this <u>blog</u> |

Now if any logged in user uploads or performs any attachment action on files in SharePoint, their name will appear for the action.

Let's upload few files and see how it works.

| Ittach2Dynamics SharePoint | | | |
|---|------------------------|--------------------|----------------------|
| SharePoint : SharePoint_1 | | | م |
| Fyzher Techologies_C738BE | Fyzher Techolog | ies_C738BE243B47E/ | A11A812000D3AF02CD • |
| ↑ UPLOAD - ↓ DOWNLOAD 🖋 RENAME 🖾 EMAIL - & CO | OPY LINK ▼ + CREATE FO | LDER | |
| Viii Upload files or folder | | Size (KB) | Modified On |
| A2D and SSS.docx | | 19.14 | 04/02/2020 16:22 |
| Kanban Board Article.docx | | 1195.15 | 04/02/2020 16:23 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Dro | op files here. | | |
| | | | |
| | | | Close |

Here the name of the admin appears when they are logged in and have uploaded the file.

| ::: SharePoint | | | | | | Q | ٢ | ? | SR |
|---------------------|--|-----------------------|------------------------------|---------------------------------|-----------------|-------------------|-------|-------|-----|
| L.S. | INICATION SITE uments Pages Site conte | nts Edit | | | | 📩 Not foll | owing | 년 Sha | are |
| ✓ Search Account | $+$ New \vee $\overline{\uparrow}$ Upload \vee | 🖉 Quick edit 🛭 🖻 Sh | are 🐵 Copy linl | k ಢ Sync 🛓 Download 🖷 | Export to Excel | 🚍 All Documents 🗸 | r V | () | 2 |
| Account > Fyzher Te | echologies_C738BE243 | 347EA11A812000D | 3AF02CD4 | | | | | | * |
| 🗋 Name 🗸 | | Modified \checkmark | Modified By \smallsetminus | $+$ Add column \smallsetminus | | | | | |
| A2D and SS | 5.docx | 2 hours ago | Sam Richard | | | | | | |
| 😰 🥍 Kanban Boa | rd Article.docx | 2 hours ago | Sam Richard | | | | | | |

Now let's take another use-case when a user, who is not an admin uploads a file. Rhea is a Sales Manager who does not have admin rights. Now she uploads the files while being logged in, and her name appears as the user uploading the file.

| ::: SharePoint | | | Q | ۰ ھ | ? RP |
|---|------------------------------|---|---------------------------------|--------|-------|
| Cs Communication site Home Documents Pages Site content | s Edit | | ☆ Not follow | ring 년 | Share |
| \wp Search Account + New \lor $\overline{\uparrow}$ Upload \lor | 🖉 Quick edit 🖻 Sha | are 🔏 Copy link ಢ Sync 🛓 Download 🖷 Export to Excel | \cdots = All Documents \vee | 70 |) Z |
| Account > Fyzher Techologies_C738BE243B | 47EA11A812000D Modified ~ | 3AF02CD4 Modified By \sim + Add column \sim | | | * |
| and SSS.docx | 2 hours ago | Sam Richard | | | |
| 💼 🛁 Kanban Board Article.docx | 2 hours ago | Sam Richard | | | |
| Maplytics Website Content_1.docx | About a minute ago | Rhea P | | | |
| Maplytics Website Content_2.docx | About a minute ago | Rhea P | | | |
| Maplytics Website Content_3.docx | About a minute ago | Rhea P | | | |
| | | | | | |

Configuring Dropbox Connector

- a) Name: Give name to the connector.
- b) **Connector Type**: Choose **Dropbox** from the drop-down.
- c) **Default connector:** If required, enable the checkbox to set Dropbox_1 as default connector.

| | ector | | |
|---------------------|---------------------|-----------------------|--|
| General Credentials | Additional Settings | Entity Configurations | |
| General | | | |
| Name | * Dropbox_1 | | |
| Connector Type | * Dropbox | | |
| Default Connector | | | |
| | | | |
| | | | |

Note: The user has to create new app for each new dropbox connector.

Now to get the Id/Secret for Dropbox follow the below steps:

Go to <u>www.dropbox.com</u> and enter your login credentials for Dropbox. After you are logged in you will land on the **'Home Page.'** At the bottom right corner of the screen click on the 'Points of Ellipsis (the three dots)' and then select **Developers** from the view.

| Install | |
|------------|--------|
| Mobile | |
| Blog | |
| Jobs | - |
| Developers |)ut |
| Contact us | No |
| Pricing | Tr |
| Copyright | E |
| Business | 1 |
| Language | |
| | •••• F |

| ← → C | /developers | | | \$ | X 🕴 🛛 |
|-------|---------------|---------|------|---------|-------------|
| | Documentation | Support | Blog | My apps | Create apps |

Now, click on **My apps** on the list in left.

If you have already created an app click on the 'app icon'. You will be redirected to the App's home page. Scroll down and you will find **App Key** and **App Secret**.

If you don't have an app Click on Create App. From Choose an API Click on Dropbox API button.

Attach2Dynamics - User Manual ** Create a new app on the DBX Platform API v2 1. Choose an API My apps API Explorer Documentation Dropbox API Dropbox Business API For apps that need access to Dropbox For apps that need to access files in HTTP Dropbox. Learn more Business team info. Learn more .NET Java JavaScript Python Swift 2. Choose the type of access you need

In Choose the type of access you need Select Full Dropbox.

| * | Create a new app on the DBX Platform |
|---|--|
| API v2 | |
| My apps | 1. Choose an API |
| API Explorer | |
| Documentation | Dropbox API |
| НТТР | For apps that need to access files in O For apps that need access to Dropbox |
| .NET | Dropbox. Learn more Dropbox. Learn more 🔍 🕘 |
| Java | |
| JavaScript | |
| Python | |
| Swift | 2. Choose the type of access you need |
| Objective-C | Learn more about access types |
| Community SDKs | |
| References | O App folder – Access to a single folder created specifically for your app. |
| Getting Started Authentication types Branding guide | O Full Dropbox – Access to all files and folders in a user's Dropbox. |

Name your app – Here enter the name of the app you are going to create. Check 'agree to terms' and click on Create App button. After clicking on Create App button you will be redirected to home page of the created app. Select your App Key and App Secret from here.

| .** | Cao Mobile | es | | |
|--|-----------------------|----------|--|-------------------------|
| API v2 | Settings | Branding | Analytics | |
| My apps | | | | |
| API Explorer Documentation | Status | | Development | Apply for production |
| HTTP .NET | Development use | ers | Only you | Enable additional users |
| Java JavaScript Python | Permission type | | Full Dropbox 🕜 | |
| Swift Objective-C Community SDKs | App key App secret | | Company of the State of the Sta | |

Enter these credentials in the **'New Connector' Credentials.** After you enter the Password/Secret (Dropbox App **Secret**) it immediately gets encrypted as shown below.

| | Owner * A Status Reason Image: A status Reason Image: A status Reason Image: A status Reason Image: A status Reason |
|--|---|
| General Credentials Additional Settings Entity Configurations Related | |
| Id * ++++++++++++++++++++++++++++++++++++ | Use below as your redirect url |
| WorkSpace * Personal | Note : Valid only for Dropbox. Before authenticating please check you have logged in with correct DropBox account. |
| | |

The user can give access of this workspace created in Dropbox cloud storage to their team members if necessary. Go to **WorkSpace** field and select **Team.** After selecting Team another field will appear termed **Team Folder.** Give name to the team folder.

| Attach2Dynamic | cs – User Manual |
|--|---|
| General Credentials Additional Settings Entity Configurations Related | Owner * A Status Reason ⊘ A John Sam Unauthenticated |
| Id * Password/Secret * ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ | Use below as your redirect url https:// cationalestics/callback.html /WebResources/ikl_/Attach2Dynamics/Callback.html |
| WorkSpace * Team Team Folder * Sales | Note : Valid only for Dropbox. Before authenticating please check you have logged in with correct DropBox account. |

This folder will appear outside App folder.

| <₩ | | | | | |
|--------------------------|-------------------------------|------------|-----------|----------|---|
| Files | A2DTeam | | | Q Search | \$ 😁 |
| Files | Name + | Modified • | Members 👻 | := • | |
| Sharing File requests | John Sam | | Only you | | Create new file |
| Deleted files | Marketing | | A2DTeam | | Upload files |
| | Projects | | A2DTeam | | Upload folder New folder Show deleted files |
| | Sales | | A2DTeam | | View in admin console |
| | 🚥 Guide to our Team Space.url | 7 mins ago | A2DTeam | | |

If the WorkSpace field is set as **Personal** then the files and folders will be stored inside App folder.

| <₩ | | | | | |
|--------------------------------|--------------------|------------|-----------|-----------|----------------------|
| Files | A2DTeam > John Sam | | | Q 📄 Searc | ch 🗘 🥲 |
| Files | Name 🕇 | Modified - | Members * | := * | |
| Sharing | Sales | | Only you | | Create new file |
| File requests Deleted files | | | | | Only you have access |
| | | | | | Upload files |
| | | | | | Upload folder |
| | | | | | New shared folder |
| | | | | | New folder |
| | | | | | Show deleted files |
| | | | | | |

Next the **Redirect URL** in connector page needs to be added in the Dropbox App as in below Screenshot. This URL is mentioned on the Connector entity.

| | Attach2Dynam | nics – User Manı | ual |
|--------------------|---|---------------------------|--|
| | | Owner ● ႙ John Sam | * 🛆 Status Reason Unauthenticated |
| General Credential | Additional Settings Entity Configurations Related | | |
| Password/Secret | * ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ | Use below as your re | edirect url WebResources/ikl_/Attach2Dynamics/Callback.html |
| WorkSpace | * Team | Note : Valid only for Dro | |
| Team Folder | * Sales | Before authenticating ple | ase check you have logged in with correct DropBox account. |

Copy this URL and paste it in the App on Dropbox as shown below:

| My apps | | | |
|----------------------|-------------------|---|-------------------------------|
| API Explorer | Status | Development | Apply for production |
| Documentation | Status | Development | Apply for production |
| нттр | | | |
| .NET | Development users | Only you | Enable additional users |
| Java | | | |
| JavaScript | Permission type | Full Dropbox 🕧 | |
| Python | | | |
| Swift | | | |
| Objective-C | App key | kpapekging al. Del | |
| Community SDKs | App secret | the Council | |
| References | | Redirect URIs | |
| Getting Started | OAuth 2 | Redirect Okis | |
| Authentication types | | https://i.crm.dynamics.com/WebResources/ikl_/Attach2D | ynamics/Callback.html $	imes$ |
| Branding guide | | https:///http.allowed.for.localbasth | |
| Content hash | | https:// (http allowed for localhost) | Add |

After entering the link click on **"Add."** This step must not be skipped.

