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Introduction

Attach2Dynamics is a new ISV add-on 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

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		୦ ଓ	Q	+	\mathbb{Y}	\$?	Sam F	р R
=	🖾 Show Chart 🕂 New 🗓] Delete 🗸 💍 Refresh 🛛 🕉 Detail	Map 🕉 Heat M	lap 🛯 🖓 Ema	il a Link	c ~	₀⁄ª Flow	~ II	Run R	eport 🗸 …	
☆ Home③ Recent ∨	ශ Active Con	nectors ~							Se	earch for records	م
🖈 Pinned 🗸 🗸											
Attach2Dynamics	✓ Connector Type	↑↓ 🍸 Auth-Type	↑↓ 🏹 Maxim	um file size (i	n kilo	1\$∕	Status Re	ason ↑↓	7	Created On 👃 🖓	7
🗘 Connectors											
Configurations											
Bulk Migration Jobs											
■ Bulk Migration Job S											
🖏 Error Logs			No data avai	ilable.							
🗟 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		
New Connector		
e neral Credentials	Additional Settings Entity Configurations	
General		
Name	* SharePoint_1	
Connector Type	* SharePoint	
Default Connector		
SharePoint Site	Look for SharePoint Site	
SharePoint Site	Default Site	
Auth-Type	* 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 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.

\sim	CONNECTOR
(\uparrow)	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		$ $ \sim
	Select		
	Credential App		

d) **Credentials:** It is mandatory to enter credentials in order to create a new Connector. Enter value for **Id** and **Password/Secret**. Next authenticate the credentials.

	ector ePoint			
General Crec	lentials Add	ditional Settings	Entity Configurations	Related
Id	×	samp@caonib.onm	icresoft.com	
Password/S	ecret *	ZZZZZ HVPNF CRQ	UX VWAQM NBJSW PLOEU	SDS
	ecret *	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/Password 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.

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.

	Attach2Dynami	cs – User Manual		
Install				
Mobile				
Blog				
Jobs	-			
Developers)u			
Contact us	No			
Pricing	Tr			
Copyright	E			
Business	٦			
Language				
\leftrightarrow \rightarrow C ($``$ Dropbox, Inc [US] https://www.dropbox.com/	/lp/developers			* 🕅 🧍 🛛
😻 Dropbox		Documentation	Support Blo	og 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.

¥	Create a new app on the DBX Platform	
API v2		
My apps	1. Choose an API	
API Explorer		
Documentation	Dropbox API	Dropbox Business API
нттр	For apps that need to access files in	 For apps that need access to Dropbox
.NET	Dropbox. Learn more	Business team info. Learn more
Java		
JavaScript	L	1
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 HTTP .NET lava	 Dropbox API For apps that need to access files in Dropbox. Learn more Dropbox. Learn more
JavaScript Python Swift Objective-C Community SDKs	2. Choose the type of access you need Learn more about access types
References Getting Started	O App folder – Access to a single folder created specifically for your app.
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.

<i>*</i> €	Cao Mobi	Cao Mobiles							
API v2	Settings	Branding	Analytics						
My apps									
API Explorer Documentation	Status		Development		Apply for production				
HTTP .NET	Development u	isers	Only you		Enable additional users				
Java JavaScript Python	Permission type	e	Full Dropbox 🕧						
Swift Objective-C Community SDKs	App key App secret		Vorietanie Participani						

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

CONNECTOR Dropbox	Owner * A Status Reason Image: A status Reason Image: A status Reason Image: A status Reason Image: A status Reason Image: A status Reason Image: A status Reason
ral <u>Credentials</u> Additional Settings Entity Configurations Related	
Password/Secret * ZZZZZ DTIVM BLUEB RVERJ OQDPV AKQAR ULSIW MF	Use below as your redirect url https://a
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.

	Owner * ≜ Status Reason ⊘ A John Sam Unauthenticated
General Credentials Additional Settings Entity Configurations Related	
Id * Password/Secret * ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ	Use below as your redirect url
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	۵. 🗠
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
	L 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 📄 Sear	rch 🗘 🥲
Files	Name +	Modified *	Members 💌	:≡ *	
Sharing File requests	Sales		Only you		Create new file
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.

