



## User Manual

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## Introduction

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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

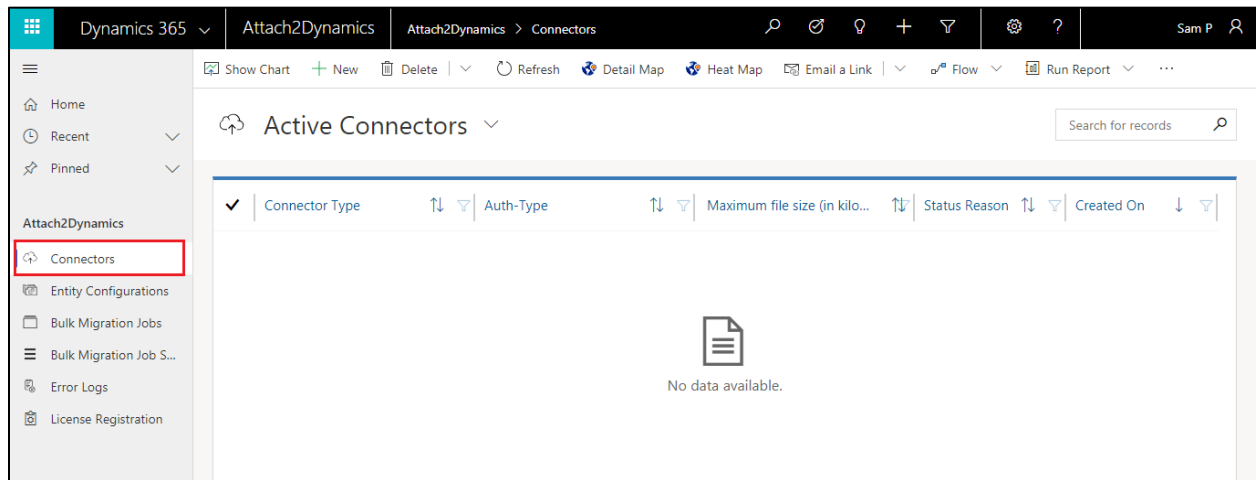
**SharePoint:** Online

**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.'**



## 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.




CONNECTOR

## New Connector


**General**
Credentials
Additional Settings
Entity Configurations

General

Name	*	SharePoint_1
Connector Type	*	SharePoint
Default Connector	<input checked="" type="checkbox"/>	
SharePoint Site	*	<div style="border: 1px solid red; padding: 2px; display: flex; align-items: center;"> <input style="width: 90%; border: none;" type="text" value="Look for SharePoint Site"/> <input style="width: 10%; border: none;" type="button" value="🔍"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Default Site</span> <span>▼</span> </div> <div style="display: flex; align-items: center;"> <span> https://[redacted].sharepoint.com</span> </div> </div>
Auth-Type	*	<input type="button" value="🔄 Change View"/>

**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 Authentication 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.



CONNECTOR

SharePoint\_1

**General**
Credentials
Additional Settings
Entity Configurations
Related

General

Name \* **SharePoint\_1**


---

Connector Type \* **SharePoint**

---

Default Connector

---

SharePoint Site \*  **Default Site**

---

Auth-Type \* 

Credential | ∨

--Select--
Credential
App

**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.

CONNECTOR  
SharePoint

General **Credentials** Additional Settings Entity Configurations Related

Id \* user@company.com

Password/Secret \* ZZZZZ HVPNF CRQUX VWAQM NBSW 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 Permissions

Id \* ---

Password/Secret \* ---

**Create Azure Active Directory App**  
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.



# Attach2Dynamics – User Manual

### SharePoint\_1

Connector

Unauthenticated  
Status Reason

General **Credentials** Additional Settings Entity Configurations Permissions Related

Id	* HoY2qe1MKnc+TvAQTNdTButy4KrAyhvnYYNDvP...
Password/Secret	* ZZZZZ BRSXF NXBIM QBNEU UCXSG LEURT UGSKJ

**Create Azure Active Directory App**  
In order to get Id and Secret Key please follow this [blog](#)

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.

### Attach2Dynamics

SharePoint

SharePoint : SharePoint\_1

Fyzher Technologies\_C738BE...

↑ **UPLOAD** ↓ DOWNLOAD RENAME EMAIL COPY LINK + CREATE FOLDER

Upload files or folder

Name	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

Drop files here.

Close

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

### SharePoint

Communication site

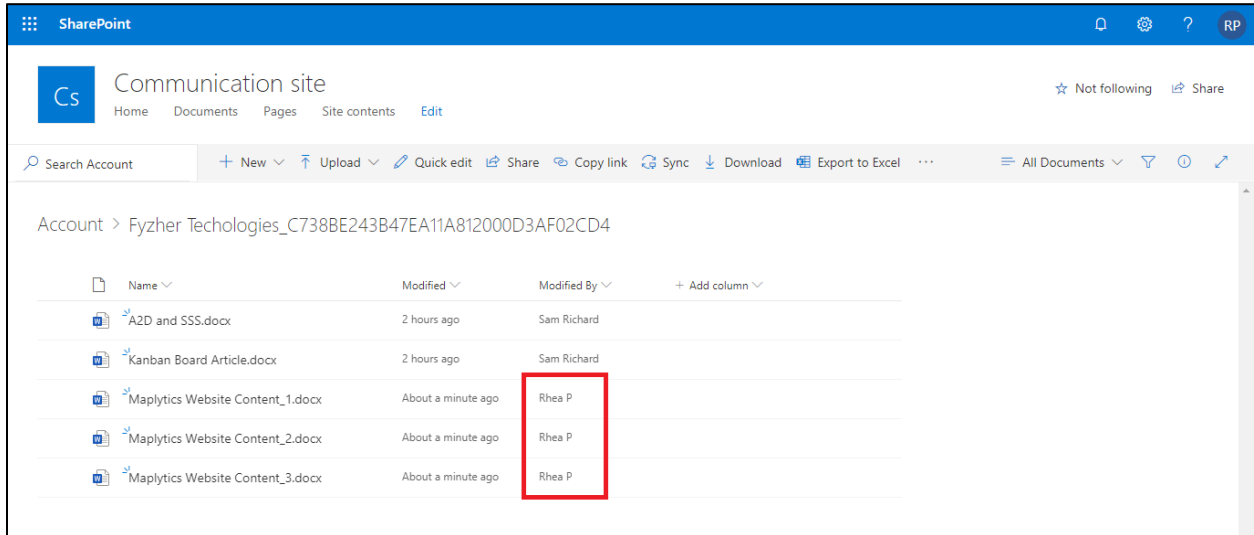
Home Documents Pages Site contents Edit

Search Account + New Upload Quick edit Share Copy link Sync Download Export to Excel ... All Documents

Account > Fyzher Technologies\_C738BE243B47EA11A812000D3AF02CD4

Name	Modified	Modified By	+ Add column
A2D and SSS.docx	2 hours ago	Sam Richard	
Kanban Board 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.



## Configuring Dropbox Connector

- Name:** Give name to the connector.
- Connector Type:** Choose **Dropbox** from the drop-down.
- Default connector:** If required, enable the checkbox to set Dropbox\_1 as default connector.

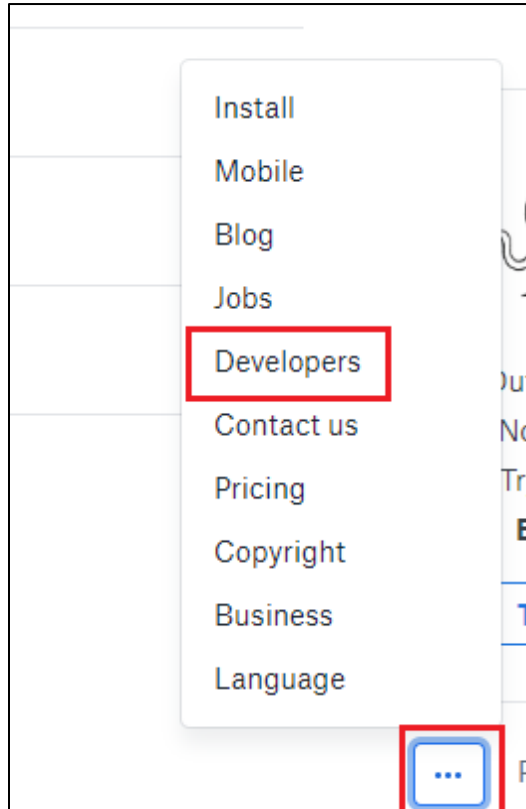
The screenshot shows the 'New Connector' configuration form. The 'Name' field is set to 'Dropbox\_1', the 'Connector Type' is set to 'Dropbox', and the 'Default Connector' checkbox is unchecked.

Field	Value
Name	Dropbox_1
Connector Type	Dropbox
Default Connector	<input type="checkbox"/>

**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:

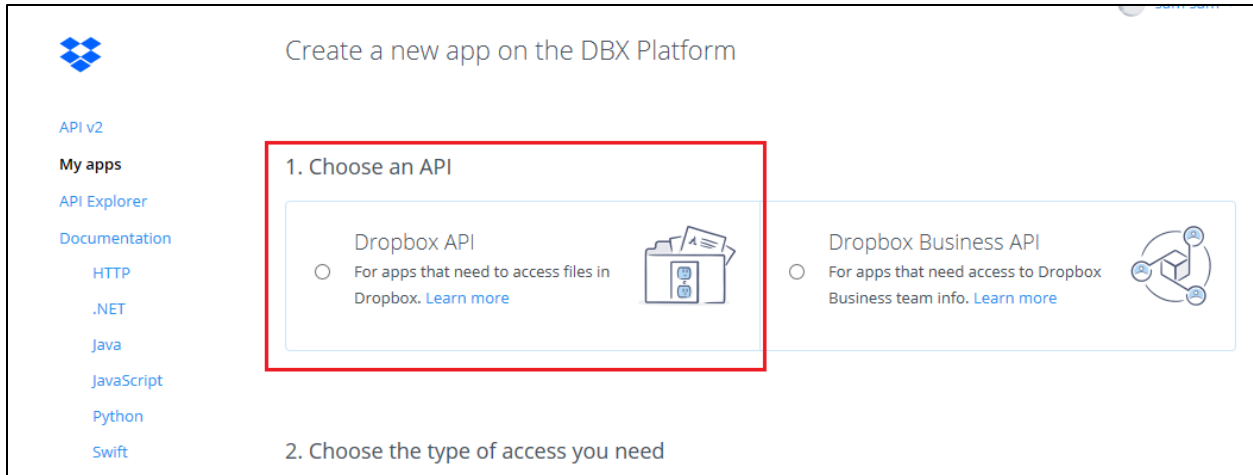
Go to [www.dropbox.com](https://www.dropbox.com) and enter your login credentials for Dropbox. After you are logged in you will land on the '**Home Page.**' At the bottom right corner of the screen click on the 'Points of Ellipsis (the three dots)' and then select **Developers** from the view.



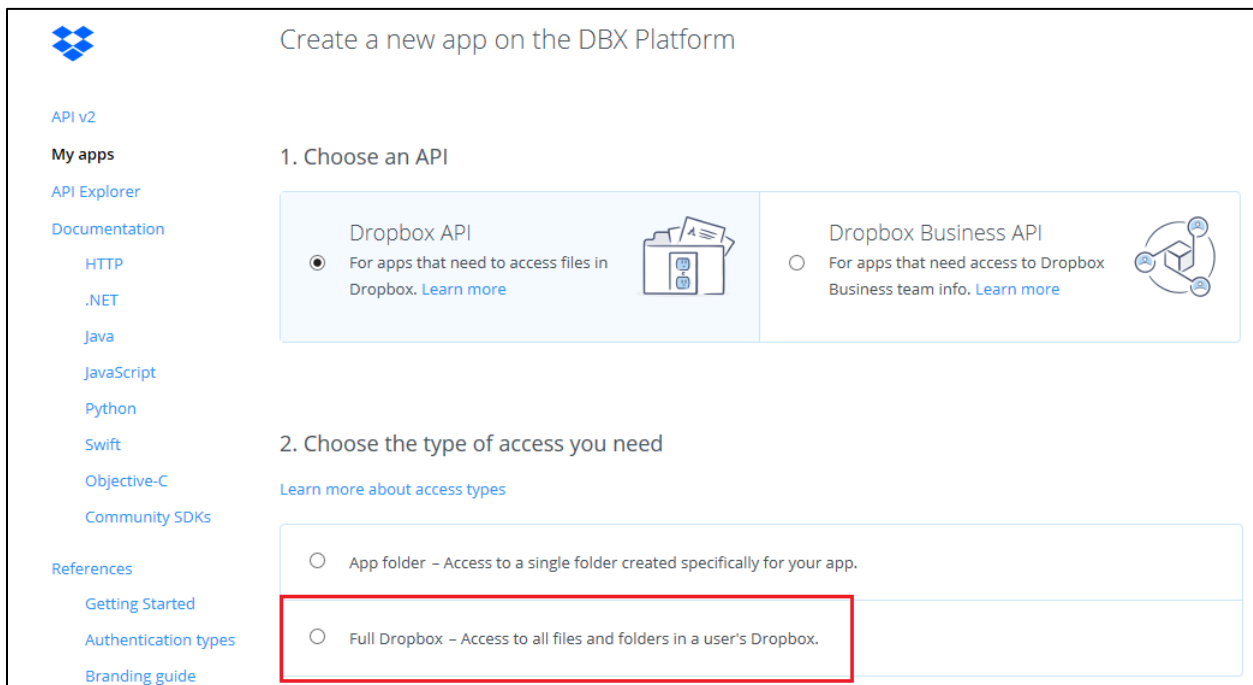
Now, click on **My apps** on the list in left.

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**.

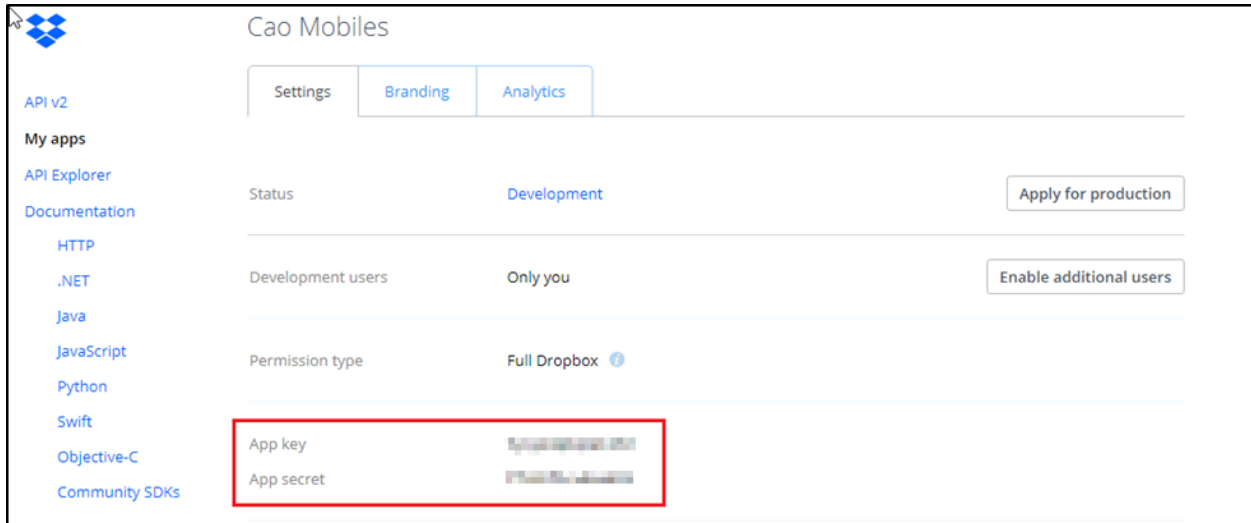
If you don't have an app Click on **Create App**. From **Choose an API** Click on **Dropbox API** button.



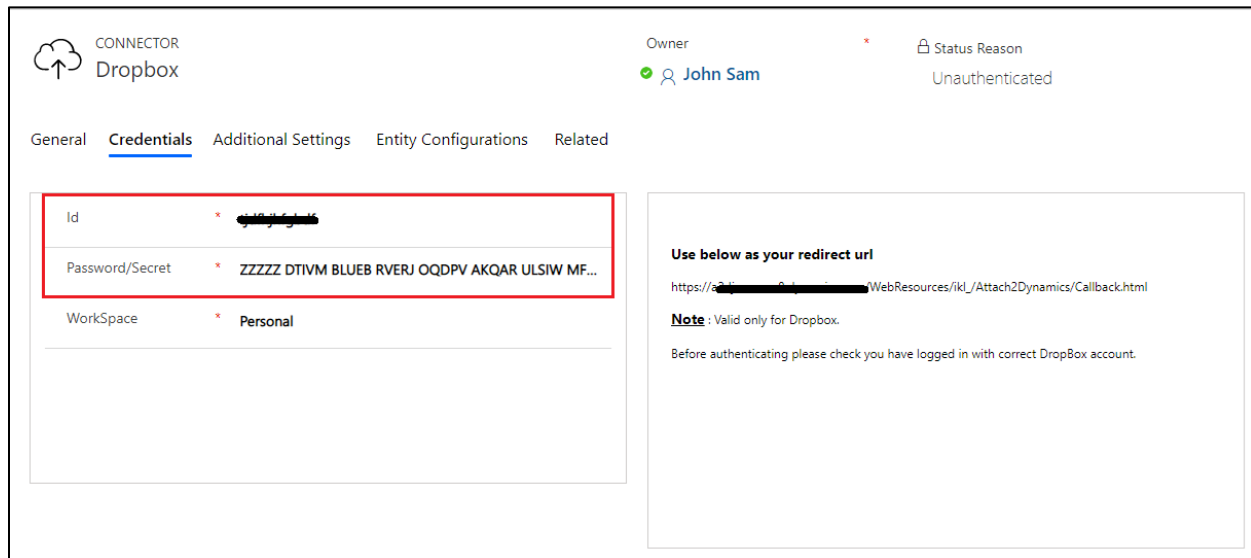
In **Choose the type of access you need** Select **Full Dropbox**.