Configuring Azure Blob Storage Connector

To get Storage Account Name & Access Key for Azure Blob Storage, follow the below steps:

Open URL: <u>https://portal.azure.com/</u> and enter your Microsoft Azure Credentials

Next go to storage account section.

| Microsoft Azure | P Sea | rch resources, services, and docs | | >_ 🖓 | L¹ ⊗ | ? 🙂 |
|---|--|---|--|---|--|-----------------------------------|
| « | | | | | | |
| + Create a resource | Azure services See all (100+) > | Create a resource > | | | | |
| 🛧 Home | A A A A A A A A A A A A A A A A | SQL | eds. | \triangleright | | <i>«</i> |
| 💷 Dashboard | Virtual machines App Services | Storage accounts SQL databases | | ure Cosmos DB | Kubernetes | Function App |
| ■ All services | L. L | | PostgreSQL servers | | services | |
| ★ FAVORITES | | | | | • | |
| All resources | Microsoft Learn | Azure Monitor Monitor your apps and | Security Center Secure your ap | | | lanagement e and optimize your |
| Resource groups | online training from Microsoft | infrastructure | infrastructure | | | spend for free |
| 🔕 App Services | WICHOSOIT | | | | | |
| Function Apps | | | | | | |
| - F | Recent resources See all your rec | continent secondaria Second vour recourses | | Useful | links | |
| SQL databases | Recent resources see anyour rec | tent resources / See all your resources / | | | | |
| SQL databases | NAME | TYPE | LAST VIEWED | Technical (| Documentation 🛽 | |
| SQL databases | | 2 | | Technical (Azure Serv | Documentation 🛛 vices 🖸 | |
| SQL databases | NAME | ТҮРЕ | LAST VIEWED | Technical (Azure Serv | Documentation 🛛 vices 🖸 ure Updates 🖄 | |
| SQL databases Azure Cosmos DB Virtual machines Load balancers | NAME | TYPE Storage account | LAST VIEWED 4 d ago | Technical I Azure Serv Recent Azu | Documentation 🛛 vices 🖸 ure Updates 🖄 | |
| SQL databases Azure Cosmos DB Virtual machines | NAME | TYPE Storage account Subscription | LAST VIEWED 4 d ago 3 wk ago | Technical I Azure Serv Recent Azu Azure Blog | Documentation 🛛 vices 🖸 ure Updates 🖄 | |
| SQL databases Azure Cosmos DB Virtual machines Cod balancers Storage accounts | NAME | TVPE Storage account Subscription Data Lake Storage Gen1 | LAST VIEWED 4 d ago 3 wk ago 3 wk ago | Technical (Azure Serv Recent Azu Azure Blog | Documentation Z vices Z ure Updates Z g Z mobile app | innon oogle Play |
| SQL databases Azure Cosmos DB Virtual machines Cod balancers Storage accounts Virtual networks Storage accounts | NAME | TYPE Storage account Subscription Data Lake Storage Gen1 Data Lake Storage Gen1 | LAST VIEWED 4 d ago 3 wk ago 3 wk ago 1 mo ago | Technical (Azure Serv Recent Azu Azure Blog | Documentation Z vices Z ure Updates Z g Z mobile app | innou Google Play |
| SQL databases SQL databases Azure Cosmos DB SVirtual machines Coad balancers Storage accounts Storage accounts Azure Active Directory Monitor SQL databases | NAME | TYPE Storage account Subscription Data Lake Storage Gen1 Data Lake Storage Gen1 Resource group | LAST VIEWED 4 d ago 3 wk ago 3 wk ago 1 mo ago 2 mo ago | Technical (Azure Serv Recent Azu Azure Blog | Documentation Z vices Z ure Updates Z g Z mobile app | innon Soogle Play |
| SQL databases SQL databases Azure Cosmos DB Virtual machines Cod balancers Storage accounts Virtual networks Azure Active Directory | NAME | TYPE Storage account Subscription Data Lake Storage Gen1 Data Lake Storage Gen1 Resource group SQL database | LAST VIEWED 4 d ago 3 wk ago 3 wk ago 1 mo ago 2 mo ago 2 mo ago | Technical (Azure Serv Recent Azu Azure Blog | Documentation Z vices Z ure Updates Z g Z mobile app | innon poogle Play |

Select your storage account and open it, look for Access Keys (as shown in the below screenshot), get the Storage account name and Key from it.

| Microsoft Azure | P s | earch resources, services, and docs | | Ŗ | Ĺ ¹ | | | © | Langer Hilloria Santa |
|------------------------|----------------------------------|--|----------|----------------|---------------------|--|----------|--------------|----------------------------|
| « | Home > a2dtestab - Access keys | | | | | | | | |
| + Create a resource | ea2dtestab - Access keys | | | | | | | | |
| | | | | | | | | | |
| Dashboard | | Use access keys to authenticate your applications when making reques Azure Key Vault - and don't share them. We recommend regenerating | | | | | | | |
| E All services | Overview | connections using one key while regenerating the other. | | | | | | | |
| + FAVORITES | Activity log | When you regenerate your access keys, you must update any Azure res action will not interrupt access to disks from your virtual machines. Lea | | d applicat | tions tha | t access | this sto | rage acco | unt to use the new keys. T |
| All resources | Access control (IAM) | | | | | | | | |
| (🐑 Resource groups | 🕐 Tags | Storage account name | | | | | | | |
| 🔇 App Services | 🗙 Diagnose and solve problems | | | | | | | | |
| Function Apps | 💕 Data transfer | key1 🗘 | | | | | | | |
| 👼 SQL databases | 🗲 Events | Key | | | | | | | |
| 🖉 Azure Cosmos DB | Storage Explorer (preview) | parente quella engliste de la procesión de la companya | an order | 0.000 | - Carl | 51 B | | | |
| 👰 Virtual machines | Settings | Connection string | - | | - 1 ₉ -1 | an a | , | | CALCULATION CONTRACT |
| 🚸 Load balancers | 📍 Access keys 🔐 | - | | | | | | | |
| Storage accounts | Geo-replication | key2 🖏 | | | | | | | |
| Virtual networks | 🙁 CORS | photocould how countries that the country is | - | defection of | 0.00 | | | | |
| Azure Active Directory | Configuration | Connection string | | | | | | | |
| Monitor | Encryption | Tala Administrative internet integrations with the second state of | 100 | and the second | n gener | 100 | NP-C | (Arrest Mark | Industry Control of State |
| 🜪 Advisor | Shared access signature | | | | | | | | |
| Security Center | 👻 Firewalls and virtual networks | | | | | | | | |
| Ocst Management + Bill | O Advanced security | | | | | | | | |

Now Create a new Connector.

- a) Name: Give name to the connector.
- b) Connector Type: Choose Azure Blob Storage from the drop-down.
- c) **Default connector:** If required, enable the checkbox to set Azure_1 as default connector.

| | ector | |
|---------------------|-------------------------|--------------------|
| General Credentials | Additional Settings Ent | ity Configurations |
| General | | |
| Name | * Azure_1 | |
| Connector Type | * Azure Blob Storage | |
| Default Connector | | |
| | | |
| | | |

Note: The user can add other storage accounts from Azure Blob Storage.

Now add the **Storage Account Name** and **Access Key**. Next authenticate the credentials. Your connector is now ready to function.

| | Owner * 이 옷 Sam P | 合 Status Reason Unauthenticated |
|--|----------------------|------------------------------------|
| neral Credentials Additional Settings Entity Configure | tions | |
| Password/Secret | W ЕНВНW ЈВАТР | |
| | | |
| | | |

Additional Settings:

a) Set file size limit for attachments – Maximum file upload size can be 50 MB.

b) **Set blocked file extensions for attachment** – This contains the list of file extensions (semicolon separated) which the Connector won't be able to upload on Cloud. You can enter it as per your preference.

e.g., txt;docx

Click on save and the **'New Connector'** is created with a form notification as **"Click on Authenticate button to authenticate the connector"**.

| Authenticate | | | | |
|--------------|--|--|--|--|
|--------------|--|--|--|--|

After the Connector record is created the connector credentials need to be authenticated.

