



Microsoft Dynamics 365

Dynamics 365/CRM Online Data Archival



COMPUSOFT

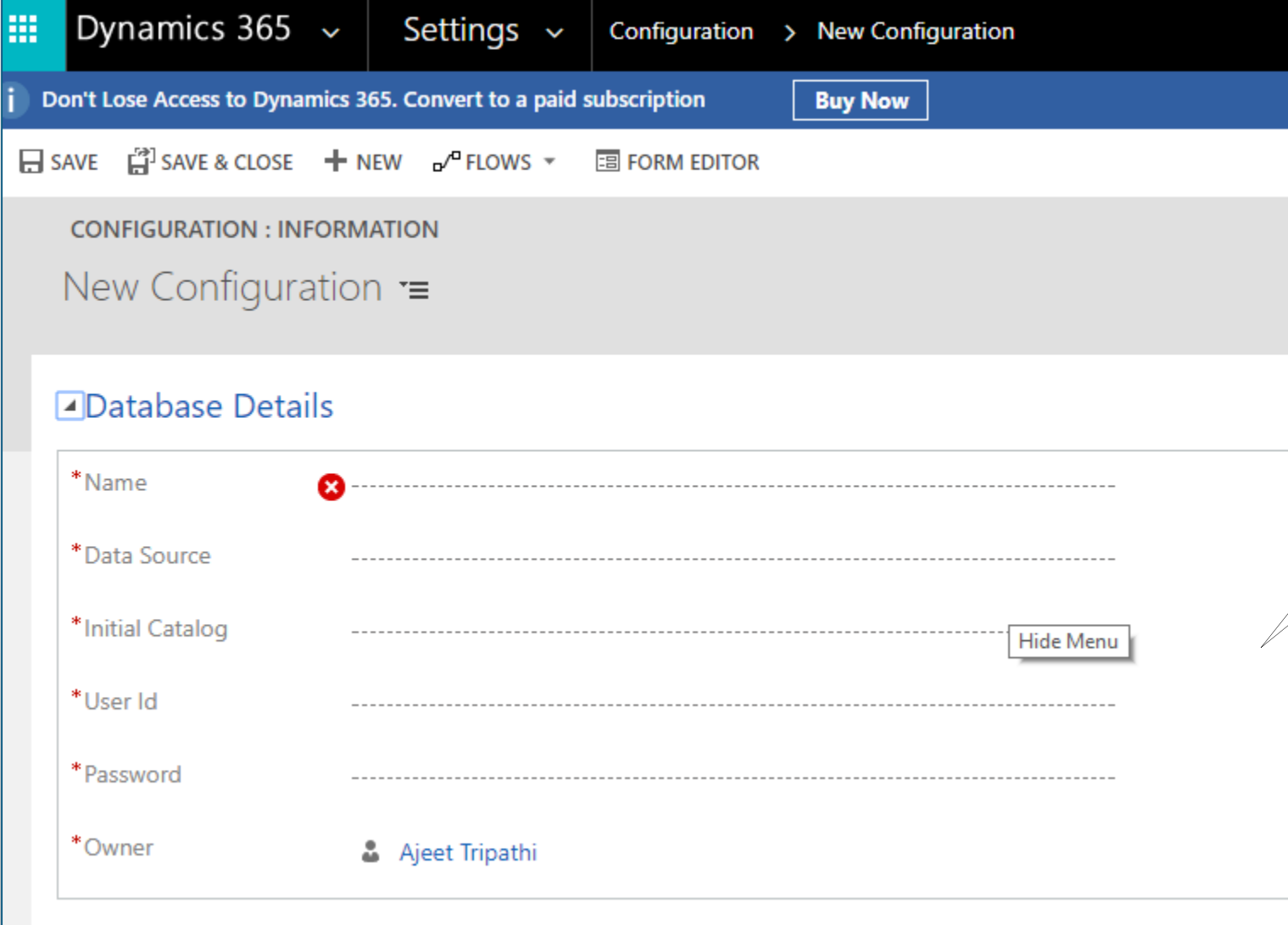
THE WORLD OF SOFTWARE

Dynamics 365/CRM Online Data Archival

Solution Features

- Availability of Archived data on cloud
- Cost saving by reducing the data consumption in Dynamics 365 CRM
- Performance improvement of Dynamics 365 CRM
- Data platform for designing various reports and analytics
- Platform for integration with different systems