**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.



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



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.

## Attach2Dynamics – User Manual

CONNECTOR  
Dropbox

Owner: John Sam  
Status Reason: Unauthenticated

General **Credentials** Additional Settings Entity Configurations Related

Id	*	[redacted]
Password/Secret	*	ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ ...
WorkSpace	*	Team
Team Folder	*	Sales

**Use below as your redirect url**  
https://[redacted]/WebResources/ikl\_/Attach2Dynamics/Callback.html

**Note** : Valid only for Dropbox.  
Before authenticating please check you have logged in with correct DropBox account.

This folder will appear outside App folder.

A2DTeam

Name	Modified	Members	
John Sam	--	Only you	...
Marketing	--	A2DTeam	...
Projects	--	A2DTeam	...
Sales	--	A2DTeam	...
Guide to our Team Space.url	7 mins ago	A2DTeam	...

Actions: Create new file, Upload files, Upload folder, New folder, Show deleted files, View in admin console

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

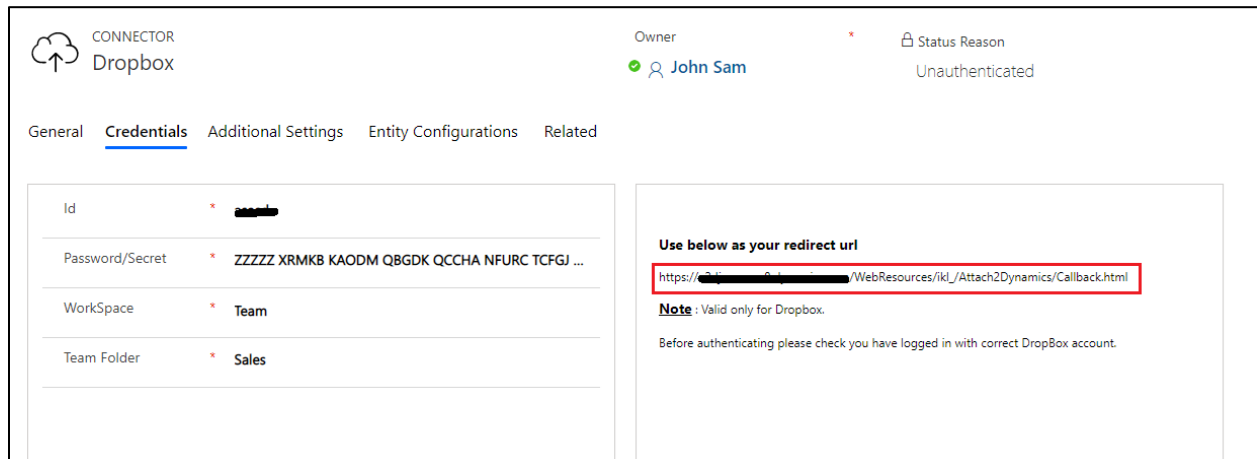
A2DTeam > John Sam

Name	Modified	Members	
Sales	--	Only you	...

Actions: Create new file, 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.

## Attach2Dynamics – User Manual



CONNECTOR  
Dropbox

Owner  
John Sam

Status Reason  
Unauthenticated

General **Credentials** Additional Settings Entity Configurations Related

Id \* [redacted]

Password/Secret \* ZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ ...

WorkSpace \* Team

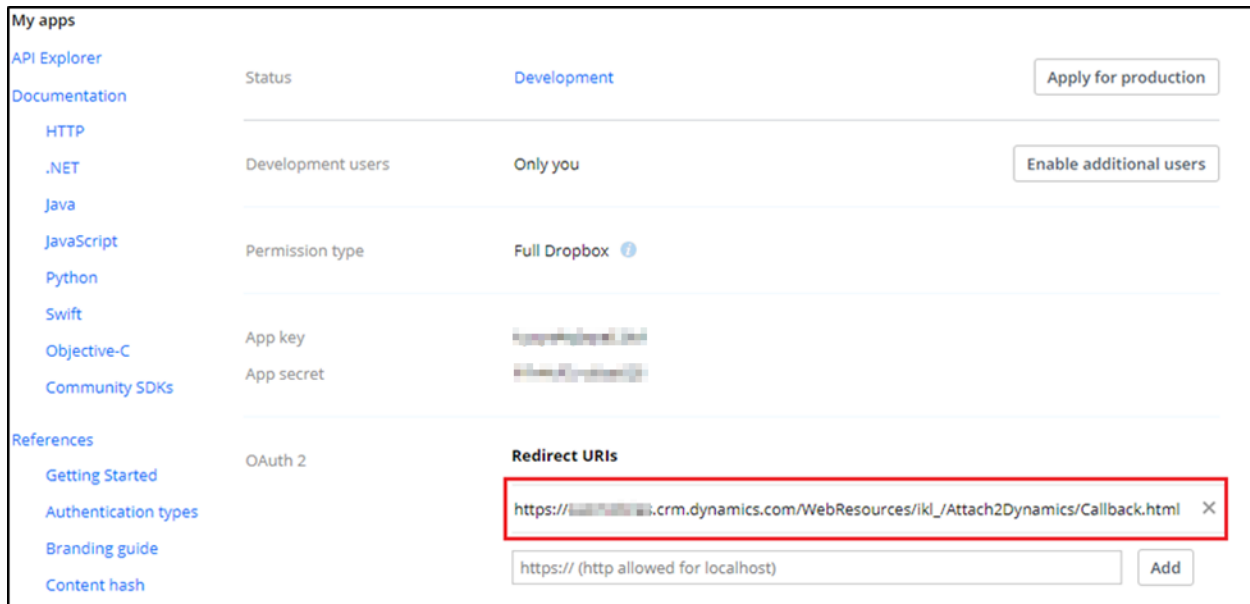
Team Folder \* Sales

**Use below as your redirect url**

[https://\[redacted\].crm.dynamics.com/WebResources/ikl\\_/Attach2Dynamics/Callback.html](https://[redacted].crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html)

**Note:** Valid only for Dropbox.  
Before authenticating please 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

Documentation

HTTP

.NET Development users Only you

Java

JavaScript Permission type Full Dropbox ⓘ

Python

Swift

Objective-C App key [redacted]

Community SDKs App secret [redacted]

References

Getting Started OAuth 2

Authentication types

Branding guide

Content hash

**Redirect URIs**

[https://\[redacted\].crm.dynamics.com/WebResources/ikl\\_/Attach2Dynamics/Callback.html](https://[redacted].crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html) X

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

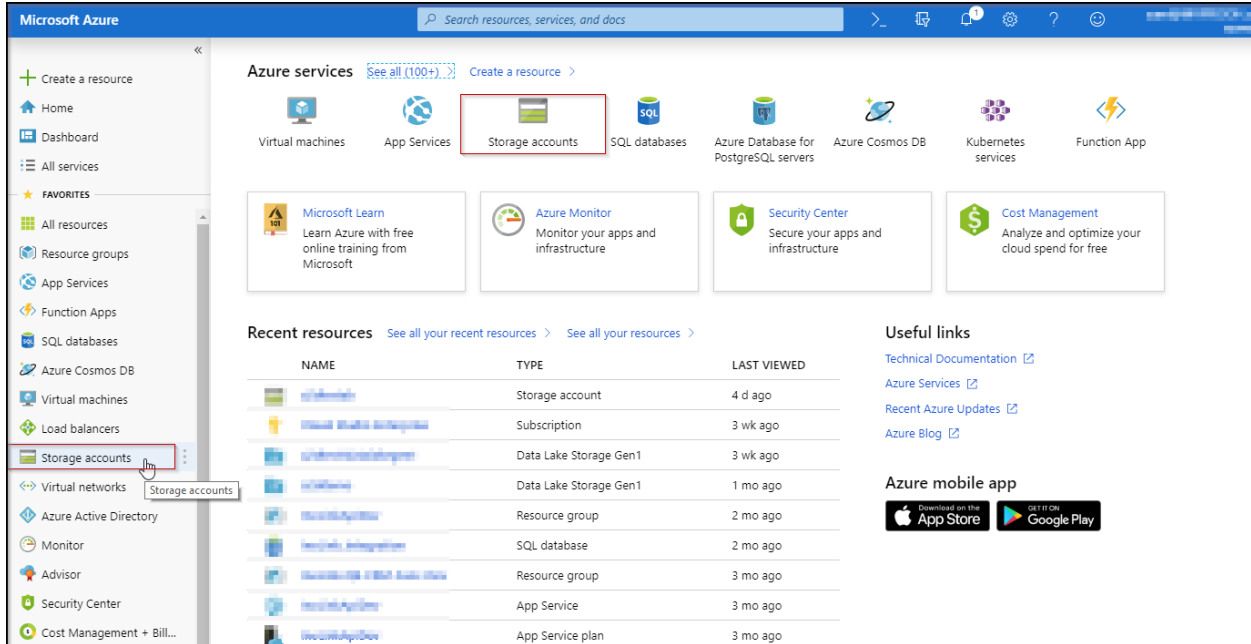
### Configuring Azure Blob Storage Connector

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

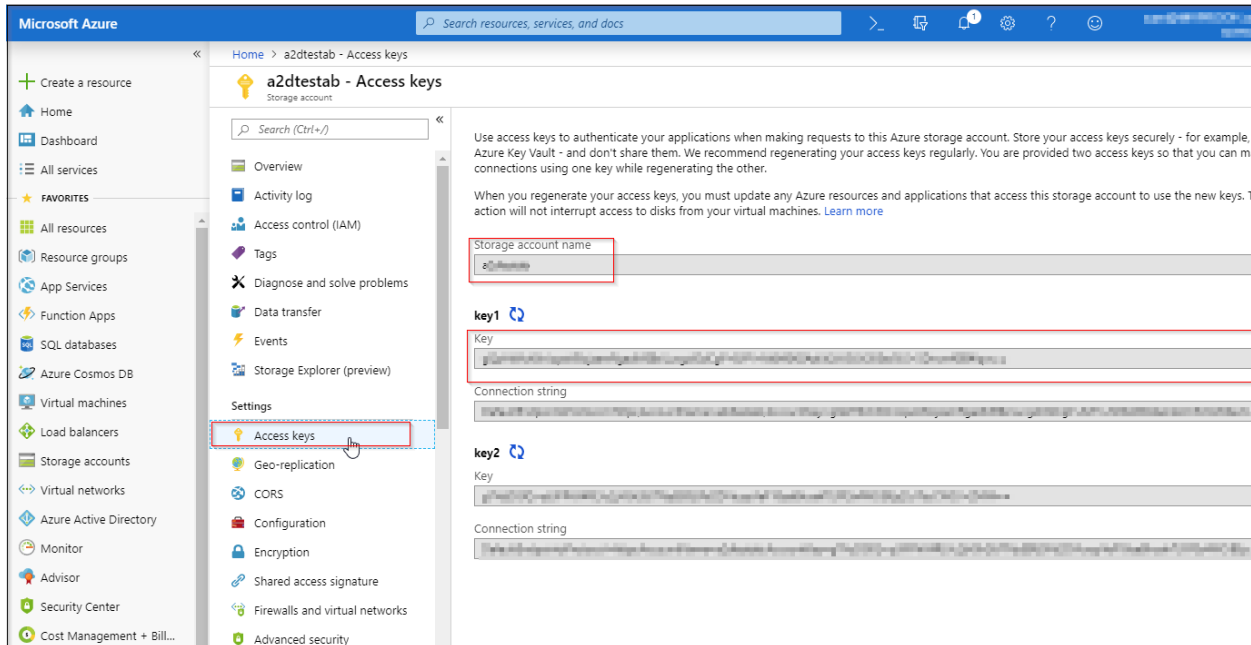
Open URL: <https://portal.azure.com/> and enter your Microsoft Azure Credentials

Next go to storage account section.

# Attach2Dynamics – User Manual



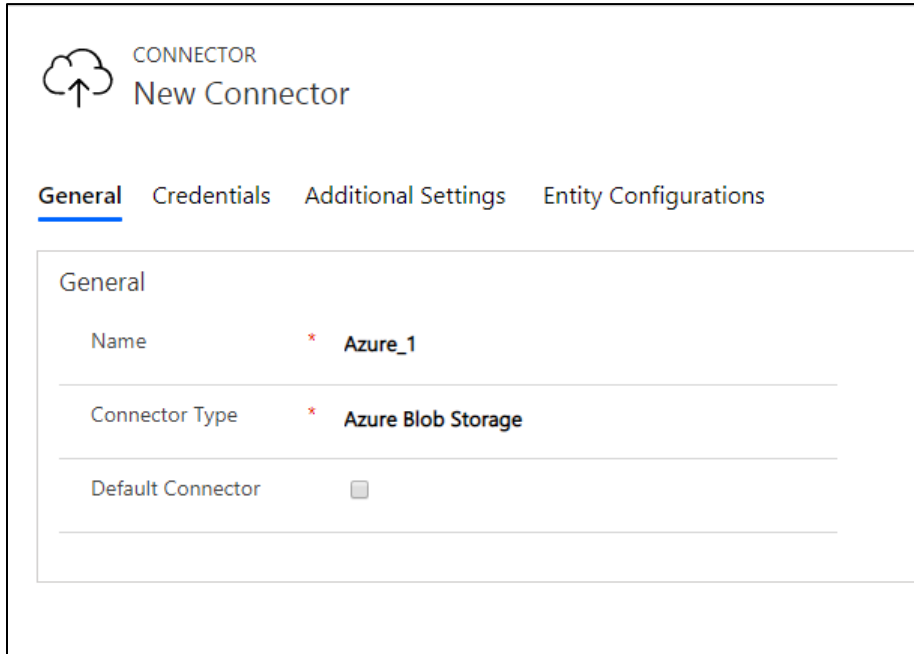
Select your storage account and open it, look for Access Keys (as shown in the below screenshot), get the Storage account name and Key from it.





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.



CONNECTOR  
New Connector

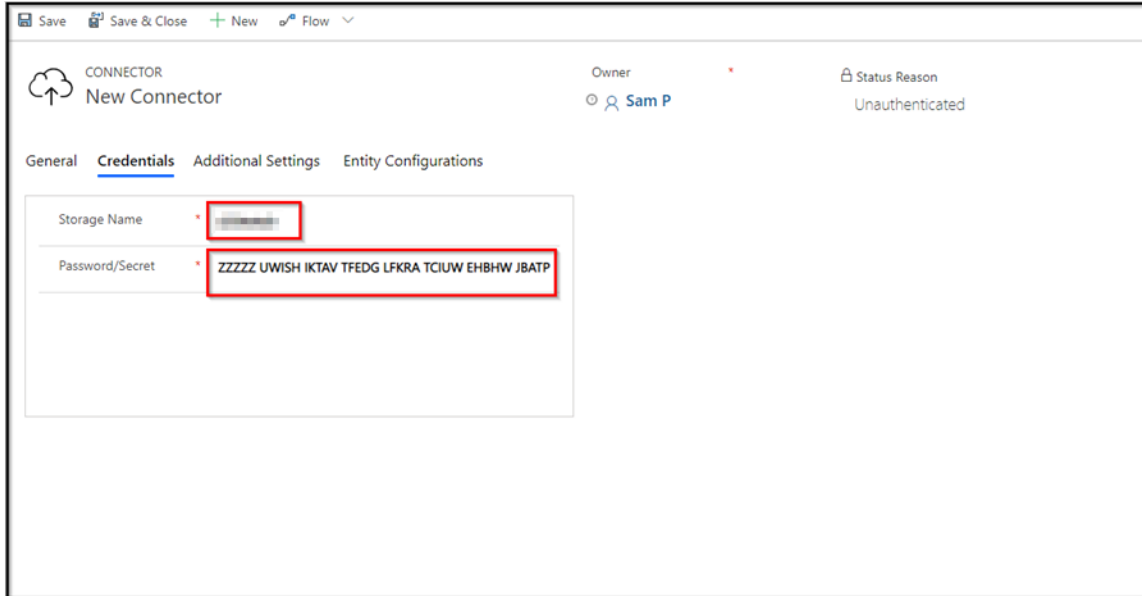
**General** Credentials Additional Settings Entity Configurations

General

Name	* Azure_1
Connector Type	* Azure Blob Storage
Default Connector	<input type="checkbox"/>

**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.



### 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**".

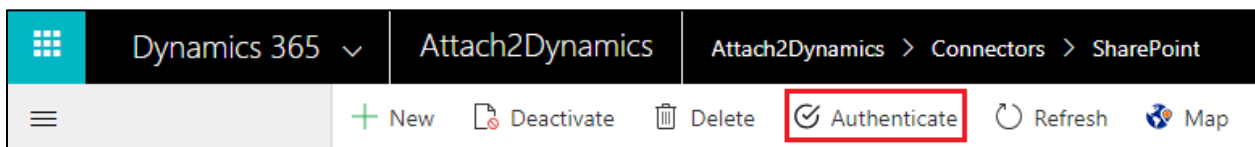
---

## Authenticate

---

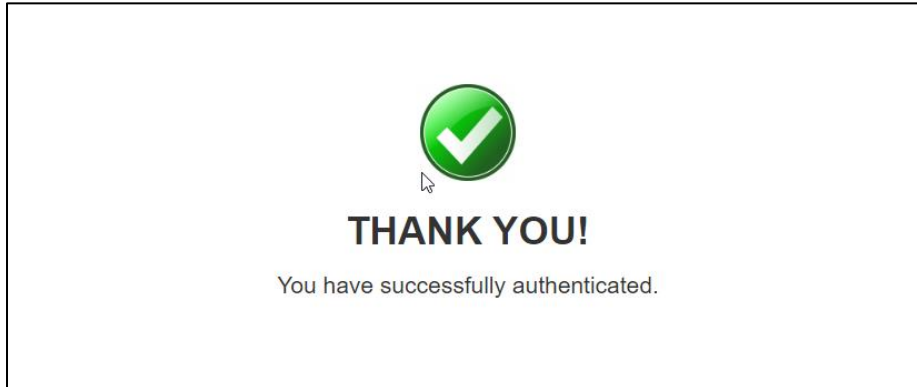
After the Connector record is created the connector credentials need to be authenticated.

