



Attach2Dynamics - User Manual

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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

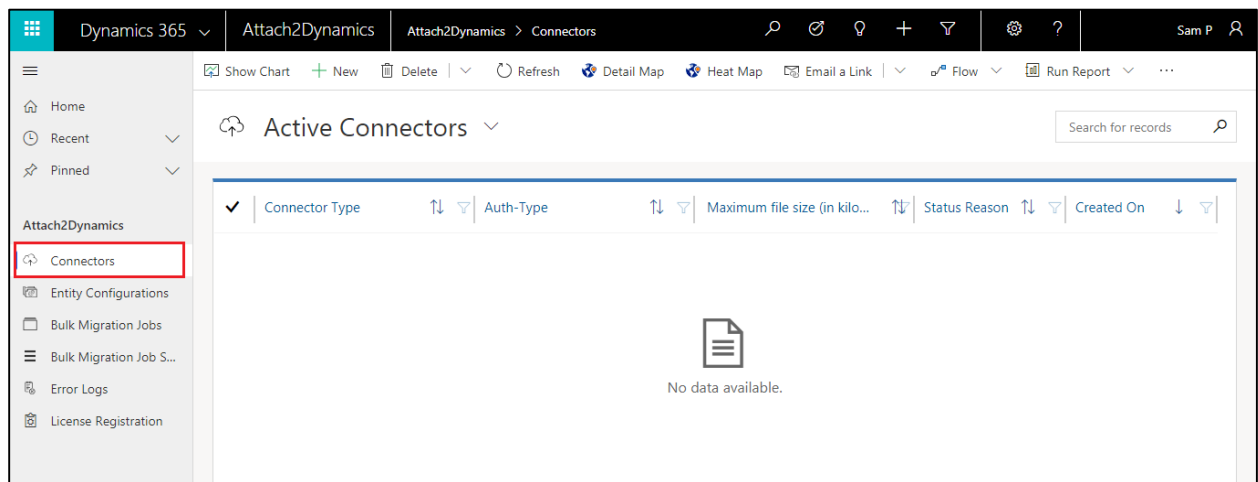
SharePoint: Online

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**.'



Configuring SharePoint Connector

- 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.
- SharePoint Site:** This is valid only for SharePoint. It is the location of SharePoint, where files and folders will be stored. Select the valid SharePoint site here. This field is not visible for Dropbox and Azure Blob Storage.



CONNECTOR
New Connector

General
Credentials
Additional Settings
Entity Configurations

General

Name *

SharePoint_1

Connector Type *

SharePoint

Default Connector

☒

SharePoint Site *

Look for SharePoint Site

Default Site


https://[redacted].sharepoint.com

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 Authentication with the connector is done through App or Credential.
 For **SharePoint** both **App** and **Credential** are supported.
 For **Dropbox** only **App** is valid.
 For **Azure Blob Storage** only **Credential** is valid.

 CONNECTOR
SharePoint_1

General Credentials Additional Settings Entity Configurations Related

General

Name

*

SharePoint_1

Connector Type

*


SharePoint

Default Connector

☒

SharePoint Site

*

 Default Site

Auth-Type

*

Credential


↓

--Select--

Credential

App

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

 CONNECTOR
SharePoint

General **Credentials** Additional Settings Entity Configurations Related

Id

*

sample@connect2dynamics.com

Password/Secret

*

ZZZZZ HVPNF CRQUX VWAQM NBSW PLOEU SDS

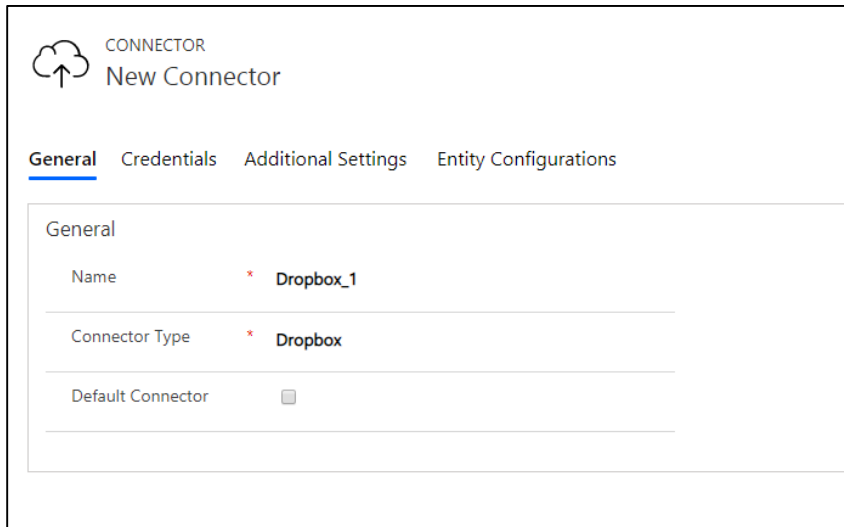
Note:

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

- **Id and Password for SharePoint:** In the **Id/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

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



CONNECTOR
New Connector

General Credentials Additional Settings Entity Configurations

General

Name * Dropbox_1

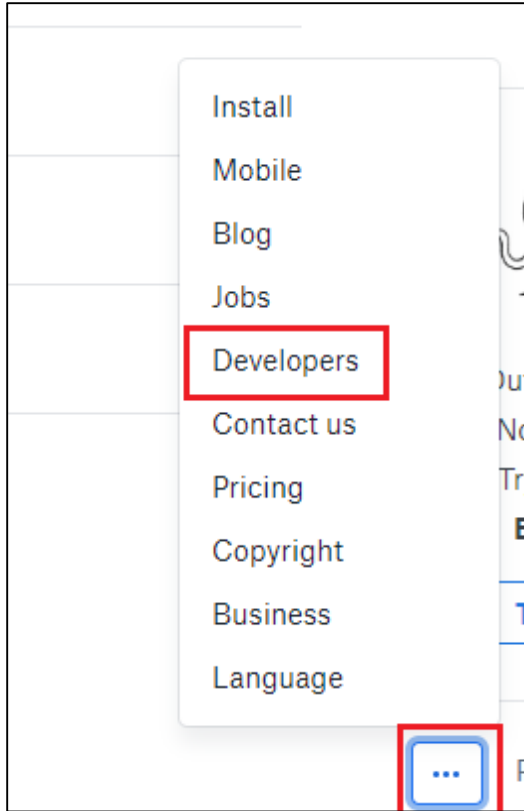
Connector Type * Dropbox

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:

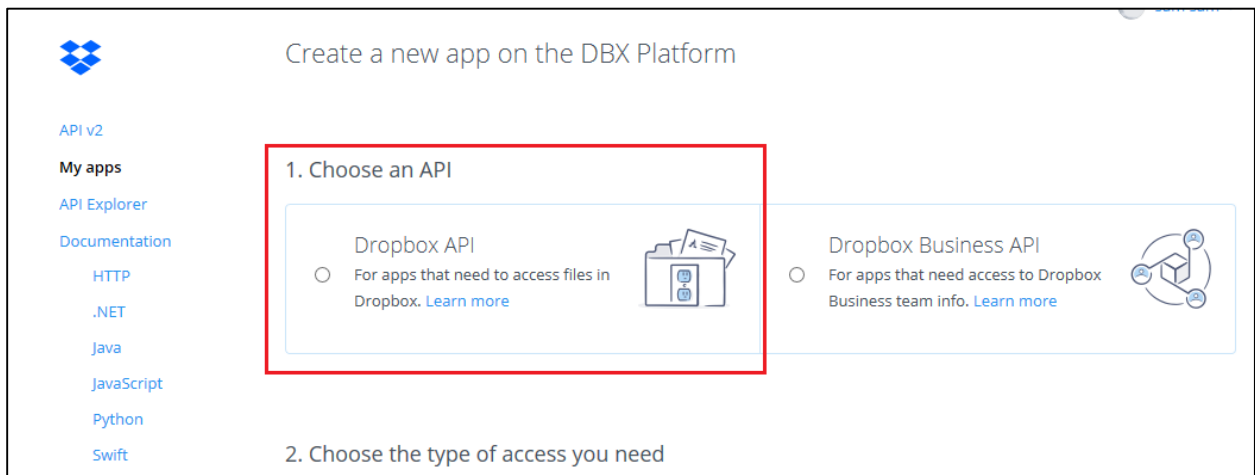
Go to www.dropbox.com and enter your login credentials for Dropbox. After you are logged in you will land on the 'Home Page.' At the bottom right corner of the screen click on the 'Points of Ellipsis (the three dots)' and then select **Developers** from the view.



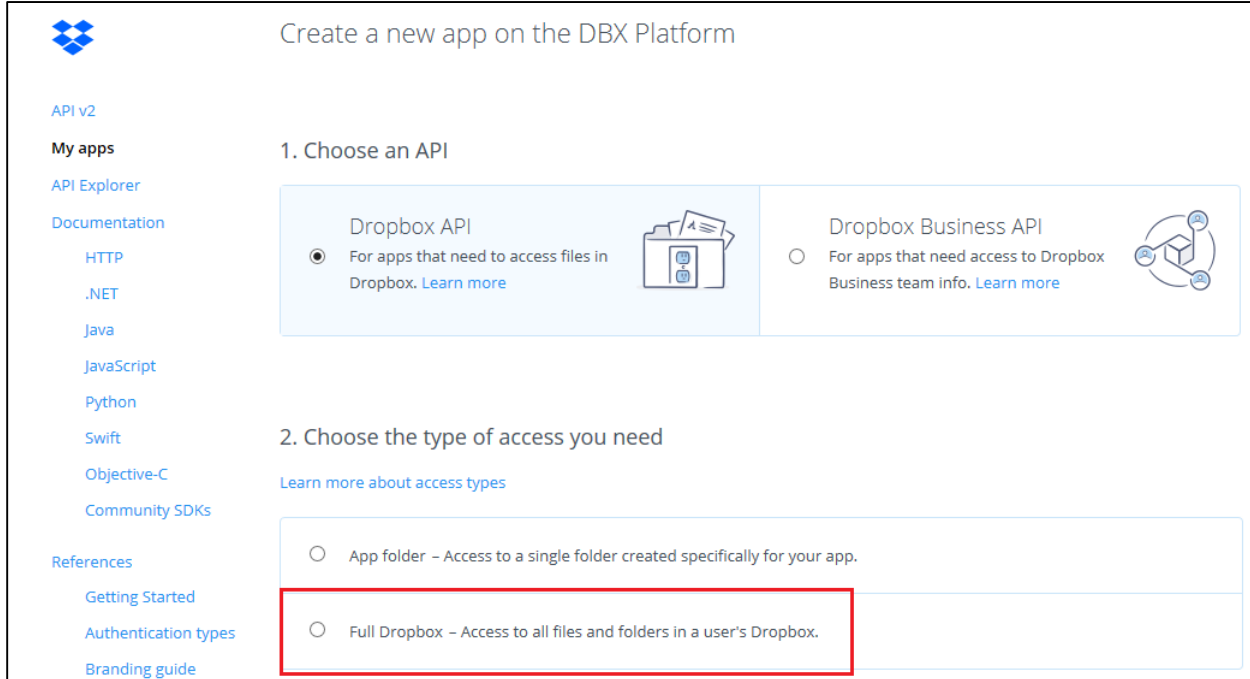
Now, click on **My apps** on the list in left.

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

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



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



Create a new app on the DBX Platform

API v2

My apps

API Explorer

Documentation

HTTP

.NET

Java

JavaScript

Python

Swift

Objective-C

Community SDKs

References

Getting Started

Authentication types

Branding guide

1. Choose an API

Dropbox API
☒ For apps that need to access files in Dropbox. [Learn more](#)

Dropbox Business API
☐ For apps that need access to Dropbox Business team info. [Learn more](#)

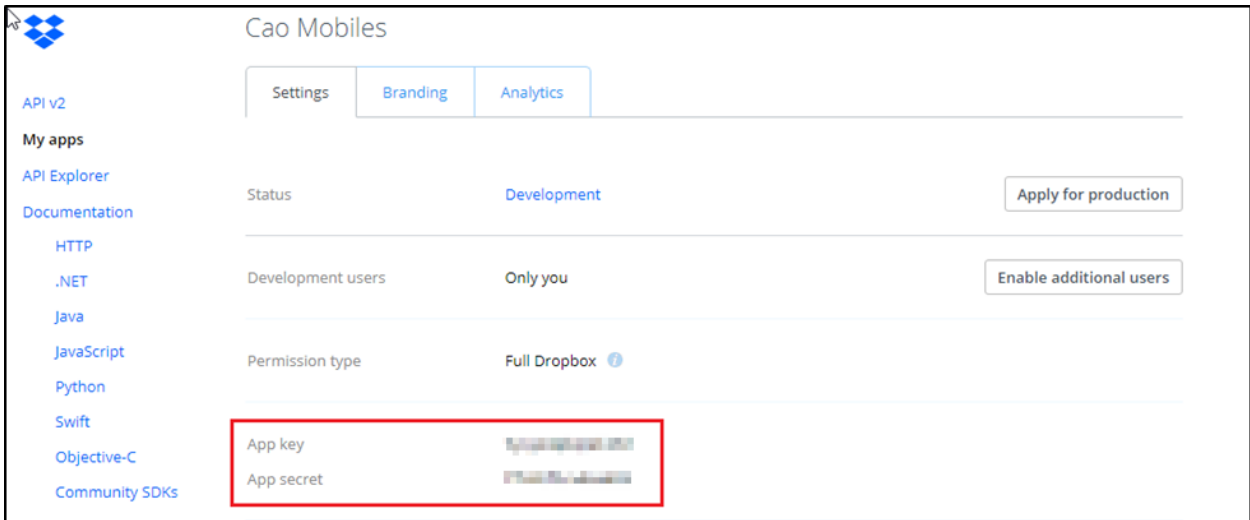
2. Choose the type of access you need

[Learn more about access types](#)

☐ App folder – Access to a single folder created specifically for your app.