To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with System Administration or Attach2Dynamics Administrator role.

| | Dynamics 365 | ~ | At | tach2Dynamic | CS | Attach | 2Dynamics > Con | nectors > Sha | rePoint |
|---|--------------|---|-----|--------------|----|--------|-----------------|---------------|---------|
| ≡ | | + | New | 👌 Deactivate | Î | Delete | 𝗭 Authenticate | 🖔 Refresh | 💸 Map |

After the Connector is Authenticated, create Entity Configuration record.

If Connector is authenticated successfully, the following success pop up will appear:



If Connector authentication fails, then the following error pop up will appear:

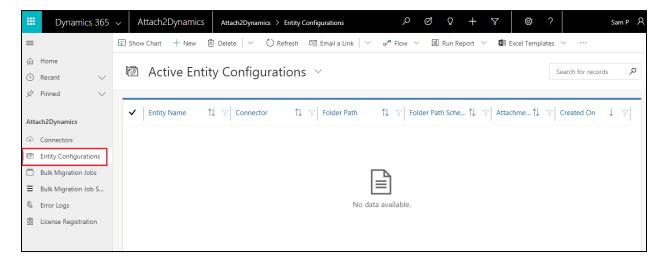


And to see the what exactly the error is, navigate to 'Logs Entity', check the error and retry the authentication.

| 🕼 Deactivate 볩 Delete 🖒 Refresh 🔗 Assign 🖻 Share 🖙 Email a Link 🦨 Flow 🗸 🖷 Word Templates 🗸 💷 Run Report 🗸 | |
|--|--|
| 777C576F-7754-EA11-A812-000D3A33F94A | John David |
| Log | Owner |
| General File Details Related | |
| △ Record Id 777C576F-7754-EA11-A812-000D3A33F94A | |
| △ Entity Configuration | |
| A Deleted On | i |
| | |
| A Deleted By | |
| A Information Please verify the credentials for Connector in CRM. | |
| | |
| | |
| A Percent IIP | - ontiture cord |
| | e-entryrecord |
| | |
| | |
| | |
| | T77C576F-7754-EA11-A812-000D3A33F94A Log General File Details Record Id 777C576F-7754-EA11-A812-000D3A33F94A A Record Id 777C576F-7754-EA11-A812-000D3A33F94A A Entity Configuration A Deleted On A Deleted By |

Entity Configuration

For 'Entity Configuration Entity' go to Attach2Dynamics → Entity Configuration.



Entity Configurations can be created from the Connector form too, just click on Entity Configuration Tab on Connector page.

| CONNECTOR SharePoint | | | | Owner * | \sim |
|-------------------------|---------------------|----------------------------|-------------------|--|---------|
| General Credentials | Additional Settings | Entity Configurations Rela | ited | | |
| | | | | + Add New Entity Confi 🖔 Refr | esh ··· |
| ✓ Entity Name | ↑↓ Connector | ↑↓ Folder Path | 1 Folder Path Sch | nema ↑↓ Attachment ↑↓ Created On | ↓ |
| | | | | | |
| | | No dat | a available. | | |
| | | | | | |
| | | | | | |
| | | | | | |

| account - Dropbox_1 Entity Configuration General Email Configuration Related | |
|--|--|
| General Email Configuration Related | |
| | |
| Connector Connector | |
| Entity Name * Account | |
| Folder Path Schema 👘 traversedpath | |
| A Folder Path /account | |
| Attachment Action Move | |
| Override Files 🛛 | |
| | |

General:

- a) **Connector:** Select the Connector (SharePoint, Dropbox or Azure Blob Storage) for which you want to configure the Entity.
- b) Entity Name: Mention the Entity for which you are configuring.
- c) Folder Path Schema: This field is visible only for Dropbox and Azure Blob Storage. In this select the field in which the folder path schema will be stored. This can be any field attribute of the Entity selected.

eg: name

Data already present in the selected field(name) gets overriden.

- **d)** Folder Path: This field is visible only for Dropbox and Azure Blob Storage. This is auto populated depending upon the entity selected.
- e) Attachment Action: You can either Copy or Move the attachment.
 - Copy: If you Select Copy, the attachment will be also be copied to SharePoint, Dropbox or Azure Blob Storage and its cloud storage path will be copied in Dynamics CRM next to attachment's location.
 - **ii) Move:** If you Select **Move**, the attachment will be moved/migrated to Cloud Storage and its cloud storage path will be left behind in Dynamics CRM next to attachment's location.

Attachment Actions can be enabled only for one entity with one Connector.

f) Override files: If checked, means trying to upload file with same name will be overriden. If unchecked, then a new file with number appended is created and uploaded in the cloud storage.

Email Configuration:

The next is Email Configuration tab. With this tab you can send the documents as attachments/links through email to the required recipients. You can set this tab as shown in below screenshot.

| accoun Entity Con | t - Dropbox_1 figuration | | |
|----------------------|-----------------------------|-------|----------------------|
| General | Email Configuration Rel | lated | |
| From | Me | Ŧ | |
| То | Users | ¥ | × Chris Matt |
| Cc | Dynamic | ¥ | × ModifiedBy |
| Bcc | Manager | ۷ | × OwningUser.Manager |
| | | | |
| | | | |
| | | | |

- From The sender i.e. the person who sends the email
- To Recipient i.e. the person to whom the email is to be sent
- CC Carbon Copy i.e. the person to whom a copy of the email information is to be sent
- BCC Blind Carbon Copy i.e. the person you have kept in the loop and do not want the other recipients to see that particular contact
- Types of Email addresses to select
 - a. Users If you select Users then all the CRM users present in the environment will be enlisted while selecting the data.
 - b. Queue If you select Queue then all the queues present in the environment will be enlisted while selecting the data.
 - c. Team If you select Team then all the teams created in the environment will be enlisted while selecting the data.
 - d. Dynamics E.g. If you have selected quote as an entity then all the lookup fields on quote which are allowed to send email will be enlisted while selecting the data.
 - e. Manager E.g. If you have selected quote as an entity then, all the system-user lookup fields on quote entity will be enlisted while selecting the data, and recipient would be the manager of the selected data.

Note:

- 1) To use Attach2Dynamics functionalites on an **Entity** it is mandatory that you create an **Entity Configuration** record for the same. Without Entity Configuration record Attach2Dynamics button will not be displayed for the respective Entity.
- **2)** Connector and Entity Configuration are editable if user has System Administrator or Attach2Dynamics Administrator role.
- **3)** Attach2Dynamics User can only read the Connector and Entity Configuration.

- **4)** Also, in order to configure an entity with SharePoint connector we need to enable SharePoint for that entity.
- 5) **Product, Sales Literature & Competitor** entity can be configured only in **Classic** User Interface.

Configuration for Moving/Copying Email Attachments

In order to enable Email Attachment movement whether Copy or Move, we need to define the Entity Configuration.

| | mail - Dropbox_1 ntity Configuration | | |
|---|---|-------|--------------------|
| G | eneral Email Configu | urati | ion Related |
| | Connector | * | ි Dropbox_1 |
| | Entity Name | * | Email |
| | 🛆 Folder Path | * | /email attachments |
| | Attachment Action | | |
| | Override Files | | |
| | | | |

Based on settings the Email Attachments would be Moved/Copied from Dynamics 365 CRM.

If **Regarding field** is **not set** for email then the email attachments will be moved/copied in a common folder named Email Attachment as shown below:

| Sales | ttach2Dynamics Form ∨ Files CRM:0001099 d only | | | Priority Norm | |
|----------------------|--|------------|-----------|------------------|---|
| nail Related | | | | | |
| From | 🔉 John Sam | | | | |
| То | 🔁 Canvas Pvt LTD | | | | |
| Cc | | | | | |
| Bcc | | | | | |
| Subject | Sales Files CRM:000 | 1099 | | | |
| | | | | | |
| Regarding | | | | | |
| Duration | 30 minutes | | | | |
| | | | | | |
| | AttachManage > Sales | | | Q 💽 Sea | irch 🎝 🗘 |
| 5 | Name + | Modified + | Members • | i = • | |
| les ing | account | | Only you | | Create new file Share folder |
| equests ted files | contact | | Only you | | Only you have access |
| www.cittad | Email Attachments | | Only you | | Upload files Upload folder |

If **Regarding field** is **set** then the Email Attachments would be Moved/Copied to the **Regarding Folder** in cloud storage as shown below:

| Sales File | 2Dynamics Form V es CRM:0001099 ly | | | Priority Norma | |
|---------------------|--|--------------------------|-----------------------|-------------------|---------------------------------|
| nail Related | | | | | |
| From | ၃ John Sam | | | | |
| То | Canvas Pvt LTD | | | | |
| Cc | | | | | |
| Всс | | | | | |
| Subject | Sales Files CRM:0001099 | | | | |
| Regarding | 🔁 Canvas Pvt Itd | | | | |
| Duration | 30 minutes | | | | |
| | | | | | |
| ÷ [| Canvas Ptv-Ltd_E4D7107BD5A3 | | | Q 🖿 Sea | arch 🗘 🗘 (|
| / files | Name t Per Document.pdf | Modified + 4 mins ago | Members + Only you | ··· | Create new file Share folder |
| aring e requests | | 1 | | | Only you have access |
| leted files | | | | | Upload files |
| | | | | | D New folder |

Configuration for Moving/Copying Sales Literature Attachments

In order to define the Sales Literature Attachment movement, we need to create an Entity Configuration for Sales Literature. Here we define the action that needs to be perfomed on the Sales Literature Attachment i.e., Move/Copy, and once defined thereafter any Sales Literature Attachment if created would either be Moved/Copied over to the configured Cloud Storage.

| ENTITY CONFIGURATIO | N : INFORMATION |
|----------------------|-----------------|
| salesliterature - | Dropbox ™ |
| ▲ General | |
| Connector * | Dropbox |
| Entity Name * | salesliterature |
| Folder Path Schema * | new_folderpath |
| Folder Path * | Salesliterature |
| Attachment Action | Move |
| Override Files | |

Configuration for Moving/Copying Notes Attachments.