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.

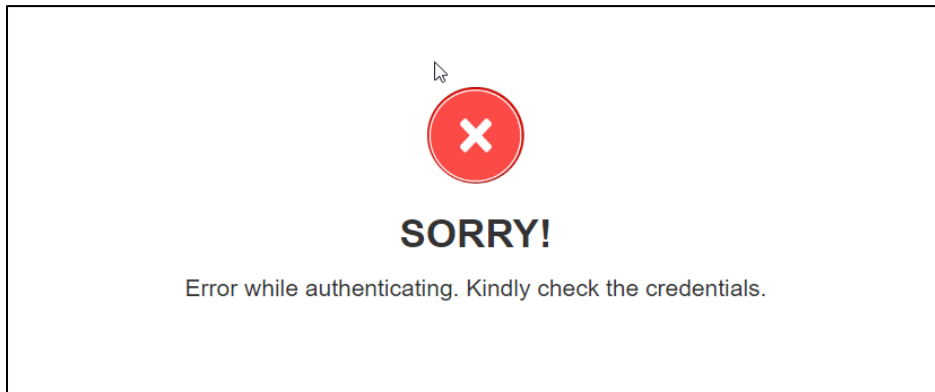


After the Connector is Authenticated, create Entity Configuration record.

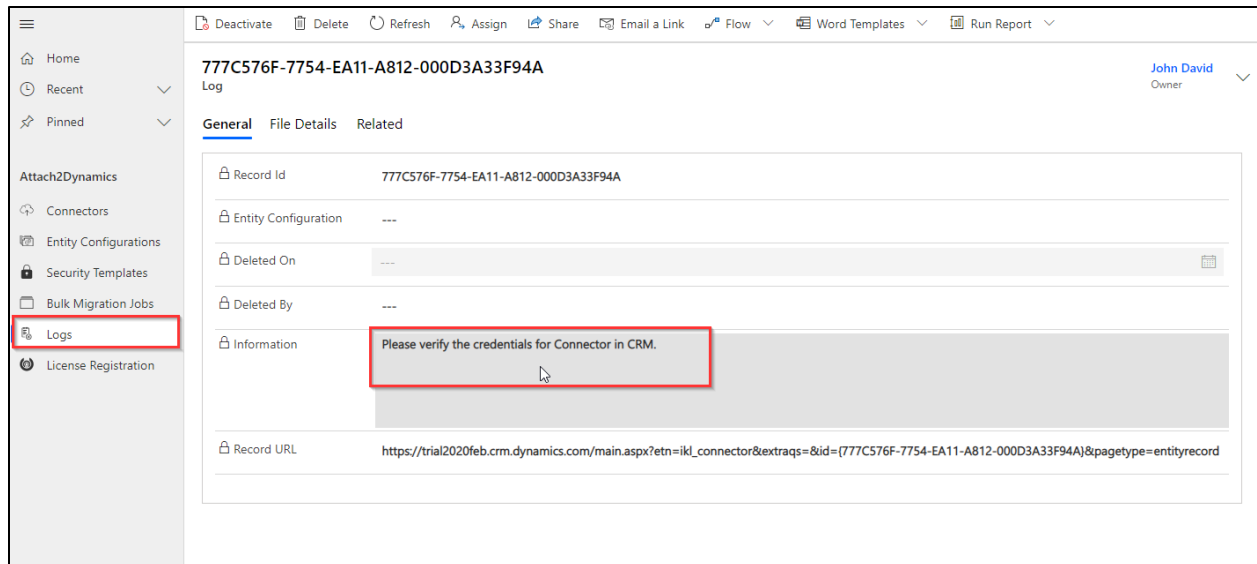
If Connector is authenticated successfully, the following success pop up will appear:



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

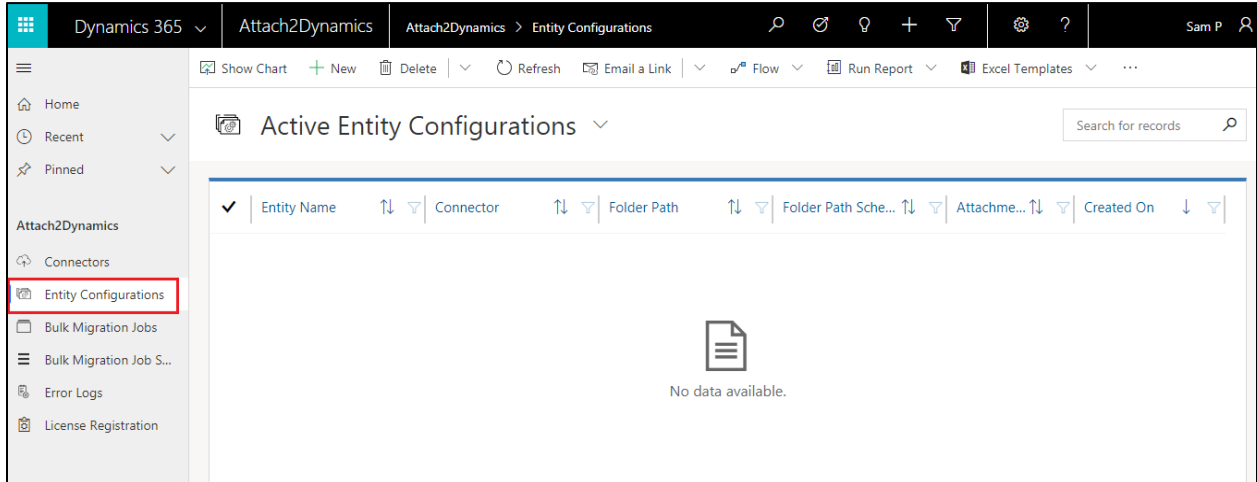


And to see the what exactly the error is, navigate to 'Logs Entity', check the error and retry the authentication.

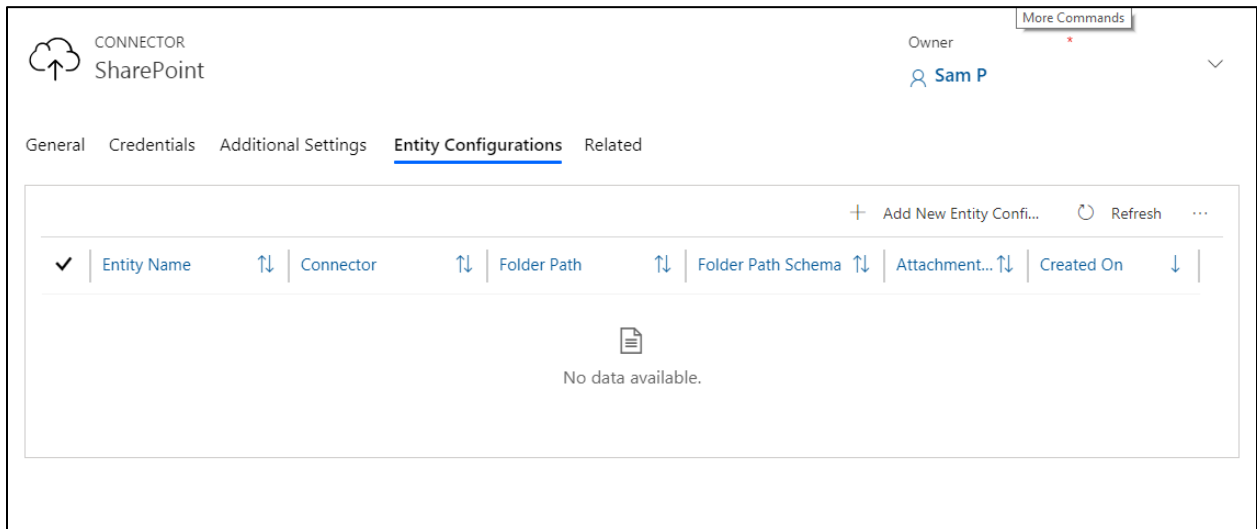


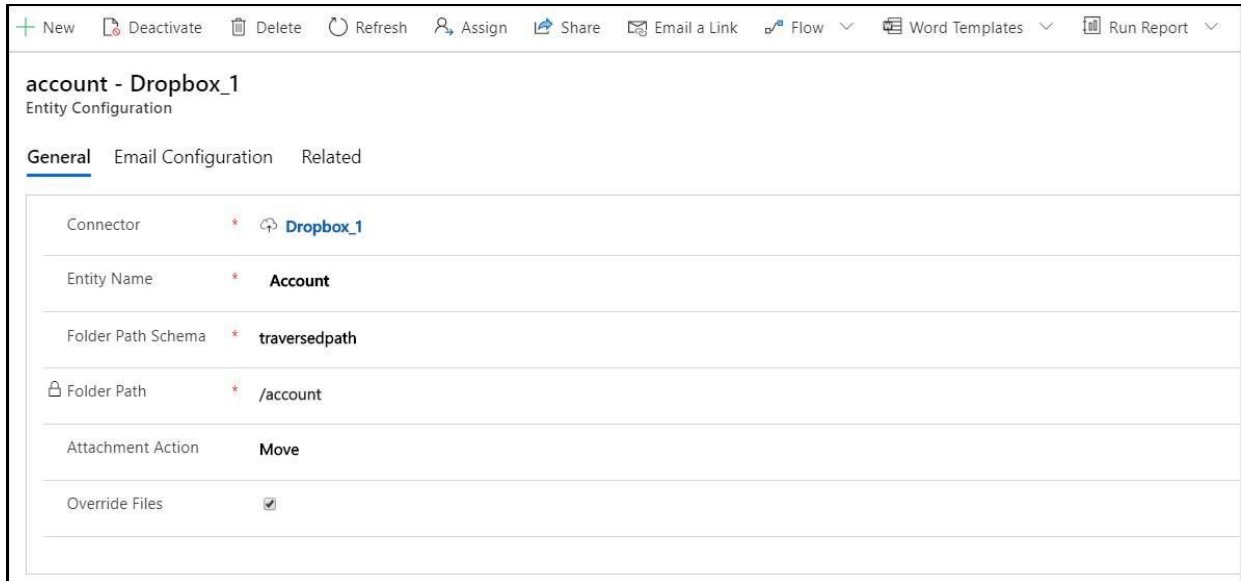
## Entity Configuration

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.





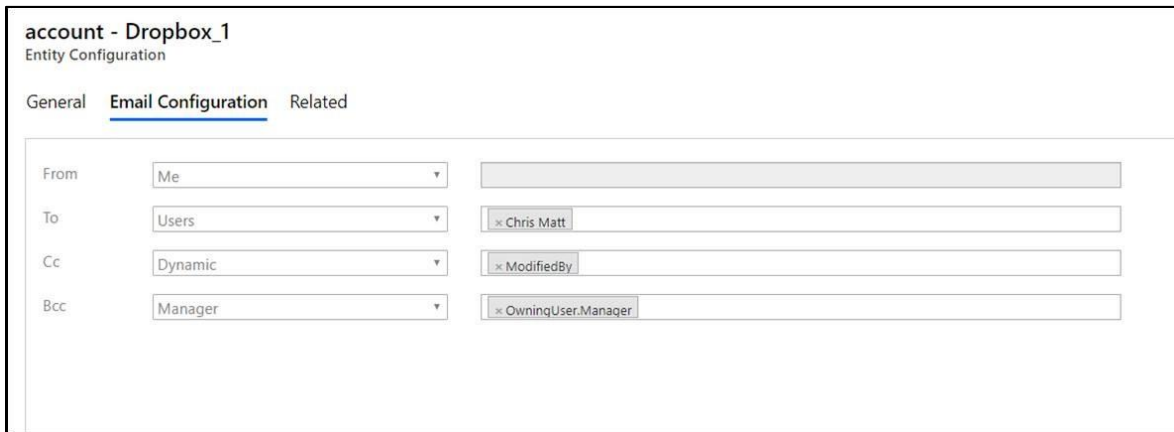
**General:**

- 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 overridden.
- 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.
  - i) **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 overridden. 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.



- 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 functionalities 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.

email - Dropbox_1 Entity Configuration		
General	Email Configuration	Related
Connector	*	Dropbox_1
Entity Name	*	Email
Folder Path	*	/email attachments
Attachment Action		---
Override Files		<input type="checkbox"/>

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:

Email: Attach2Dynamics Form ∨  
**Sales Files CRM:0001099**  
Read only


Priority  
Normal

**Email** Related

---

From  **John Sam**

---

To  **Canvas Pvt LTD**

---

Cc ---

---

Bcc ---

---

Subject **Sales Files CRM:0001099**

---




**Regarding** ---

---

Duration **30 minutes**

AttachManage > Sales

Search

Name ↑	Modified ↓	Members ↓	⋮
 account	--	Only you	⋮
 contact	--	Only you	⋮
 <b>Email Attachments</b>	--	Only you	⋮

Create new file  
Share folder

Only you have access.

Upload files  
Upload folder  
New folder  
Show deleted files

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



Email: Attach2Dynamics Form ▼  
**Sales Files CRM:0001099**  
Read only

Priority  
Normal

**Email** Related

---

From **John Sam**

---

To **Canvas Pvt LTD**

---

Cc ---

---

Bcc ---

---

Subject **Sales Files CRM:0001099**

---

Regarding **Canvas Pvt Ltd**

---

Duration **30 minutes**

> **Canvas Pvt-Ltd\_E4D7107BD5A3E911A981000D3AF03F9B** Search Notifications Profile

Name	Modified	Members	Actions
Document.pdf	4 mins ago	Only you	...

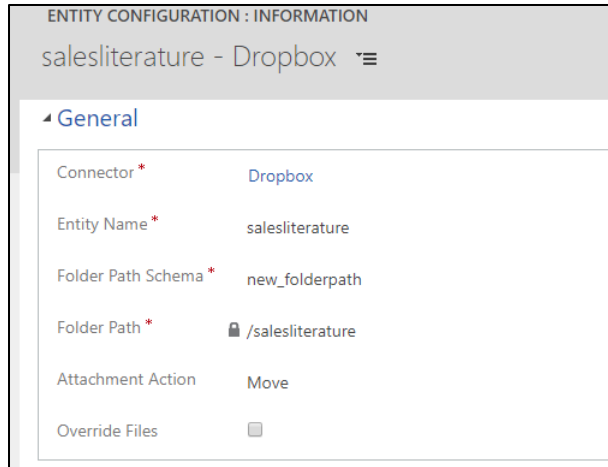
**Create new file**  
Share folder

Only you have access

- Upload files
- Upload folder
- New folder
- Show deleted files

### 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 performed 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.



### Configuration for Moving/Copying Notes Attachments.

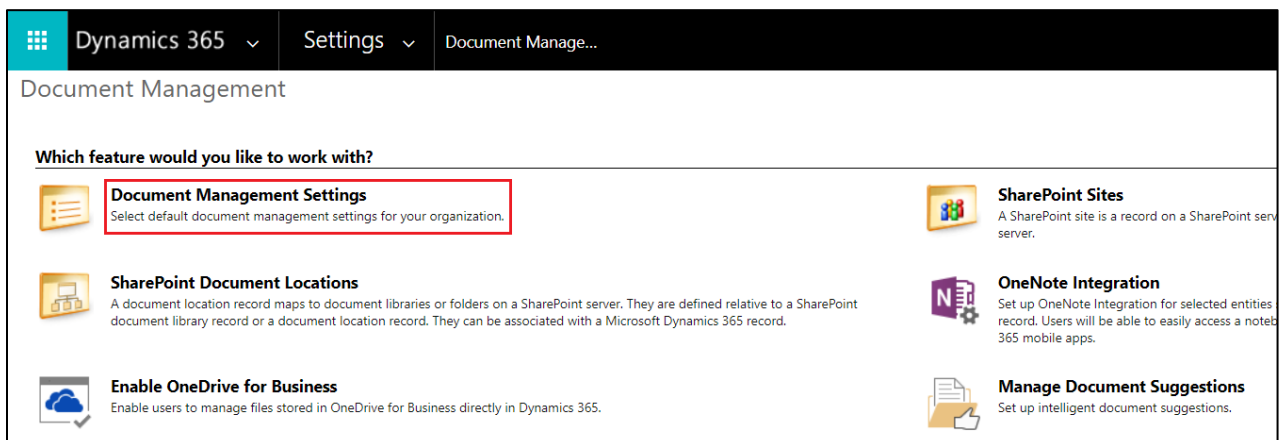
Unlike Email Attachments and Sales Literature Attachments, we don't have to create a different Entity Configuration record for Moving/Copying Notes Attachment, while creating an Entity Configuration for any entities (except Email and Sales Literature), if the Attachment Action is defined, then the corresponding 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 → Settings → Document Management Settings.



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

Document Management Settings - Google Chrome

inogicdemo.crm8.dynamics.com/WebWizard/WizardContainer.aspx?Wizar...