☒ 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 Mobiles

Settings Branding Analytics

API v2

My apps

API Explorer

Documentation

HTTP

.NET

Java

JavaScript

Python

Swift

Objective-C

Community SDKs

Status Development [Apply for production](#)

Development users Only you [Enable additional users](#)

Permission type Full Dropbox ⓘ

App key

App secret

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

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CONNECTOR
Dropbox

Owner
John Sam

Status Reason
Unauthenticated

General **Credentials** Additional Settings Entity Configurations Related

Id	*	[REDACTED]
Password/Secret	*	ZZZZZ DTIVM BLUEB RVERJ OQDPV AKQAR ULSIW MF...
WorkSpace	*	Personal

Use below as your redirect url

[https://\[REDACTED\]/WebResources/ikl_/Attach2Dynamics/Callback.html](https://[REDACTED]/WebResources/ikl_/Attach2Dynamics/Callback.html)

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.

CONNECTOR
Dropbox

Owner
John Sam

Status Reason
Unauthenticated

General **Credentials** Additional Settings Entity Configurations Related

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

Use below as your redirect url

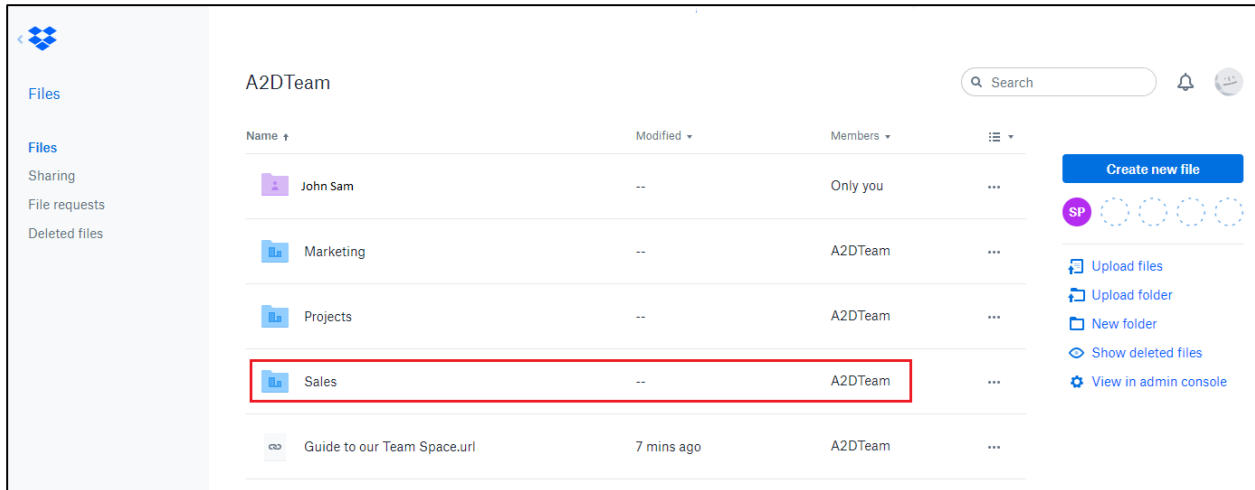
[https://\[REDACTED\]/WebResources/ikl_/Attach2Dynamics/Callback.html](https://[REDACTED]/WebResources/ikl_/Attach2Dynamics/Callback.html)

Note : Valid only for Dropbox.

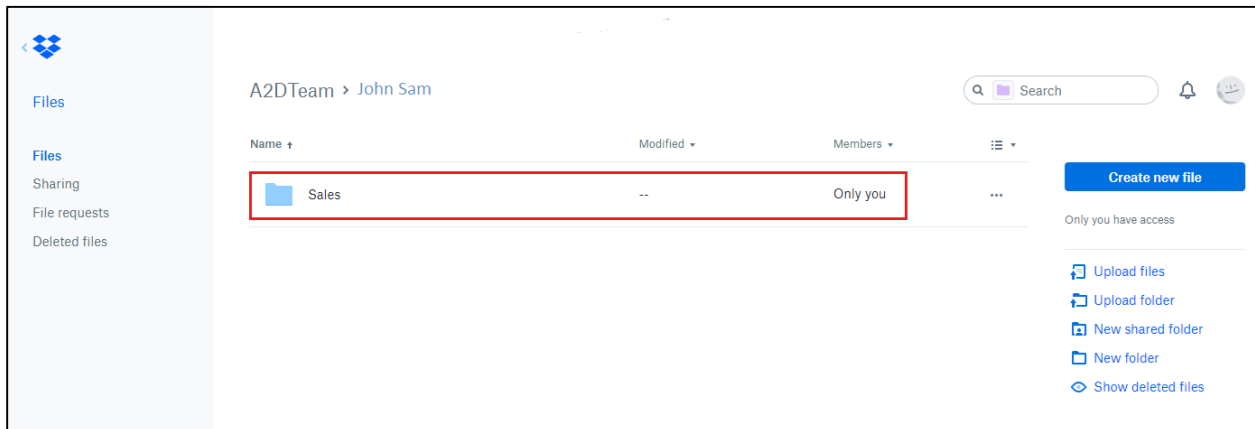
Before authenticating please check you have logged in with correct DropBox account.

This folder will appear outside App folder.

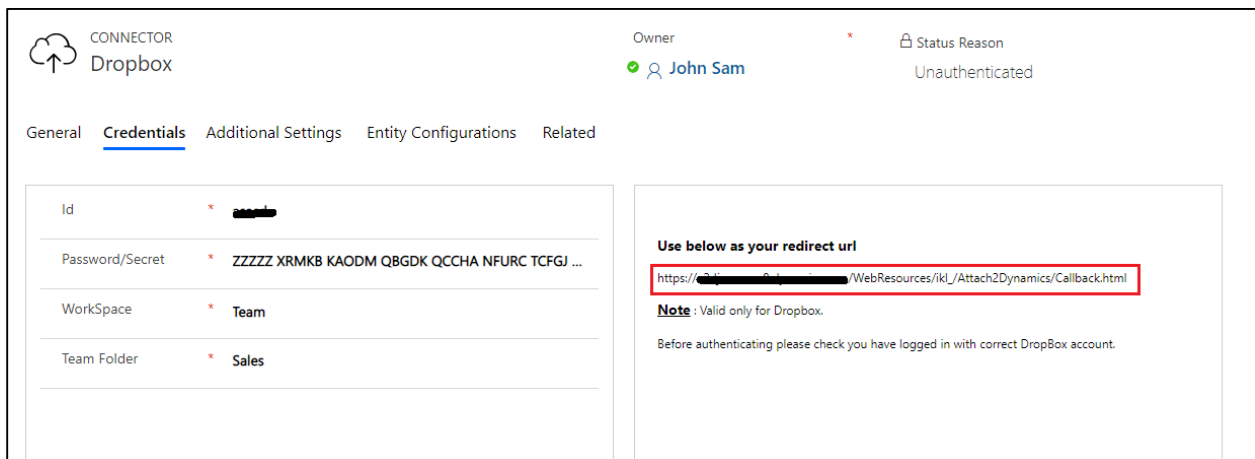
Attach2Dynamics – User Manual



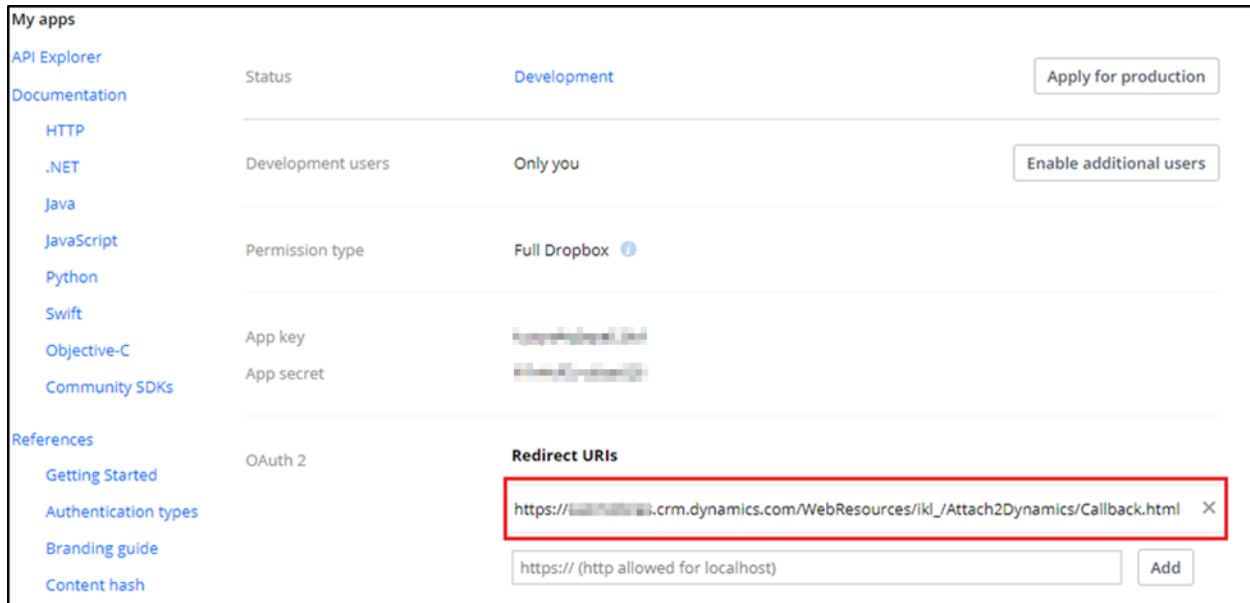
If the Workspace field is set as **Personal** then the files and folders will be stored inside App folder.



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.



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



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

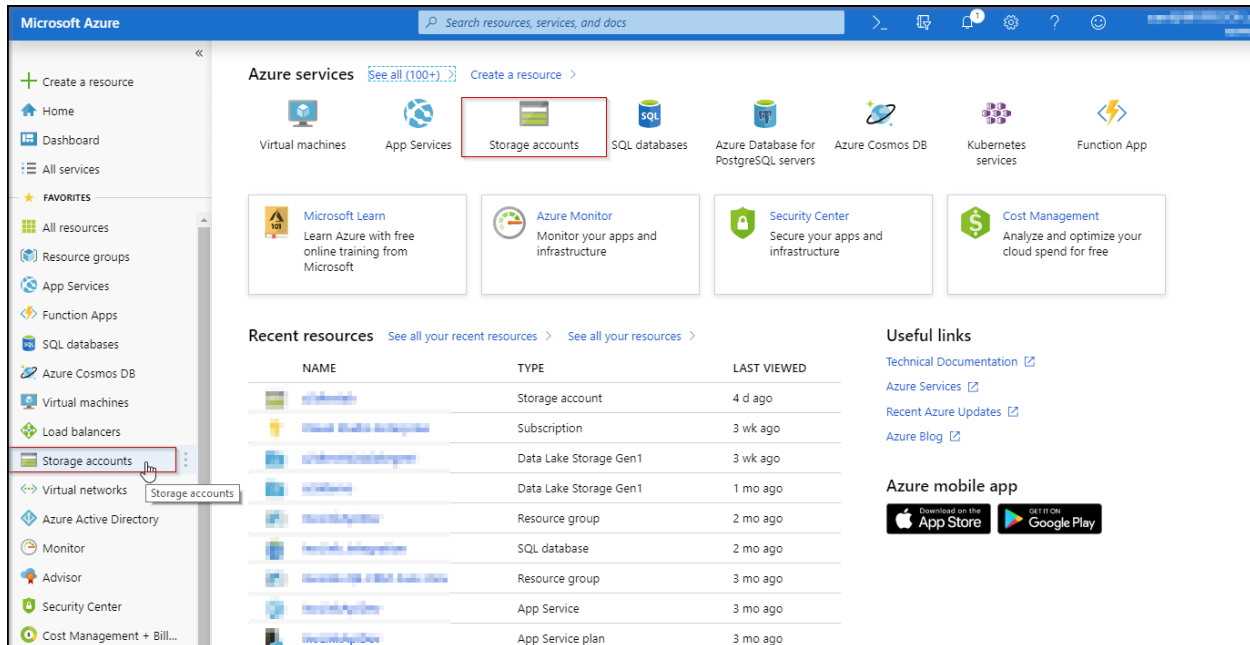
Configuring Azure Blob Storage Connector

