Microsoft Dynamics® CRM

XRM.Attachment Add-on

Installation and Configuration Guide

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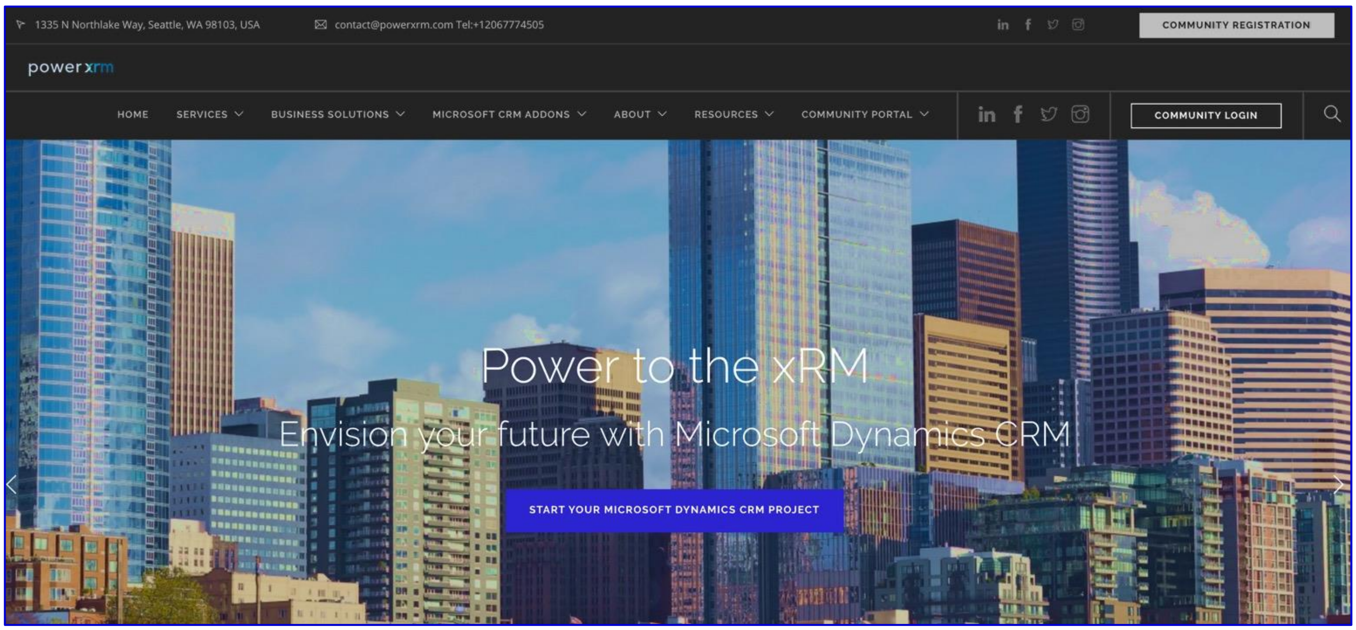
XRM Community Registration

XRM Community is a community of Dynamics CRM solutions and Dynamics CRM components to deliver a greater value to businesses around the world that enable Dynamics CRM customers to build their own CRM engagement solutions on Microsoft technologies.

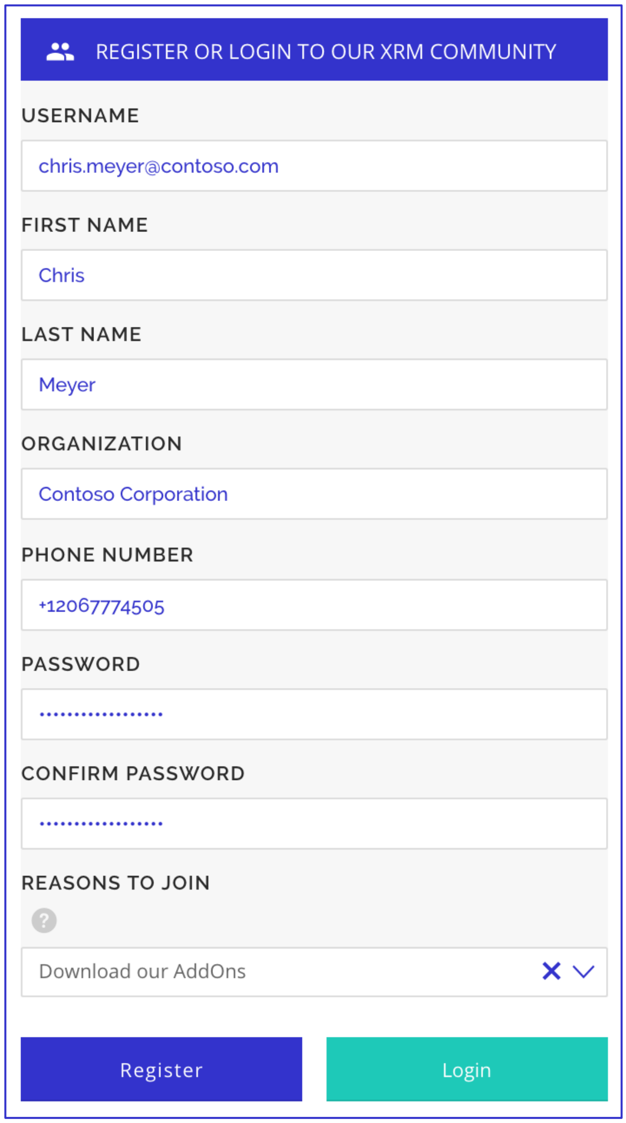
These Add-on capabilities enable any business processes to become Customer-facing. The first step in using an XRM.Attachment AddOn is to register on our Community Registration at: www.powerxrm.com



The Add-ons download will empower your own customers as well as our partner ecosystem to accelerate our efforts to embrace Microsoft Dynamics CRM so they can deliver personalized and predictive customer experiences.

Registration and Solution Download

Download the AddOn from the PowerXRM Community. The Registration takes place at: http://www.powerxrm.com/register filling the registration form below:


REGISTER OR LOGIN TO OUR XRM COMMUNITY

USERNAME

chris.meyer@contoso.com

FIRST NAME

Chris

LAST NAME

Meyer

ORGANIZATION

Contoso Corporation

PHONE NUMBER

+12067774505

PASSWORD

••••••••••••••••••

CONFIRM PASSWORD

••••••••••••••••••

REASONS TO JOIN

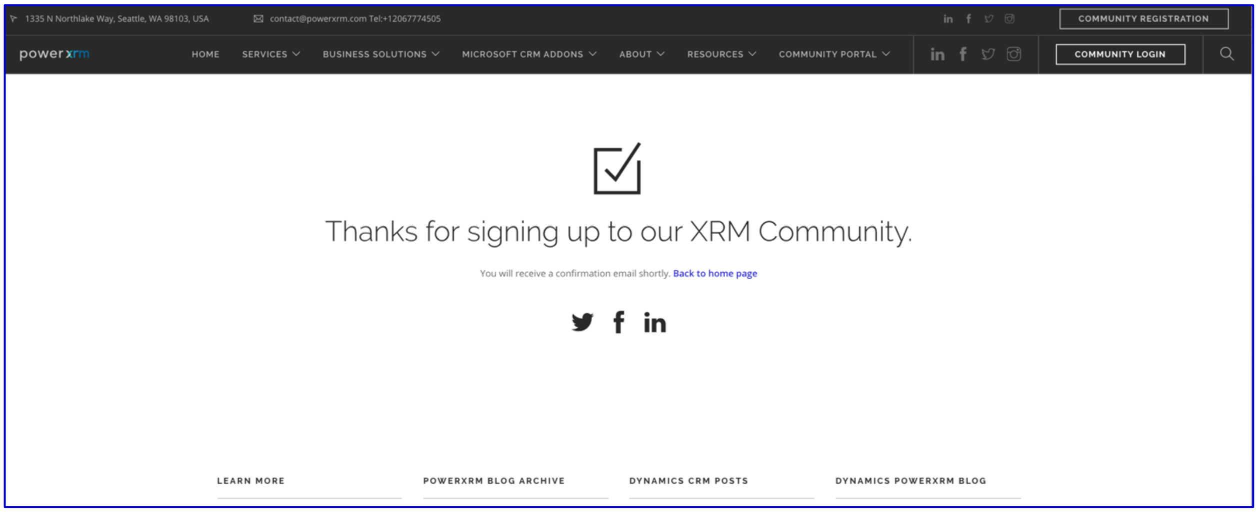
Download our AddOns

Register

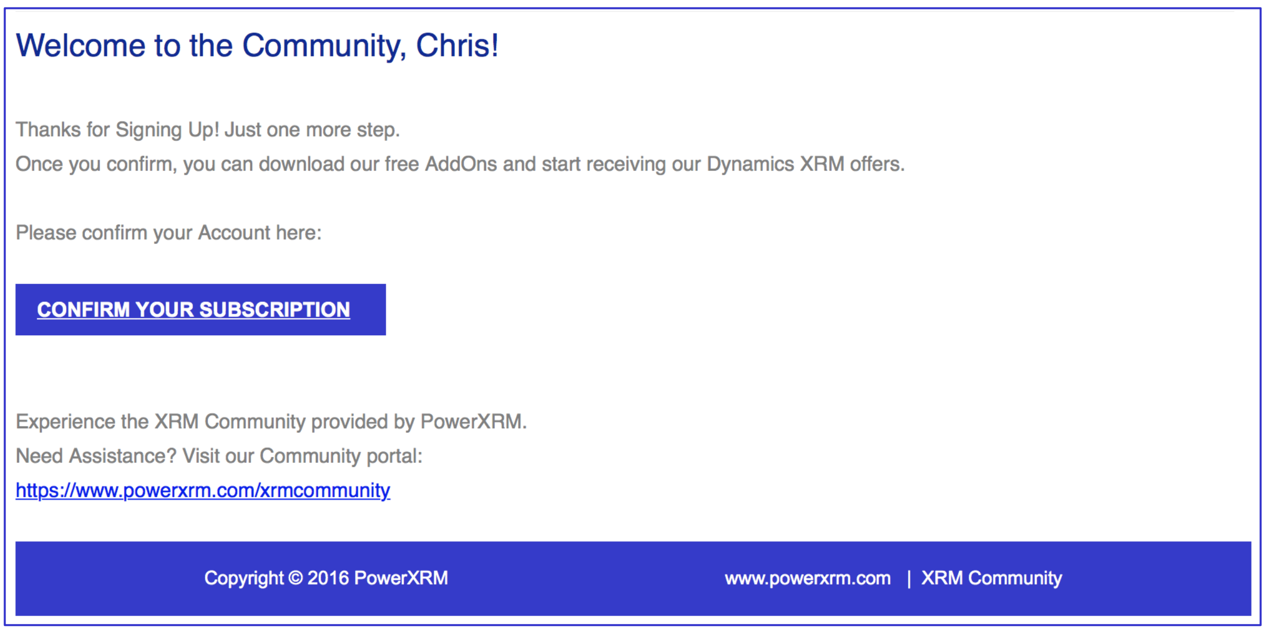
Login

To Register for our Free Add-ons, you need to fill in your data, such as username (valid email address) that will be used as a License when using your Add-on, first name, last name, password, etc. And, at the bottom of the page, you need to select the reason of your registration. In this specific case select:

Download our Add-ons. When you fill in the data and click Register, you will get an email with a Confirmation request. You need to confirm your email and registration:



Email Confirmation request:



Welcome to the Community, Chris!

Thanks for Signing Up! Just one more step.
Once you confirm, you can download our free AddOns and start receiving our Dynamics XRM offers.

Please confirm your Account here:

CONFIRM YOUR SUBSCRIPTION

Experience the XRM Community provided by PowerXRM.
Need Assistance? Visit our Community portal:
https://www.powerxrm.com/xrmcommunity

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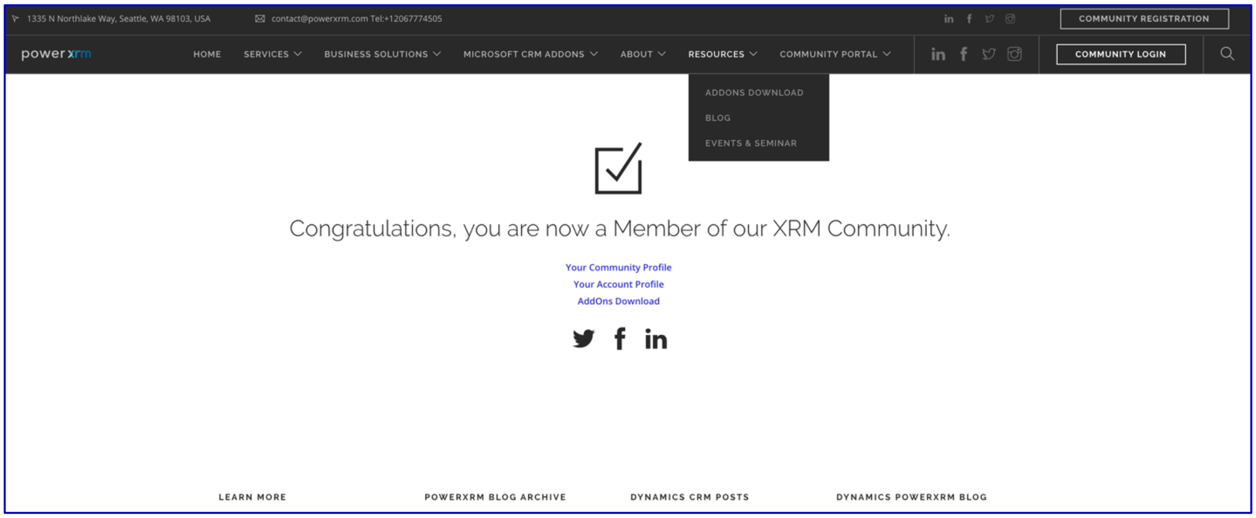
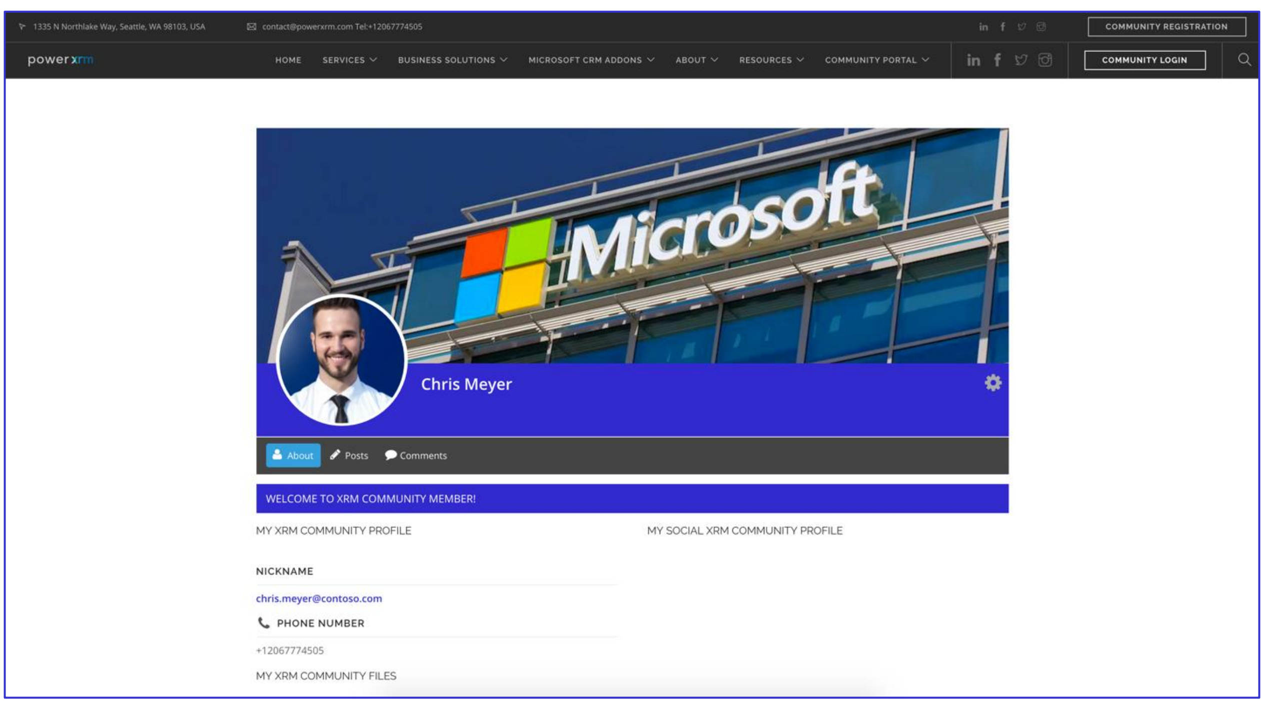
Once Confirmed, you will be redirected to the Community Confirmation page:

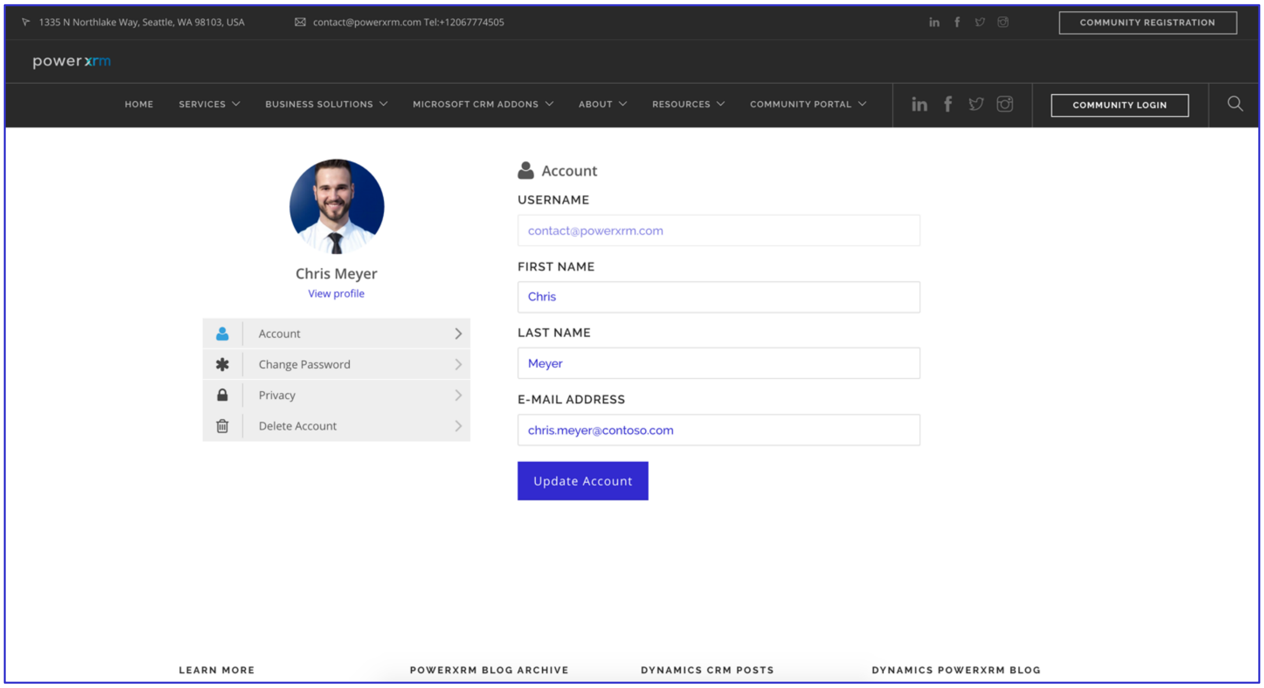


Once you have registered, you will be able to download your Solution. On http://www.powerxrm.com/, select the appropriate Microsoft CRM Add-ons, and choose the Add-on you want to download.

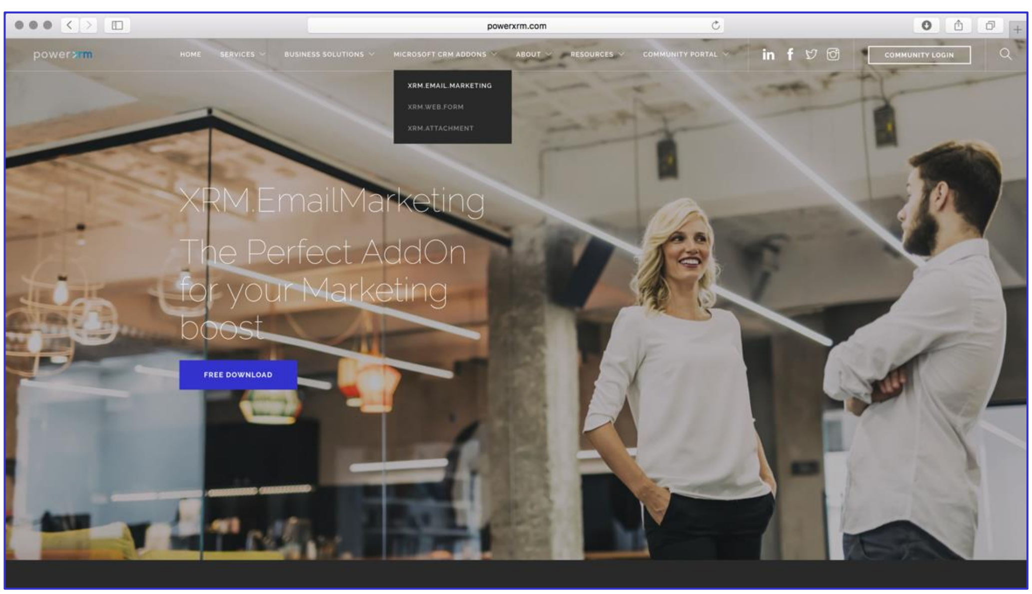
You can check your Community profile and add your details, by selecting Community Portal: Community profile