## Document Management Settings

[Help](#)

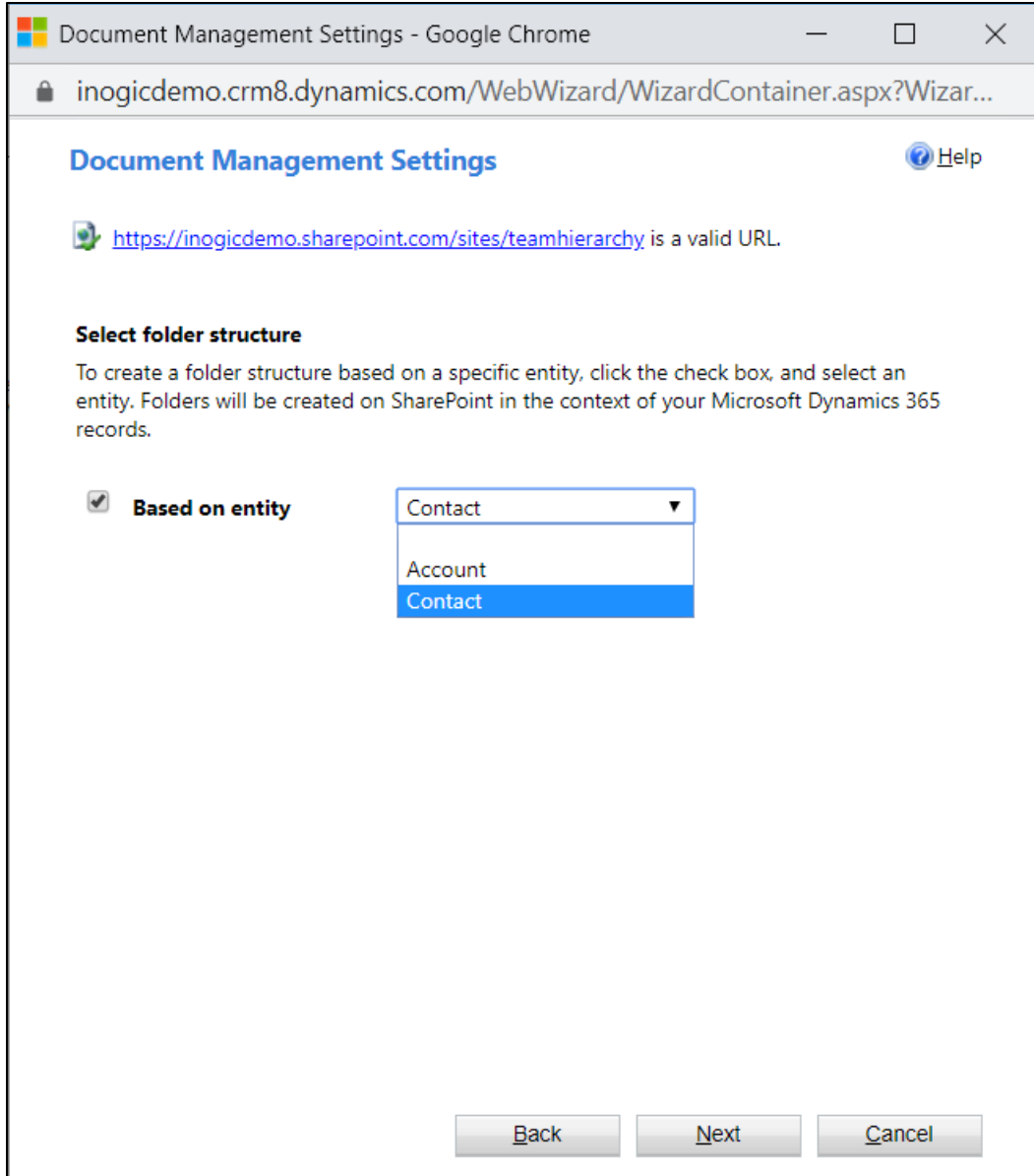
**Select entities**  
Document management will be enabled on the selected entities.

<input type="checkbox"/>	Entities
<input type="checkbox"/>	Accounting Company
<input type="checkbox"/>	Action Card Regarding
<input type="checkbox"/>	Action Card Role Setting
<input type="checkbox"/>	Address
<input type="checkbox"/>	AI Builder Dataset File
<input type="checkbox"/>	Alert
<input type="checkbox"/>	Alerts4Dynamics Log
<input type="checkbox"/>	ApiSettings
<input type="checkbox"/>	Applied Transactions
<input type="checkbox"/>	Appointment

**SharePoint site**  
The selected SharePoint site will be used as the default site for document management.

**SharePoint Site:**

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



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

Save Save & Close + New Flow

### New Entity Configuration

**General** Email Configuration

Connector	*	---
Entity Name	*	--Select--
Attachment Action		---
Override Files		<input type="checkbox"/>

Error Logs

5) Populate the following fields → Click on Save.

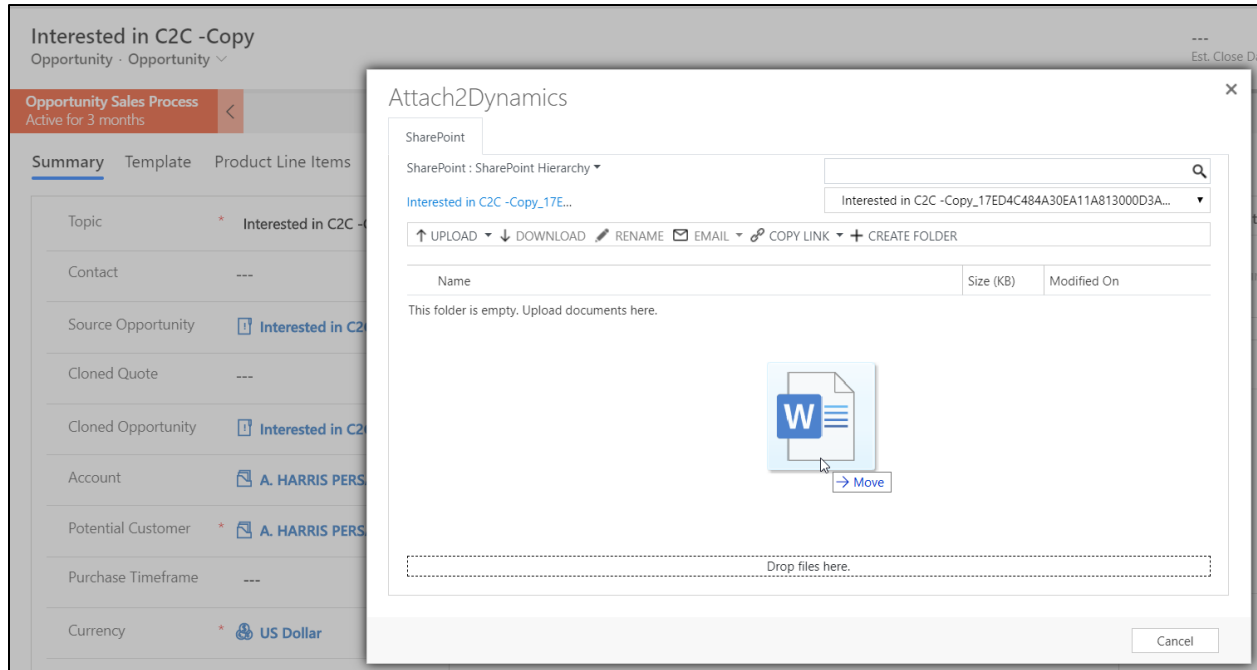
- a. **Connector:** Select the connector for the particular SharePoint site
- b. **Entity Name:** Select the entity.
- c. **Attachment Action:** Select either move or copy
- d. **Override Files:** Enable the checkbox if required
- e. **Folder Structure Fields:** This field appears on selection of the 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.

**opportunity - SharePoint Hierarchy**  
Entity Configuration

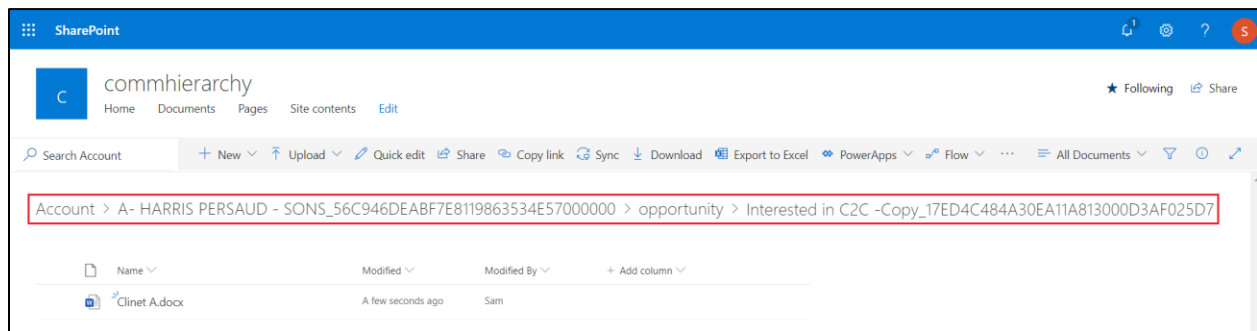
**General** Email Configuration Related

Connector	*	<b>SharePoint Hierarchy</b>
Entity Name	*	<b>Opportunity</b>
Attachment Action		<b>Move</b>
Override Files		<input type="checkbox"/>
Folder Structure Field *		Account

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



- 7) Next go to SharePoint site. Here, the respective file will be stored in the following manner:  
**Account > Account Name\_guid > Opportunity > Opportunity Name\_guid.**



## 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.

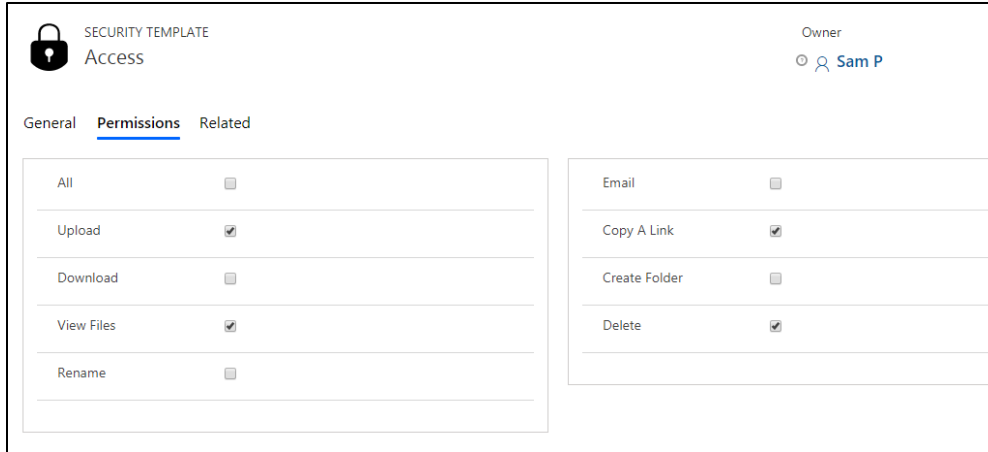
The screenshot shows the 'New Security Template' form. At the top left, there is a lock icon and the text 'SECURITY TEMPLATE' and 'New Security Template'. At the top right, it says 'Owner' with a red asterisk and a user icon for 'Sam P'. Below this, there are two tabs: 'General' (selected) and 'Permissions'. The 'General' tab contains two input fields: 'Name' with a red asterisk and a dropdown arrow, and 'Connector' with a red asterisk and a dropdown arrow. To the right of these fields is a large empty text area.

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.

The screenshot shows the 'Access' form. At the top left, there is a lock icon and the text 'SECURITY TEMPLATE' and 'Access'. At the top right, it says 'Owner' with a red asterisk and a user icon for 'Sam P'. Below this, there are three tabs: 'General' (selected), 'Permissions', and 'Related'. The 'General' tab contains two input fields: 'Name' with a red asterisk and the text 'Access', and 'Connector' with a red asterisk and a dropdown arrow pointing to 'SharePoint'. To the right of these fields is a 'Users' table. The table has a header row with columns: 'Full Name', 'Site', 'Business Unit', and 'Title'. There is a checkbox in the first column. Below the header, there is one row with the following data: a checked checkbox, 'Sam P', '---', 'forgear', and '---'. At the top right of the table, there is a link 'Add Existing User' and a dropdown arrow. A scrollbar is visible at the bottom of the table.

## 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.



**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 MIGRATION JOB**

Emails - Last X Weeks

🔒 Status Reason

Scheduled

Owner

● John Sam


General
Information
Bulk Migration Job Status
Related

For ?	* Emails	Operator	* Last X Weeks
Connector	*  SharePoint_TeamSite	Value	* 2
Schedule Date	* 09-08-2019  13:30		
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 represents 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:** Specify 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 JOB  
Emails - Last X Weeks  
Read only

Status Reason  
Completed

Owner  
 John Sam

General **Information** Bulk Migration Job Status Related

 Total Records Processed		161
Last updated:		08-09-2019 14:37
 Total Succeeded Records	160	
Last updated:		08-09-2019 14:37
 Total Succeeded Size (KB)	46,234.85	
Last updated:		08-09-2019 14:37
 Total Ignored Records	1	
Last updated:		08-09-2019 14:37
 Total Ignored Size (KB)	0.89	
Last updated:		08-09-2019 14:37
 Total Failed Records	0	
Last updated:		08-09-2019 14:37
 Total Failed Size (KB)	0.00	
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

✓	Bulk Migrati...	Name	File Size (KB)	Record Url	Status Reason	Created On ↓
	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.

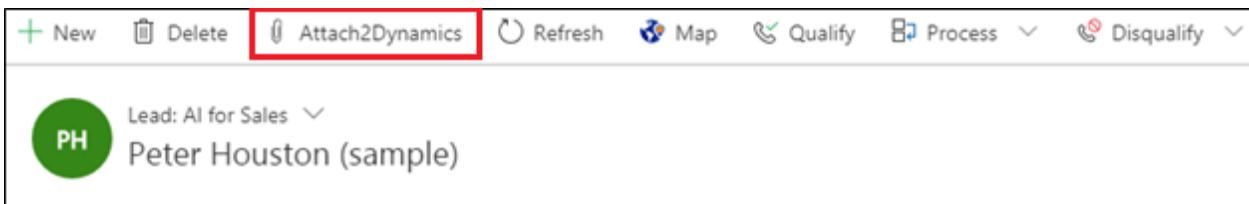
Let's take an example of Lead entity. Suppose Entity configuration record for Lead entity with SharePoint connector is created.

**New Entity Configuration** Owner ▼

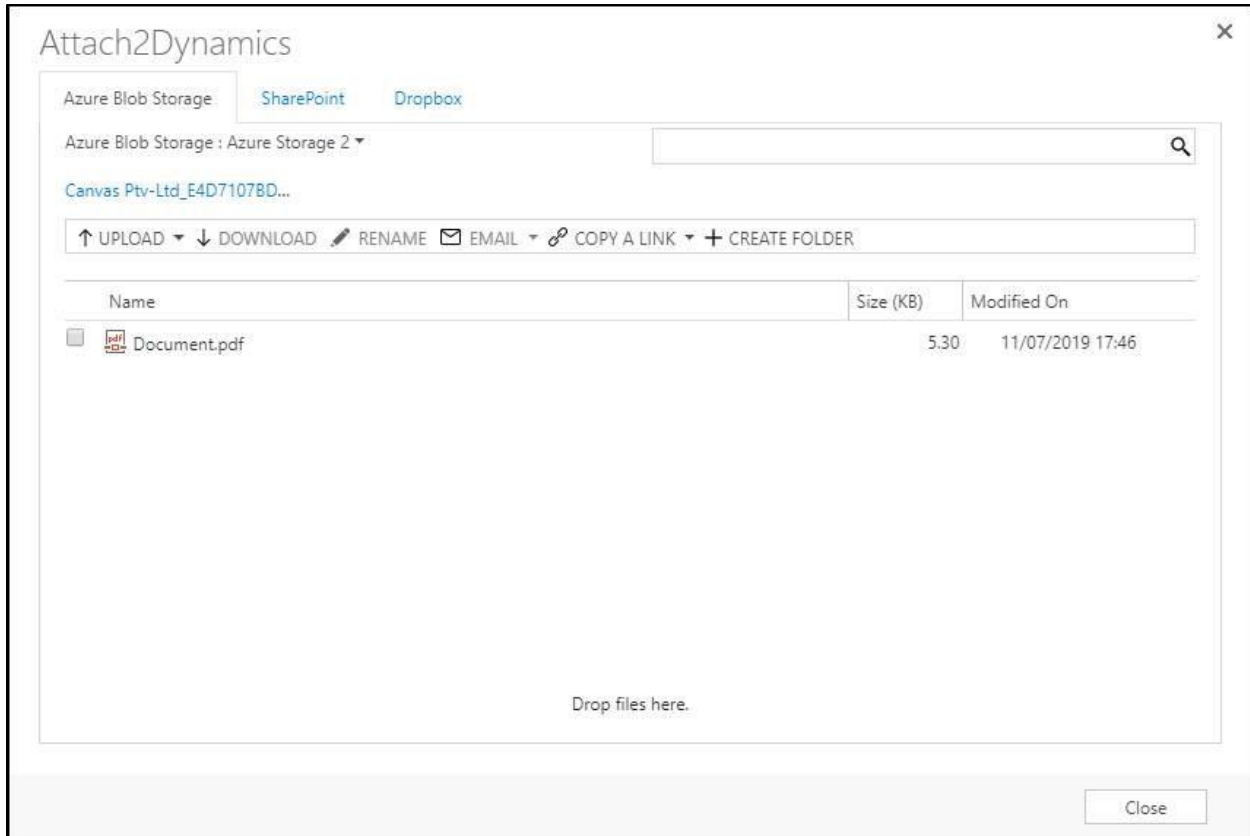
**General** | Email Configuration

Connector	* <b>SharePoint</b>
Entity Name	* <b>Lead</b> <span>▼</span>
Attachment Action	<b>Move</b>
Override Files	<input checked="" type="checkbox"/>

Attach2Dynamics button will be seen in the Command bar.