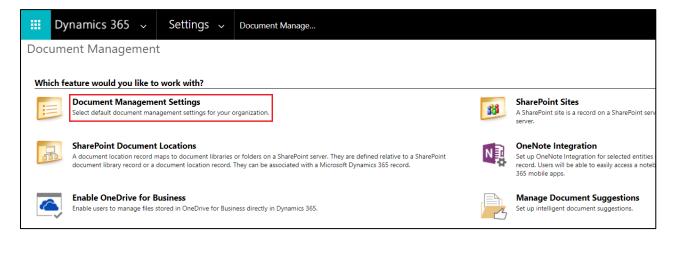
Unlike Email Attachments and Sales Literature Attachments, we don't have to create a different Entity Configuration record for Moving/Copying Notes Attachment, while creating an Entity Configuration for any entities (except Email and Sales Literature), if the Attachment Action is defined, then the corresponding Entity's Notes Attachment would be Moved or Copied based on the Attachment Action selected.

Configuring Hierarchy Structure

Attachments/Documents of Dynamics 365 CRM records can be stored in SharePoint sites on the basis of hierarchy.

To achieve this, follow the steps given below:

1) Go to Advanced Settings \rightarrow Settings \rightarrow Document Management Settings.



2) Select Entities \rightarrow Enter the URL of respective SharePoint site.

| Document Management Settings - Google Chrome | - Ll | × | | | |
|---|----------------|--------------|--|--|--|
| inogicdemo.crm8.dynamics.com/WebWizard/WizardContaine | er.aspx?Wiz | ar | | | |
| Document Management Settings | @ <u>+</u> | <u>l</u> elp | | | |
| Select entities Document management will be enabled on the selected entities. | | | | | |
| Entities | | | | | |
| Accounting Company | A | | | | |
| Action Card Regarding | | | | | |
| Action Card Role Setting | | | | | |
| Address | | | | | |
| Al Builder Dataset File | | | | | |
| Alert | | | | | |
| Alerts4Dynamics Log | | | | | |
| ApiSettings | | | | | |
| Applied Transactions | | | | | |
| Appointment | - | | | | |
| SharePoint site The selected SharePoint site will be used as the default site for document mar SharePoint Site: | nagement. |] | | | |
| Next | <u>C</u> ancel | | | | |

3) Enable the Checkbox 'Based on Entity' \rightarrow Select either of the entities, Account or Contact.

| Document Management Setting | s - Google Chrome | - 🗆 × | | | | |
|---|-----------------------|---------------------|--|--|--|--|
| inogicdemo.crm8.dynamics.com/WebWizard/WizardContainer.aspx?Wizar | | | | | | |
| Document Management Settings | | | | | | |
| https://inogicdemo.sharepoint.com/sites/teamhierarchy is a valid URL. | | | | | | |
| Select folder structure To create a folder structure based entity. Folders will be created on records. | | | | | | |
| Based on entity | Contact 🔻 | | | | | |
| | Account | | | | | |
| | Contact | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | Dest: | | | | | |
| | <u>B</u> ack <u>N</u> | Next <u>C</u> ancel | | | | |

4) Next, go to Entity Configurations \rightarrow Click on New.

| \blacksquare Save & Close + New α'^{a} Flow \vee | | | | |
|---|--|--|--|--|
| New Entity Configuration | | | | |
| General Email Configuration | | | | |
| Connector * | | | | |
| Entity Name *Select | | | | |
| Attachment Action | | | | |
| Override Files | | | | |
| | | | | |
| Error Logs | | | | |
| | | | | |

- 5) Populate the following fields \rightarrow Click on Save.
 - a. Connector: Select the connector for the particular SharePoint site
 - b. Entity Name: Select the entity.
 - c. Attachment Action: Select either move or copy
 - d. **Override Files:** Enable the checkbox if required
 - e. **Folder Structure Fields:** This field appears on selection of the entity for which hierarchy structure is configured. In this field, customized entity with Account or Contact lookups will be populated. Select either of the entities.

| y Configuration | guration Related |
|-----------------------|--------------------------|
| Connector | * 🍄 SharePoint Hierarchy |
| Entity Name | * Opportunity |
| Attachment Action | Move |
| Override Files | |
| Folder Structure Fiel | d* Account |
| | |

 Now go to Opportunity → Select an opportunity → Click on Attach2Dynamics button → Drag and Drop required file.

| Interested in C2C - Opportunity · Opportunity | | | | | | Est. | . Close E |
|---|-----------------------|---|-------------------------|------------|--------------------|------|-----------|
| Opportunity Sales Process Active for 3 months | < | Attach2Dynamics | | | | | × |
| Summary Template | Product Line Items | SharePoint : SharePoint Hierarchy 🔻 | | | | ۹ | |
| Торіс | * 1.1 | Interested in C2C -Copy_17E | Interested in C2C -Copy | y_17ED4C48 | 4A30EA11A813000D3A | ۲ | |
| юріс | * Interested in C2C - | 🕇 upload 🔻 🥹 download 🖋 rename 🖾 email 👻 & copy lin | K ▼ + CREATE FOLDER | | | | |
| Contact | | Name | | Size (KB) | Modified On | | |
| Source Opportunity | Interested in C20 | This folder is empty. Upload documents here. | | | | | |
| Cloned Quote | | | | | | | |
| Cloned Opportunity | Interested in C20 | W | | | | | |
| Account | 🔁 A. HARRIS PERS | | → Move | | | | |
| Potential Customer | * 🖪 A. HARRIS PERS. | , | | | | | |
| Purchase Timeframe | | Drop files | here. | | | |] |
| Currency | * 🛞 US Dollar | | | | Car | ncel | |

 Next go to SharePoint site. Here, the respective file will be stored in the following manner: Account > Account Name_guid > Opportunity > Opportunity Name_guid.

| ::: SharePoint | | ද් ¹ @ ? <mark>(</mark> S |
|---|--|--------------------------------------|
| C COMMhierarchy Home Documents Pages Site content | Edit | ★ Following 🖻 Share |
| $ ho$ Search Account + New \sim $\overline{\uparrow}$ Upload \sim | 🖉 Quick edit 🥴 Share 🔏 Copy link 👶 Sync 🛓 Download 🖷 Export to Excel 🌼 PowerApps 🗸 ୶ Flow 🗠 \cdots | = All Documents 🗠 🍸 🕕 🧷 |
| Account > A- HARRIS PERSAUD - SONS_56 | 0946DEABF7E8119863534E57000000 > opportunity > Interested in C2C -Copy_17ED4C484A30 | DEA11A813000D3AF025D7 |
| 🗋 Name 🗸 | Modified \checkmark Modified By \checkmark + Add column \checkmark | |
| Clinet A.docx | A few seconds ago Sam | |
| | | |

Security Templates

Security Templates Entity enables to control access given to the users over various features of Attach2Dynamics such as Upload, Download, Email, Copy Link, Rename etc. in all three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

Note: If two records are created for the same user then the user will get highest access permission from either of the records.

1. General

This section is where you define the name of record and the connector to a particular cloud storage.

| SECURITY TEMPLATE New Security Template | Owner * | |
|--|---------|--|
| General Permissions | | |
| | | |

Populate the given fields and save the changes. After the changes are saved you need to select users to whom this security template should apply.

| SECURITY TEMPLATE Access | | Owner 이 오 San | ۰ ۲ P | |
|-----------------------------|-------------|------------------|----------------------------|----|
| General Permissions Related | | | | |
| Name * Access | Users | | 🖄 Add Existing User \cdots | |
| Connector * 🖓 SharePoint | ✓ Full Name | ↑ Site | Business Unit Titl | le |
| | ⊙ Sam P | | forgear | |
| | | | | |
| | 4 | | |) |
| | | | | |

2. Permissions

Next tab is **Permissions** which comprises of all the Attach2Dynamics features. To provide access to Attach2Dynamics features just enable the checkbox given against each and every feature.

| Access | | |
|-----------------------|---------------|----------|
| , cccss | | © |
| I Permissions Related | | |
| | | |
| | Email | |
| oload 🖉 | Copy A Link | X |
| ownload 🗌 | Create Folder | |
| | Delete | V |

Note:

- If no template is created for a user, then all the features would be enabled except the Delete feature.
- For Delete feature a Security Template is must.

Bulk Migration Jobs

Bulk Migration Job Entity enables users to configure the bulk movement of the attachments from CRM to the configured cloud storage and also it shows the details and status of the migrating Emails, Notes and Sales Literature Attachments.

Note:

- Users are advised to do the migration during off business hours for minimum interruption as there may be bulk of data to be moved.
- Only the Entities where the Attachment Action is defined as Move in the Entity Configuration will be considered for Bulk Migration.