	Owner ▲ Status Reason
General Credentials Additional Settings Entity Configurations Relat	ed
Id *	
Password/Secret * ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ	Use below as your redirect url
WorkSpace * Team	https://
Team Folder * Sales	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	Apply for production
Documentation	510105	bevelopment	Apply for production
HTTP			
.NET	Development users	Only you	Enable additional users
Java			
JavaScript	Permission type	Full Dropbox 🕧	
Python			
Swift			
Objective-C	App key	hyperpering large and little	
Community SDKs	App secret	stand-stands	
References		Redirect URIs	
Getting Started	OAuth 2	Redirect Okis	
Authentication types		https://i.crm.dynamics.com/WebResour	rces/ikl_/Attach2Dynamics/Callback.html $ imes$
Branding guide		https:// (http allowed for localhost)	Add
Content hash		https:// (http/anowed/for/localitiost)	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	, <i>P</i> Sea	rch resources, services, and docs		>_ 🖓	⊗	? 🙂 🗖
*						
+ Create a resource	Azure services See all (100+) >	Create a resource >				
🛧 Home		squ	uls.	\geq		< <u>+></u>
🖿 Dashboard	Virtual machines App Services	Storage accounts SQL databases		ure Cosmos DB	Kubernetes	Function App
∃ All services			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			pend for free
🔇 App Services	MICIOSOIT					
Function Apps						
-	Description of the second s				too loo	
SQL databases	Recent resources See all your rec	cent resources > See all your resources >		Useful I		
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SQL databases Azure Cosmos DB Image: Strate Cosmo	NAME	ТҮРЕ	LAST VIEWED	Technical D Azure Serv	Documentation 🛛 rices 🖸 ure Updates 🖄	
SQL Gatabases Azure Cosmos DB Virtual machines		TYPE Storage account	LAST VIEWED 4 d ago	Technical I Azure Serv Recent Azu	Documentation 🛛 rices 🖸 ure Updates 🖄	
SQL databases Aque Cosmos DB Virtual machines Load balancers Storage accounts		TYPE Storage account Subscription	LAST VIEWED 4 d ago 3 wk ago	Technical E Azure Serv Recent Azu Azure Blog	Documentation 🛛 rices 🖸 ure Updates 🖄	
SQL databases Azure Cosmos DB Virtual machines Load balancers Storage accounts	NAME	TYPE Storage account Subscription Data Lake Storage Gen1	LAST VIEWED 4 d ago 3 wk ago 3 wk ago	Technical E Azure Serv Recent Azu Azure Blog	Cocumentation 2 rices 2 ure Updates 2 C nobile app	ттом ооде Play
Sur adrabases Aure Cosmos DB Virtual machines Coad 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 E Azure Serv Recent Azu Azure Blog	Cocumentation 2 rices 2 ure Updates 2 C nobile app	teron cogle Play
Sure Cosmos DB Virtual machines Coad balancers Storage accounts Virtual networks Azure Active Directory	NAME Statements Statements	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 E Azure Serv Recent Azu Azure Blog	Cocumentation 2 rices 2 ure Updates 2 C nobile app	recon oogle Play
Succession of the second seco	NAME Statements Statements	TYPE Storage account Subscription Data Lake Storage Gen1 Data Lake Storage Gen1 Resource group SQL database	LAST VIEWED 4 d ago 3 wk ago 3 wk ago 1 mo ago 2 mo ago 2 mo ago	Technical E Azure Serv Recent Azu Azure Blog	Cocumentation 2 rices 2 ure Updates 2 C nobile app	тлом oogle Play

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

Microsoft Azure	P s	earch resources, services, and docs		Ŗ	Ĺ ¹			\odot	Langer Hooks
«	Home > a2dtestab - Access keys								
+ Create a resource	eacdtestab - Access keys								
A Home	Search (Ctrl+/) «								
Dashboard		Use access keys to authenticate your applications when making request Azure Key Vault - and don't share them. We recommend regenerating y							
I 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. Lear		d applicat	tions tha	t access	this sto	rage accol	unt to use the new keys. 1
All resources	Access control (IAM)	, ,	- more						
(🕄 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 que la companya de la companya d	10,000	10.000					
👰 Virtual machines	Settings	Connection string	-1.1.5		- 1 ₉ -1	an a	,		CARLO DI MANGA
Load balancers	🕈 Access keys 🔐								
Storage accounts	Geo-replication	key2 🖏							
Virtual networks	🔇 CORS	phenological flowing procerting in the phenolity in the second state	-	defects	0.00				
Azure Active Directory	🚊 Configuration	Connection string							
Monitor	Encryption		-180-s	and the second	n gener	100	NP-C	(Augusta)	Industry Control of State
🔶 Advisor	Shared access signature								
Security Center	😚 Firewalls and virtual networks								
Cost Management + Bill	2 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 Entity	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.