On Click of the button, Attach2Dynamics window opens.



Below are the features:

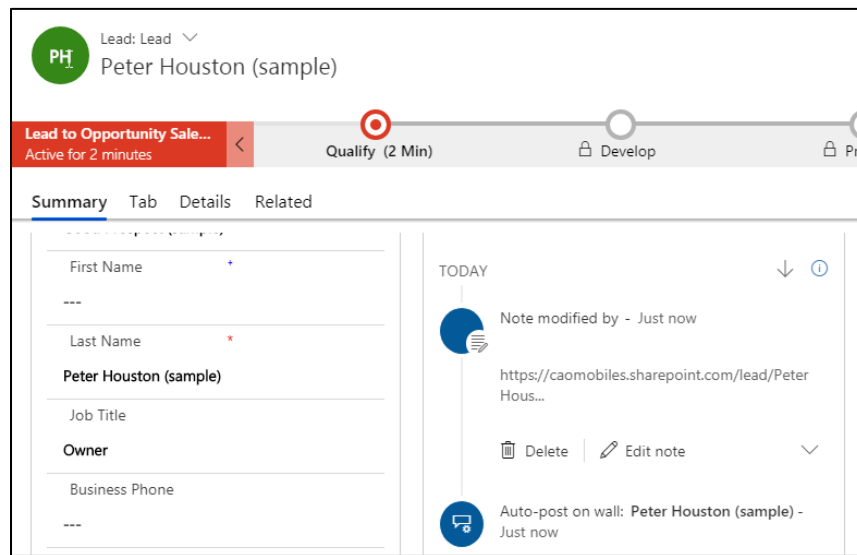
- a) **Drag and Drop Files and Folders:** Users can drag and drop multiple files and folders at one time to SharePoint, Azure Blob Storage or Dropbox from Dynamics 365 CRM.  
*Note: Drag & Drop of files and folders is not supported in IE.*
- b) **Upload:** Users can upload multiple files and single folder 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.

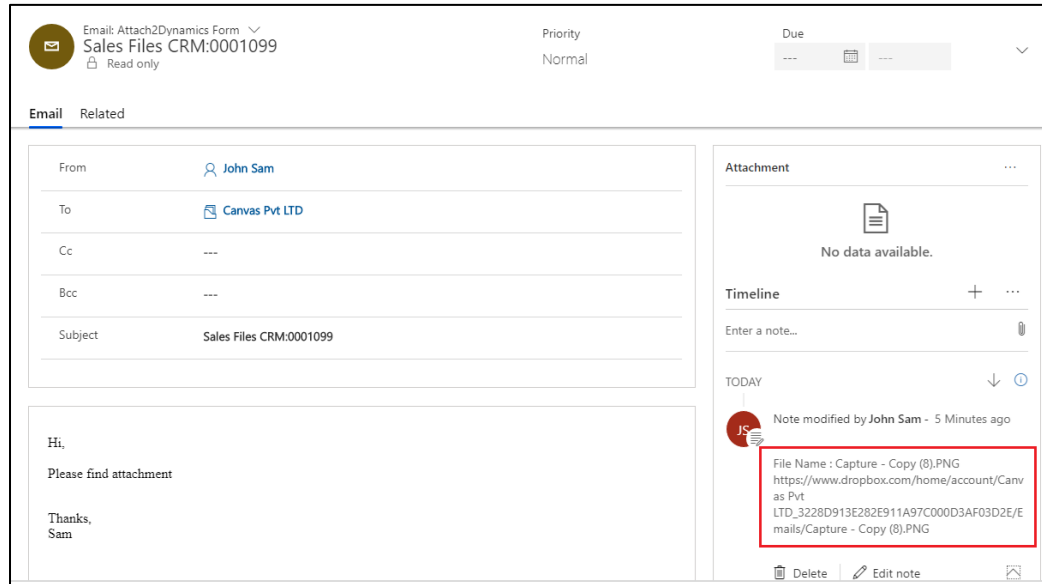
- f) **Create Folder:** Users can create the folder for all three cloud storages.
- g) **Deep search Tab:** Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search 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.



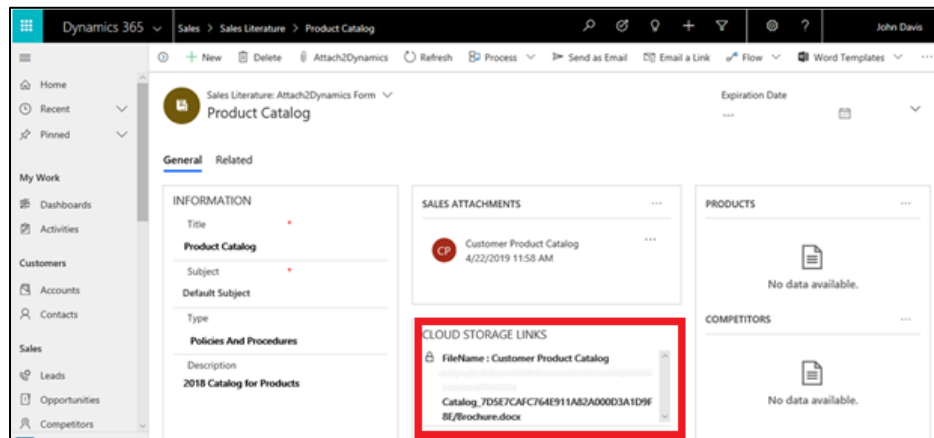
**b. Email Attachments:**

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.

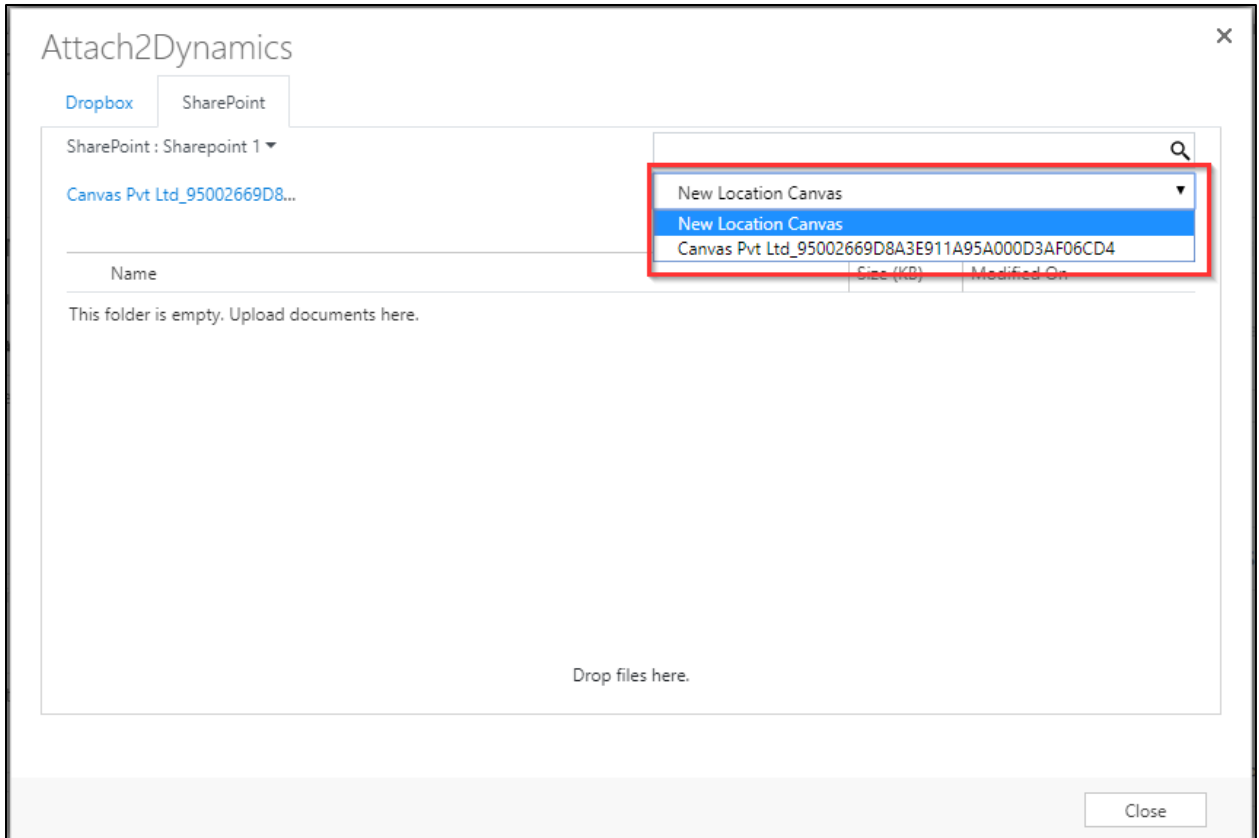


**c. Sales Literature Attachments:**

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.

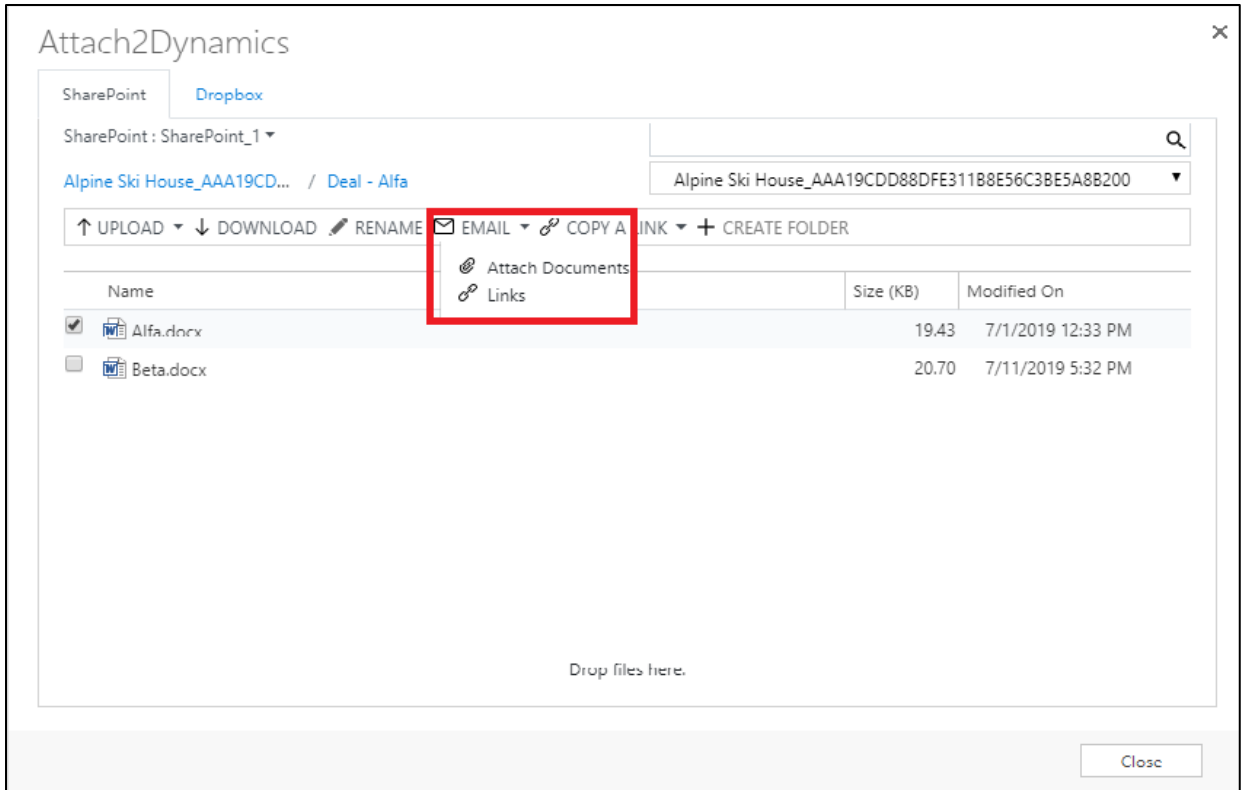


- i) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

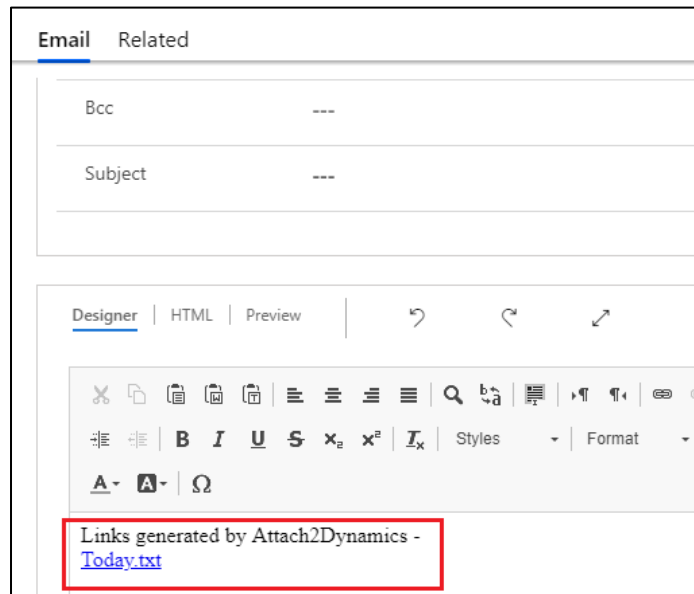


- j) **Email:** Users also have an option to send an email. There are two options for this – send as Link or Attachment.

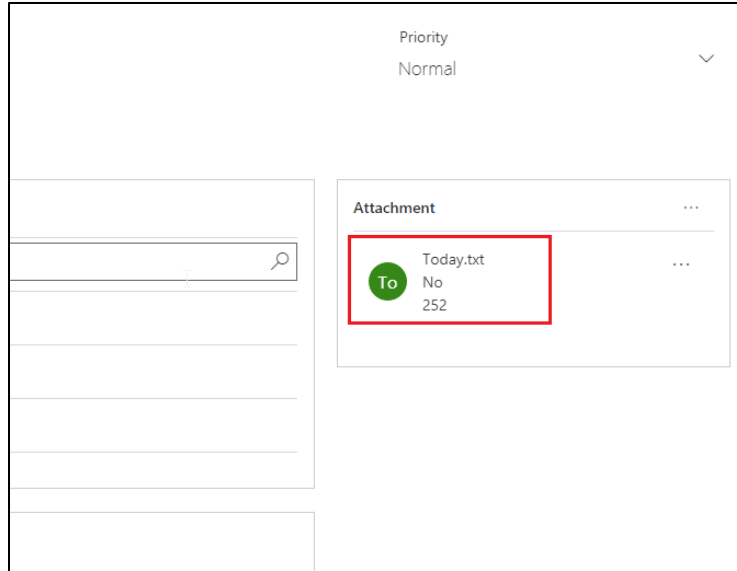




- 1) **Links:** On selecting this option you can insert the file's/folder's link in the email body. The below window opens on choosing the option 'Link' with link of file in email body.