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

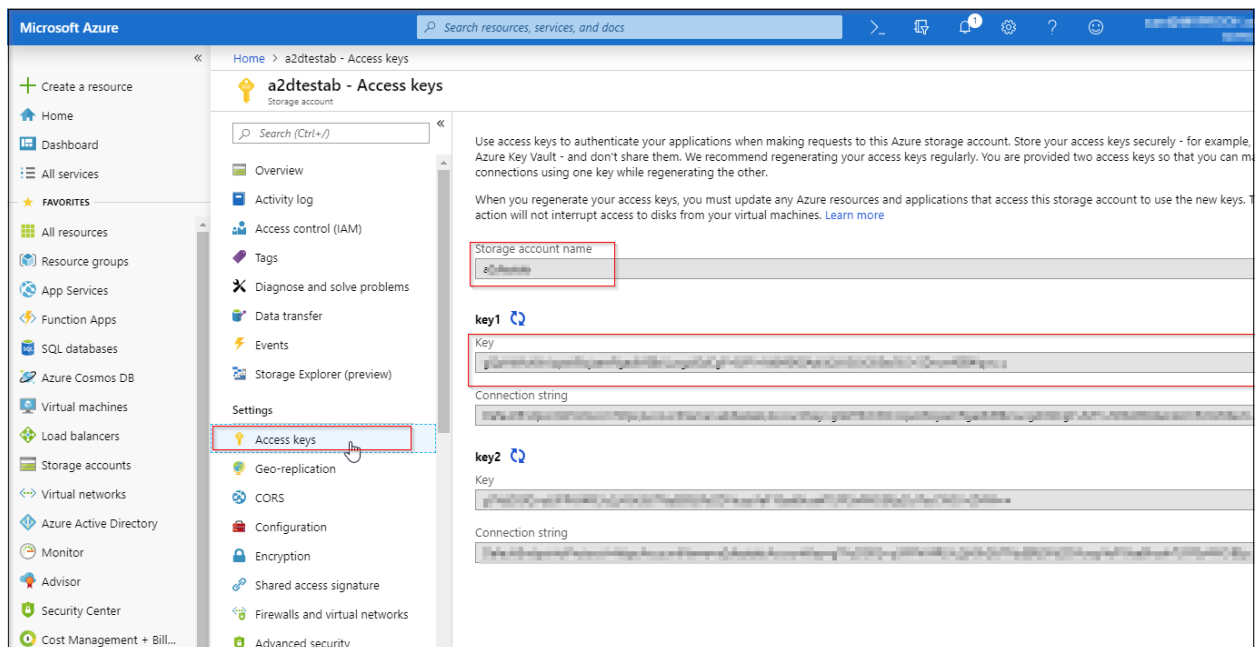
Open URL: <https://portal.azure.com/> and enter your Microsoft Azure Credentials

Next go to storage account section.

Attach2Dynamics – User Manual

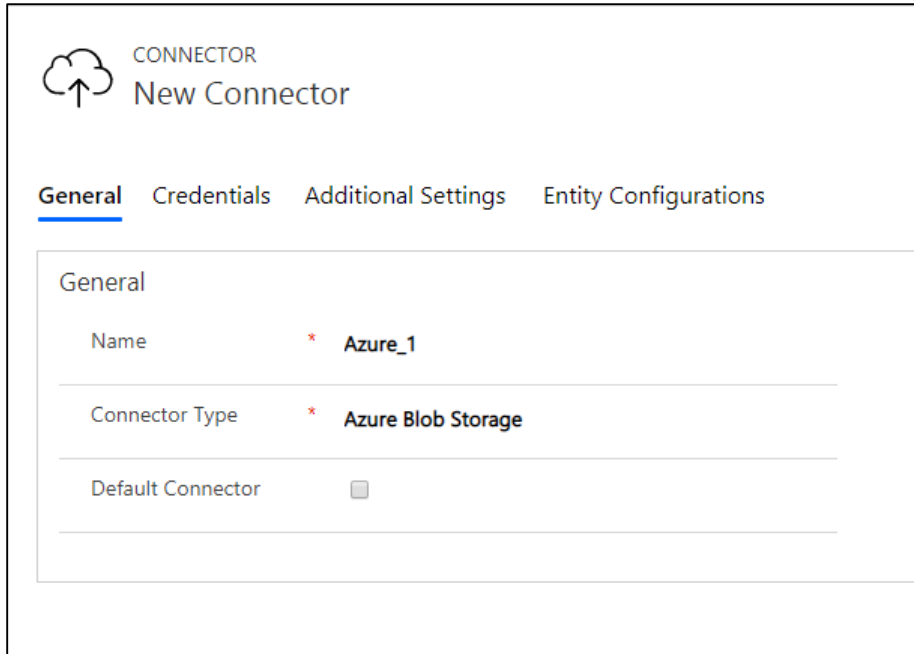


Select your storage account and open it, look for Access Keys (as shown in the below screenshot), get the Storage account name and Key from it.



Now Create a new **Connector**.

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



CONNECTOR
New Connector

General Credentials Additional Settings Entity Configurations

General

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

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

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

Additional Settings:

- a) **Set file size limit for attachments** – Maximum file upload size can be 50 MB.
- b) **Set blocked file extensions for attachment** – This contains the list of file extensions (semicolon separated) which the Connector won't be able to upload on Cloud. You can enter it as per your preference.

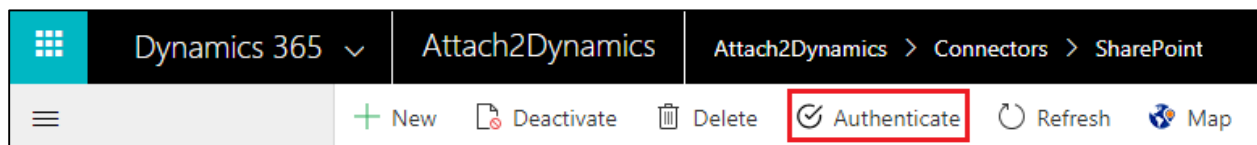
e.g., txt;docx

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

Authenticate

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

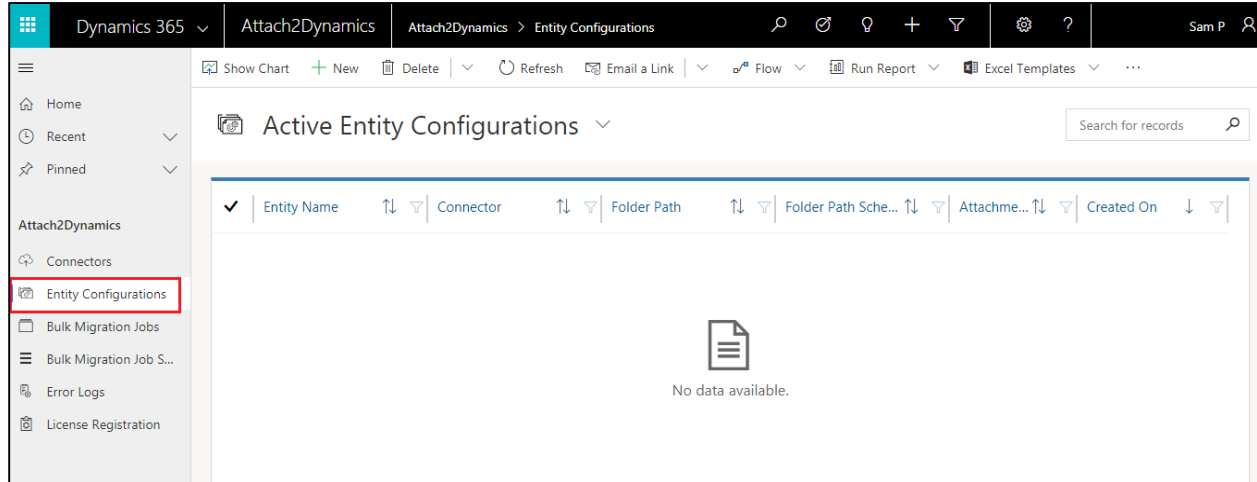
To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with System Administration or Attach2Dynamics Administrator role.



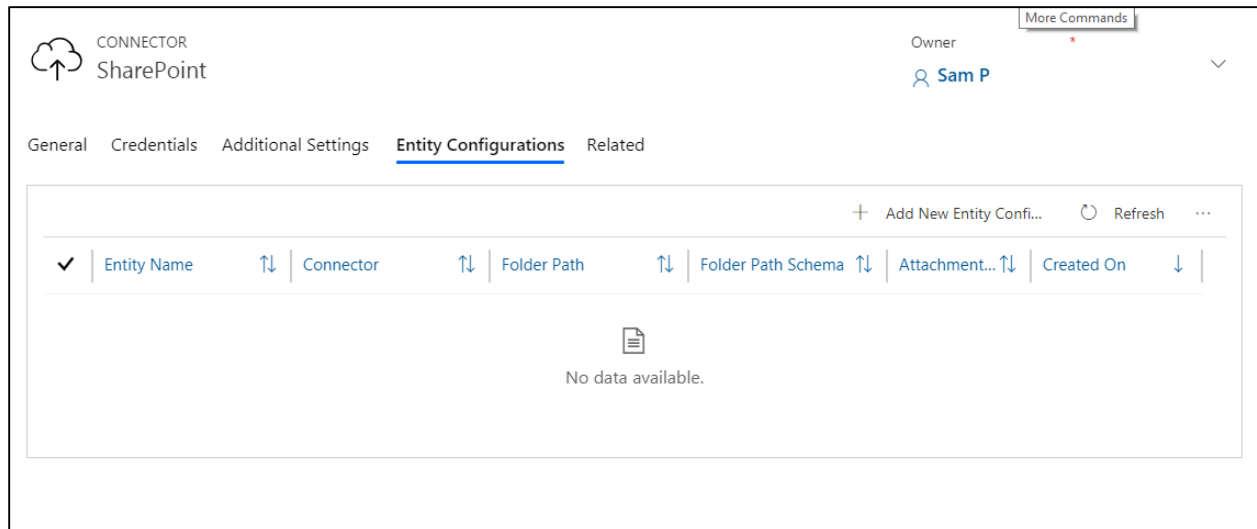
After the Connector is Authenticated, Entity Configuration record should be created.

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.



The screenshot shows the 'ENTITY CONFIGURATION' window for 'account - Azure Blob Storage'. The 'General' tab is active, displaying the following configuration details:

- Connector:** Azure Blob Storage
- Entity Name:** Account
- Folder Path Schema:** new_azurefolderpath
- Folder Path:** /account
- Attachment Action:** ---
- Override Files:** ☐

General:

- Connector:** Select the Connector (SharePoint, Dropbox or Azure Blob Storage) for which you want to configure the Entity.
- Entity Name:** Mention the Entity for which you are configuring.
- Folder Path Schema:** This field is **visible** only for Dropbox and Azure Blob Storage. In this select the field in which the folder path schema will be stored. This can be any field attribute of the Entity selected.
eg: name
Data already present in the selected field(name) gets overridden.
- Folder Path:** This field is visible only for Dropbox and Azure Blob Storage. This is auto populated depending upon the entity selected.
- 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.
 - 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.
- Override files:** If checked, means trying to upload file with same name will be overridden. If unchecked, then a new file with number appended is created and uploaded in the cloud storage.

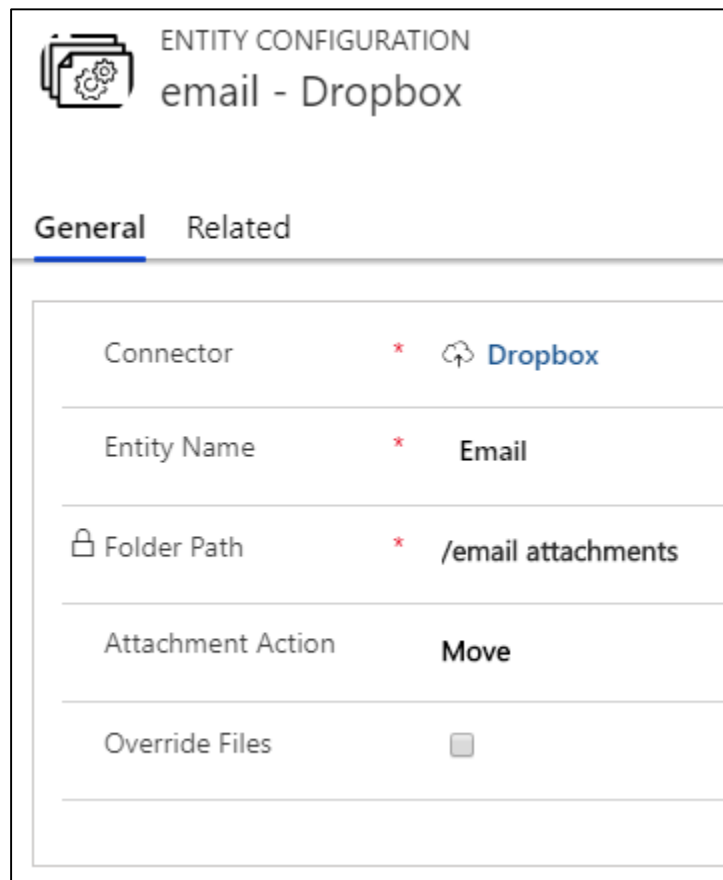
Note:

- 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.