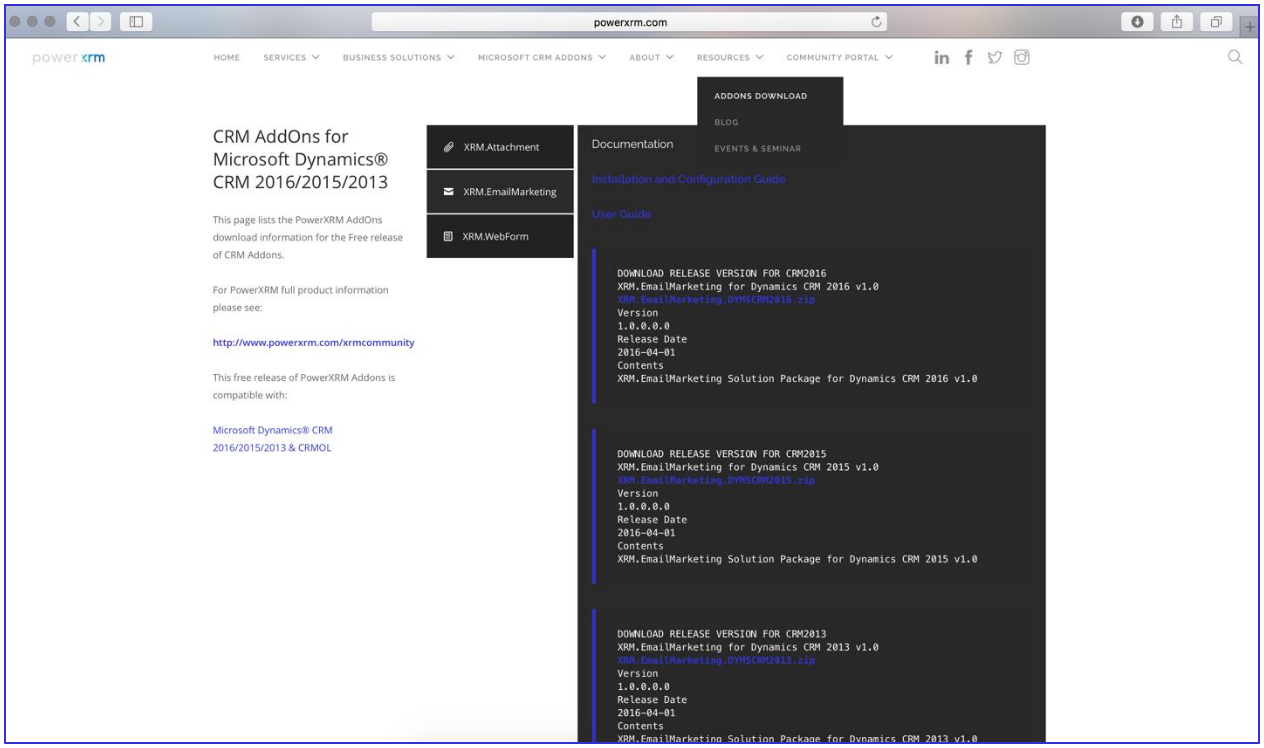


Your can access your Account Profile and change your Account details except your username (your email address used to register for free Add-Ons). Account profile is under the Community Profile, My Account:



The Registration will allow you to download the AddOns where you can read more about its features and download the Solution by clicking Free Download and save it on your local machine.

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This free release of PowerXRM Addons is compatible with:
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XRM.EmailMarketing
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Installation and Configuration Guide
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1.0.0.0.0
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2016-04-01
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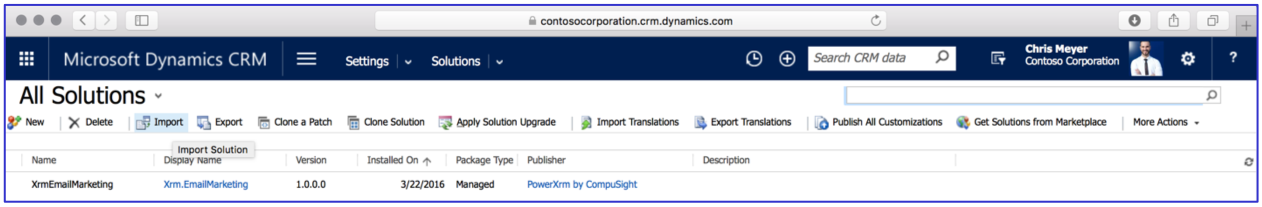
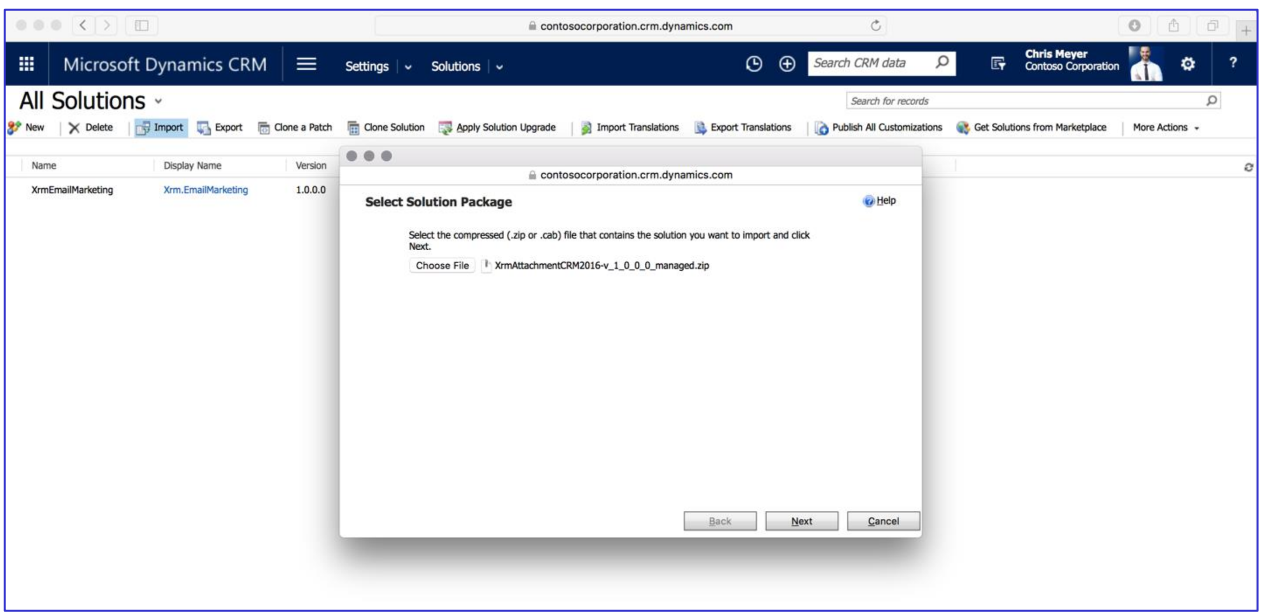
Import and Solution Installation

The following instruction will guide you through the import and installation process of your AddOn.

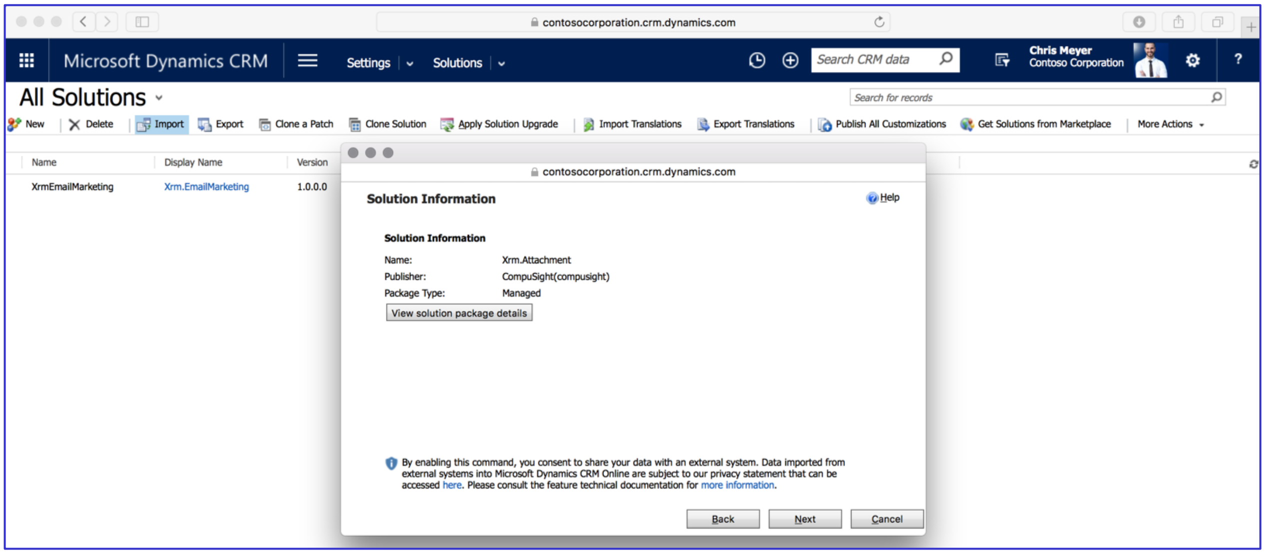
The downloaded Solution is imported in Microsoft Dynamics CRM, simply by going to the Solutions page in Dynamics CRM. When on the Solution page, click Import.