1. General

This section is where you define the period and Email/Note/Sales Literature attachment we are moving to cloud storage.

| BULK MIGRATIC Emails - La | JOB Ist X Weeks | _ | Status Reason Scheduled | | ^{Owner} ❷ ႙ John Sam |
|------------------------------|-----------------------------------|---|----------------------------|--------------|----------------------------------|
| eral Information | Bulk Migration Job Status Related | | | | |
| For ? | * Emails | | Operator | * Last X Wee | ks |
| Connector | * ゆ SharePoint_TeamSite | | Value | * 2 | |
| Schedule Date | * 09-08-2019 🛗 13:30 | G | | | |
| Attachment Action | * Move | | | | |
| | | | | | |

- 1. For ?: This specifies whether we are doing Bulk Migration for Emails, Notes or Sales Literature.
- **2. Connector:** In this field we specify the connector support i.e. SharePoint, Dropbox or Azure Blob Storage.
- 3. Schedule Date: Scheduled date keeps track of the date from which the migration job will start.
- 4. Attachment Action: In this field we specify the action ie. Copy or Move.
- 5. Operator: In this field we specify the period for which we have to migrate Note/Email Attachment/Sales Literature Attachments to cloud storage. Here, X repesents Numeric Value. For
 - e.g. Last 10 days, Last 3 weeks, etc. where the number 10 and 3 specifies the Value.
 - a) Last X Days: Specifiy data of how many(X) days has to be migrated to cloud storage.
 - **b)** Last X Weeks: Specify data of how many(X) weeks has to migrated to cloud storage.
 - c) Last X Months: Specifies data of how many(X) months has to be migrated to cloud storage.
 - d) Last X Years: Specifies data of how many(X) years has to be migrated to cloud storage.
 - e) Older Than: This moves all the Notes/Email attachments prior and inclusive of the date to cloud storage.
 - f) **Custom:** This specifies the period **Process From** date to **Process Till** date between which the data is to be moved to cloud storage.

Note: The Notes and Sales Literature Attachments will be moved to their corresponding record folder and Email attachments will move to a common folder named **Email Attachment or Regarding Folder**.

2. Information

| BULK MIGRATION Emails - Las A Read only | t X Weeks | Poland | Status Reason Completed | Owner © ႙ John Sam |
|---|---------------------------|---------|------------------------------|-----------------------|
| General Information | Bulk Migration Job Status | Related | | |
| Total Records Processed | 161 | | | |
| Last updated: | 08-09-2019 14:37 | | | |
| | | | | |
| Total Succeeded Records | 160 | | Total Succeeded Size (KB) | 46,234.85 |
| Last updated: | 08-09-2019 14:37 | | Last updated: | 08-09-2019 14:37 |
| Total Ignored Records | 1 | | Total Ignored Size (KB) | 0.89 |
| Last updated: | 08-09-2019 14:37 | | Last updated: | 08-09-2019 14:37 |
| Total Failed Records | 0 | | 🗄 Total Failed Size (KB) | 0.00 |
| Last updated: | 08-09-2019 14:37 | | Last updated: | 08-09-2019 14:37 |
| | | | | |

The next tab is **Information** which comprises the details of processed records.

- 1) Total Records Processed: Total number of Emails/Notes/Sales Literatures that are processed.
- 2) Total Succeeded Records: Total number of records that have successfully migrated to cloud storage.
- 3) Total Ignored Records: Number of records that were ignored.
- 4) Total Failed Records: Total number of records that failed in the process of migration.
- 5) **Total Succeeded Size (KB):** The size of records that were moved to cloud storage. This tells the Dynamics 365 CRM user how much space he has freed from the CRM.
- 6) **Total Ignored Size (KB):** This is the size of files that were ignored while migrating to cloud storage.
- 7) **Total Failed Size (KB):** Size of failed files while uploading to cloud storage.

Bulk Migration Job Status

| ≡ | Active Bulk N | Search for records | Q | | | | |
|---|---------------------|---|----------------|--------------------|---------------|----------------------------------|---|
| ~ | Bulk Migrati 🛛 🍸 | Name V | File Size (KB) | Record Url | Status Reason | ∇ Created On \downarrow | 7 |
| | Emails - Last X Wee | mountains_home_snow_peaks_95827_1600x1200_63 | 1,186.75 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |
| | Emails - Last X Wee | Image 6_637009313893501055.jpeg - 4,76,910.00 | 476.91 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |
| | Emails - Last X Wee | mountains_home_snow_peaks_95827_1600x1200_63 | 1,186.75 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |
| | Emails - Last X Wee | Image 5.jpg - 5,64,795.00 | 564.80 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |
| | Emails - Last X Wee | mountains_home_snow_peaks_95827_1600x1200_63 | 1,186.75 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |
| | Emails - Last X Wee | mountains_home_snow_peaks_95827_1600x1200_63 | 1,186.75 | https://map888.crm | Succeeded | 09-08-2019 14:26 | |

This Entity tells the status of the migration of Notes/Email Attachments/Sales Literature Attachments:

- 1) Name: Name of the attachment that is migrated to cloud storage.
- 2) File Size (KB): Size of the attachment file that is migrated to cloud storage.
- 3) **Record Url:** The URL of the attachment on Cloud Storage.
- 4) Status Reason: This is the status of the job whether it is successful, ignored or failed.

Note: At a time only three jobs can be executed, one for Note, one for Email and one for Sales Literature Attachment. After completion other jobs can be created.

Visibility of Attach2Dynamics button

Attach2Dynamics button is visible only if;

- 1) Logged in User is either has Attach2Dynamics User or Attach2Dynamics Administrator role
- 2) Entity Configuration record exists for that entity.

Use of Attach2Dynamics

Once Entity Configuration record is created user can start using Attach2Dynamics.

Let's take an example of Lead entity. Suppose Entity configuration record for Lead entity with SharePoint connector is created.

| New Entity Config | Owner 🗸 | |
|----------------------|----------------|--------|
| General Email Config | uration | |
| Connector | * 🍄 SharePoint | |
| Entity Name | * Lead | \sim |
| Attachment Action | Move | |
| Override Files | × | |
| | \searrow | |

Attach2Dynamics button will be seen in the Command bar.



On Click of the button, Attach2Dynamics window opens.

| Attach2Dynamic | CS | | | | | |
|----------------------------|------------------------|---------------------------|---------------------|-----------|-------------|---|
| Azure Blob Storage | iharePoint Dropbox | | | | | |
| Azure Blob Storage : Azure | : Storage 2 🔻 | | | | | (|
| Canvas Ptv-Ltd_E4D7107B | | | | | | |
| ↑ UPLOAD - ↓ DOWN | iload 🖋 rename 🖾 email | . ≠ o ^o copy a | .INK → + CREATE FOI | LDER | | |
| Name | | | | Size (KB) | Modified On | |
| | | | | | | |
| | | | | | | |

Below are the features:

- a) Drag and Drop Files and Folders: Users can drag and drop multiple files and folders at one time to SharePoint, Azure Blob Storage or Dropbox from Dynamics 365 CRM. *Note: Drag & Drop of files and folders is not supported in IE.*
- **b)** Upload: Users can upload multiple files and single folder at a time using the solution. They get user-friendly UI to see the list of files uploaded on SharePoint, Azure Blob Storage or Dropbox against the current record. Upload Folder through button is not available on IE.
- c) Download: Users can get access to all documents of required storage system and download them. Bulk download of files is possible.

Download of folder is not supported for SharePoint and Azure Blob Storage but is available for Dropbox.

- **d) Rename:** Users have the option to rename the documents by selecting the required files and folders. However, in Azure Blob Storage user can rename only files not folders.
- e) Copy Link: Users can simply copy and paste the generated link for the selected document using this option when required to be sent outside the Dynamics 365 CRM.

If only **View** is selected then the document is available in read only mode whereas, if **Edit** mode is selected then the document is available for editing.

For Dropbox, only View mode is available. This feature is also available in Azure Blob Storage.