The screenshot shows the 'ENTITY CONFIGURATION' window for 'email - Dropbox'. It has two tabs: 'General' (selected) and 'Related'. The 'General' tab contains a table with the following configuration:

Field	Value
Connector	*  Dropbox
Entity Name	* Email
Folder Path	* /email attachments
Attachment Action	Move
Override Files	<input type="checkbox"/>

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

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




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


Priority
Normal

Email Related

From

 John Sam

To

 Canvas Pvt LTD

Cc

Bcc


Subject

Sales Files CRM:0001099

Regarding



Duration




30 minutes



Files
My files
Sharing
File requests
Deleted files

AttachManage > Sales








Name ↑	Modified ↓	Members ↓	
 account	--	Only you	...
 contact	--	Only you	...
 Email Attachments	--	Only you	...


Create new file

Share folder

Only you have access.

 Upload files
 Upload folder
 New folder
 Show deleted files


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


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


Priority
Normal

Email Related

From

 John Sam

To

 Canvas Pvt LTD


Cc

Bcc

Subject

Sales Files CRM:0001099

Regarding

 Canvas Pvt Ltd

Duration

30 minutes


Files
My files
Sharing
File requests
Deleted files

Canvas Pvt-Ltd_E4D7107BD5A3E911A981000D3AF03F9B

Document.pdf

4 mins ago

Only you

...

Create new file

Share folder

Only you have access

Upload files

Upload folder

New folder

Show deleted files

Configuration for Moving/Copying Sales Literature Attachments

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

ENTITY CONFIGURATION : 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

Save

Save & Close

New

Flow

Home

Recent

Pinned

Attach2Dynamics

Connectors

Entity Configurations

Security Templates

Bulk Migration Jobs

Bulk Migration Job S...

Logs

License Registration

SECURITY TEMPLATE

New Security Template

Owner

Sam P

General

Permissions

Name *

Connector *

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

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

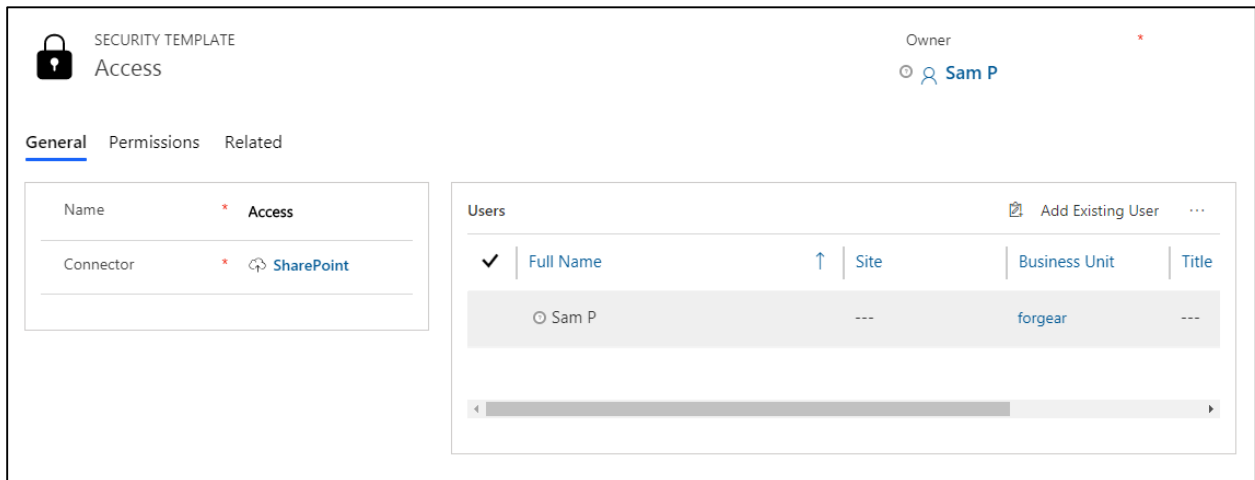
1. General

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



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

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



The screenshot shows the 'Access' tab of the security template configuration. At the top, there is a lock icon and the text 'SECURITY TEMPLATE' and 'Access'. On the right, it says 'Owner' followed by a user icon and 'Sam P'. Below this, there are three tabs: 'General', 'Permissions' (selected), and 'Related'. The 'Permissions' tab contains two input fields: 'Name' and 'Connector', both with a red asterisk. The 'Name' field is filled with 'Access', and the 'Connector' field is filled with 'SharePoint'. To the right of these fields is a large empty text area. Below the 'Permissions' tab, there is a 'Users' section with a table. The table has columns: 'Full Name', 'Site', 'Business Unit', and 'Title'. There is a checkbox in the first column. The table contains one row with the user 'Sam P', 'Site' as '---', 'Business Unit' as 'forgear', and 'Title' as '---'. There is a scroll bar at the bottom of the table.

2. Permissions

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

SECURITY TEMPLATE

Access

Owner

Sam P

General

Permissions

Related

All	<input type="checkbox"/>
Upload	<input checked="" type="checkbox"/>
Download	<input type="checkbox"/>
View Files	<input checked="" type="checkbox"/>
Rename	<input type="checkbox"/>

Email	<input type="checkbox"/>
Copy A Link	<input checked="" type="checkbox"/>
Create Folder	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>

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

Sam P

Save

Save & Close

New

Flow

BULK MIGRATION JOB

New Bulk Migration Job

Status Reason

Draft

General

Information

Bulk Migration Job Status

For ?	*	---	Operator	*	Last X Days
Schedule Date	*	---	Value	*	---
Attachment Action	*	---			

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.

The screenshot displays the 'Bulk Migration Job' configuration window. At the top, there's a toolbar with options like New, Delete, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and Run Report. Below this, the job title 'Emails - Last X Weeks' is shown with a 'Read only' icon. The owner is 'Sam' and the status is 'Completed'. The 'General' tab is selected, showing the following configuration:

For ?	* Emails	Operator	* Last X Weeks
Schedule Date	* 05-06-2019	Value	* 1
Attachment Action	* Move		

- For ?**: This specifies whether we are doing **Bulk Migration** for **Emails, Notes or Sales Literature**.
- Schedule Date**: Scheduled date keeps track of the date from which the migration job will start.
- Attachment Action**: In this field we specify the action ie. Copy or Move.
- Operator**: In this field we specify the period for which we have to migrate Note/Email Attachment/Sales Literature Attachments to cloud storage. Here, X represents Numeric Value. For e.g. Last 10 days, Last 3 weeks, etc. where the number 10 and 3 specifies the Value.
 - Last X Days**: Specify data of how many(X) days has to be migrated to cloud storage.
 - Last X Weeks**: Specify data of how many(X) weeks has to be migrated to cloud storage.
 - Last X Months**: Specifies data of how many(X) months has to be migrated to cloud storage.
 - Last X Years**: Specifies data of how many(X) years has to be migrated to cloud storage.
 - Older Than**: This moves all the Notes/Email attachments prior and inclusive of the date to cloud storage.
 - 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

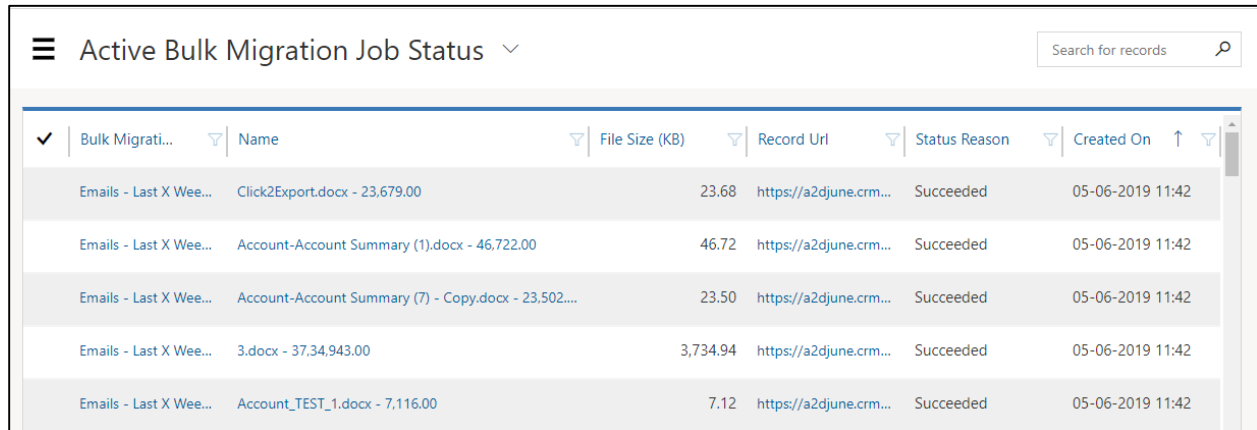
The screenshot displays the 'BULK MIGRATION JOB' interface for 'Emails - Last X Weeks'. The job is owned by 'Sam' and has a status of 'Completed'. The 'Information' tab is selected, showing the following details:

General		Information	Bulk Migration Job Status	Related
<div> <div> <div> <div>BULK MIGRATION JOB</div> <div>Emails - Last X Weeks</div> <div>Read only</div> </div> </div> <div> <div>Owner</div> <div>Sam</div> </div> <div> <div>Status Reason</div> <div>Completed</div> </div> </div>				
<div> <div> <div>Total Records Processed</div> <div>99</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div>				
<div> <div> <div>Total Succeeded Records</div> <div>99</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div> <div> <div> <div>Total Succeeded Size (KB)</div> <div>33,824.07</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div>				
<div> <div> <div>Total Ignored Records</div> <div>0</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div> <div> <div> <div>Total Ignored Size (KB)</div> <div>0.00</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div>				
<div> <div> <div>Total Failed Records</div> <div>0</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div> <div> <div> <div>Total Failed Size (KB)</div> <div>0.00</div> </div> <div> <div>Last updated:</div> <div>05-06-2019 20:57</div> </div> </div>				

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



✓ Bulk Migrati...	Name	File Size (KB)	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 - 23,502....	23.50	https://a2djune.crm...	Succeeded	05-06-2019 11:42
Emails - Last X Wee...	3.docx - 37,34,943.00	3,734.94	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.




ENTITY CONFIGURATION



New Entity Configuration


Owner
Sam P






General


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

Attach2Dynamics button will be seen in the Command bar.

 New
  Delete

 Attach2Dynamics

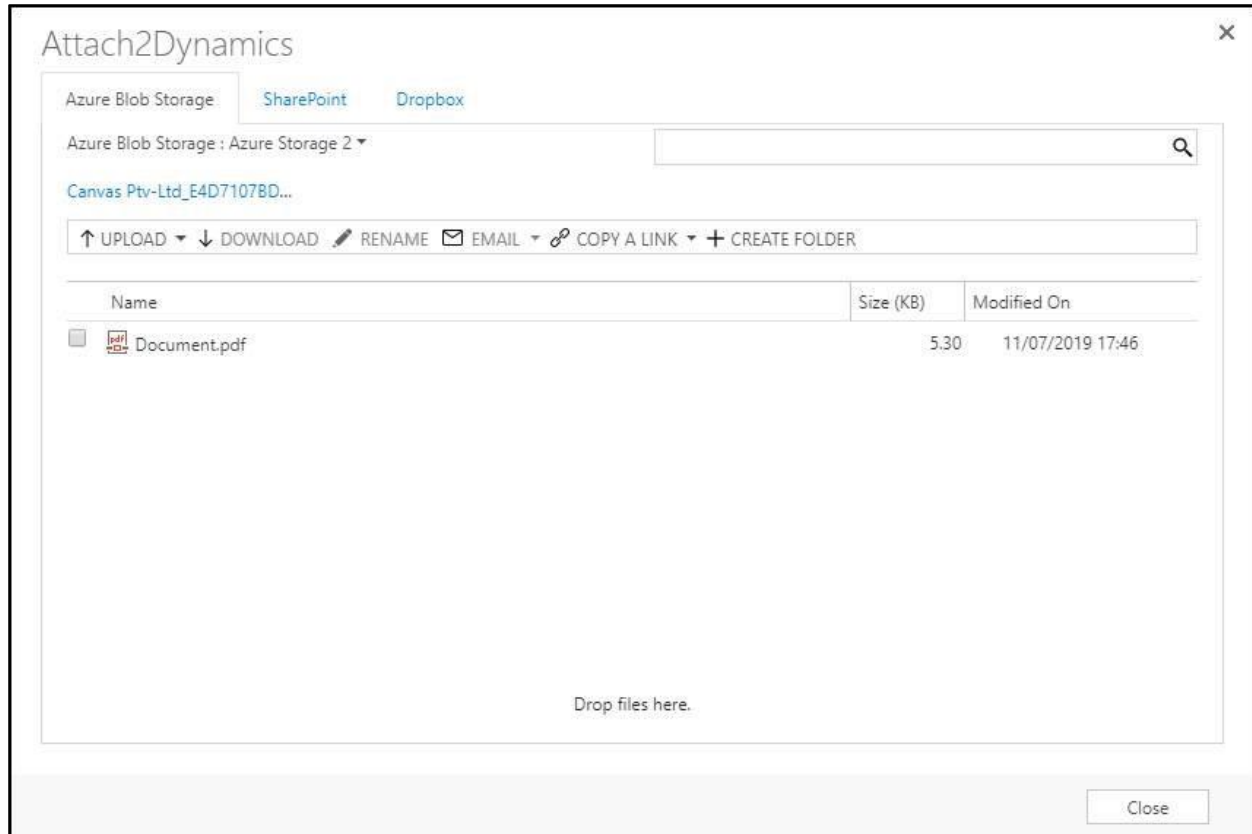
 Refresh
  Map
  Qualify
  Process
  Disqualify



Lead: AI for Sales

Peter Houston (sample)

On Click of the button, Attach2Dynamics window opens.