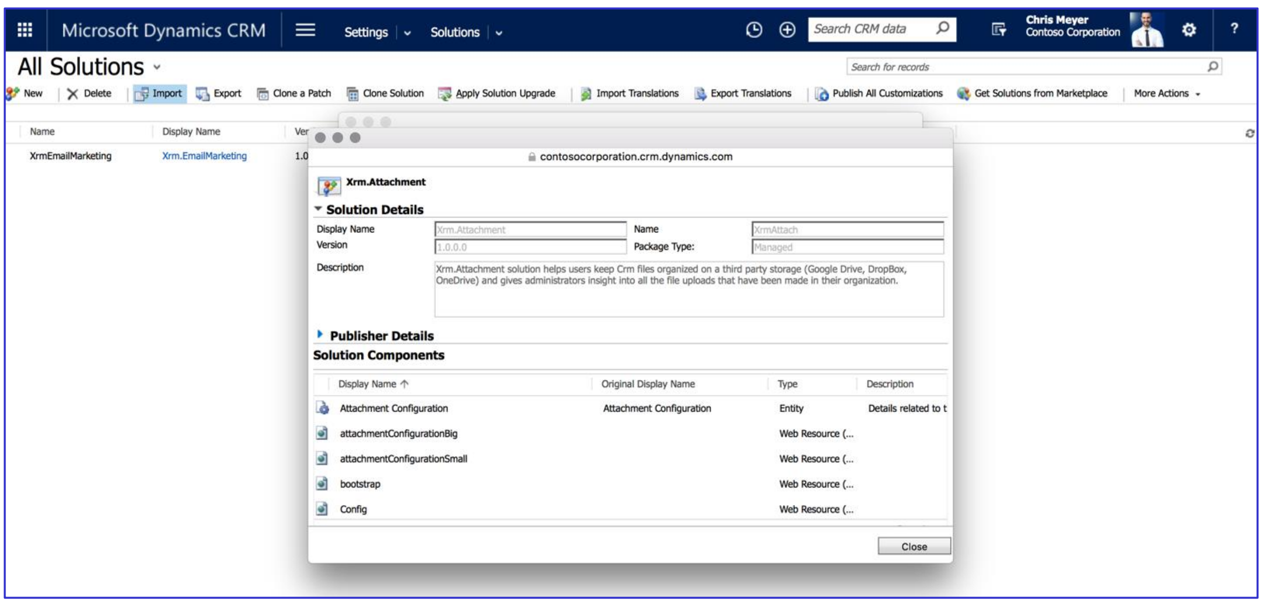


The Import opens a new setup wizard where the end-user locates and selects the downloaded zip executable file for import. The following solution package: XrmAttachment_1_0_0_0 must be installed in the Dynamics CRM, prior to running the XRM.Attachment Solution:

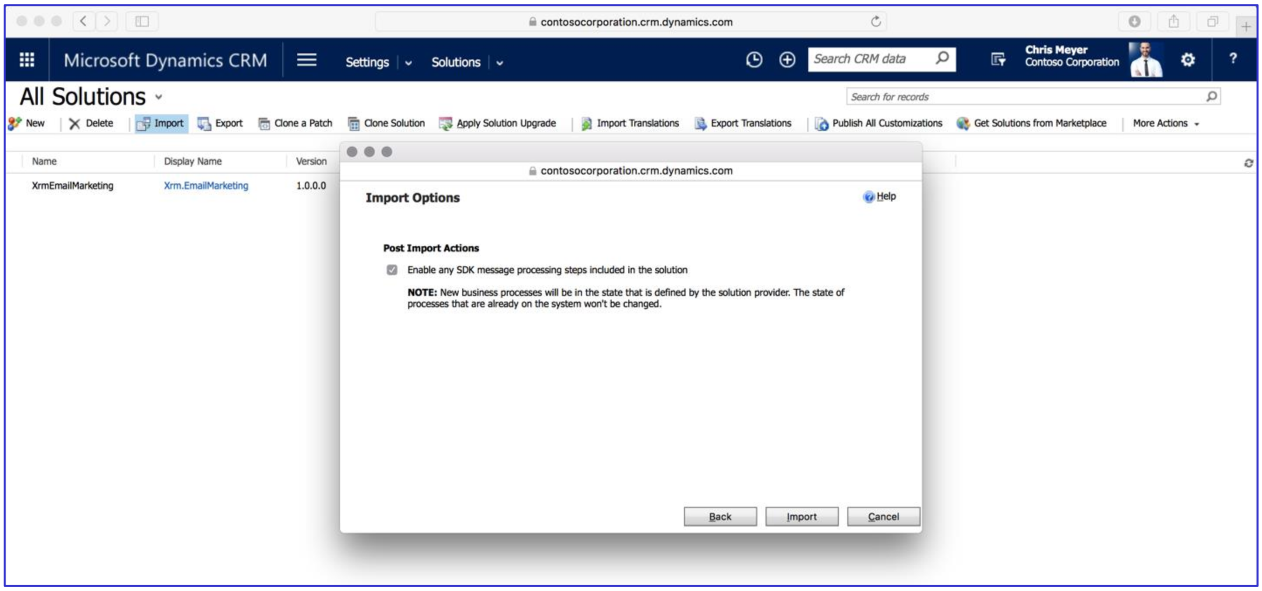


Click next, and on the next step, the Dynamics CRM Solutions wizard, displays the Solution Information.