CONNECTOR New Connector	Owner A Status R 이 있 Sam P Unauth	eason enticated
neral Credentials Additional Settings Entity Configu	rations	
Storage Name		
Password/Secret * ZZZZZ UWISH IKTAV TFEDG LFKRA TO	IUW EHBHW JBATP	

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.

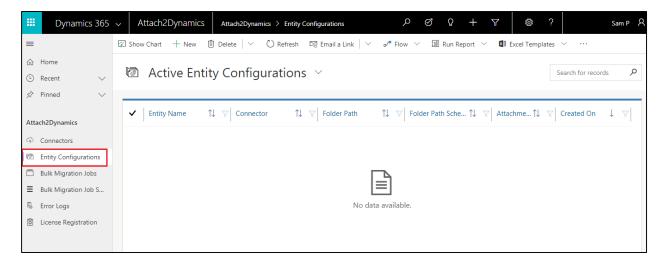
To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with System Administration or Attach2Dynamics Administrator role.

	Dynamics 365	~	Attach2Dynamic	S	Attach2Dynamics > Connectors > SharePoint					
=		+	New 🗋 Deactivate	۵ آ	Delete	𝒮 Authenticate	🖔 Refresh	😵 Map		

After the Connector is Authenticated, Entity Configuration record should be created.

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 *	~
General Credentials Additional Settings Entity Configurations Related		
	+ Add New Entity Confi 🖔 Refresh …	
✓ Entity Name ↑↓ Connector ↑↓ Folder Path ↑↓ Folder Path Sche	ema \downarrow Attachment \downarrow Created On \downarrow	
No data available.		

+ New 🗋 Deac	tivate 🛍 Delete	🕐 Refresh	A, Assign	🖄 Share	🖼 Email a Link	⊳⁄ª Flow ∨	🕼 Word Templates 🗸	🔟 Run Report $$	
							Own	er	*
account - A	Azure Blob Sto	rage					° A	John Sam	
eneral Related	* 谷 Azure Blo	Storage							
Entity Name	* Account	storage							~
Folder Path Schema		erpath							-
🛱 Folder Path	* /account								
Attachment Action									
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.
 - 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 overriden. If unchecked, then a new file with number appended is created and uploaded in the cloud storage.

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 Inerface.

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					
General Related					
Connector	* ゆ Dropbox				
Entity Name	* Email				
🛆 Folder Path	* /email attachments				
Attachment Action	Move				
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 ad only			Priority Norm	
ail Related					
From	🔍 John Sam				
То	🔁 Canvas Pvt LTD				
Cc					
Bcc					
Subject	Sales Files CRM:000	1099			
Regarding					
Duration	30 minutes				
	30 minutes				
	30 minutes AttachManage > Sales			Q Sec	arch
		Modified •	Members +	(Q,) Set	
Duration	AttachManage > Sales	Modified •	Members + Only you		arch 🏠 Create new file Share folder
Duration	AttachManage > Sales			III •	Create new file

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

	Dynamics Form s CRM:0001099			Priority Norma	1
nail Related					
From	♀ 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	ch 🎝 🗘
ring	rer Document.pdf	Modified + 4 mins ago	Members + Only you	i z •	Create new file Share folder
requests eted files					Only you have access

Configuration for Moving/Copying Sales Literature Attachments

In order to define the Sales Literarute 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 CONFIGURATION	DN : 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.

Security Templates

Dynamics 365	 Attach2Dynamics 	م	S S	} +	Y	¢ ?	Sam P
=	Gave and Save & Close + New of Plow ∨						
 ☆ Home ③ Recent ∨ ☆ Pinned ∨ 	SECURITY TEMPLATE New Security Template				Owner ල උ San	ı P	×
Attach2Dynamics	General Permissions						
ං Connectors	Name *						
Entity Configurations	Connector *						
Security Templates							
Bulk Migration Jobs							
■ Bulk Migration Job S							
🖏 Logs							
License Registration							

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 이 오 Sam P	x
General Permissions		
Name *		
Connector *		

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 TEN Access	MPLATE		Owner © ද Sam	* 1 P	
General Permission	ns Related				
Name	* Access	Users		🖄 Add Existing Use	er …
Connector	* 🖓 SharePoint	✓ Full Name	↑ Site	Business Unit	Title
		⊙ Sam P		forgear	
		4			۱.
Connector		⊙ Sam P	I Site	I	

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.