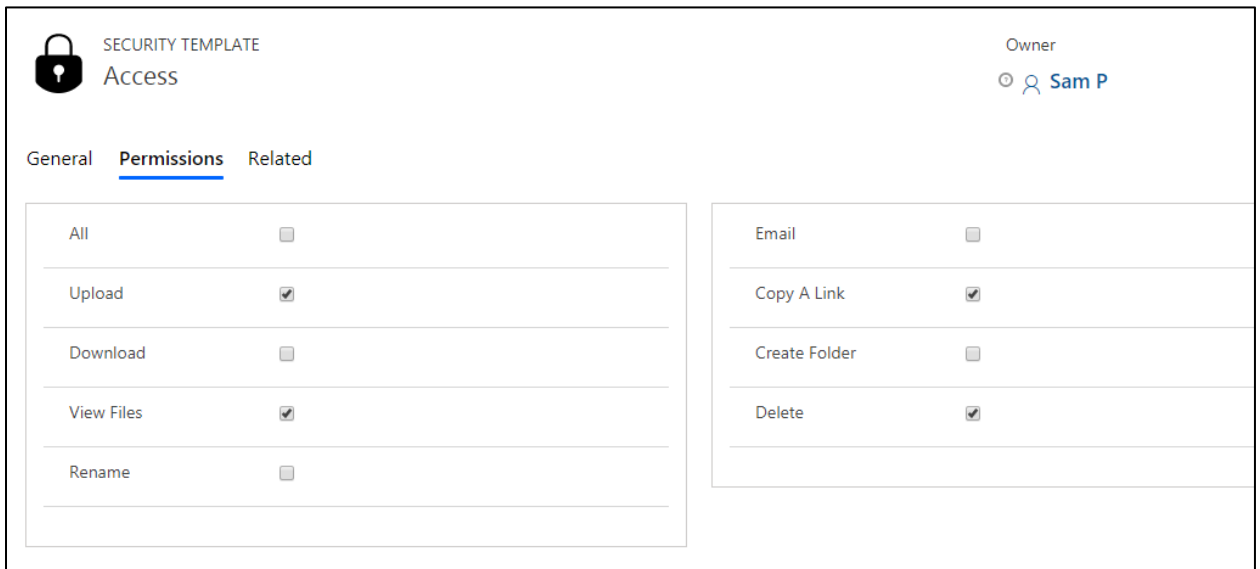


- 2) **Attach Documents:** On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'



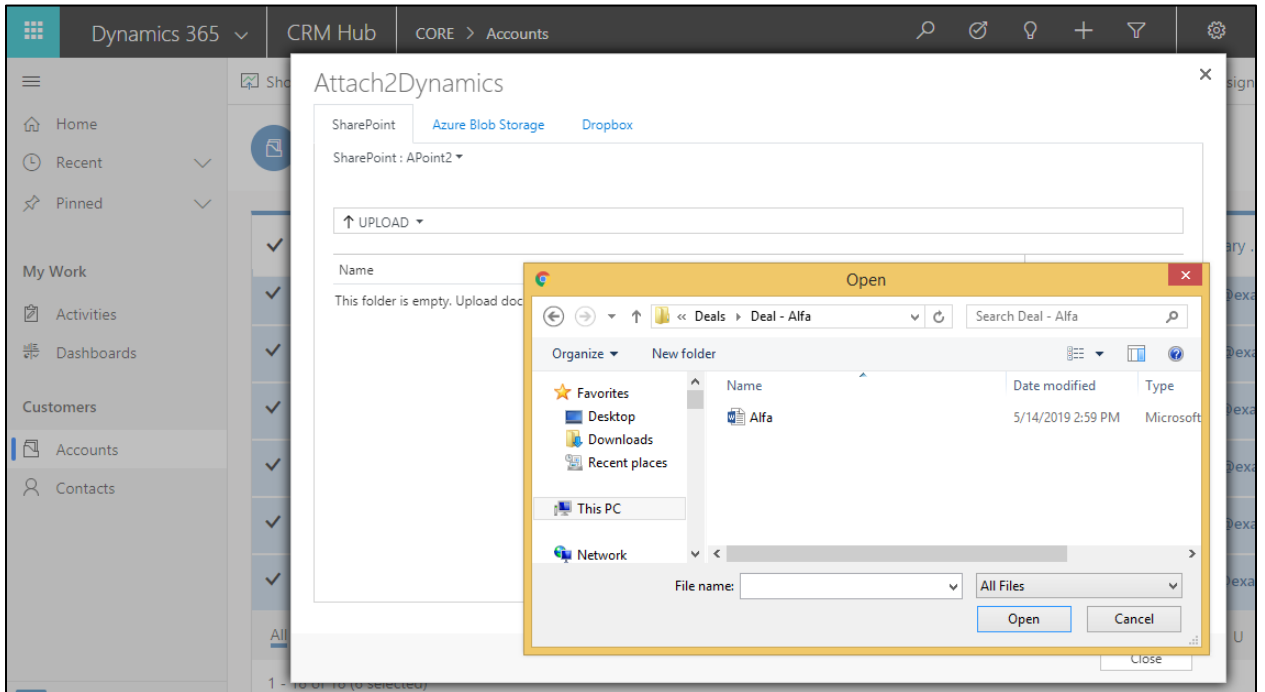
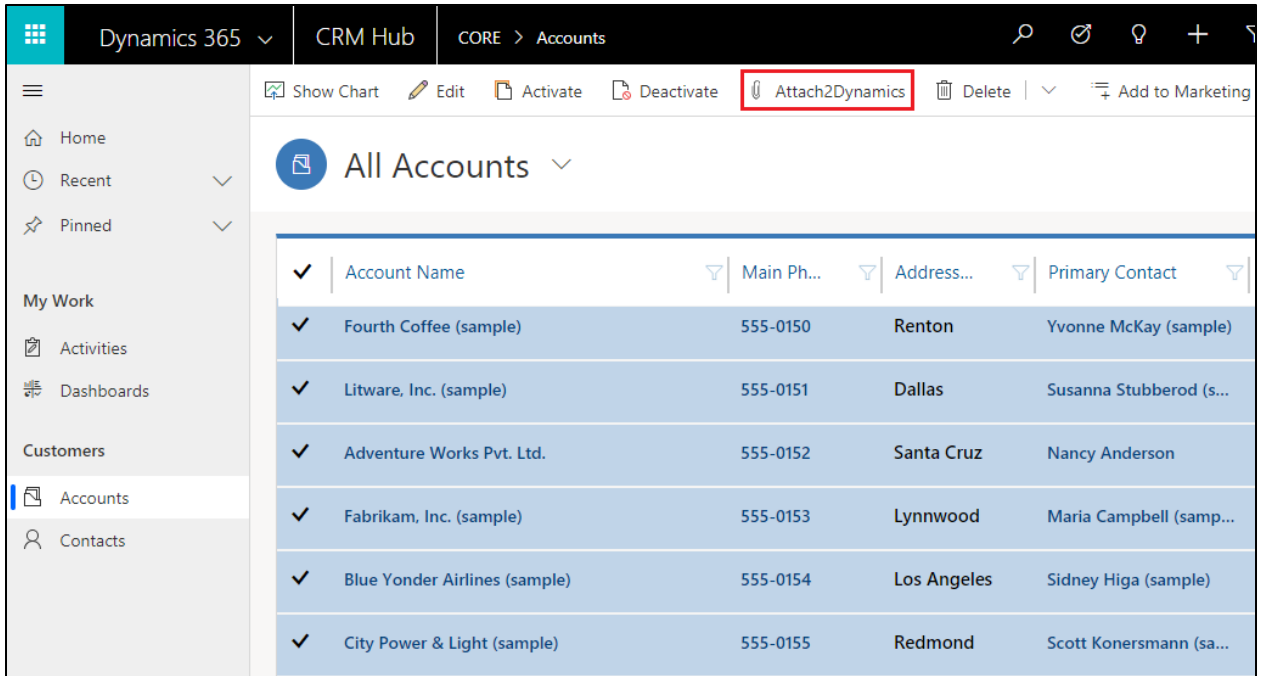
**Note:** Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

- 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.

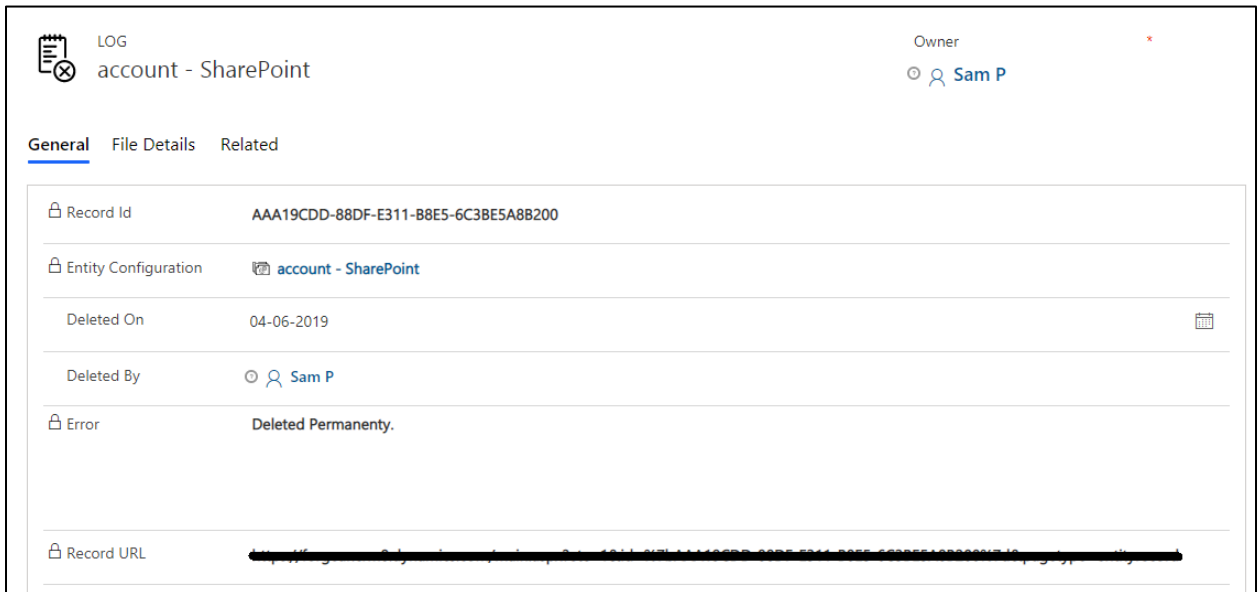
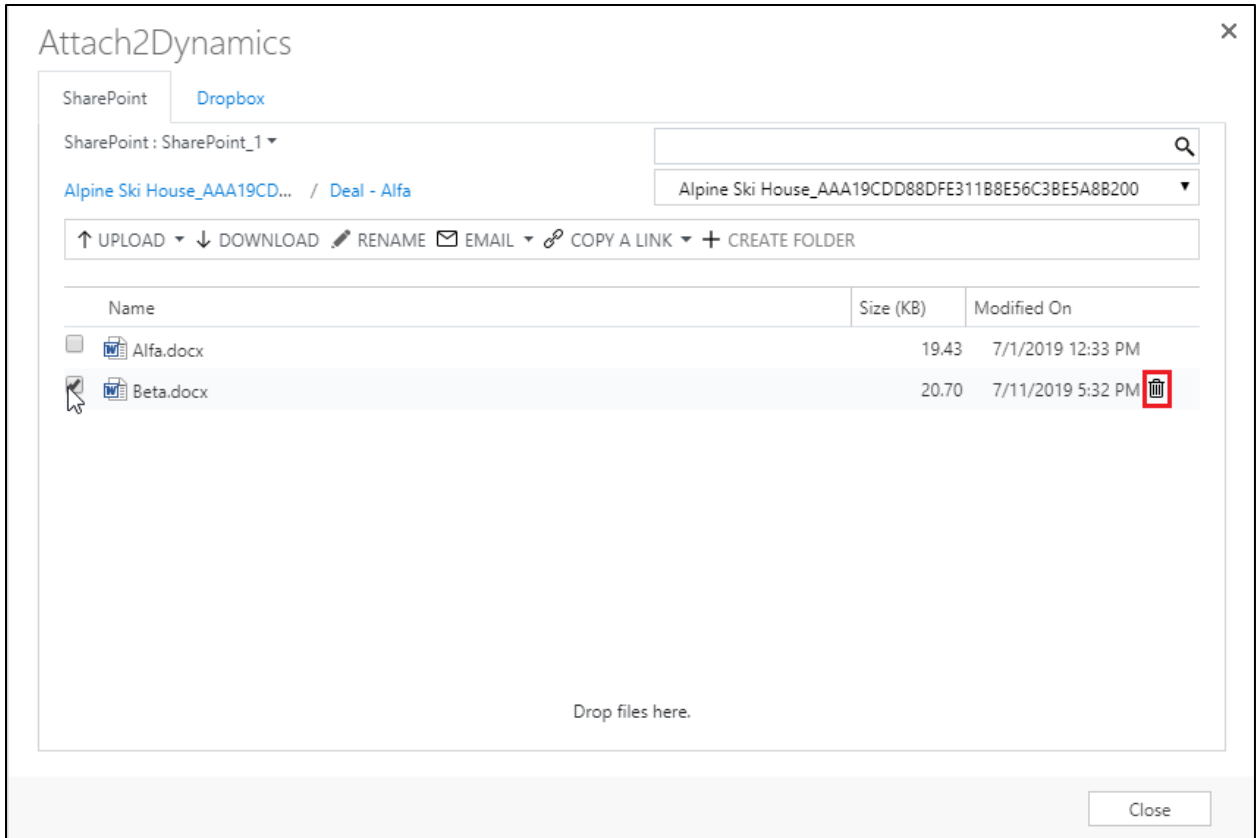


- l) **Support for uploading files from Home Page:** Upload files from home page directly for the selected records.

## Attach2Dynamics – User Manual



- 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**.



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**

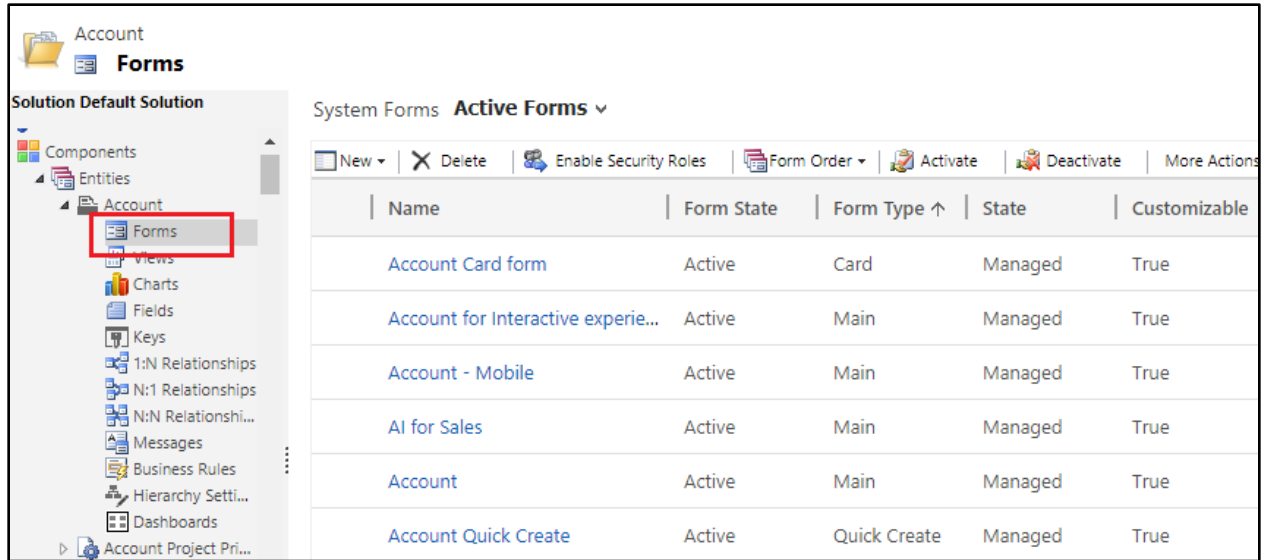
A Default solution will open. Here are the steps how to create embedded tab in the Form of a particular Entity.

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

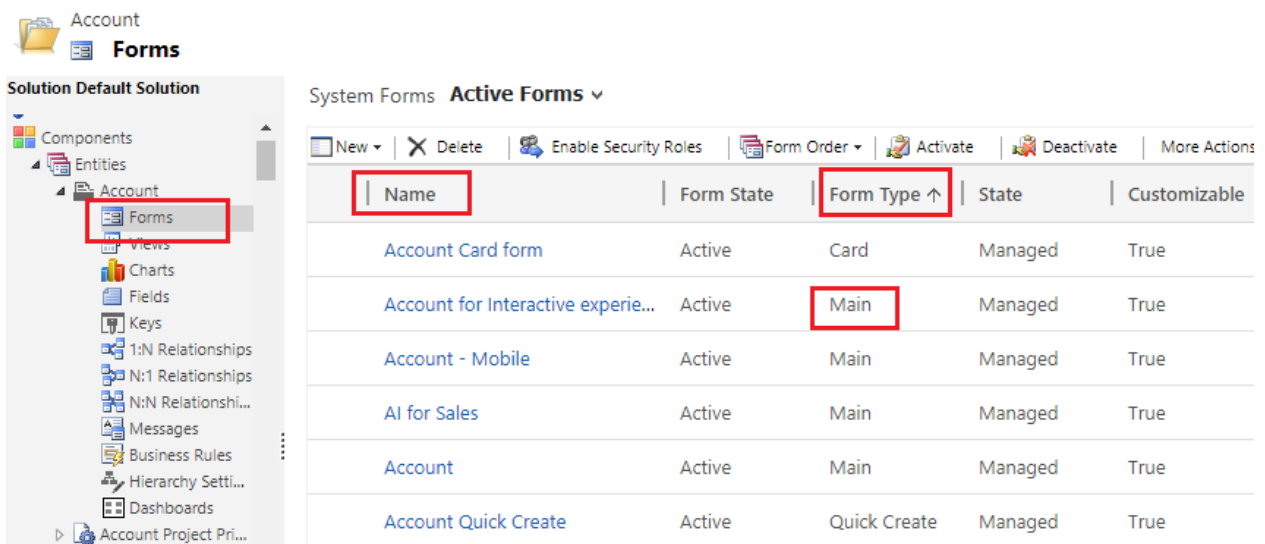
The screenshot shows the Attach2Dynamics interface. On the left, the 'Solution Default Solution' pane is open, and the 'Entities' folder under 'Components' is selected. The main area displays a table of components.

Component Type	Display Name	Name	Type	State	Customizable
		organization_featuree...	Option Set	Managed	False
		flipswitch_options	Option Set	Managed	False
		subscriptionstatistico...	Option Set	Managed	False
		sdkmessage_autotran...	Option Set	Managed	False
	A Yes or No boolean	field_security_permissi...	Option Set	Managed	False
	Account	account	Entity	Managed	True
	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.