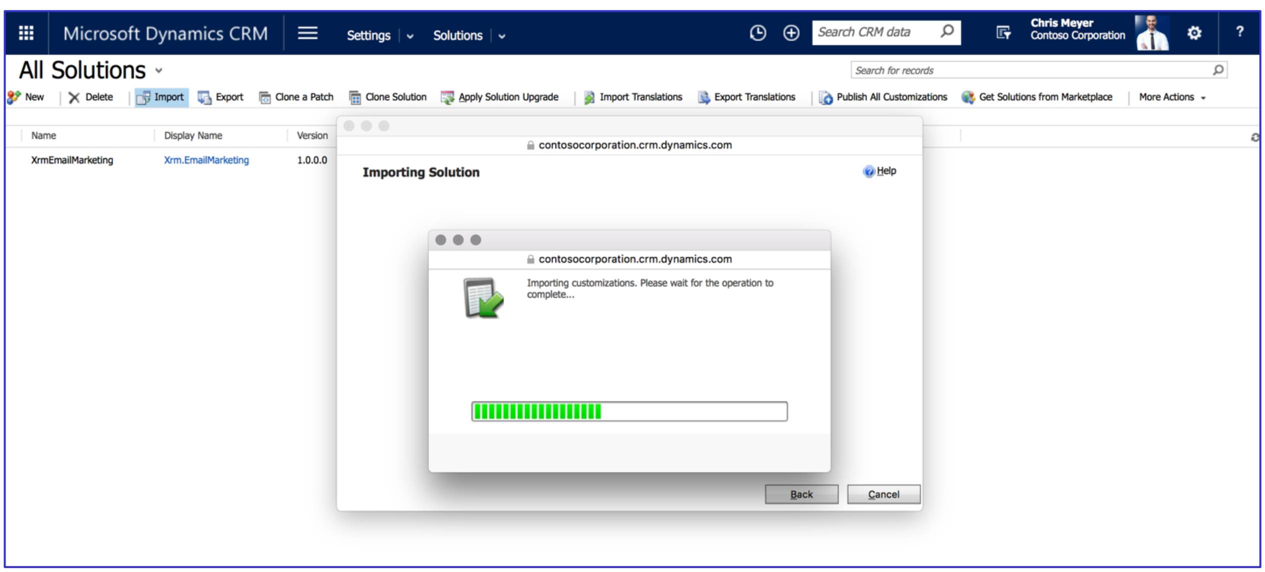


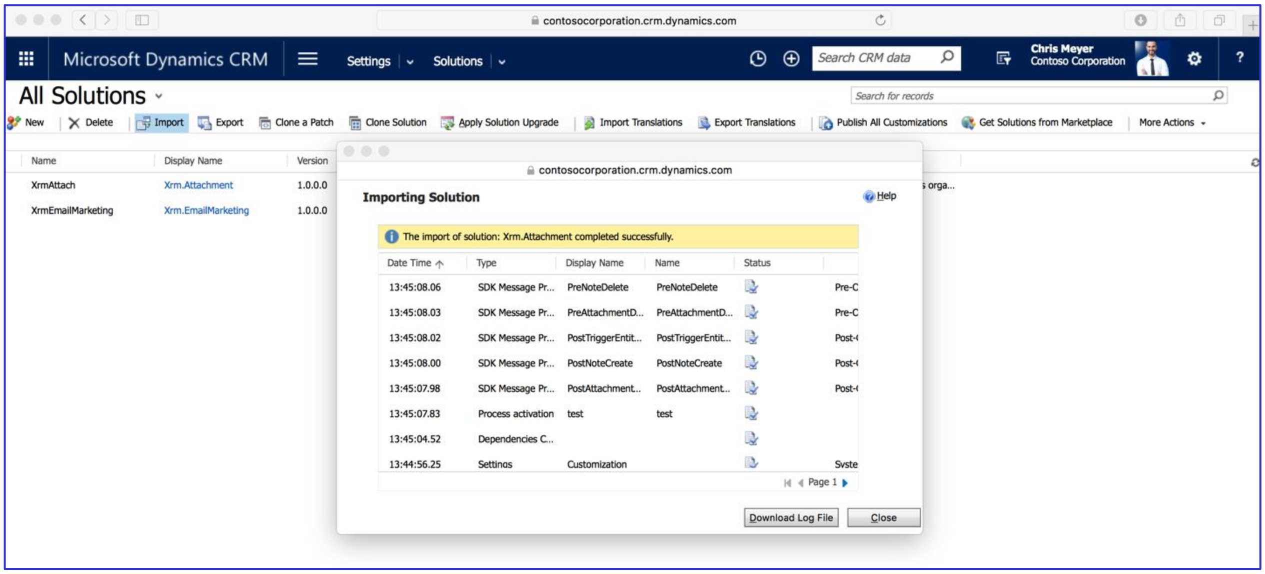


Click next, and on the next step, a wizard displays a check-box message: Enable any SDK message processing steps included in the solution. The message s checked by default, and you should leave it checked.

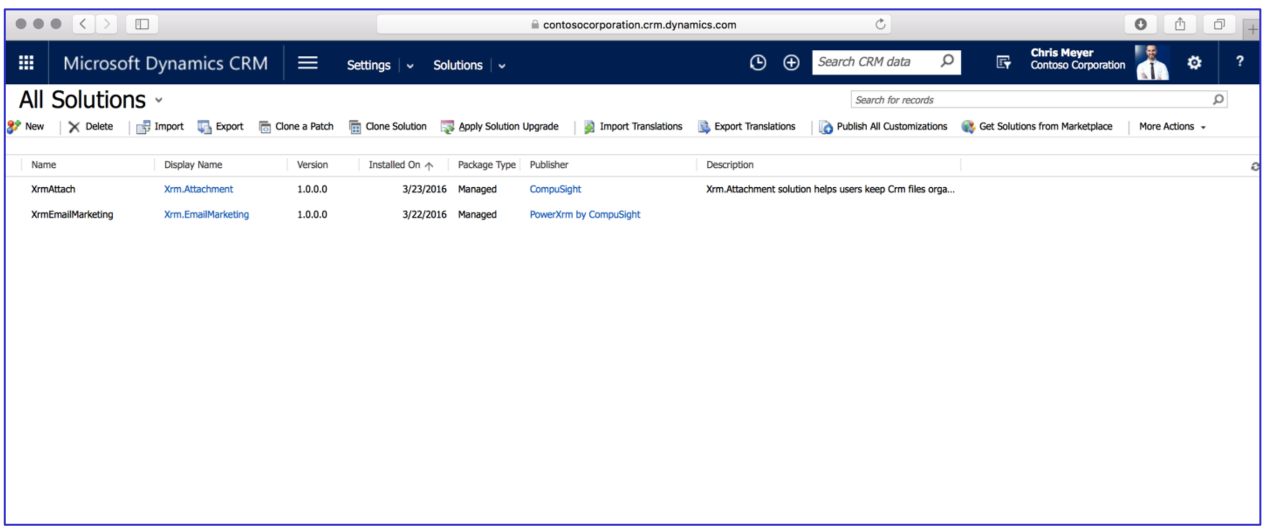


Click Import. This starts the importing process, and when the process is done, a window of confirmation is displayed. Besides the message about successful import, there is a list of installed components and status of their import. There is an option to Download Log File at the bottom of the page. Click close, marking that the import is finalized and the solution is ready to be used.

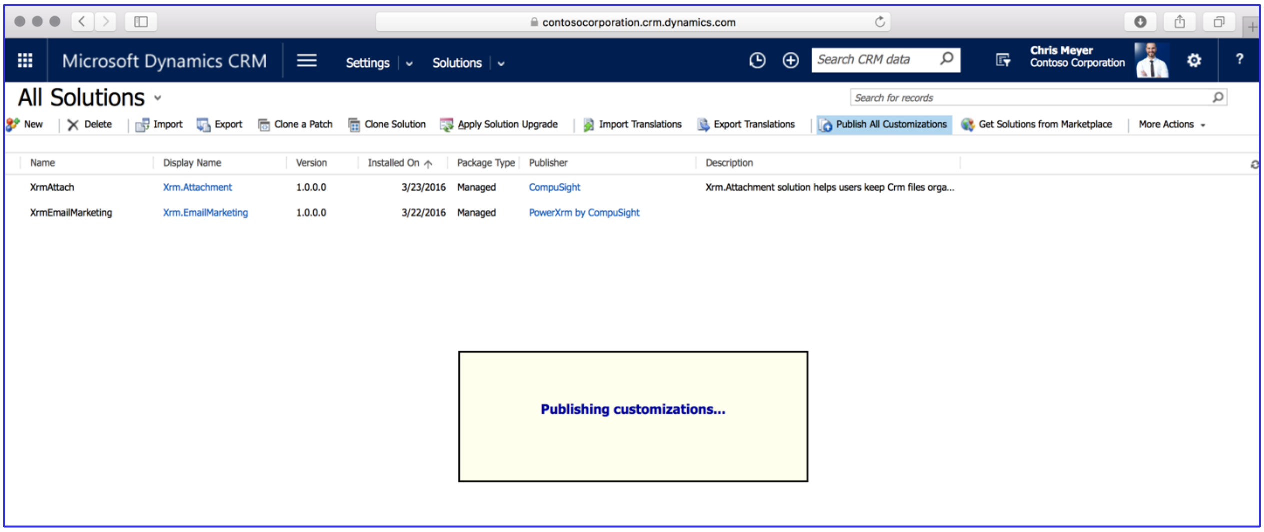




On the Solution page, there is your XRM.Attachment Add-on solution that was just imported.