		Owner
Access		ං 🔿 Sam P
ral Permissions Related		
All	Email	
Jpload 🕑	Copy A Link	×
Download 🔲	Create Folder	
/iew Files	Delete	•

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

Dynamics 365	~ Attach2Dynamics	<i>ی</i> ک	Q + ∀ @ ?	Sam P
=	⊟ Save ੴ Save & Close + New ∞″ Flow ∨			
 ☆ Home ③ Recent ∨ ☆ Pinned ∨ 	New Bulk Migration Job		台 Status Reason Draft	~
Attach2Dynamics	General Information Bulk Migration Job Status			
ං Connectors	For ? *	Operator	* Last X Days	$ $ \vee
 Entity Configurations Security Templates 	Schedule Date * 🛗	🕒 Value	×	
Bulk Migration Jobs	Attachment Action *			
■ Bulk Migration Job S				
🗟 Logs				
License Registration				

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 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.

+ New 🛍 Delete 💍 Refresh 🙈 Assign 🖻 Sha	re 🖾 Email a Link 🖬 🕫 Flov	v 🗸 📲 Word Templates	∨ 🗊 Run	Report 🗸
BULK MIGRATION JOB Emails - Last X Weeks A Read only		Owner ❷ ႙ Sam	×	Status Reason Completed
General Information Bulk Migration Job Status	Related			
For ? * Emails		Operator *	Last X Weeks	
Schedule Date * 05-06-2019	11:42 🕒	Value *	1	
Attachment Action * Move				

- 1. For ?: This specifies whether we are doing Bulk Migration for Emails, Notes or Sales Literature.
- 2. Schedule Date: Scheduled date keeps track of the date from which the migration job will start.
- 3. Attachment Action: In this field we specify the action ie. Copy or Move.
- **4. 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		Owner Q Sam	* Status Reason Completed
ieneral Information	Bulk Migration Job Status Related		
Total Records Processed	99		
Last updated:	05-06-2019 20:57		
Total Succeeded Records	99	Total Succeeded Size (KB)	33,824.07
Last updated:	05-06-2019 20:57	Last updated:	05-06-2019 20:57
Total Ignored Records	0	Total Ignored Size (KB)	0.00
Last updated:	05-06-2019 20:57	Last updated:	05-06-2019 20:57
Total Failed Records	0	Total Failed Size (KB)	0.00
Last updated:	05-06-2019 20:57	Last updated:	05-06-2019 20:57

The next tab is **Information** which comprises the details of processing 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	Migration Job Status $$					Search for records	Q
~	Bulk Migrati 🖓	Name	File Size (KB)	7	Record Url 🛛	Status Reason	\[\] Created On \ \ \ \ \ \ \ \ \	<
	Emails - Last X Wee	Click2Export.docx - 23,679.00		23.68	https://a2djune.crm	Succeeded	05-06-2019 11:42	
	Emails - Last X Wee	Account-Account Summary (1).docx - 46,722.00		46.72	https://a2djune.crm	Succeeded	05-06-2019 11:42	
	Emails - Last X Wee	Account-Account Summary (7) - Copy.docx - 23,50	2	23.50	https://a2djune.crm	Succeeded	05-06-2019 11:42	
	Emails - Last X Wee	3.docx - 37,34,943.00	3,7	34.94	https://a2djune.crm	Succeeded	05-06-2019 11:42	
	Emails - Last X Wee	Account_TEST_1.docx - 7,116.00		7.12	https://a2djune.crm	Succeeded	05-06-2019 11:42	

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	RATION Configuration	Owner ⓒ ္ Sam P
General		
Connector	* 🍄 SharePoint	
Entity Name	* Lead	
Attachment Action	Move	
Override Files		

Attach2Dynamics button will be seen in the Command bar.

+ New	🗓 Delete	Attach2Dynamics	🖔 Refresh	😵 Map	😵 Qualify	Process V	唆 Disqualify 🗸
РН	Lead: Al for S Peter Ho	^{Sales} ∨ ouston (sample)					

On Click of the button, Attach2Dynamics window opens.