Below are the features:

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

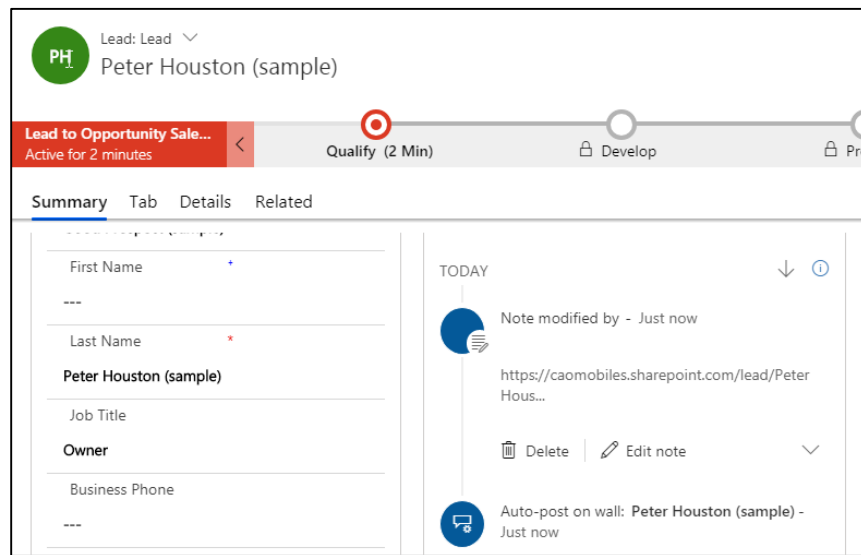
Download of folder is not supported for SharePoint and Azure Blob Storage but is available for Dropbox.
- d) **Rename:** Users have the option to rename the documents by selecting the required files and folders. However, in Azure Blob Storage user can rename only files not folders.
- e) **Copy Link:**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

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

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

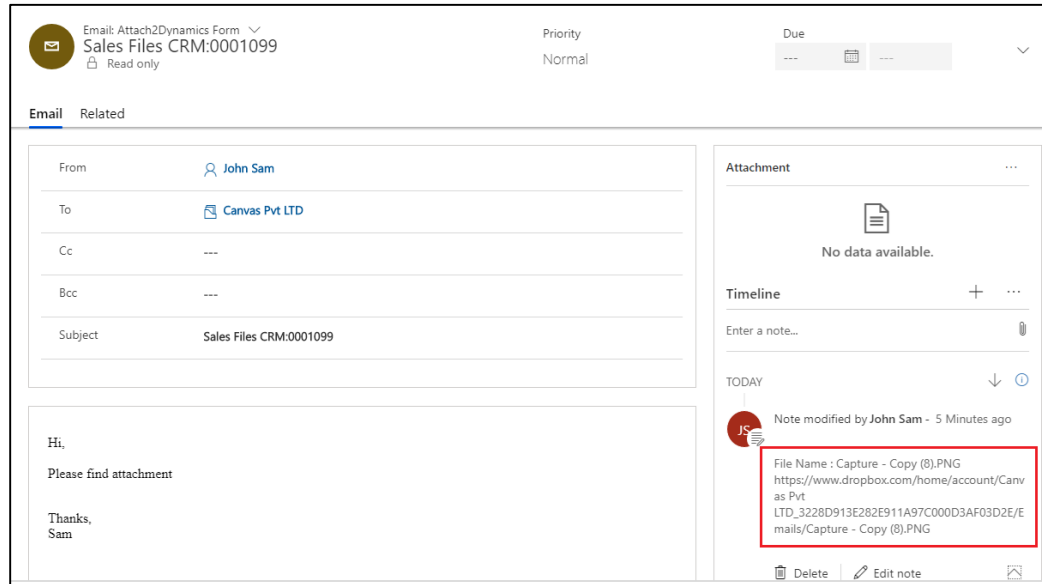
- f) **Create Folder:** Users can create the folder for all three cloud storages.
- g) **Deep search Tab:** Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search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

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



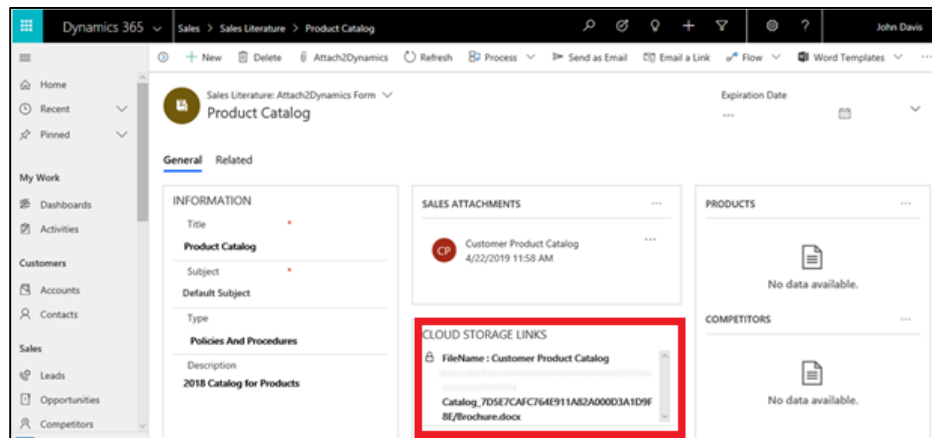
b. Email Attachments:

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

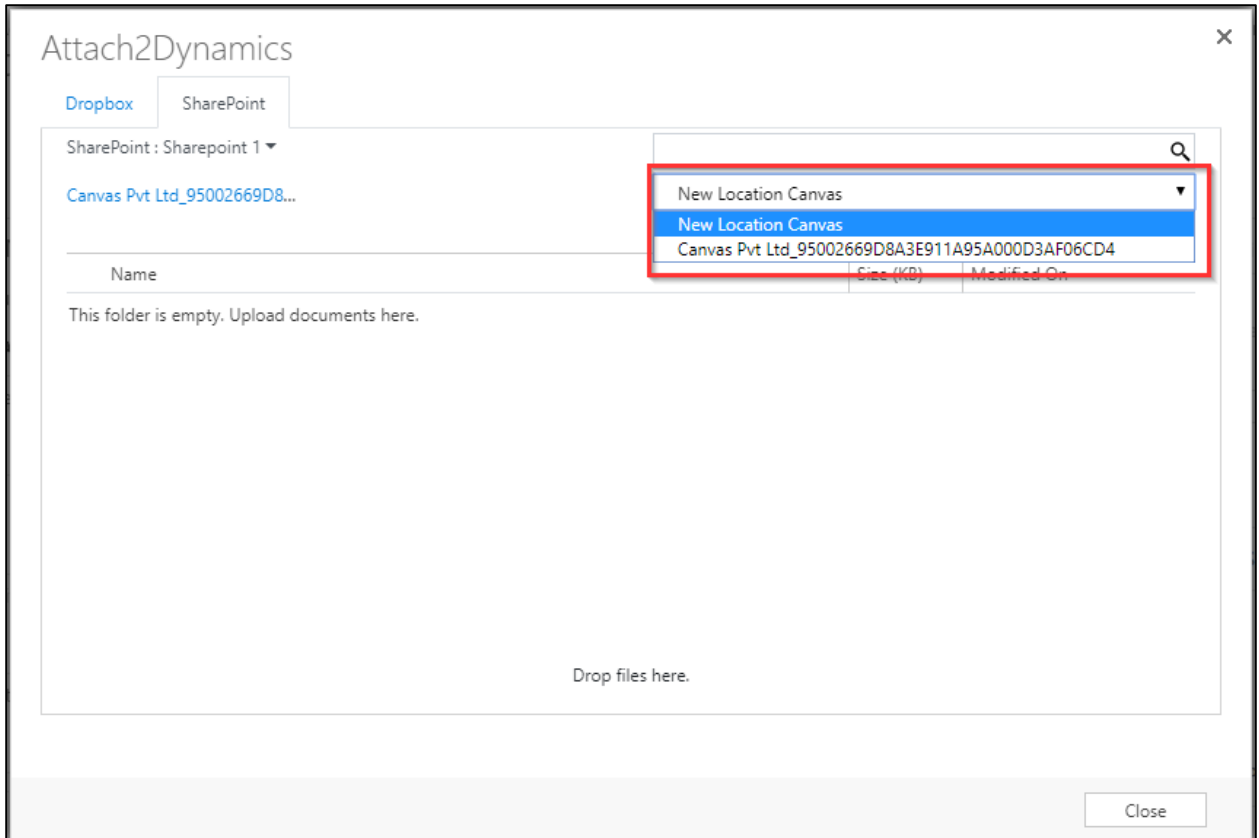


c. Sales Literature Attachments:

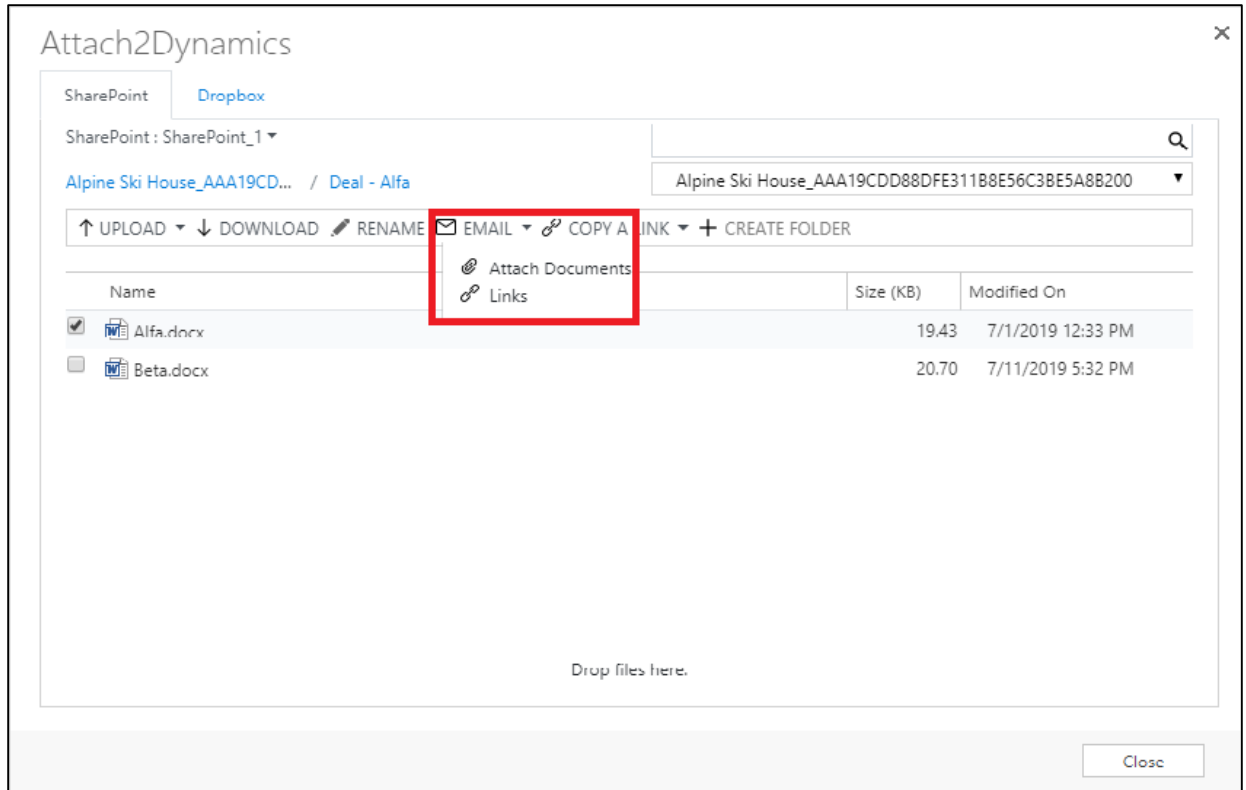
If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a path back in **Cloud Storage Links** section.