For all components to be published and ready to be used, you can select the newly imported solution and click Publish All Customizations.



Next step in using XRM.Attachment solution is to set configuration in configuration page.

XRM.Attachment Configuration

Setting up the XRM.Attachment Add-on. After importing the XRM.Attachment solution as described in Installation guide, CRM system administration is responsible for all the configuration that needs to be done before CRM attachments are sent to remote storages.

Click on the XRM.Attachment Solution, highlighted in blue:

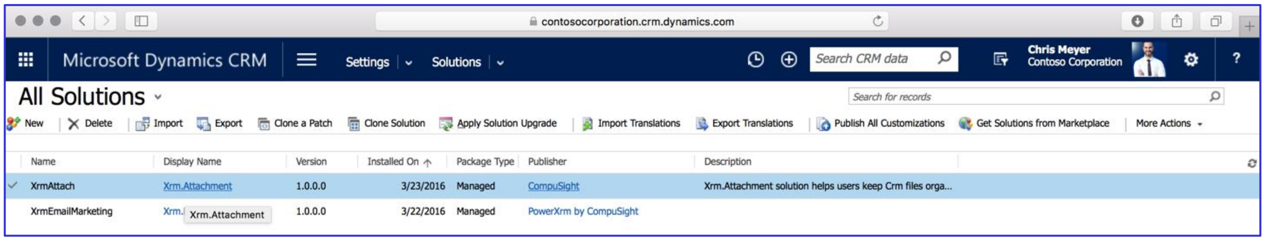


Figure 1. List of solutions

This configuration can be found on the Configuration page of the XRM.Attachment solution.

To configure the XRM.Attachment solution, the CRM Administrators will need to:

1. Activate and Validate the License
2. Configure and Authenticate the 3rd Party storage provider (Google, Drobox, OneDrive):
   2.1. Authenticate the 3rd Party storage provider
   2.2. Add preferred Entities from CRM, where to upload Attachments

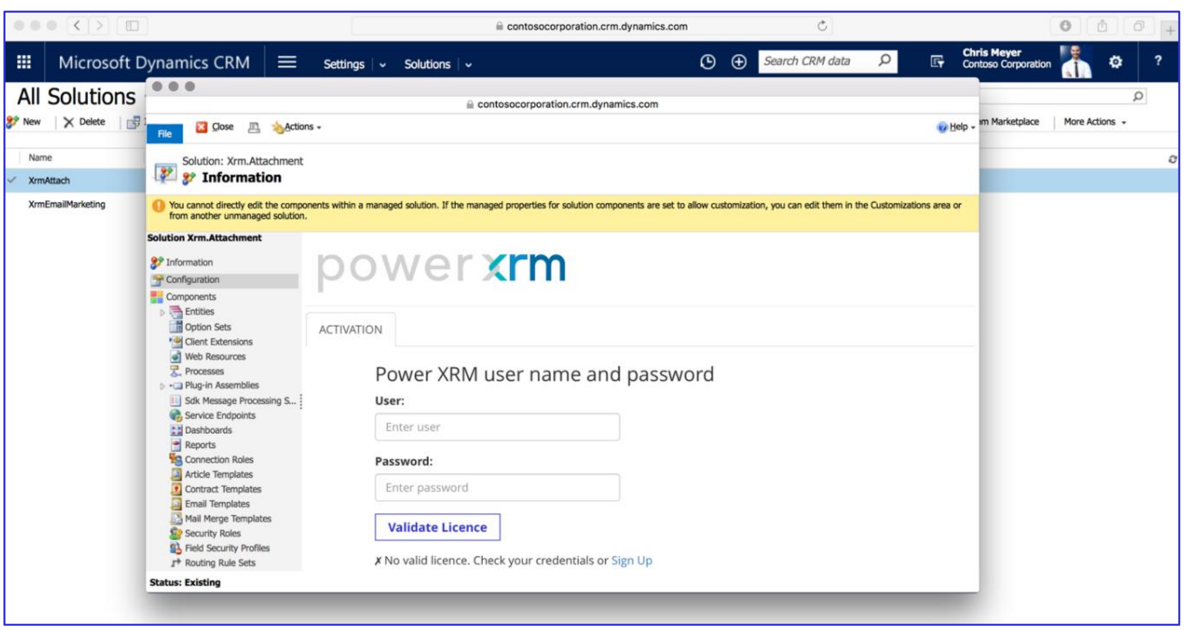


Figure 2. Validating Licenses

In case the License is not successfully validated or the License was never assigned in the first place, CRM administrator can find a link to the Registration page: Sign Up just below the Validate License button.