Attach2Dynamics			
Azure Blob Storage SharePoint Dropbox			
Azure Blob Storage : Azure Storage 2 🔻			
Canvas Ptv-Ltd_E4D7107BD			
↑ UPLOAD - ↓ DOWNLOAD 🖋 RENAME 🖾 EMAIL	≠ σ ^ρ COPY A LINK ≠ + C	REATE FOLDER	
Name		Size (KB)	Modified On
Document.pdf		5.3	0 11/07/2019 17:46

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 (sampl	e)	0	
Lead to Opportunity Sale Active for 2 minutes	Qualify (2 Min)	A Develop	⊖ Pro
Summary Tab Details Related			
First Name	TODAY	Note modified by - Just now https://caomobiles.sharepoint.com/lead	↓ (i) /Peter
Job Title Owner		Hous Delete 🖉 Edit note	\sim
Business Phone		Auto-post on wall: Peter Houston (sam Just now	ple) -

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.

	Email: Attach2Dyna Sales Files CF A Read only	imics Form ∨ RM:0001099	Priority Normal	Due	~
E	mail Related				
	From	♀ John Sam		Attachment	
	То	Canvas Pvt LTD			
	Cc			No data av	vailable.
	Bcc			Timeline	+ …
	Subject	Sales Files CRM:0001099		Enter a note	Û
				TODAY	\downarrow 0
	Hi,			Note modified by Joh	n Sam - 5 Minutes ago
	Th, Please find attachment Thanks, Sam			File Name : Capture - https://www.dropbox as Pvt	.com/home/account/Canv 911A97C000D3AF03D2E/E
				🗊 Delete 🖉 Ed	it 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	ى م	Ŷ	+ 7	© ?	John Davis 🖇
=	⊘ + New	🖒 Refresh 🛛 Process ∨ 🖙 Send as Email	0명 Ema	il a Link 🕜 P	iow 🗸 🗱 w	Vord Templates 🗸 🛛 …
 in Home in Recent in Recent in Prinned in My Work 	Sales Literature: Attach2Dynamics Form ∨ Product Catalog General Related			Expira 	ition Date	
Dashboards Activities Customers Accounts	INFORMATION Trie Product Catalog Subject Default Subject	SALES ATTACHMENTS Customer Product Catalog 4/22/2019 11:58 AM		PRODUC	TS	,
R Contacts Sales Velocity Velocity Competitors	Type Policies And Procedures Description 2018 Catalog for Products	CLOUD STORAGE LINKS FileName : Customer Product Catalog Catalog, 70587CAFC764E911A82A00003A1 86/Brochure.docx	11096	COMPETI	No data av	,

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.

SharePoint Dropbox			
SharePoint : SharePoint_1 ▼			
Alpine Ski House_AAA19CD / D	Deal - Alfa	Alpine Ski House_AAA19CDD88DFE3	11B8E56C3BE5A8B200
↑ UPLOAD - ↓ DOWNLOAD .	🖉 RENAME 🎦 EMAIL 🔻 🔗 COPY A	INK 🔻 🕂 CREATE FOLDER	
Name	P Links	Size (KB)	Modified On
Alfa.docx	0 Links	19.43	
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 Related				
Bcc				
Subject				
Designer HT	ML Preview	7	Ç	2
× 6 🕯		≝ ≣ Q	ç9 🗎	•¶ ¶• @ §
-#E de B <u>A</u> - A-	<u>Ι U</u> S × _ε Ω	x ² <u>T</u> _x S	tyles 👻	Format 👻
Links genera <u>Today.txt</u>	tted by Attach2Dyr	namics -		

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 이 오 Sam P
General Permissions Related		
All	Email	
Upload 🖉	Copy A Link	Ø
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	Ç	⊳ & \$ + ĭ
=	🛱 Show Chart 🥒 Edit 📑 Activate 🔒	Deactivate 🛛 Attach2Dynamics 🗐 Delete	→ ·= Add to Marketing
☆ Home			
🕒 Recent 🗸 🗸	All Accounts ~		
🖈 Pinned 🗸 🗸			
	✓ Account Name	\bigtriangledown Main Ph \bigtriangledown Address \bigtriangledown	Primary Contact
My Work	✓ Fourth Coffee (sample)	555-0150 Renton	Yvonne McKay (sample)
Activities			
₩≓ Dashboards	✓ Litware, Inc. (sample)	555-0151 Dallas	Susanna Stubberod (s
Customers	✓ Adventure Works Pvt. Ltd.	555-0152 Santa Cruz	Nancy Anderson
Accounts	✓ Fabrikam, Inc. (sample)	555-0153 Lynnwood	Maria Campbell (samp
A Contacts			
	✓ Blue Yonder Airlines (sample)	555-0154 Los Angeles	Sidney Higa (sample)
	✓ City Power & Light (sample)	555-0155 Redmond	Scott Konersmann (sa