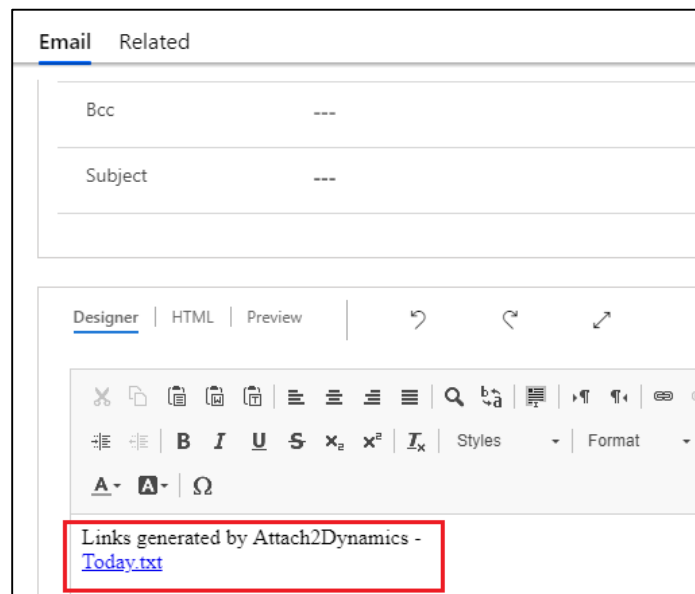
- i) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.



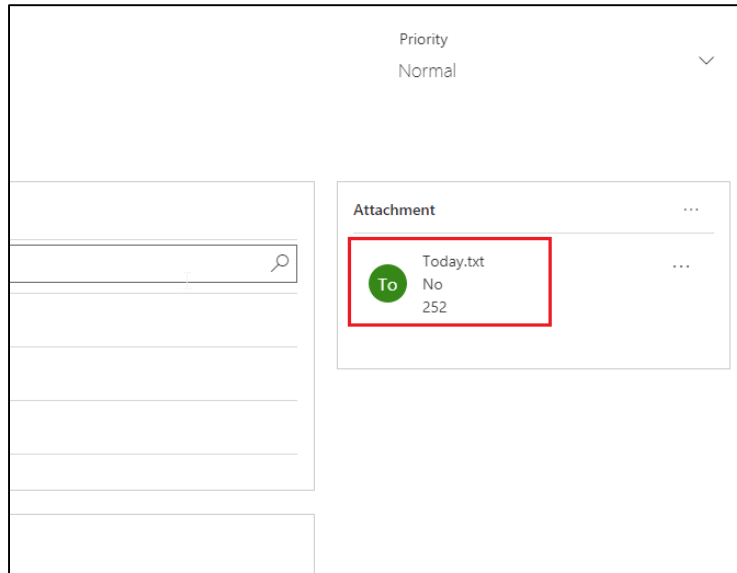
- j) **Email:** Users also have an option to send an email. There are two options for this – send as Link or Attachment.



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

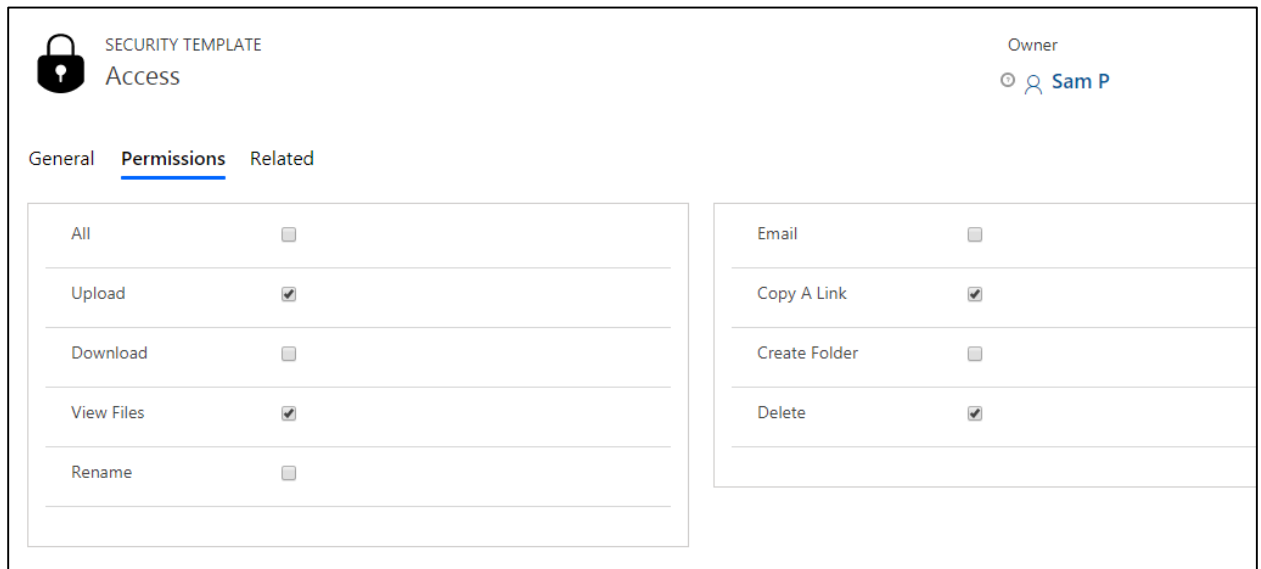


- 2) **Attach Documents:** On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'



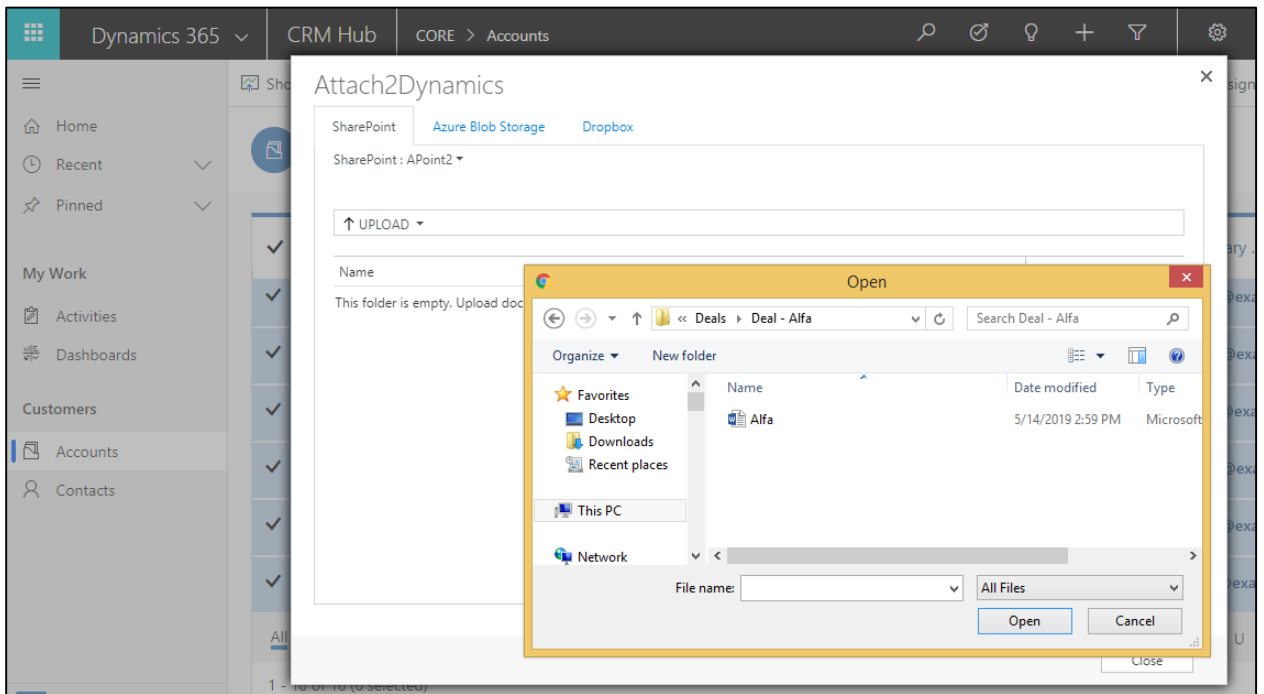
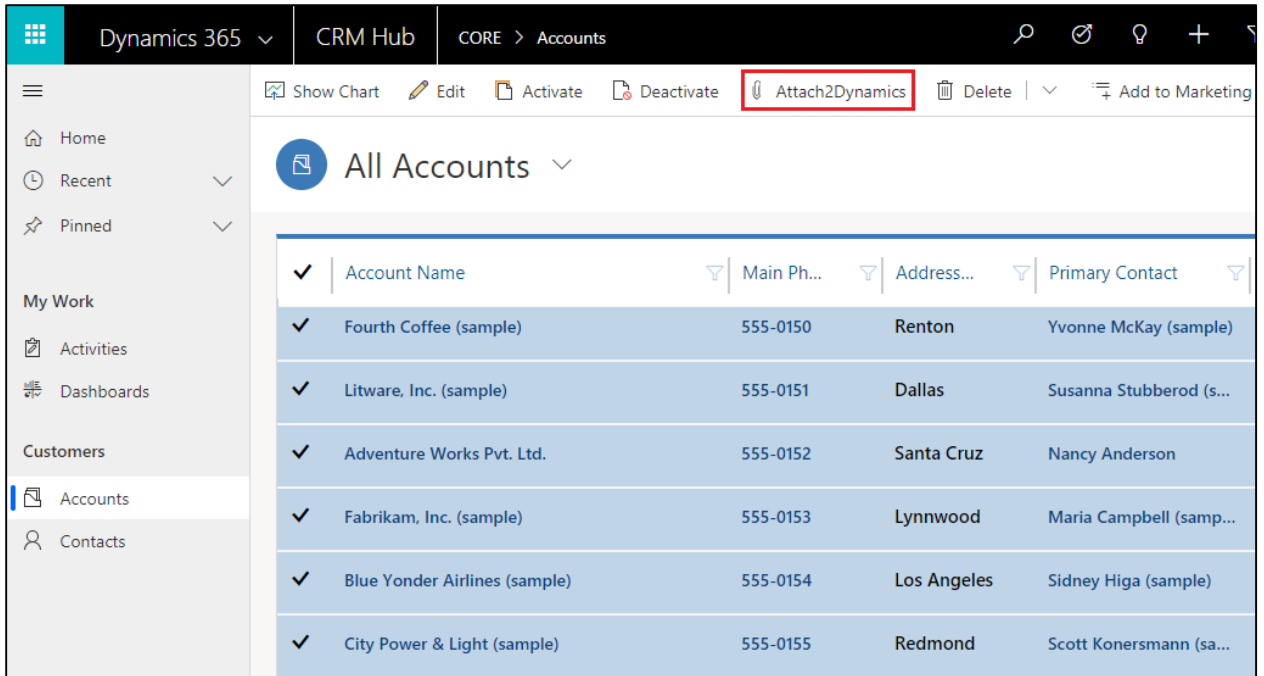
Note: Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