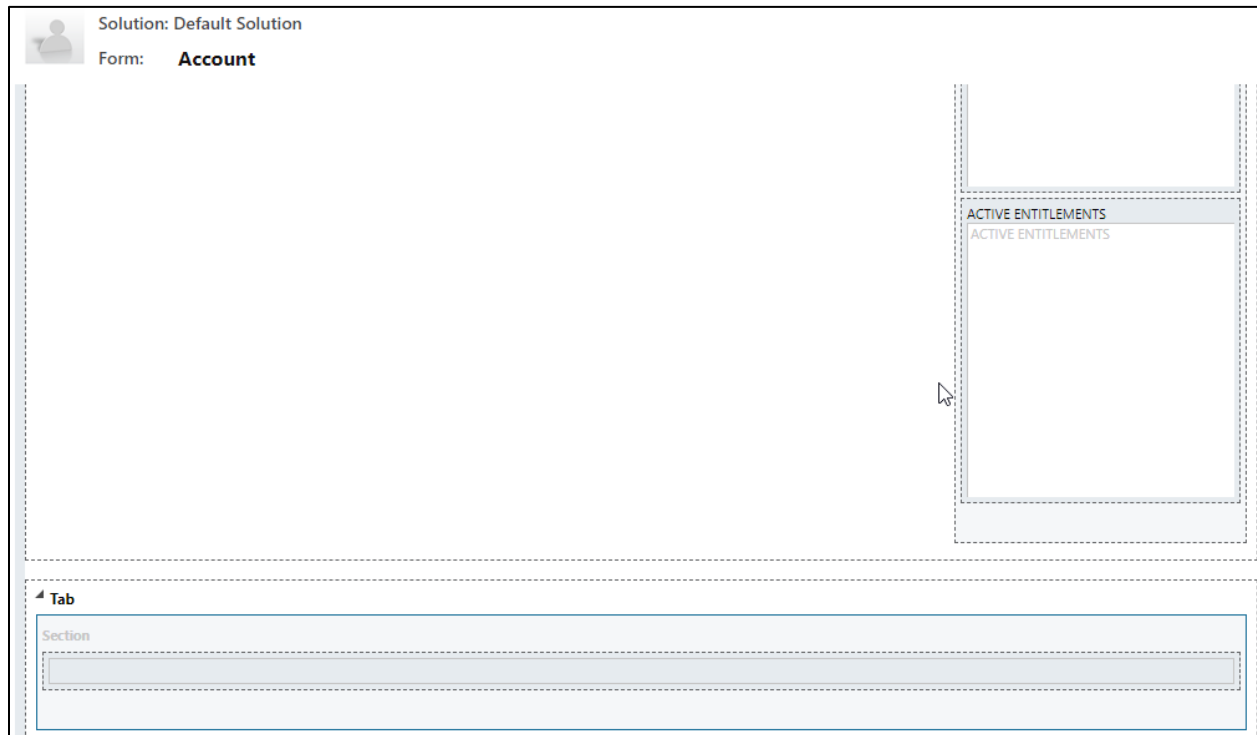
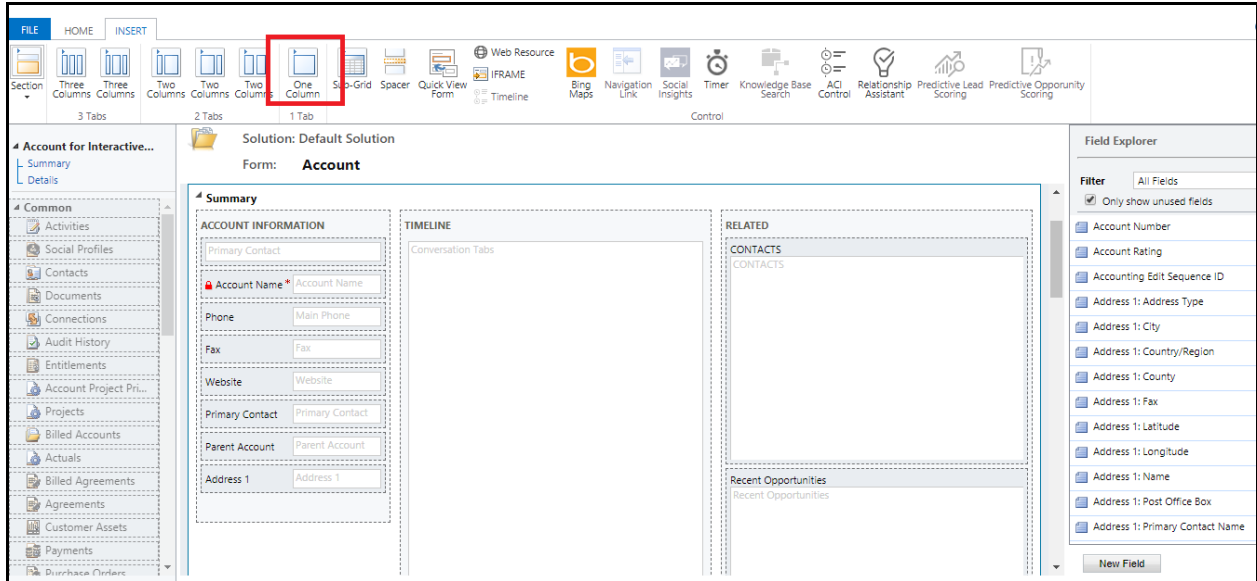


c) Under the **Active Forms** Select any **Name** for which **Form Type** is **Main**.

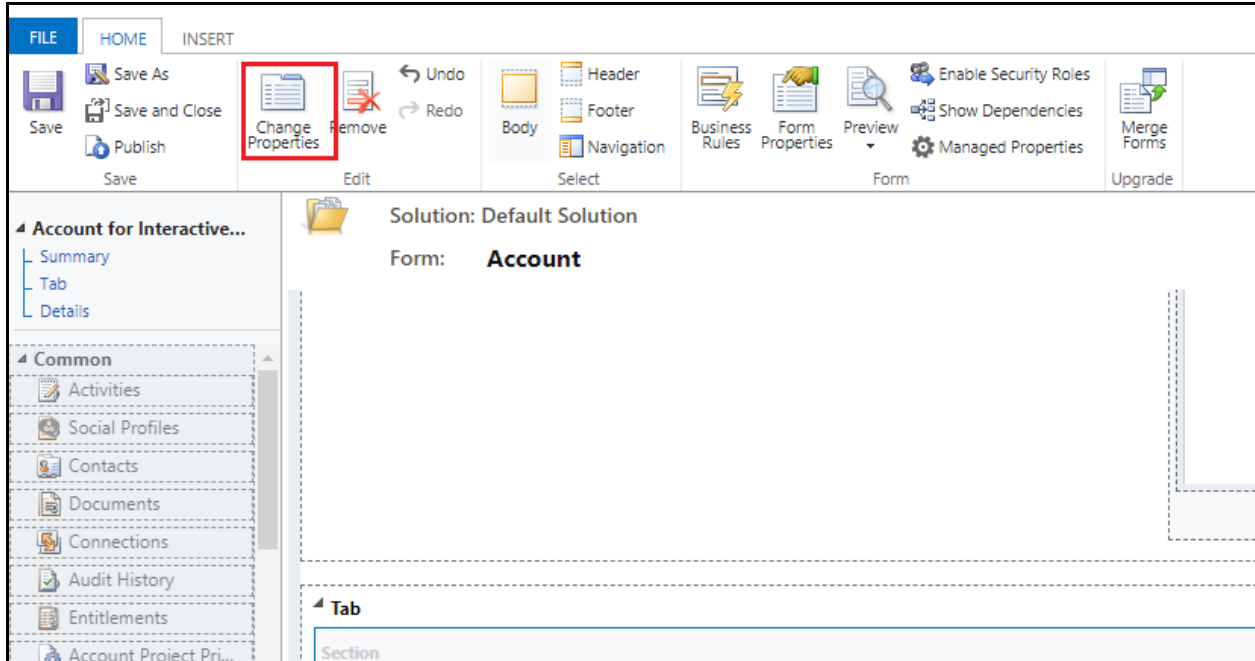


d) The **Forms** Window will open. Go to **Insert** tab and insert **One Column Tab** and insert it anywhere on the form framework.

# Attach2Dynamics – User Manual



e) Go to **Home** and click on **Change Properties**.



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.



Display   Formatting   Events

Name

Specify a unique name.

\*Name    tab\_8

\*Label    Attach2Dynamics

Show the label of this tab on the Form

Expand this tab by default

Visibility

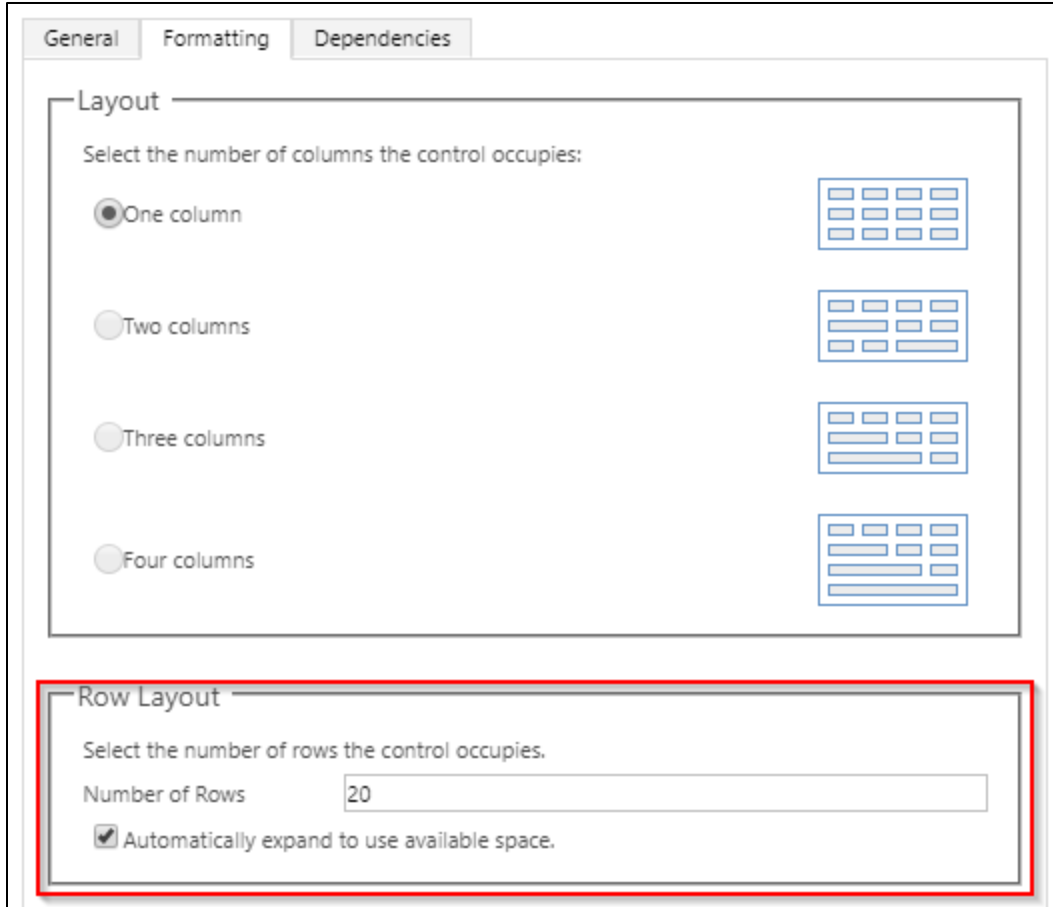
Specify the default visibility of this tab.

Visible by default

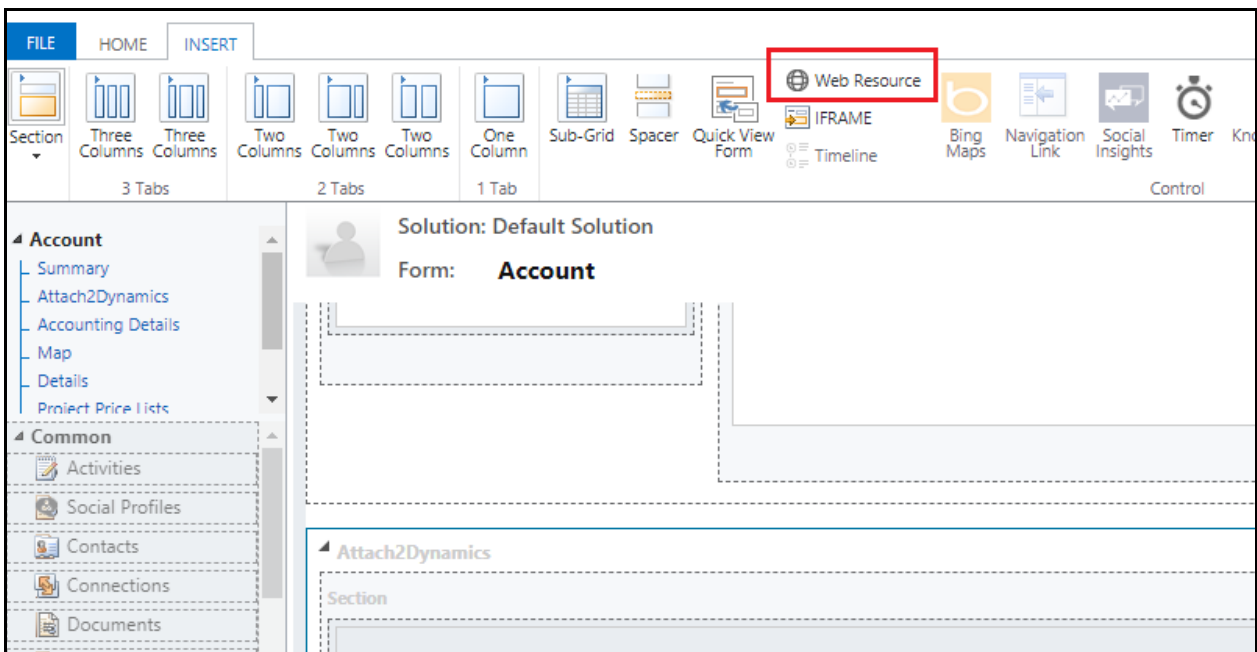
Availability

Specify the default availability of this tab on phone.

Available on phone



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



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**.

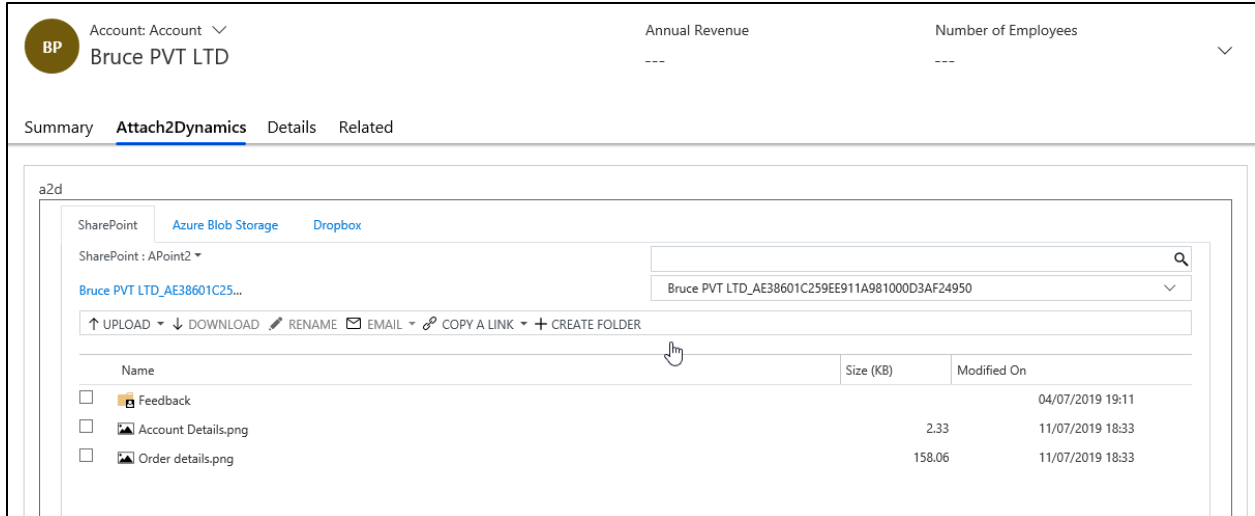
The screenshot shows a configuration form with several sections:

- Web resource**: A text field containing the URL `ikl_/Attach2Dynamics/Library/index.html`. This section is highlighted with a red box.
- Field Name and Properties**:
  - Name \***: A text field containing `WebResource_` followed by a dropdown menu showing `Attach2Dynamics`.
  - Label \***: A text field containing `Attach2Dynamics`.
  - Display label on the Form
- Visibility**:
  - Visible by default
  - Enable for mobileThis section is highlighted with a red box.
- Web Resource Properties**:
  - Custom Parameter(data): An empty text area.
  - Restrict cross-frame scripting, where supported.
  - Pass record object-type code and unique identifier as parameters. This checkbox is highlighted with a red box.

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.