- f) Create Folder: Users can create the folder for all three cloud storages.
- g) Deep search Tab: Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search for files or folders based on your current path. If you are currently in a "/A.Datum/Sample" path and if there are more folders/files inside that path, if you search for any keyword it'll scan till the last file and folder and return the result. Azure Blob Storage does not support deep search but user can search within the current folder.
- h) Move/Copy Dynamics 365 CRM Attachments: Users can move/copy Dynamics 365 CRM Notes Attachments/Email Attachments and Sales Literature Attachments to Dropbox, SharePoint or Azure Blob Storage.
 - a. Notes:

If enabled, it'll move/copy the Note Attachments to the respective entity folder and leave a path in the Note Body.

| | PH Peter Houston (sam | nple) | | | | |
|----|---|----------------|------------|--|---------|----|
| | d to Opportunity Sale ve for 2 minutes | Qualify (2 Mir | 1) | 🔒 Develop | Αp | ro |
| Su | mmary Tab Details Relat | ed | | | | |
| - | First Name + | | TODAY | | ↓ ① | |
| | Last Name * | | | Note modified by - Just now | | |
| | Peter Houston (sample) | | | https://caomobiles.sharepoint.com/lead Hous | l/Peter | |
| | Owner | | | 🗎 Delete 🖉 Edit note | \sim | |
| | Business Phone | | F 8 | Auto-post on wall: Peter Houston (sam Just now | iple) - | |

b. Email Attachments:

If enabled, it'll move/copy the Email Attachments to a common folder called Email Attachments or Regarding folder and leave a path in the Note Body.

| | | namics Form ∨ CRM:0001099 | Priority Normal | Due 📅 | ~ |
|---|--|------------------------------|--------------------|---|---|
| - | mail Related | | | | |
| | From | ႙ John Sam | | Attachment | |
| | То | Canvas Pvt LTD | | | |
| | Cc | | | No data ava | ilable. |
| | Bcc | | | Timeline | + … |
| | Subject | Sales Files CRM:0001099 | | Enter a note | Û |
| | | | | TODAY | ↓ 0 |
| | Hi. | | | Note modified by John | Sam - 5 Minutes ago |
| | rii, Please find attachment Thanks, Sam | E | | File Name : Capture - C https://www.dropbox.co as Pvt | om/home/account/Canv 1A97C000D3AF03D2E/E |
| | | | | 🗊 Delete 🖉 Edit | note 🖂 |

c. Sales Literature Attachments:

If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a path back in **Cloud Storage Links** section.

| Dynamics 365 | ✓ Sales > Sales Literature > Product Catalog | ی م | g ð | + 7 🛛 | ? John Davis \$ |
|--|--|--|-------------|--------------------|---------------------------|
| = | ⊘ + New | 🖒 Refresh 🚯 Process 🗸 🕨 Send as Emai | ail 🛛 🕅 Ema | il a Link 🖉 Flow 🗸 | 🕼 Word Templates \vee 🛛 … |
| in Home in Recent in Pinned in My Work | Sales Literature: Attach2Dynamics Form V Product Catalog General Related | | | Expiration Date | . · |
| Dashboards Activities Customers Accounts | INFORMATION Trie Product Catalog Subject Default Subject | SALES ATTACHMENTS Customer Product Catalog 4/22/2019 11:58 AM | | PRODUCTS | La available. |
| R Contacts Sales Velocity Velocity Leads Image: Opportunities R Competitors Velocity | Type Policies And Procedures Description 2018 Catalog for Products | CLOUD STORAGE LINKS FileName : Customer Product Catalog Catalog_7D5E7CAFC764E911A82A00003 8E/Brochwerdeox | 3A1D9F | COMPETITORS | data available. |

i) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

| Dropbox SharePoint SharePoint : Sharepoint 1 ▼ Canvas Pvt Ltd_95002669D8 | | New Location Canvas New Location Canvas |
|--|----------------------------|---|
| Name This folder is empty. Upload doo | uments here. | Canvas Pvt Ltd_95002669D8A3E911A95A000D3AF06CD4 |
| | Drop f | ïles here. |
| | | |
| Email: Users also have an or Attachment. | option to send an email. T | here are two options for this – send as Lin |
| | | |

| Attach2Dynamics | | | |
|--------------------------------------|------------------------------|---------------------------------|--------------------|
| SharePoint Dropbox | | | |
| SharePoint : SharePoint_1 🔻 | | | |
| Alpine Ski House_AAA19CD / Deal - Al | fa | Alpine Ski House_AAA19CDD88DFE3 | 11B8E56C3BE5A8B200 |
| ↑ UPLOAD - ↓ DOWNLOAD 🖋 RENA | ame 🗹 email 🔻 🔗 copy a 🛛 ink | ▼ + CREATE FOLDER | |
| Name | Attach Documents | Size (KB) | Modified On |
| ✓ M Alfa.docx | 0 LINKS | 19.43 | 7/1/2019 12:33 PM |
| Beta.docx | | 20.70 | 7/11/2019 5:32 PM |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

1) Links: On selecting this option you can insert the file's/folder's link in the email body. The below window opens on choosing the option 'Link' with link of file in email body.

| Email R | elated | | | | |
|-----------------------|----------------------------|-------------------------|--------------------|------------|--------------|
| Bcc | | | | | |
| Subje | ct | | | | |
| | | | | | |
| Designe | r HTML | Preview | 5 | Ç | 2 |
| × | - (= (W | | | Q, b*à ≣ | I∣₊¶ ¶₊∣œ o |
| | Β <i>Ι</i> Δ- Ω | <u>U</u> S > | k₂ x² <u>I</u> x | Styles | ▪ Format ▪ |
| Links <u>Today</u> | generated b <u>Atxt</u> | oy Attach2D | ynamics - |] | |

2) Attach Documents: On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'

| Priority Normal | ~ |
|--------------------------------------|---|
| Attachment Today.txt No 252 | |

Note: Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

k) Access Control of the Action: Control the access given to users over various features of Attach2Dynamics such as Upload, Download, Email, View Files, Delete, Create Folder, Copy a Link and Rename.

| SECURITY TEMPLATE Access | Owner © උ Sam P |
|-----------------------------|--------------------|
| General Permissions Related | |
| All | Email |
| Upload 🖉 | Copy A Link 🖉 |
| Download 📃 | Create Folder |
| View Files 🖉 | Delete 🖉 |
| Rename | |
| | |

I) Support for uploading files from Home Page: Upload files from home page directly for the selected records.

| Dynamics 365 | CRM Hub CORE > Accounts | | ନ ଓ ଓ + ୮ |
|--|-------------------------------------|---|--|
| = | 🛱 Show Chart 🥒 Edit 📑 Activate 🗋 De | eactivate 🕼 Attach2Dynamics 🛍 Delete | $ $ \vee $\stackrel{:=}{\to}$ Add to Marketing |
| ☆ Home ③ Recent ∨ | All Accounts ~ | | |
| Pinned My Work | ✓ Account Name | \mathbb{Y} Main Ph \mathbb{Y} Address | $\nabla \Big $ Primary Contact $\nabla \Big $ |
| Activities | ✓ Fourth Coffee (sample) | 555-0150 Renton | Yvonne McKay (sample) |
| 빠르 Dashboards | ✓ Litware, Inc. (sample) | 555-0151 Dallas | Susanna Stubberod (s |
| Customers | ✓ Adventure Works Pvt. Ltd. | 555-0152 Santa Cruz | Nancy Anderson |
| Accounts Contacts | ✓ Fabrikam, Inc. (sample) | 555-0153 Lynnwood | Maria Campbell (samp |
| | Blue Yonder Airlines (sample) | 555-0154 Los Angeles | Sidney Higa (sample) |
| | ✓ City Power & Light (sample) | 555-0155 Redmond | Scott Konersmann (sa |

| | Dynamics 3 | 365 、 | ~ (| CRM Hub | CORE > Accou | nts | | م | Q | Ŷ | + | 7 | \$\$ |
|------------------|------------|--------|--------|-------------------|----------------------|-------------------------|-----------------------|------|-------|---------------------|-----|-----------------|-------------------|
| = | | | 🛱 Shc | Attach2 | Dynamics | | | | | | | | × _{sign} |
| í ش | Home | | | SharePoint | Azure Blob Stora | age Dropbox | | | | | | | - 81 |
| L F | Recent | \sim | | SharePoint | : APoint2 🔻 | | | | | | | | - 11 |
| s? I | Pinned | \sim | | ↑ UPLOA | ↓D ▼ | | | | | | | | ary . |
| My W | Vork | | | Name | | ¢ | | Open | | | | | × |
| Ê / | Activities | | ~ | This folder | is empty. Upload doc | € ∋ - ↑ 🎚 | ≪ Deals → Deal - Alfa | ~ ¢ | Searc | h Deal - A | lfa | م ر | Dexa |
| <u>네트</u> 6년~ | Dashboards | | ~ | | | Organize 🔻 Ne | w folder | | | | - | | Dexa |
| Custo | omers | | ~ | | | ★ Favorites ■ Desktop | ▲ Name | * | | Date mo 5/14/201 | | Type M Micro | Dovo |
| | Accounts | | ~ | | | Downloads Recent places | | | | | | | Dexa |
| 8 0 | Contacts | | · ~ | | | 1 This PC | | | | | | | Dexa |
| | | | | | | 🗣 Network | v < | | | | | | > |
| | | | ~ | | | | File name: | Ŷ | All F | iles | | ~ |)exa |
| | | | All | | | | | | | Open | | Cancel |] |
| _ | | | 1 | 10 01 10 (0 58186 | eu | | | | | | | Close | - 1 |

m) Delete: Users can delete files from all the three cloud storages. The details of these deleted files is then stored in the Log Entity. To view the same navigate to Attach2Dynamics→Logs→Deleted File Status.

| Attach2Dyr | namics | | | | | |
|--|---|--------------|--------------------|----------------|------------|---------|
| SharePoint | Dropbox | | | | | |
| SharePoint : Share | ePoint_1 ▼ | | | | | |
| Alpine Ski House_ | AAA19CD / Deal - Alfa | | Alpine Ski House_A | AA19CDD88DFE3 | 11B8E56C3B | E5A8B |
| ↑ UPLOAD - | 🕹 download 🖋 rename 🖾 email 🔻 d | 𝔗 COPY A LIN | ik ▼ 🕂 CREATE FOL | DER | | |
| Name | | | | Size (KB) | Modified C | n |
| Alfa.docx | ¢ | | | 19.43 | 7/1/2019 | 9 12:33 |
| 😤 🖻 Beta.doc | х | | | 20.70 | 7/11/201 | 19 5:32 |
| | | Drop files h | iere. | | | |
| | | Drop files P | iere. | | | |
| | | Drop files h | iere. | | | |
| LOG | | Drop files P | iere. | Owner | | |
| ≝n LOG Solution - | SharePoint | Drop files h | iere. | Owner © Q S | am P | |
| EOG COUNT - eneral File Details | | Drop files ł | iere. | | am P | |
| - | | | iere. | | am P | |
| eneral File Details | Related AAA19CDD-88DF-E311-B8E5-6C3BE5A8B20 | | iere. | | am P | |
| eneral File Details | Related AAA19CDD-88DF-E311-B8E5-6C3BE5A8B20 | | | | am P | |
| Eneral File Details A Record Id Entity Configuration | Related AAA19CDD-88DF-E311-B8E5-6C3BE5A8B20 AAA19CDD-88DF-E311-B8E5-6C3BE5A8B20 | | | | am P | |

The user can get complete information such as **Deleted On, Deleted By, File Name** etc. from the log.