🗰 Dynamics 365 🗸 CRM Hub	CORE > Accounts	م	Ø	Q	+ 7	,	ŝ
≡ 🖾 Attach	2Dynamics						× _{sign}
☆ Home SharePo	int Azure Blob Storage Dropbox						
	int : APoint2 🔻						
☆ Pinned ∨	OAD ¥						ary .
My Work Name	© Oper					×	
Activities	ler is empty. Upload doc 🛞 👻 ↑ 🚺 « Deals 🕨 Deal - Alfa	~ ¢	Searc	ch Deal - Al	lfa	Q	Dexa
📲 Dashboards 🗸	Organize 🔻 New folder				= -	0	Dexa
Customers 🗸	★ Favorites Name Name Name Alfa			Date mod 5/14/2019		Type Microsoft)exa
Accounts	Downloads Recent places						Dexa
R Contacts							PCA.
✓	🛤 This PC						Dexa
	🙀 Network 🗸 <					>	
×	File name:	,	V All F	Files		~)exa
All				Open	Cance	el	U
1 - 10 01 10 10 30	lectedy					ose	

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.

Attach2Dynami	CS				
SharePoint Dropbox					
SharePoint : SharePoint_1	•				
Alpine Ski House_AAA19C	D / Deal - Alfa		Alpine Ski House_AA	A19CDD88DFE3	11B8E56C3BE5A8
\uparrow upload $\neg \downarrow$ down	nload 🖋 rename 🖾 email 🔻 d	🖋 COPY A LINK		ER	
Name				Size (KB)	Modified On
Alfa.docx				19.43	7/1/2019 12:3
🕺 🕅 Beta.docx				20.70	7/11/2019 5:3
		Drop files he	e.		
		Drop files he	e.		
		Drop files he	e.		
		Drop files he	e.	Owner	
LOG account - ShareF	Point	Drop files he	e.	Owner ⊙ ∧ S	
LOG account - ShareF eneral File Details Relate		Drop files he	e.		
eneral File Details Relate			e.		
eneral File Details Relate	ed		e.		
eneral File Details Relate	ed AA19CDD-88DF-E311-B8E5-6C3BE5A8B20		e.		
eneral File Details Relate A Record Id A A Entity Configuration Image: Configuration Deleted On 04	ed AA19CDD-88DF-E311-B8E5-6C3BE5A8B20 한 account - SharePoint		e.		

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.

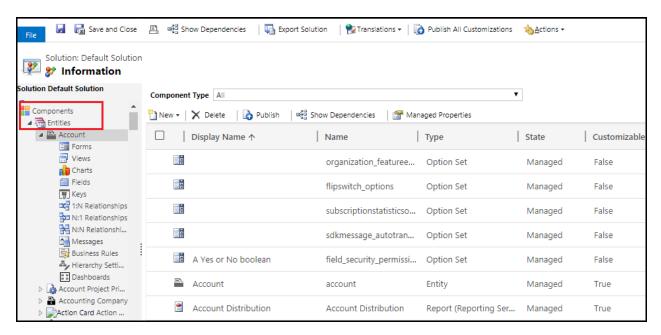
Embedded Attach2Dynamics

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

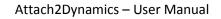
Go to Settings -> Customizations -> Customize the System