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

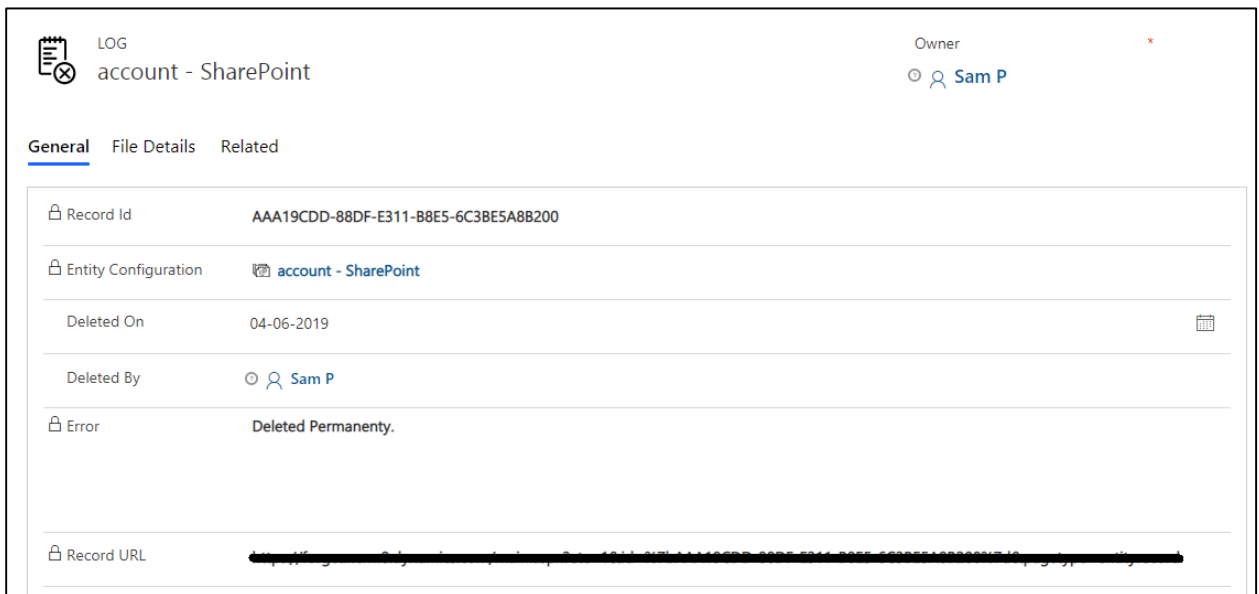
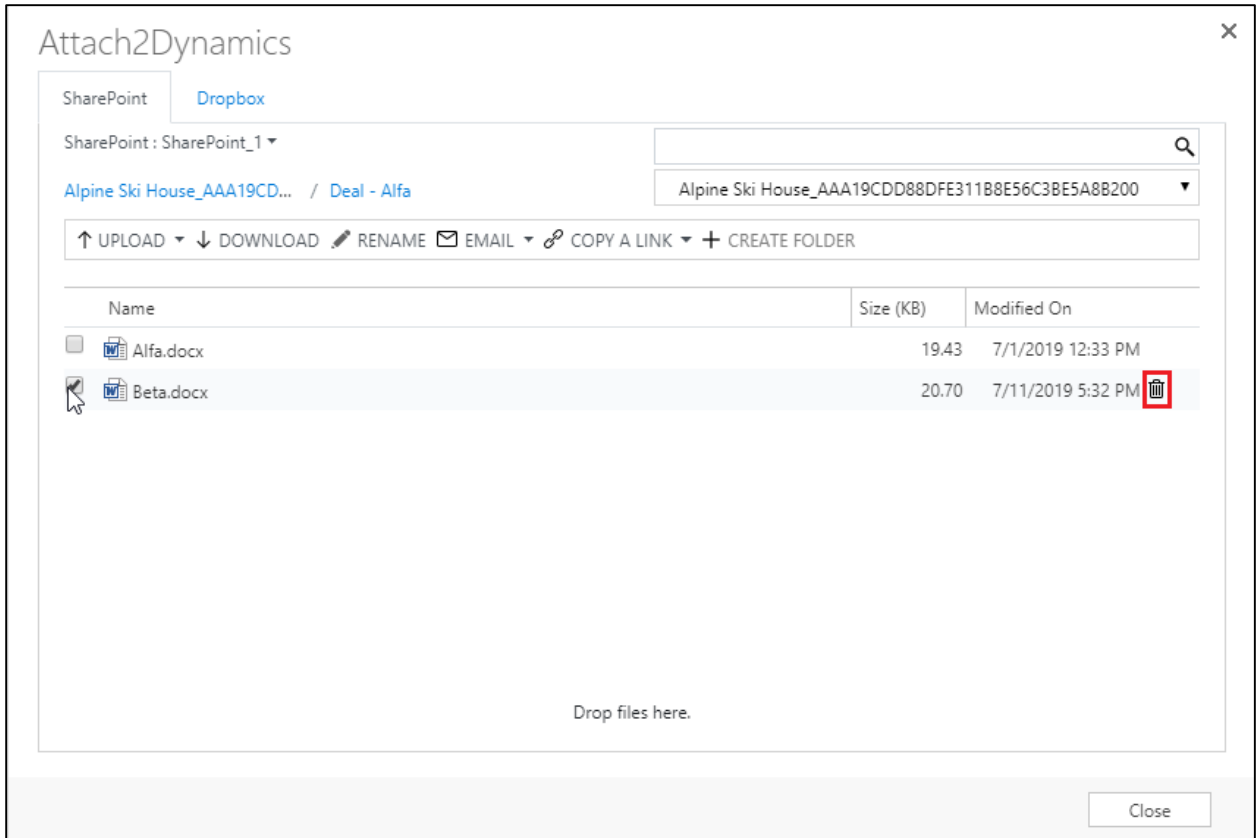


- l) Support for uploading files from Home Page:** Upload files from home page directly for the selected records.

Attach2Dynamics – User Manual



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



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

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

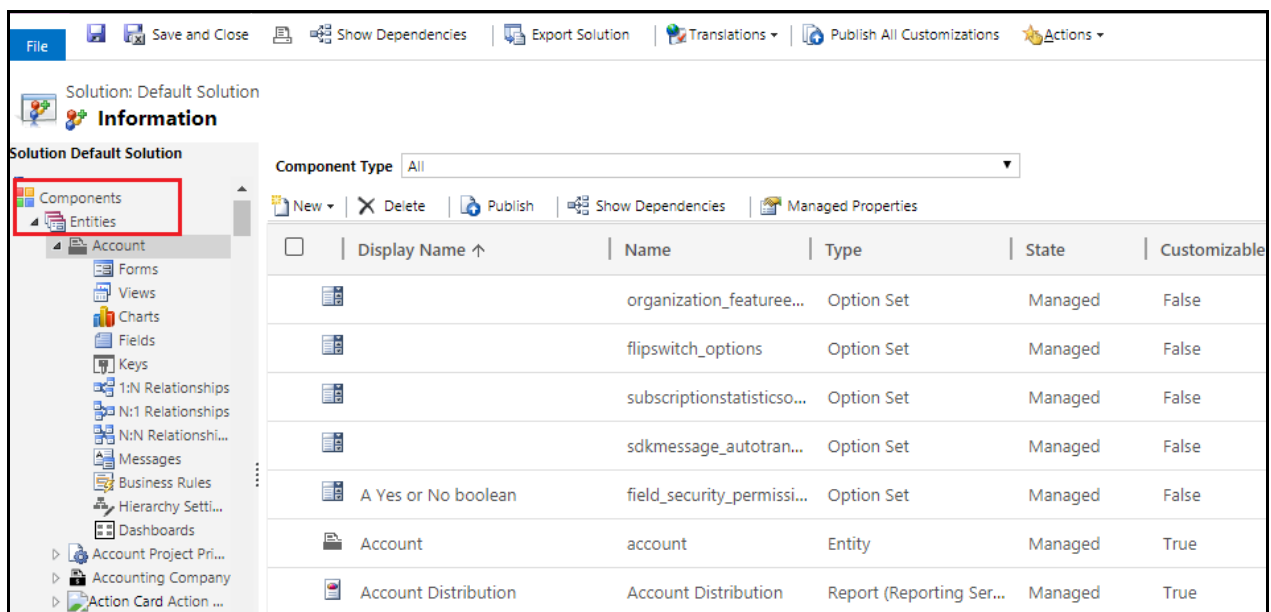
Embedded Attach2Dynamics

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

Go to **Settings -> Customizations -> Customize the System**

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

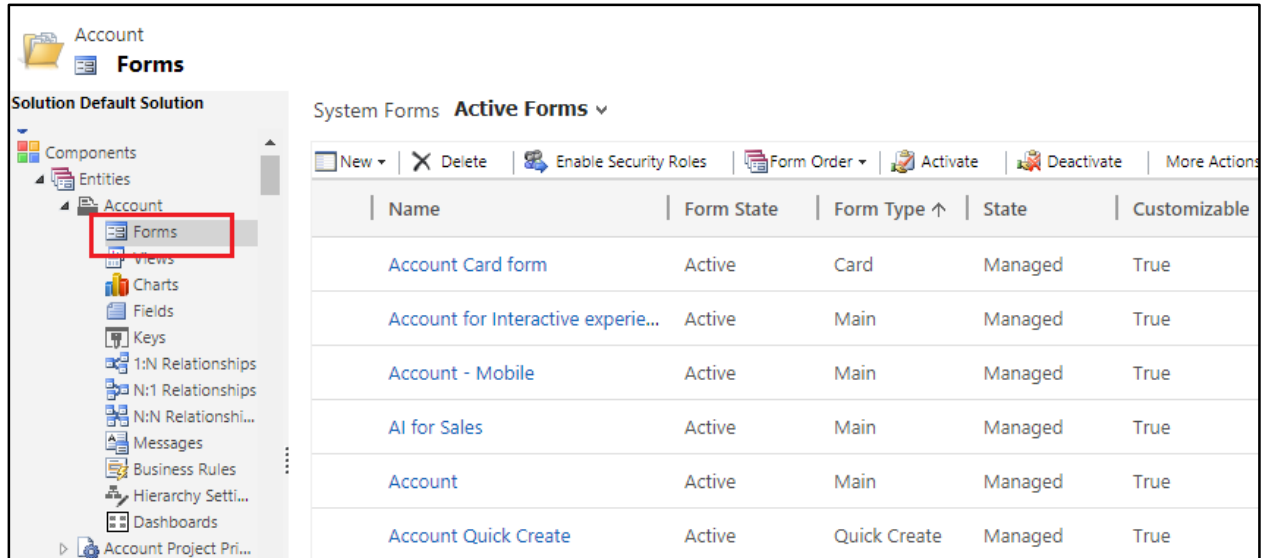
a) On the left pane go to **Components -> Entities**



The screenshot shows the Attach2Dynamics application interface. On the left, the 'Components' pane is expanded, and 'Entities' is selected. The main pane displays a table of components with the following data:

Display Name	Name	Type	State	Customizable
organization_featuree...	organization_featuree...	Option Set	Managed	False
flipswitch_options	flipswitch_options	Option Set	Managed	False
subscriptionstatisticso...	subscriptionstatisticso...	Option Set	Managed	False
sdkmessage_autotran...	sdkmessage_autotran...	Option Set	Managed	False
A Yes or No boolean	field_security_permissi...	Option Set	Managed	False
Account	account	Entity	Managed	True
Account Distribution	Account Distribution	Report (Reporting Ser...	Managed	True

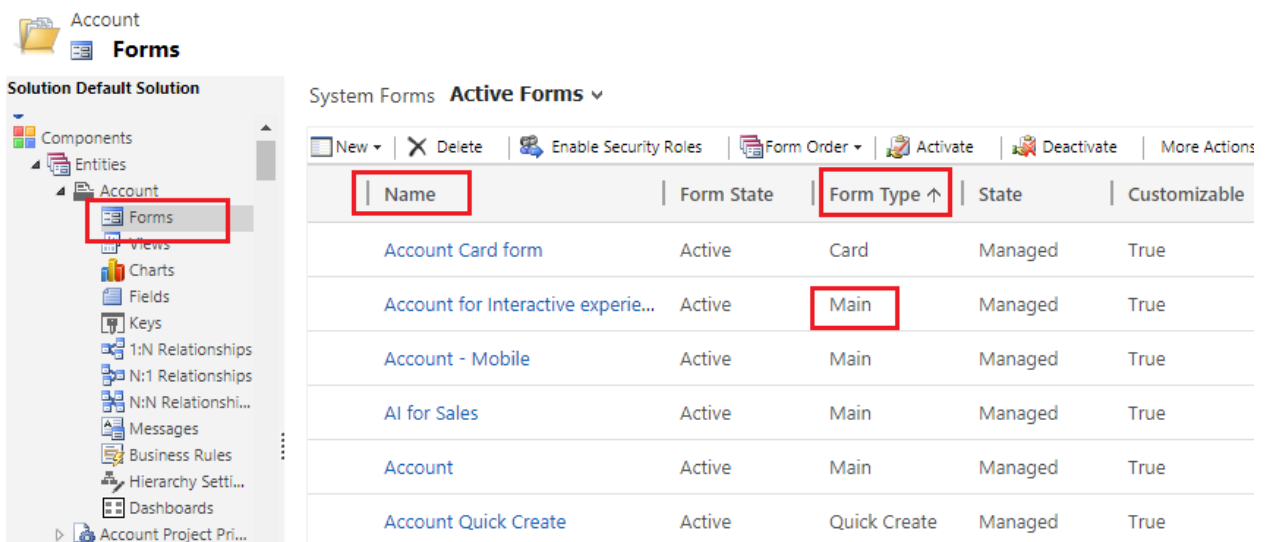
b) Expand the **Entity** Drop Down and Select **Forms** for the Entity you want to create embedded tab for.