## Attach2Dynamics – User Manual

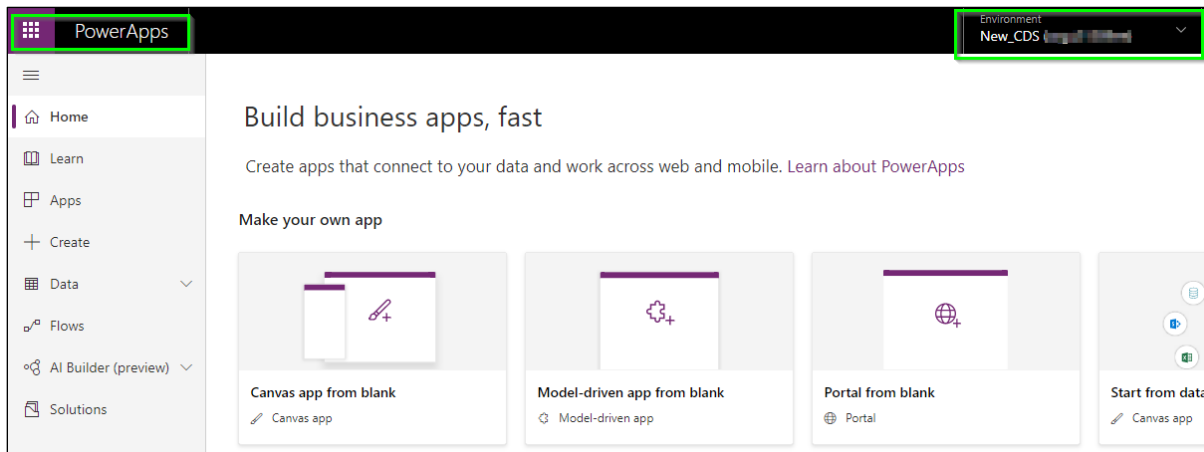


### Log

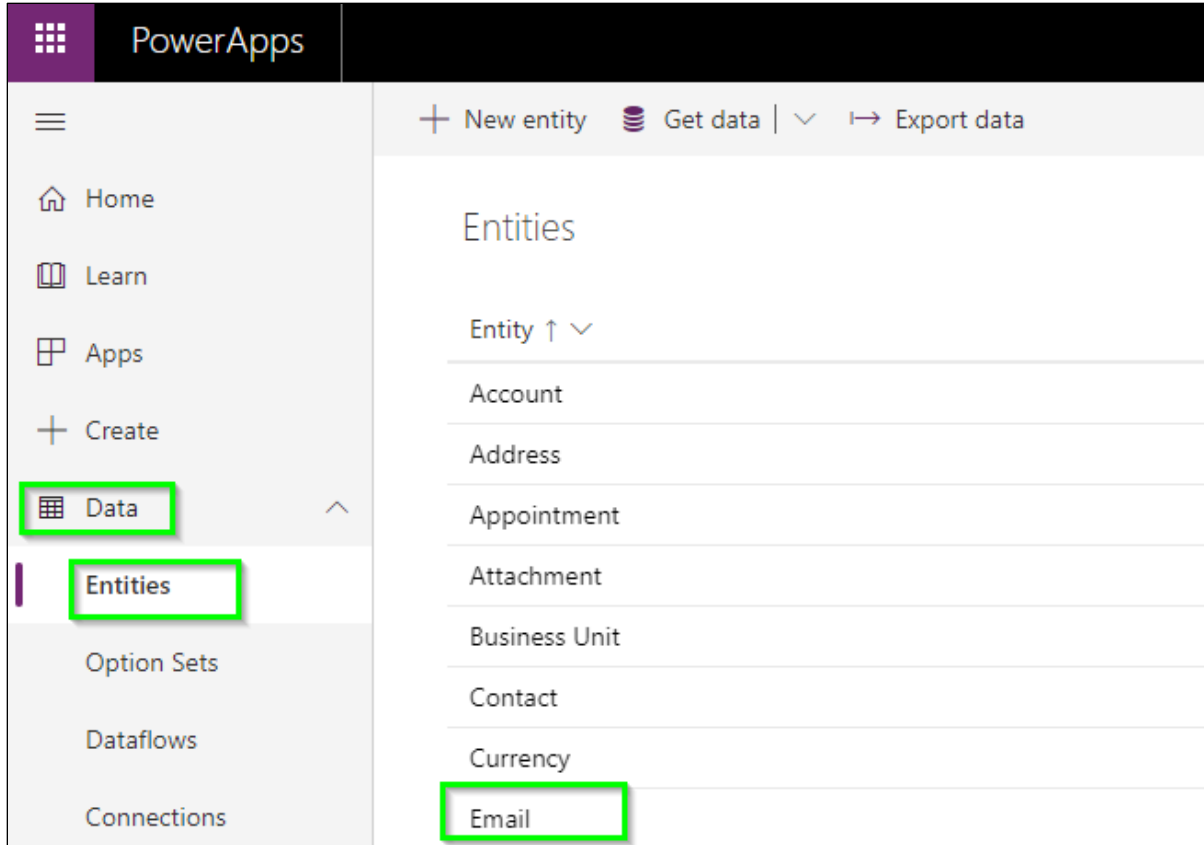
This tracks any errors occurred during the functioning of Attach2Dynamics, details of files ignored during uploading and files deleted from cloud storages.

### CDS: Add Notes section on the Email form

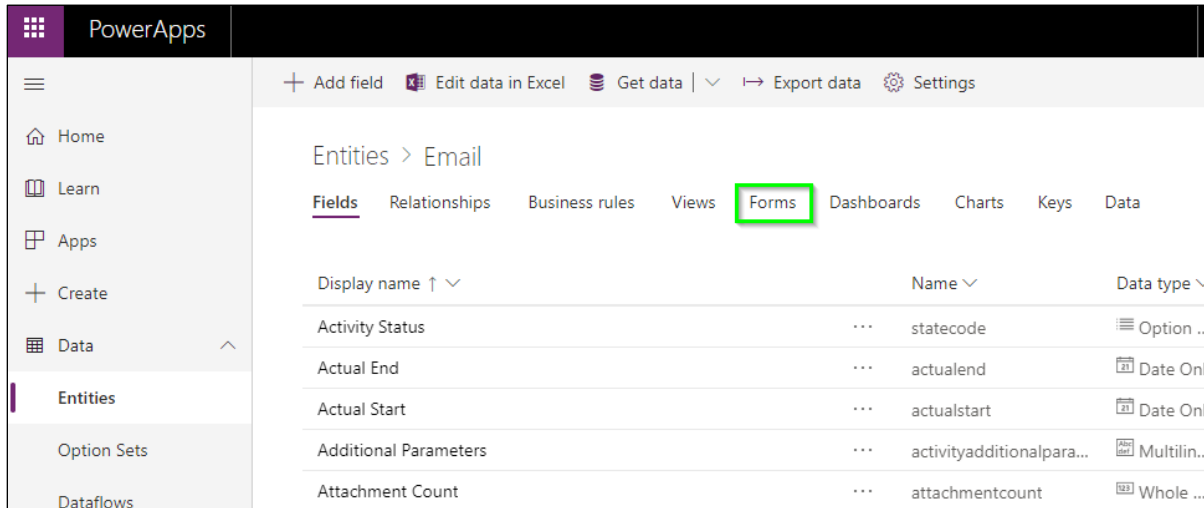
**Step 1:** Navigate to PowerApps and select your CDS environment.



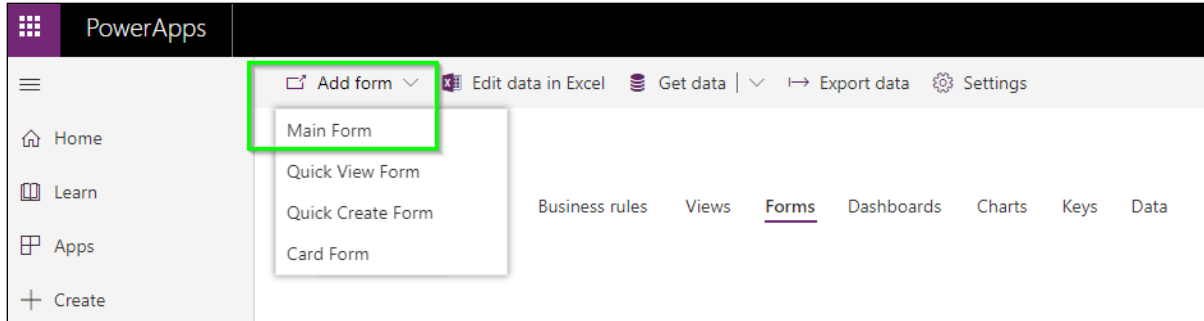
**Step 2:** Enlarge the 'Data' section and click on **Entities**.



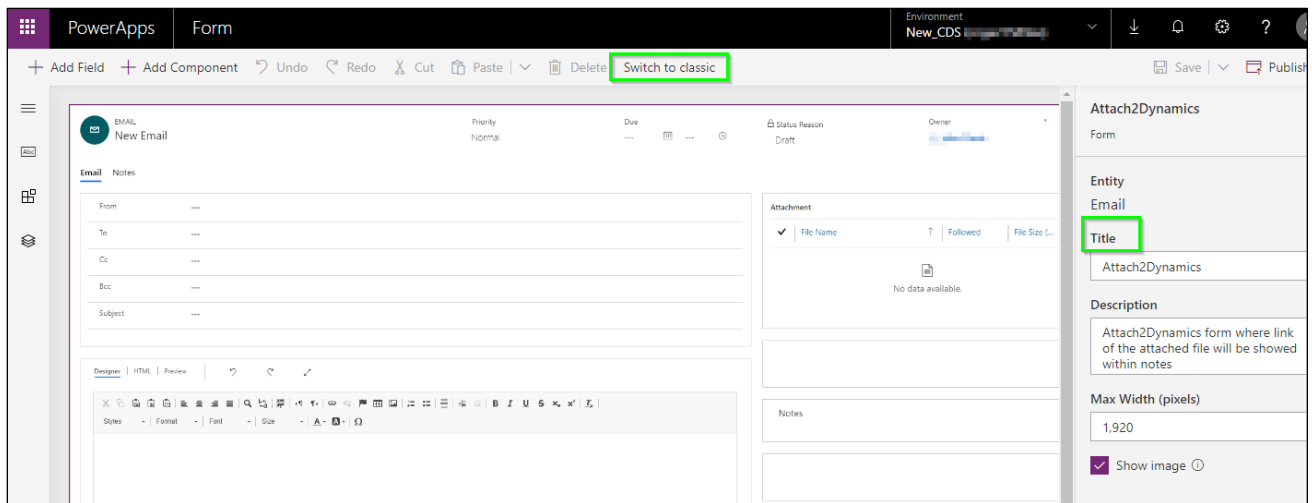
**Step 3:** Select 'Email' entity and click on 'Forms'.



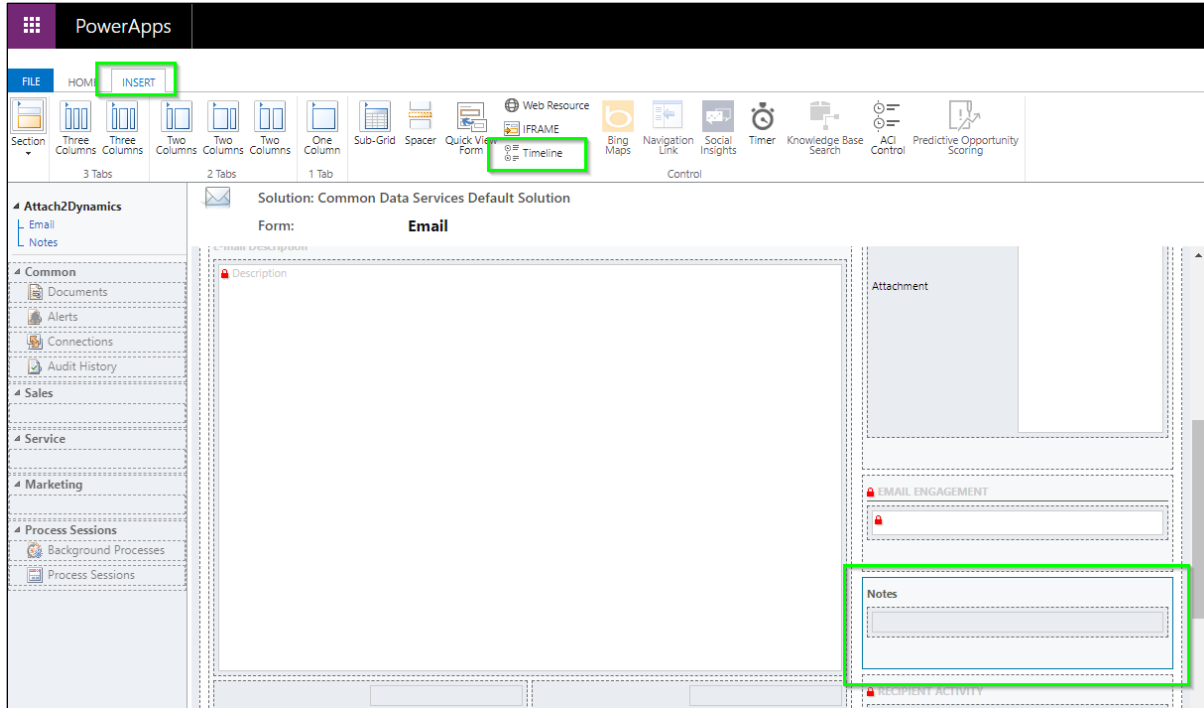
**Step 4:** Click on 'Add form' from the ribbon bar and choose the 'Main Form'.



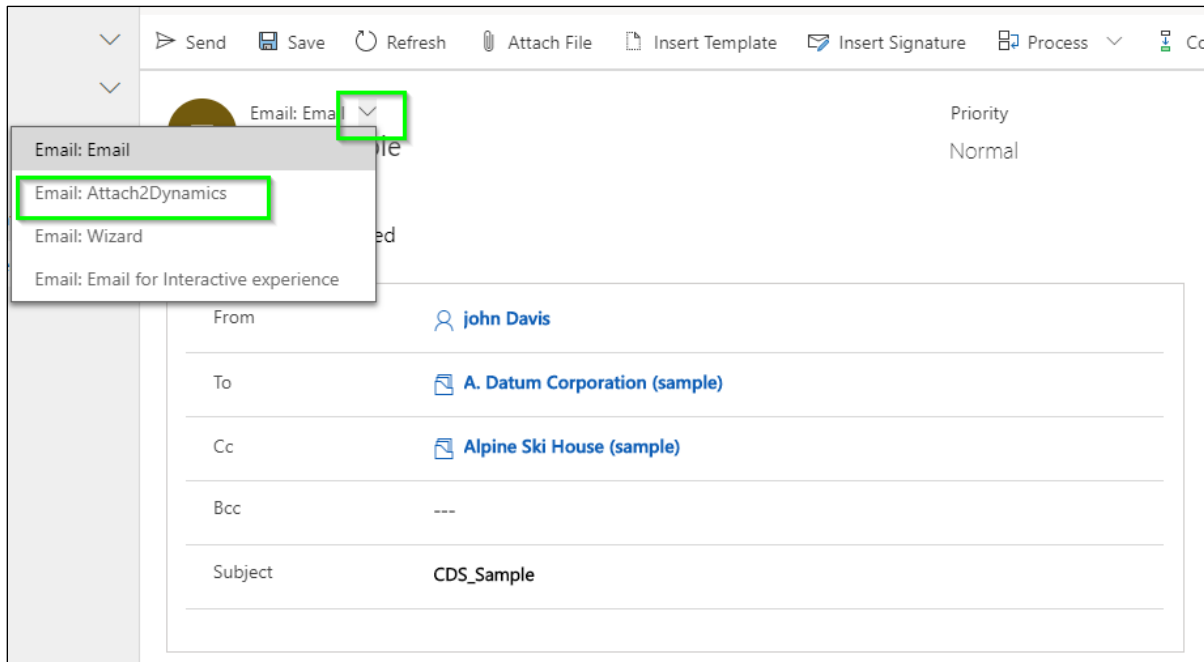
**Step 5:** You will see the window shown below, enter **Title and Description** and click on the **'Switch to classic'** button.



**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.

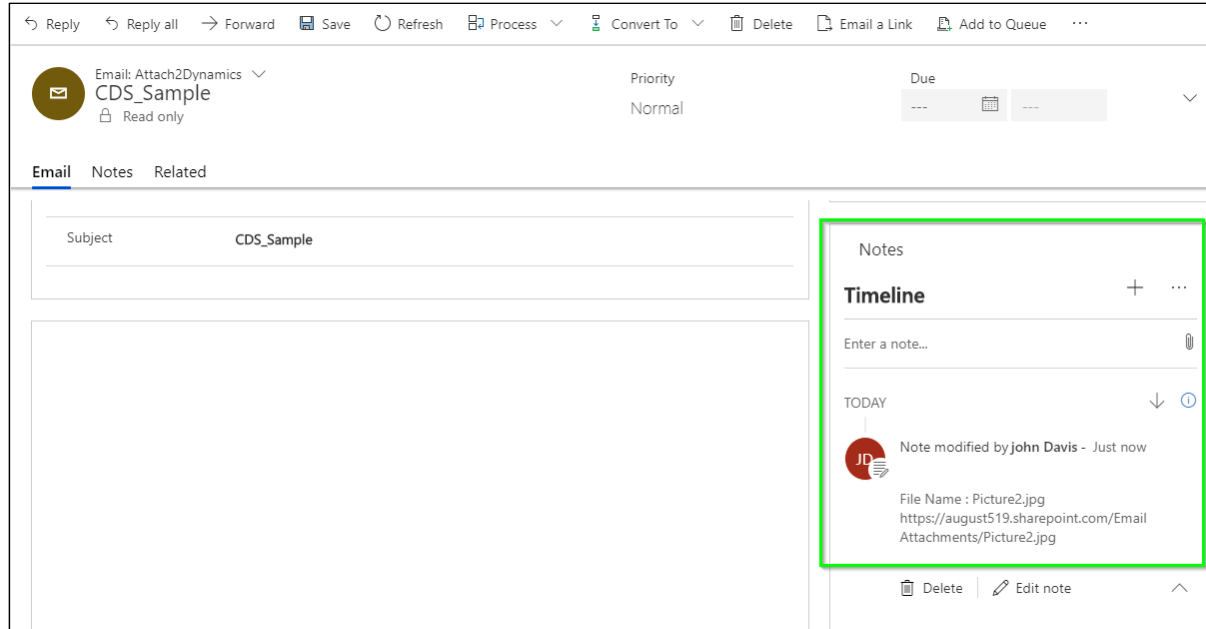


**Step 7:** Save and Publish the form. Now, navigate to Site map and create email. You will see the below screen, choose the form which you created with note section.



**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.

## Attach2Dynamics – User Manual



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## Contact Us

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