



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 A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A A 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
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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:

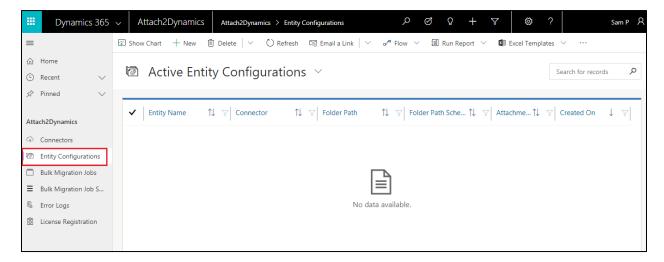


And to see the what exactly the error is, navigate to 'Logs Entity', check the error and retry the authentication.

🕼 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.

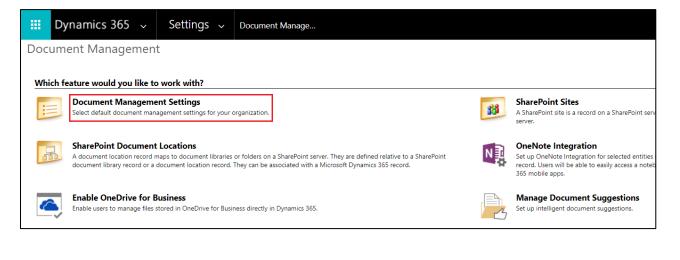
Unlike Email Attachments and Sales Literature Attachments, we don't have to create a different Entity Configuration record for Moving/Copying Notes Attachment, while creating an Entity Configuration for any entities (except Email and Sales Literature), if the Attachment Action is defined, then the corresponding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

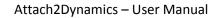
Go to Settings -> Customizations -> Customize the System

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.

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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
Reply → Reply all → Forward 📓 Save 🖒 Refresh	BJ Process > 툴 Convert To > 🗊 Delete	Li Email a Link P. Add to Queue
Email: Attach2Dynamics V CDS_Sample A Read only	Priority Normal	Due
Subject CDS_Sample		Notes Timeline + ···· Enter a note
		TODAY \checkmark ① Note modified by john Davis - Just now File Name : Picture2.jpg https://august519.sharepoint.com/Email Attachments/Picture2.jpg
		🛍 Delete 🖉 Edit note 🔨 🔨

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