Initial Set up



Dynamics 365 ▾ **Settings** ▾ **Configuration** > **New Configuration**


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CONFIGURATION : INFORMATION

New Configuration ≡

☒ Database Details


*Name  _____

*Data Source _____

*Initial Catalog _____ **Hide Menu**

*User Id _____

*Password _____

*Owner  Ajeet Tripathi

Enter
Database
details

Archival Process

Dynamics 365 Settings Archival > New Archival

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ARCHIVAL : INFORMATION

New Archival

General

Entity Name* --Select Entity Name-- Field Name*

*Name --Select Entity Name--

Operator

From

To

Select the data to be archived and archive the data

Track the data archival log

Dynamics 365 Settings Archival > Contact >

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+ NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW START DIA

ARCHIVAL : INFORMATION

Contact

General

*Name	Contact
Operator	BETWEEN
From	11-04-2017
To	30-01-2018

View Archived Data

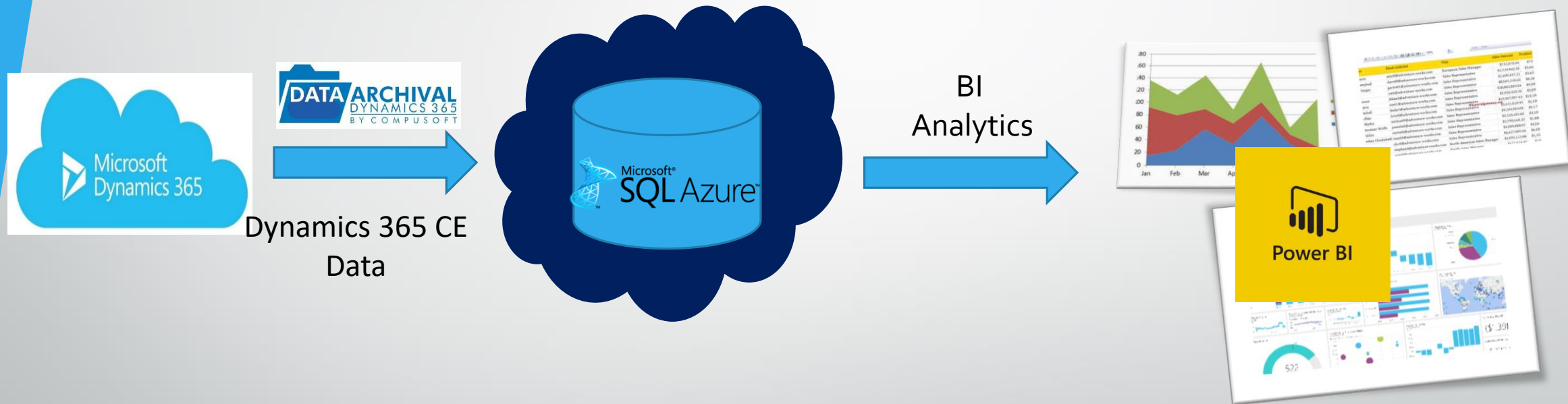
Search: <input type="text"/> Search			
Title	Entity Name: ALL	File Name	Download
1	contact	All Leads.xlsx	Download
5644	contact	AzureBlob.xlsx	Download
5644	contact	Requirement.txt	Download
5644	contact	Support Call Log.xlsx	Download
1	contact	dynamics365eula.txt	Download
1	contact	Code.txt	Download
000117925	account	Amazon.docx	Download
000114145	account	Spoton Script for IVR.docx	Download
000114125	account	1.txt	Download
000114642	account	escalation template.docx	Download
000117531	account	ErrorDetails (6).txt	Download
000117531	account	ErrorDetails (6).txt	Download
CAS-00262-M3H6D7	incident	HOTO SHEET.xlsx	Download
CAS-00263-Z5R1L5	incident	Book1.xlsx	Download
CAS-00340-K9X0K6	incident	Image Today at 12-21-58 AM.HEIC	Download
CAS-00369-H3P2L5	incident	Book1.xlsx	Download
CAS-00308-H0W3Q5	incident	The Ultimate Guide to Successfully Sell Customer Experience to Your Boss.pdf	
CAS-00309-SSP7L5	incident	IVR Blaster - Consignment number and status code to be displayed into Dynamics CRM.msg	
CAS-00310-Q1D8D8	incident	IVR Blaster - Consignment number and status code to be displayed into Dynamics CRM.msg	
CAS-00312-D6H7V2	incident	ErrorDetails (1).txt	