(n) View Files: User can preview necessary files with a single click before downloading it. This feature is available only in SharePoint and Dropbox.

Embedded Attach2Dynamics

It is possible to add Attach2Dynamics tab embedded in Entity record page directly without having to open it from the **Ribbon Button**.

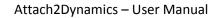
Go to Settings -> Customizations -> Customize the System

A Default solution will open. Here are the steps how to create embedded tab in the Form of a particular Entity.

a) On the left pane go to **Components -> Entities**

| File | 🖹 🥰 Show Dependencies 🛛 📮 Expo | ort Solution 🏾 🙀 Translations 🕶 🛛 👔 | Publish All Customizations | <u>∕&A</u> ctions - | |
|--|--------------------------------|-------------------------------------|----------------------------|------------------------------------|--------------|
| Solution: Default Solution | | | | | |
| Solution Default Solution | Component Type All | | • | | |
| Components | New 🗸 🗙 Delete 🛛 🚺 Publish | 📲 Show Dependencies 🛛 😭 Manag | ged Properties | | |
| Account | □ Display Name ↑ | Name 1 | Гуре | State | Customizable |
| Views | | organization_featuree | Option Set | Managed | False |
| Fields | | flipswitch_options | Option Set | Managed | False |
| a 1:N Relationships | | subscriptionstatisticso | Option Set | Managed | False |
| N:N Relationshi Messages | | sdkmessage_autotran | Option Set | Managed | False |
| Business Rules | A Yes or No boolean | field_security_permissi | Option Set | Managed | False |
| Dashboards 🕼 🖓 Dashboards | Account | account | Entity | Managed | True |
| Accounting Company Action Card Action | Account Distribution | Account Distribution | Report (Reporting Ser | Managed | True |

b) Expand the Entity Drop Down and Select Forms for the Entity you want to create embedded tab for.



| Account | | | | | |
|---------------------------------------|------------------------------------|----------------|----------------------|------------------|-----------------|
| Solution Default Solution | System Forms Active Forms V | | | | |
| Components | New 🗸 🗙 Delete 🛛 🚳 Enable Security | Roles 🛛 📑 Form | n Order 👻 🧝 Activa | ate 🛛 🦓 Deactiva | te More Actions |
| Account | Name | Form State | Form Type 🛧 | State | Customizable |
| Charts | Account Card form | Active | Card | Managed | True |
| Fields | Account for Interactive experie | Active | Main | Managed | True |
| 1:N Relationships | Account - Mobile | Active | Main | Managed | True |
| N:N Relationshi | AI for Sales | Active | Main | Managed | True |
| Business Rules | Account | Active | Main | Managed | True |
| Dashboards ▷ 🍓 Account Project Pri | Account Quick Create | Active | Quick Create | Managed | True |

c) Under the Active Forms Select any Name for which Form Type is Main.

| Account | | | | | |
|----------------------------------|---------------------------------|---------------|------------------------|----------------|-------------------|
| Solution Default Solution | System Forms Active Forms v | | | | |
| Components | New - X Delete Security | Roles 🛛 🔂 For | rm Order ▾ │ 🤔 Activat | te 🍂 Deactiv | vate More Actions |
| Tiews | Account Card form | Active | Card | Managed | True |
| Fields | Account for Interactive experie | Active | Main | Managed | True |
| 1:N Relationships | Account - Mobile | Active | Main | Managed | True |
| N:N Relationshi | AI for Sales | Active | Main | Managed | True |
| Business Rules 🖧 Hierarchy Setti | Account | Active | Main | Managed | True |
| Dashboards 👔 🗟 🕞 🕞 | Account Quick Create | Active | Quick Create | Managed | True |

d) The **Forms** Window will open. Go to **Insert** tab and insert **One Column Tab** and insert it anywhere on the form framework.

| FILE HOME INSERT | | | | |
|--|---------------------------------|-------------------|--|--------------------------------------|
| | | Web Resource | 💀 🖗 📑 👘 😇 🔤 🔝 | |
| Section Three Three Two Columns Columns Columns | Two Two One Sup-Grid ! | | ACI Relationship Predictive Lead P Link Insights Timer Knowledge Base ACI Relationship Predictive Lead P Control Assistant Scoring | Predictive Opporunity Scoring |
| 3 Tabs | 2 Tabs 1 Tab | ©≓ Innenne | Control | |
| Account for Interactive | Solution: Default Solution | on | | Field Explorer |
| _ Summary | Form: Account | | | |
| L Details | | | | Filter All Fields |
| ▲ Common | ⁴ Summary | 1 | | Only show unused fields |
| Activities | ACCOUNT INFORMATION | TIMELINE | RELATED | Account Number |
| Social Profiles | Primary Contact | Conversation Tabs | CONTACTS | Account Rating |
| Contacts | Account Name * Account Name | | | Accounting Edit Sequence ID |
| Documents | Phone Main Phone | | | Address 1: Address Type |
| Audit History | | | | Address 1: City |
| Entitlements | Fax Fax | | | Address 1: Country/Region |
| Account Project Pri | Website Website | | | Address 1: County |
| Projects | Primary Contact Primary Contact | | | Address 1: Fax |
| Billed Accounts | | | | Address 1: Latitude |
| Actuals | Parent Account Parent Account | | | Address 1: Longitude |
| Billed Agreements | Address 1 Address 1 | | Recent Opportunities | Address 1: Name |
| By Agreements | | | Recent Opportunities | Address 1: Post Office Box |
| Customer Assets | L | -4 | | Address 1: Primary Contact Name |
| Payments | | | | New Field |
| Purchase Orders | | | | |
| | | | ACTI | IVE ENTITLEMENTS IVE ENTITLEMENTS |
| [▲] Tab | | | | |
| Section | | | | |
| | | | | |
| | | | |] |
| | | | | |
| | | | | |

e) Go to Home and click on Change Properties.

P a g e 47 of 56

Attach2Dynamics - User Manual HOME INSERT 🗌 Header <u> S</u>ave As 🕤 Undo 🚳 Enable Security Roles 2 Pedo 🤊 Save and Close Footer Real Show Dependencies Save Change Properties Body Business Form Rules Properties Preview Merge Forms emove Navigation Kanaged Properties 👌 Publish -Edit Form Save Select Upgrade Solution: Default Solution **4** Account for Interactive... L Summary Form: Account _ Tab L Details ▲ Common 📝 Activities Social Profiles 🚺 Contacts Documents 🔊 Connections Audit History 🚽 Tab Entitlements nt Pri

f) A tab **Properties Window** will be landed. In **Name** and **Label** enter the name you want to be displayed in the tab on Entity record page. Click on OK.

| Specify a un | ique name. | |
|------------------|---|--|
| *Name | tab_8 | |
| *Label | Attach2Dynamics | |
| Show t | he label of this tab on the Form | |
| Expand | this tab by default | |
| 🕑 Visible by d | erouit | |
| | | |
| — Availability – | ault availability of this tab on phone. | |
| - Availability - | | |
| - | | |

| General Formatting De | pendencies | | | | | |
|---|---------------------------|--|--|--|--|--|
| Layout | | | | | | |
| Select the number of colun | ins the control occupies: | | | | | |
| One column | | | | | | |
| Two columns | | | | | | |
| Three columns | | | | | | |
| Four columns | | | | | | |
| Row Layout | | | | | | |
| Select the number of rows | the control occupies | | | | | |
| | - | | | | | |
| Number of Rows 20 Image: Automatically expand to use available space. | | | | | | |
| <u> </u> | | | | | | |

g) Go to Insert tab and click on Web Resource.

| FILE | HOME | INSER | т | | | | | | | | | | | |
|------------|------------------|------------------|----------|----------------|----------------|---------------|-----------|--------|--------------------|--------------|--------------|--------------------|--------------------|----------------|
| Section | Three Columns | Three Columns | Two | Two Columns | Two Columns | One Column | Sub-Grid | Spacer | Quick View Form | Web Resource | Bing Maps | Navigation Link | Social Insights | Ö Timer Kno |
| | 3 Ta | bs | | 2 Tabs | | 1 Tab | | | | | | | C | ontrol |
| ⊿ Acco | unt | | | -2 | Soluti | on: Defa | ult Solut | ion | | | | | | |
| _ Sum | mary | | | - | Form: | Acc | ount | | | | | | | |
| _ Atta | ch2Dynami | cs | | 1.11 | | | | | 8.3 | | | | | |
| _ Acco | ounting Det | tails | | | | | | | | | | | | |
| _ Map | | | | | | | | | | | | | | |
| _ Deta | | | - | | | | | | | | | | | |
| | ect Price Lis | :ts | | | | | | | | | | | | |
| ⊿ Com | | | A | | | | | | | | | | | |
| 🔀 A | Activities | | | | | | | | | | | | | |
| 9 | Social Prof | ïles | | | | | | | | | | | | |
| <u>s</u> (| Contacts | | | Atta | ch2Dynan | nics | | | | | | | | |
| <u></u> | Connectio | ns | | Sectio | | | | | | | | | | |
| | Document | 5 | | | | | | | | | | | | |

h) In Web resource field enter ikl_/Attach2Dynamics/Library/index.html

In Name and Label enter the name you want to be displayed.