System Forms Active Forms

Name	Form State	Form Type ↑	State	Customizable
Account Card form	Active	Card	Managed	True
Account for Interactive experie...	Active	Main	Managed	True
Account - Mobile	Active	Main	Managed	True
AI for Sales	Active	Main	Managed	True
Account	Active	Main	Managed	True
Account Quick Create	Active	Quick Create	Managed	True

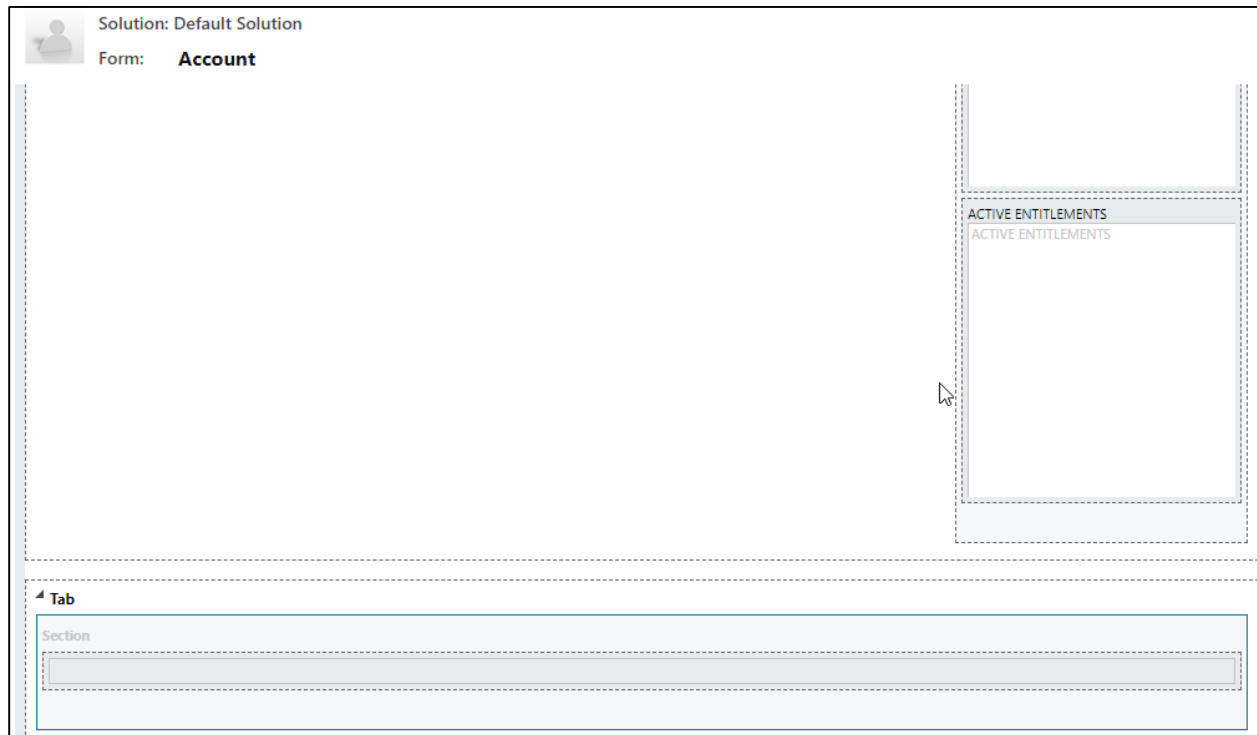
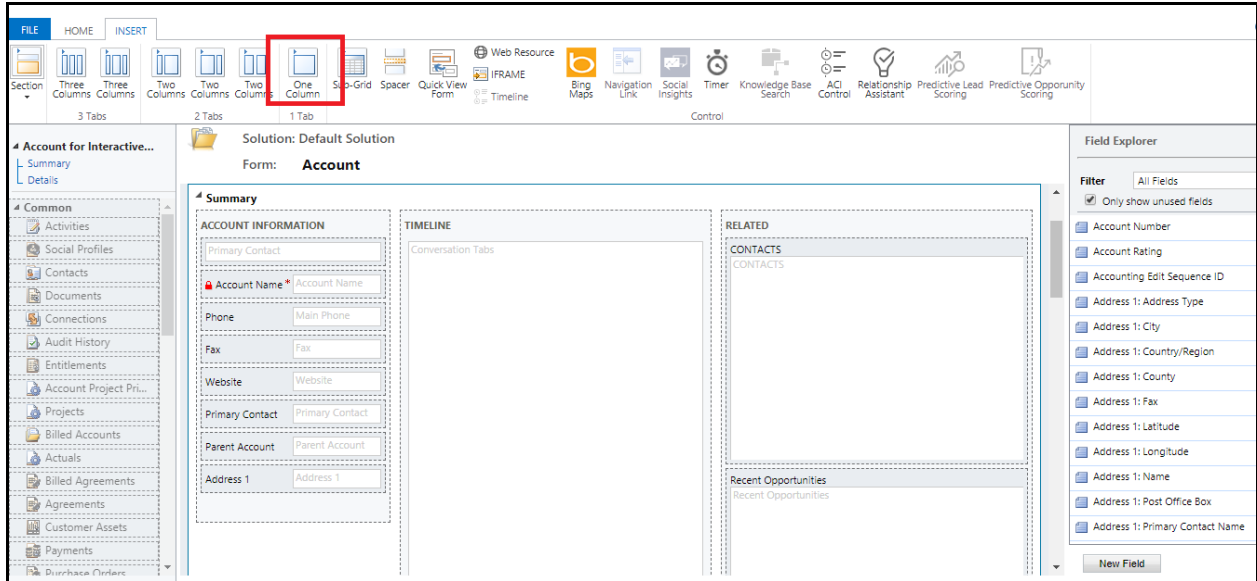
c) Under the **Active Forms** Select any **Name** for which **Form Type** is **Main**.



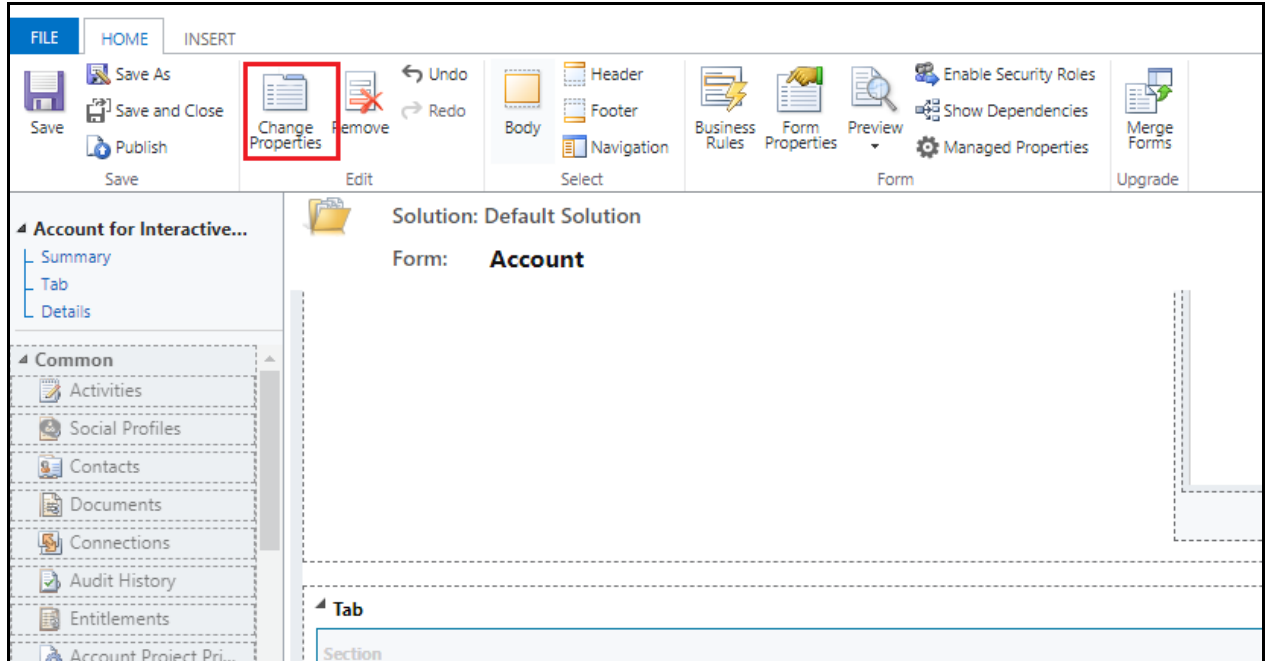
System Forms Active Forms

Name	Form State	Form Type ↑	State	Customizable
Account Card form	Active	Card	Managed	True
Account for Interactive experie...	Active	Main	Managed	True
Account - Mobile	Active	Main	Managed	True
AI for Sales	Active	Main	Managed	True
Account	Active	Main	Managed	True
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.



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



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

Display
Formatting
Events

Name
Specify a unique name.

*Name

tab_8

*Label

Attach2Dynamics

☐ Show the label of this tab on the Form

☒ Expand this tab by default

Visibility
Specify the default visibility of this tab.

☒ Visible by default

Availability
Specify the default availability of this tab on phone.

☒ Available on phone

General Formatting Dependencies

Layout

Select the number of columns the control occupies:

☒ One column

☐ Two columns

☐ Three columns

☐ Four columns

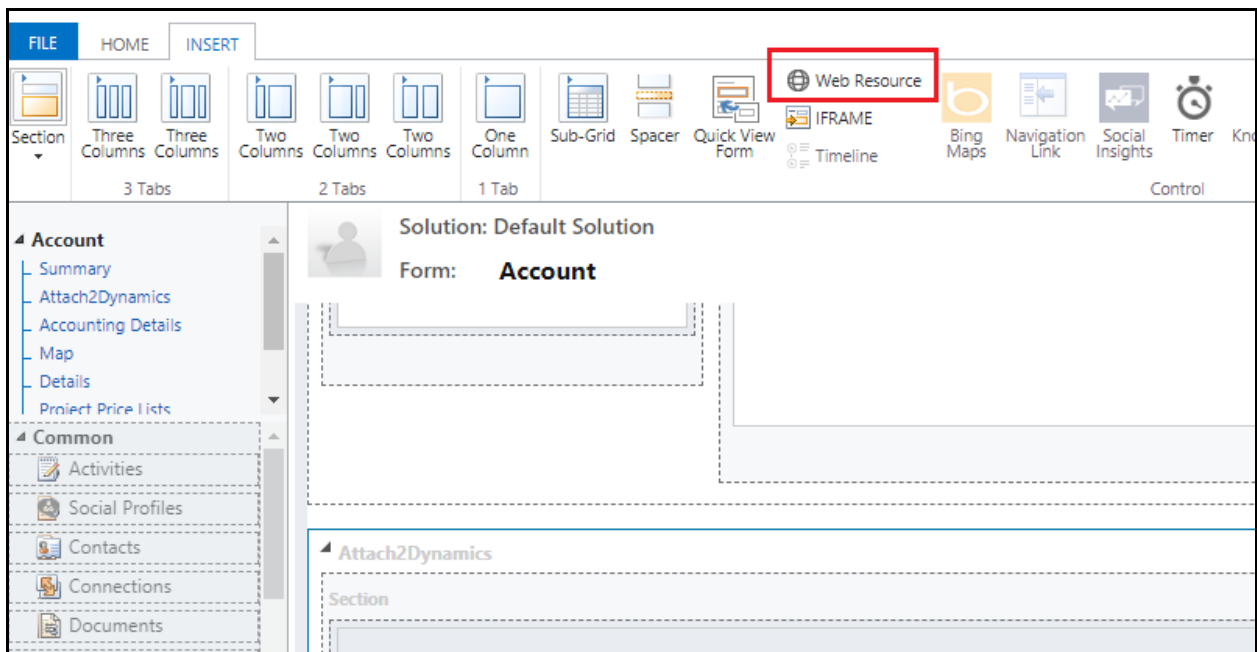
Row Layout

Select the number of rows the control occupies.

Number of Rows

☒ Automatically expand to use available space.

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



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

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

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

The screenshot shows a configuration form for a web resource. It is divided into four main sections, each with a red border:

- Web resource**: Contains a text field with the value `ikl_/Attach2Dynamics/Library/index.html` and a magnifying glass icon.
- Field Name and Properties**: Contains two text fields. The first is labeled "Name *" and contains `WebResource_`. The second is labeled "Label *" and contains `Attach2Dynamics`. Below these is a checkbox labeled "Display label on the Form" which is unchecked.
- Visibility**: Contains two checkboxes, both of which are checked: "Visible by default" and "Enable for mobile".
- Web Resource Properties**: Contains a text field labeled "Custom Parameter(data)". Below it are two checkboxes: "Restrict cross-frame scripting, where supported." (unchecked) and "Pass record object-type code and unique identifier as parameters." (checked).

i) Go to **Home** and **Save** then **Publish**.

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

Attach2Dynamics – User Manual

BP

Account: Account
Bruce PVT LTD

Annual Revenue

Number of Employees

Summary **Attach2Dynamics** Details Related

a2d

SharePoint Azure Blob Storage Dropbox

SharePoint : APoint2

Bruce PVT LTD_AE38601C25...

Bruce PVT LTD_AE38601C259EE911A981000D3AF24950

UPLOAD DOWNLOAD RENAME EMAIL COPY A LINK CREATE FOLDER

Name	Size (KB)	Modified On
<input type="checkbox"/> Feedback		04/07/2019 19:11
<input type="checkbox"/> Account Details.png	2.33	11/07/2019 18:33
<input type="checkbox"/> Order details.png	158.06	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.

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