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



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 📑 Forn	n Order 👻 瀫 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				
			o 🔄 🔤 😇 📑 🚱 🧀	
v Columns Columns	Two Two One Sup-Grid S s Columns Column	pacer Quick View S Timeline N	ing Navigation Social Timer Knowledge Base ACI Relationship Predictive Lea laps Link Insights Search Control Assistant Scoring	d Predictive Opporunity Scoring
3 Tabs	2 Tabs 1 Tab		Control	
▲ Account for Interactive	Solution: Default Solutio	n		Field Explorer
L Summary Details	Form: Account			Filter All Fields
4 Common	[▲] Summary			Only show unused fields
Activities	ACCOUNT INFORMATION	TIMELINE	RELATED	Account Number
Social Profiles	Primary Contact	Conversation Tabs	CONTACTS	Account Rating
🛐 Contacts	A coount Name		CONTACTS	Accounting Edit Sequence ID
Documents	Account Name* Account Name			Address 1: Address Type
Sonnections	Phone Main Phone			Address 1: City
Audit History	Fax Fax			Address 1: Country/Region
Entitlements	Website Website			Address 1: County
Account Project Pri				Address 1: Fax
Billed Accounts	Primary Contact Primary Contact			Address 1: Latitude
Actuals	Parent Account Parent Account			Address 1: Longitude
Billed Agreements	Address 1 Address 1		Recent Opportunities	Address 1: Name
Agreements	·		Recent Opportunities	Address 1: Post Office Box
Customer Assets	L			Address 1: Primary Contact Name
Payments				Vew Field
Purchase Orders				
				CTIVE ENTITLEMENTS
▲ Tab Section				
[] [] [] [] [] [] [] [] [] []				[[

e) Go to Home and click on Change Properties.

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Attach2Dynamics - User Manual HOME INSERT 🔣 Save As 🚳 Enable Security Roles 🕤 Undo 7 Save and Close E Footer Real Show Dependencies redo Business Form Rules Properties Save Change Properties Body Preview Merge Forms emove 👌 Publish Navigation Managed Properties . Edit Save Select Form Upgrade Solution: Default Solution 4 Account for Interactive... Summary Form: Account _ Tab L Details ₄ Common 🛃 Activities Social Profiles 🛐 Contacts Documents 🔊 Connections Audit History [⊿] Tab 📓 Entitlements nt Pr

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 uni	ique name.
*Name	tab_8
*Label	Attach2Dynamics
Show the second seco	ne label of this tab on the Form
Expand	this tab by default
🕑 Visible by de	erault
-Availability -	
-	ult availability of this tab on phone.
-	

Layout	
One column	
Two columns	
Three columns	
Four columns	
- Pow Lavout	
Row Layout	
Select the number of rows the control occupies.	
Automatically expand to use available space.	

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

FILE	HOME	INSER	Т								1			
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 Tal	bs		2 Tabs		1 Tab							C	ontrol
⊿ Acco	unt			-2	Soluti	on: Defa	ult Solut	ion						
L Sum	mary				Form:	Acc	ount							
_ Atta	ch2Dynami	cs		2.01					8.91					
	ounting Det	ails												
_ Map														
_ Deta			-											
	ect Price Lis	ts												
⊿ Com			÷											
- 🔀 A	Activities													
و 🙆	Social Prof	iles												
<u>s</u> (Contacts			Atta	:h2Dynar	nics								
<u></u>	Connectior	ns		Sectio	í									
	Documents	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 resou		ibrary/index.html	
Field Nam	and Properties		
Name *	WebResource_ Attach2Dynamics		Ī
Label *	Attach2Dynamics		
U Display I	bel on the Form		
Uisibility − Visibility − Visible b Enable fo	default		
−Visibility −	default		
−Visibility −	r mobile		

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	Num	per of Employees	
nary Attach2Dynamics Details Related				
SharePoint Azure Blob Storage Dropbox				
SharePoint : APoint2 -				۹
SharePoint : APoint2 *				
Bruce PVT LTD_AE38601C25	Bruce PVT LTD_AE38601C259E	E911A981000D3AF24950)	~
		E911A981000D3AF24950)	
Bruce PVT LTD_AE38601C25 ↑ UPLOAD ▼ ↓ DOWNLOAD 𝖋 RENAME 🖾 EMAIL ▼				
Bruce PVT LTD_AE38601C25 ↑ UPLOAD ▼ ↓ DOWNLOAD ✔ RENAME EMAIL ▼ Name	<i>P</i> COPY A LINK ▼ + CREATE FOLDER		odified On	
Bruce PVT LTD_AE38601C25 ↑ UPLOAD ~ ↓ DOWNLOAD 《 RENAME EMAIL ~	<i>P</i> COPY A LINK ▼ + CREATE FOLDER			

Log

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

Contact Us

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