Scroll down and check the **Pass record object-type code and unique identifier as parameters** box. Click on **OK**.

| Web resource | | dex.html 🗖 |
|---|---------------------------------------|------------|
| Field Name | and Properties | |
| Name * | WebResource_ Attach2Dynamics | |
| Label * | Attach2Dynamics | |
| U Display la | bel on the Form | |
| Uisibility — ✓isibility — ✓Visible by ✓Enable fo | default | |
| Visibility — Visible by Enable fo | default | |
| Visibility — Visible by Enable fo | default • mobile rce Properties | |

i) Go to Home and Save then Publish.

j) Now navigate to **Entity** (for which you have configured the Form) and open a record. Scroll down and you can see your desired tab embedded in the page.

| Account: Account \checkmark Bruce PVT LTD | Annual Revenue | Nur | mber of Employees |
|--|--------------------------------|---------------------------|--------------------------------------|
| Bruce PVI LID | | | |
| | | | |
| ary Attach2Dynamics Details Related | | | |
| | | | |
| | | | |
| SharePoint Azure Blob Storage Dropbox | | | |
| SharePoint : APoint2 - | | | ٥ |
| Bruce PVT LTD_AE38601C25 | Bruce PVT LTD_AE3860 | 01C259EE911A981000D3AF249 | 950 × |
| | COPY A LINK ▼ + CREATE FOI DER | | |
| TUPLOAD - UDOWNIOAD / RENAME M EMAIL - | | | |
| ↑ UPLOAD 🔻 🕹 DOWNLOAD 🖋 RENAME 🖾 EMAIL 👻 | | Size (KB) | Modified On |
| ↑ UPLOAD ▼ ↓ DOWNLOAD | 40 | Size (KB) | |
| | | Size (KB) | 04/07/2019 19:11 |
| Name | | 2.33 | 04/07/2019 19:11 11/07/2019 18:33 |

Log

This tracks any errors occurred during the functioning of Attach2Dynamics, details of files ignored during uploading and files deleted from cloud storages.

CDS: Add Notes section on the Email form

Step 1: Navigate to PowerApps and select your CDS environment.

| PowerApps | | | Environment New_CDS | × |
|---|-------------------------------------|---|---------------------------|---------------------------------------|
| = | | | | |
| 企 Home | Build business apps, fa | ast | | |
| 🛄 Learn | Create apps that connect to your da | ta and work across web and mobile. Le | earn about PowerApps | |
| ₽ Apps | Make your own app | | | |
| + Create | | | | |
| 🖩 Data 🗸 🗸 | | <u>A</u> | | |
| ₀∕ ^a Flows | I+ | <\$ ₊ | ⊕_+ | |
| ଂଟ୍ରି Al Builder (preview) $ \smallsetminus $ | | | | |
| Solutions | Canvas app from blank Canvas app | Model-driven app from blank Model-driven app | Portal from blank Portal | Start from data <i>C</i> anvas app |

Step 2: Enlarge the 'Data' section and click on Entities.

| | PowerApps | | |
|----|---------------|---|--|
| = | | + | - New entity $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$ |
| | Home Learn | | Entities |
| | Apps | | Entity \uparrow \checkmark |
| | Create | | Account |
| _ | create | | Address |
| ■ | Data ^ | | Appointment |
| Ιſ | Entities | | Attachment |
| | Option Sets | | Business Unit |
| | option sets | | Contact |
| | Dataflows | | Currency |
| | Connections | | Email |

Step 3: Select 'Email' entity and click on 'Forms'.

| | PowerApps | | | |
|---|-------------|--|----------------------------|----------------------------|
| = | | $+$ Add field 🛛 🏙 Edit data in Excel 🛢 Get data $ \lor \mapsto$ Export data | a 🔅 Settings | |
| ŵ | Home | Entities > Email | | |
| | Learn | Fields Relationships Business rules Views Forms Das | shboards Charts Keys | Data |
| ₽ | Apps | | | |
| + | Create | Display name \uparrow \checkmark | Name \checkmark | Data type \smallsetminus |
| Ħ | Data ^ | Activity Status | ··· statecode | ≡ Option |
| | bata | Actual End | ··· actualend | 🗊 Date Only |
| | Entities | Actual Start | ··· actualstart | 🗊 Date Only |
| | Option Sets | Additional Parameters | ··· activityadditionalpara | def Multilin |
| | Dataflows | Attachment Count | ··· attachmentcount | 123 Whole |

Step 4: Click on 'Add form' from the ribbon bar and choose the 'Main Form'.

| PowerApps | | |
|-----------|--------------------------|--|
| = | 🖬 Add form 🖂 🖾 Edit data | ata in Excel 🛭 🛢 Get data 🗸 🛏 Export data 🐇 Settings |
| 合 Home | Main Form | |
| 🛄 Learn | Quick View Form | |
| | Quick Create Form | Business rules Views Forms Dashboards Charts Keys Data |
| ₽ Apps | Card Form | |
| + Create | | |

Step 5: You will see the window shown below, enter Title and Description and click on the 'Switch to classic' button.

| | PowerApps | Form | | | | | | | | Environment New_CDS | ~ | → | Q I | 3 | ? |
|--------|-----------------------------------|---------------------------|--|---------------------|----------------------------|--|-------------|--------|--------------------------|------------------------|-----|-------------------------------------|-----------------------------------|------|--------------------|
| + | Add Field + Add (| Component | り Undo ぐ Red | lo 🔏 Cut 🛅 | Paste 🗸 | 🗊 Delete | Switch to o | lassic | | | | | Save | ~ E | 🖥 Publisł |
| | EMAIL New Email Email Notes | | | | Priority Normal | | Due 📰 | © | A Status Reason Draft | Owner * | For | | mamics | | |
| ⊞ ⊗ | From | | | | | | | | Attachment File Name | ↑ Followed File Size (| En | nail | | | |
| | Cc Bcc Subject | | | | | | | | | No data available. | 11 | Attach2D | ynamics | | |
| | Designer HTML Pre | view *> | < 2 | | | | | | | | | Attach2D of the att vithin no | ynamics fo ached file v tes | m wh | ere link showed |
| | | ■ ● # ■ • t • Fent | Α, ±3, ∰ +1, τ, αο ∞, ∰ - S2# - <u>Α</u> - [Ω]- Ω | · ■ ■ = = = + | ∉ B <i>I</i> <u>U</u> -5 | $\mathbf{x}_{\mathbf{x}} \cdot \mathbf{x}^{t} \mid \underline{\mathbf{f}}_{\mathbf{x}} \mid$ | | | Notes | | | x Width | (pixels) | | |
| | | | | | | | | | | | | Show i | mage 🛈 | | |

Step 6: Once you click on 'Switch to classic' button you will see the below screen, then navigate to **'Insert'** tab, select **'Notes'** section and click on **'Timeline'** button.

| PowerApps | | | | | |
|---|---------------------------------|---|--|------------|---|
| FILE HOMI INSERT | | | | | |
| Section Columns Columns | ns Columns Columns Column | -Grid Spacer Quick View Sesource Form Spacer Quick View S≡ Form S≡ Timeline | Bing Navigation Social Timer Knowledge t Maps Navigation Insights | © = | |
| 3 Tabs | 2 Tabs 1 Tab Solution: Commo | Data Services Default Solution | Control | | |
| Attach2Dynamics Email | Form: | Email | | | |
| L Notes | Description | | | | - |
| Common Documents Documents Alerts Connections Aulet History Sales Service Marketing Process Sessions Process Sessions | Cescription | | | Attachment | |
| | | | | | |
| | | | | | |

Step 7: Save and Publish the form. Now, navigate to Site map and create email. You will see the below screen, choose the form which you created with note section.

| \sim | ⊳ Send | 🔒 Save | 🕐 Refresh | Attach File | 🗅 Insert Template | 🖙 Insert Signature | 🛛 Process 🗸 | E Cor |
|--------------------------------|----------------|--------------|-----------|------------------|-------------------|--------------------|-------------|-------|
| ~ | | Email: Ema | \sim | | | Pric | ority | |
| Email: Email | | | ie | | | No | rmal | |
| Email: Attach Email: Wizard | - | | ed | | | | | |
| Email: Email f | for Interactiv | e experience | | | | | | |
| | Fro | m | <u>م</u> | john Davis | | | | |
| | То | | | A. Datum Corpor | ation (sample) | | | |
| | Cc | | | Alpine Ski House | (sample) | | | |
| | Bco | 2 | | | | | | |
| | Sul | bject | CD | S_Sample | | | | |
| | | | | | | | | |

Step 8: Once you select the form, you will get the below screen where you can see link of the attachment is saved within the note section.

| ŀ | Attach2Dynamics – User Manu | al |
|---|--------------------------------------|--|
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