View Archived Attachments

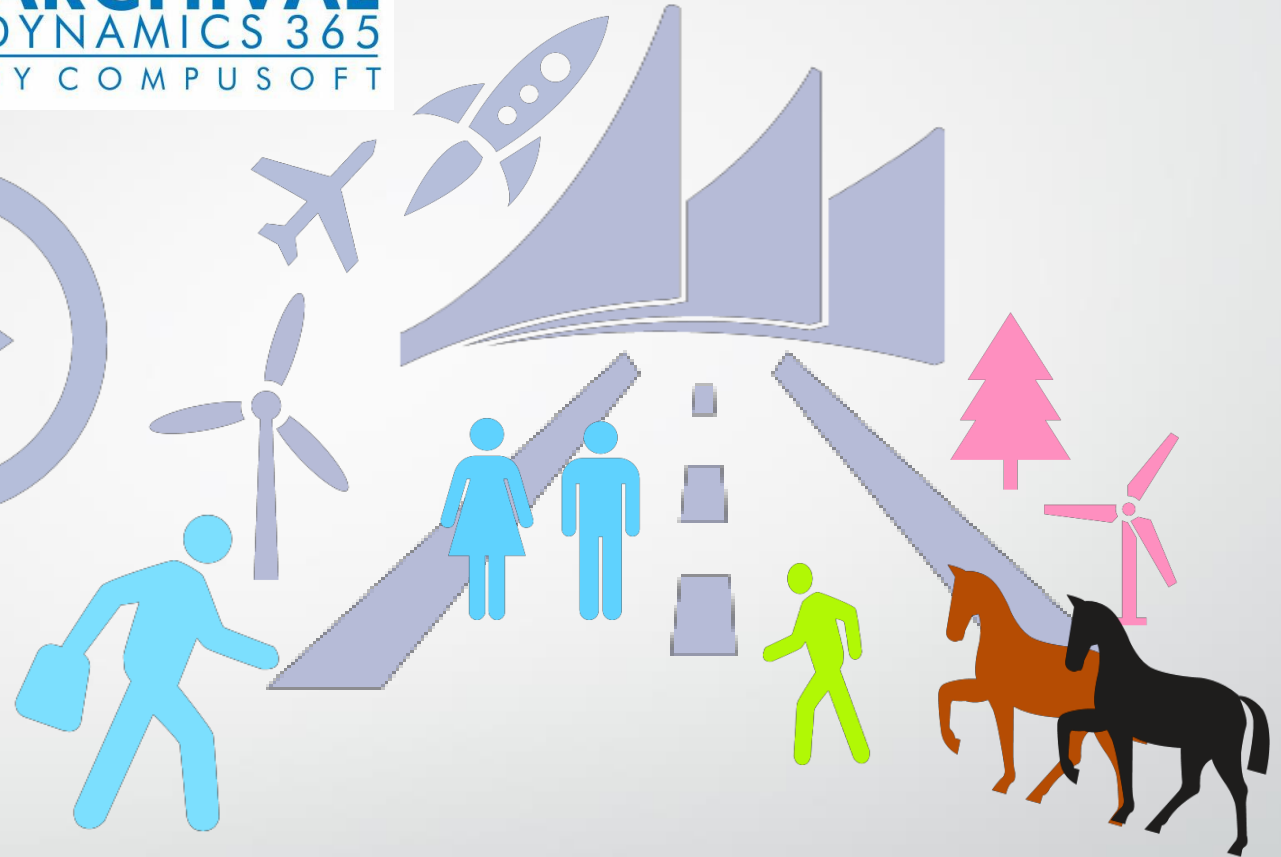
View Archived data

Search		Search				
Case Number	Original Case No.	Consignment No.	Customer	Name Code	Case Type	Description
CAS-00304-K4T154		000118108	ATCO ENGINEERING		Productive	Int
CAS-00301-M0P182		000118108	ATCO ENGINEERING		Productive	Int
CAS-00308-K3S181		000118108	ATCO ENGINEERING		Productive	Int
CAS-00007-K0G1L8	TC200176	01438049	000117960 CAMBRIDGE UNIVERSITY PRESS INDIA PVT LTD INC	CNC	Productive	-
CAS-00008-K7D081	TC200172	01342143	000048016 KATYULARE PRIVATE LIMITED	RRR	Productive	-
CAS-00009-K3D081	TC200175	014408798	000118101 HBL POWER SYSTEMS LTD-SHARDEEPET PLANT	RRR	Productive	-
CAS-00000-K3D081	TC200173	013809427	00002008 SYNTHITE INDUSTRIES SPICE DIV	APN	Productive	Shipment is sent for delivery today. same confirmed case before we are clear this ticket.
CAS-00001-T1T187	TC200174	014031840	000118170 THEION PHARMACEUTICALS LTD	RRR	Productive	-
CAS-00002-K4L2L2	TC200177	014314018	000006408 SUNDVOTA SUNANDHI PHARMACEUTICALS PRIVATE LIMITED	CDR	Productive	-
CAS-00003-K4L2L2	TC200171	014276202	000118860 KARRIER MEDIA INDIA PVT LTD (REVERSE)	RRR	Productive	-
CAS-00004-M0T081	TC200170	013138023	000118231 SVN PRIVATE LIMITED	DEF	Productive	-
CAS-00005-K4G0L4	TC2001709	013138016	000118231 SVN PRIVATE LIMITED	CDR	Productive	-
CAS-00006-P0V187	TC2001711	012740017	000118860 KARRIER MEDIA INDIA PVT LTD (REVERSE)	LOC	Productive	Case is Moved to Next Branch. Closed By: System
CAS-00007-K1M081	TC2001784	014270342	000118133 J & J ANNELL PVT LTD	RRR	Productive	Case is Moved to Next Branch. Closed By: System
CAS-00008-K3D081	TC20017237	014331382	000118075 French Digital advertisement Sales India	RRR	Productive	-
CAS-00009-M0P182	TC2001710	012317780	000118860 KARRIER MEDIA INDIA PVT LTD (REVERSE)	UNT	Productive	Case is Delivered. Closed By: System
CAS-00010-K2D081	TC200179	011801118	000118418 HEAVY TELECOMMUNICATIONS (INDIA) CO PVT LTD	RRR	Productive	Case is Moved to Next Branch. Closed By: System
CAS-00011-T4V188	TC2001794	011888602	000118208 HBL POWER SYSTEMS LTD-NANDGAON PLANT	RRR	Productive	Following up on the case, and shall shortly update with closing instructions on case
CAS-00012-K0G1L8	TC2001796	013811286	000118231 SVN PRIVATE LIMITED	DEF	Productive	-
CAS-00013-K4G0L4	TC20017128	014021881	000048332 PERFECT COURIER & CARGO	CDR	Productive	-

Proposed Usage of Archived data



enjoy...



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