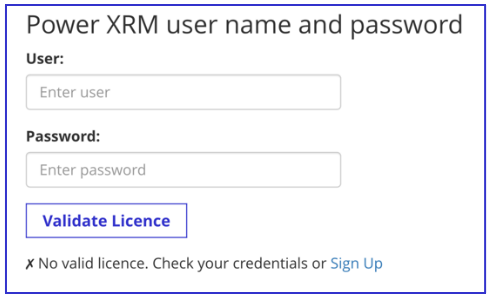


Figure 3. Failed license validation

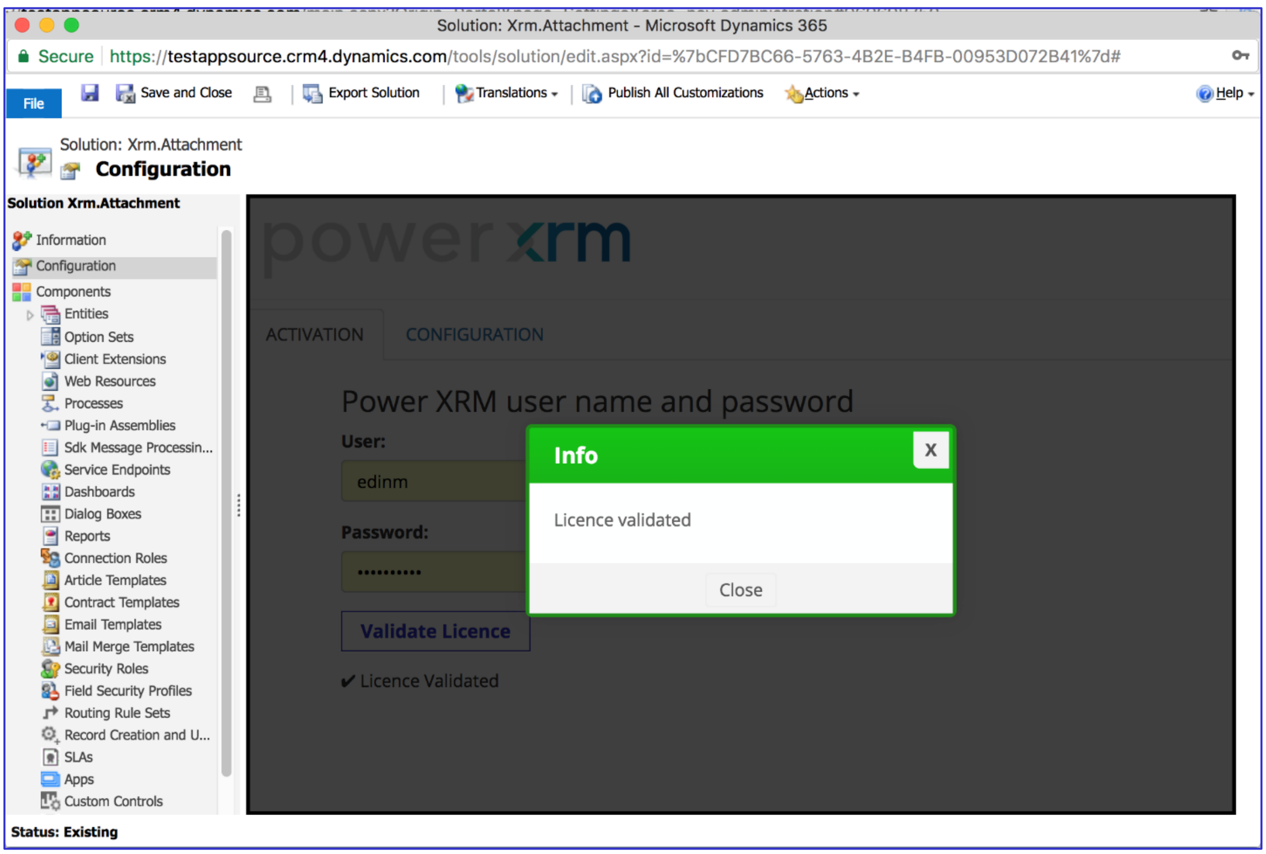


Figure 4. License Validated

Configuration tab take care of the the configuration regarding *3rd* Party Storages. User can choose from three different Storage providers:

- Google Drive
- Drobox
- OneDrive

First thing that administrator needs to do is to authenticate against chosen storage and after that choose entities for which upload will be enabled. In the list are presented all entities that have relationships with Note (annotation) entity. If entity is in excluded list, upload to remote storage won't be done. If the CRM Organization administrator needs to change (add or remove entities) the selected Entities at any time, he can adjust the Included Entities list and click on Save changes button to update the Configuration.

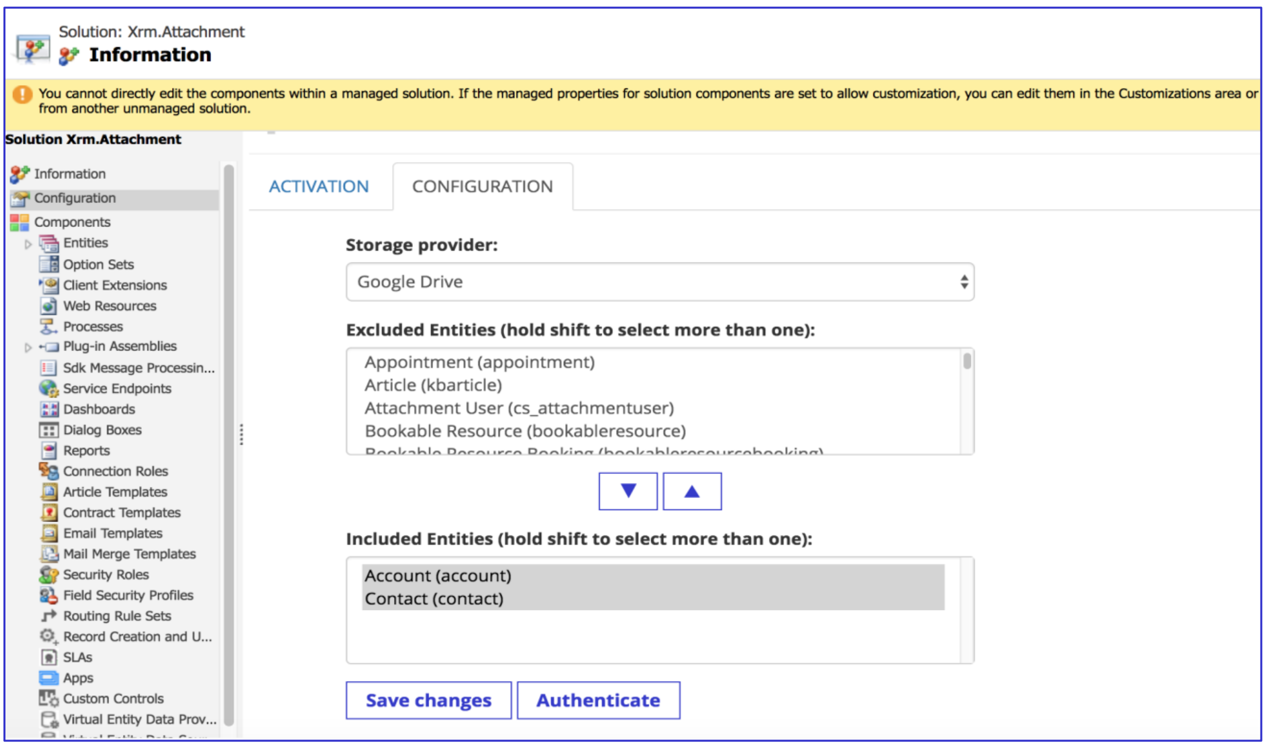


Figure 5. Storage Configuration details

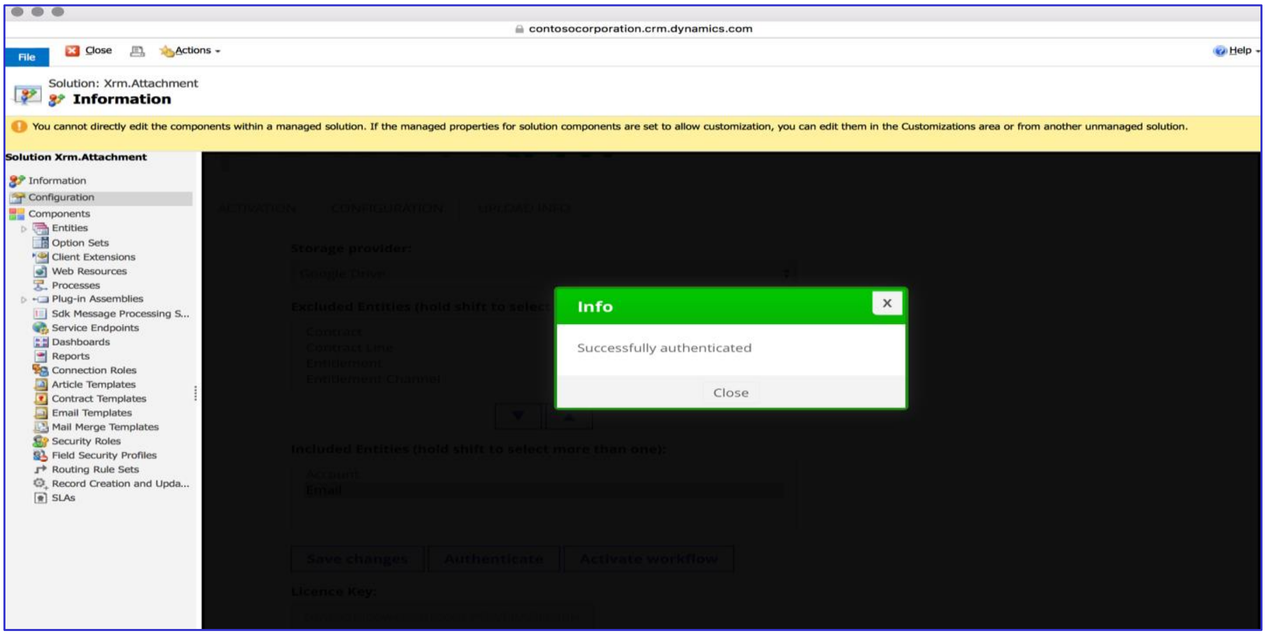


Figure 6. 3rd Party storage (Google Drive) Successful Authentication

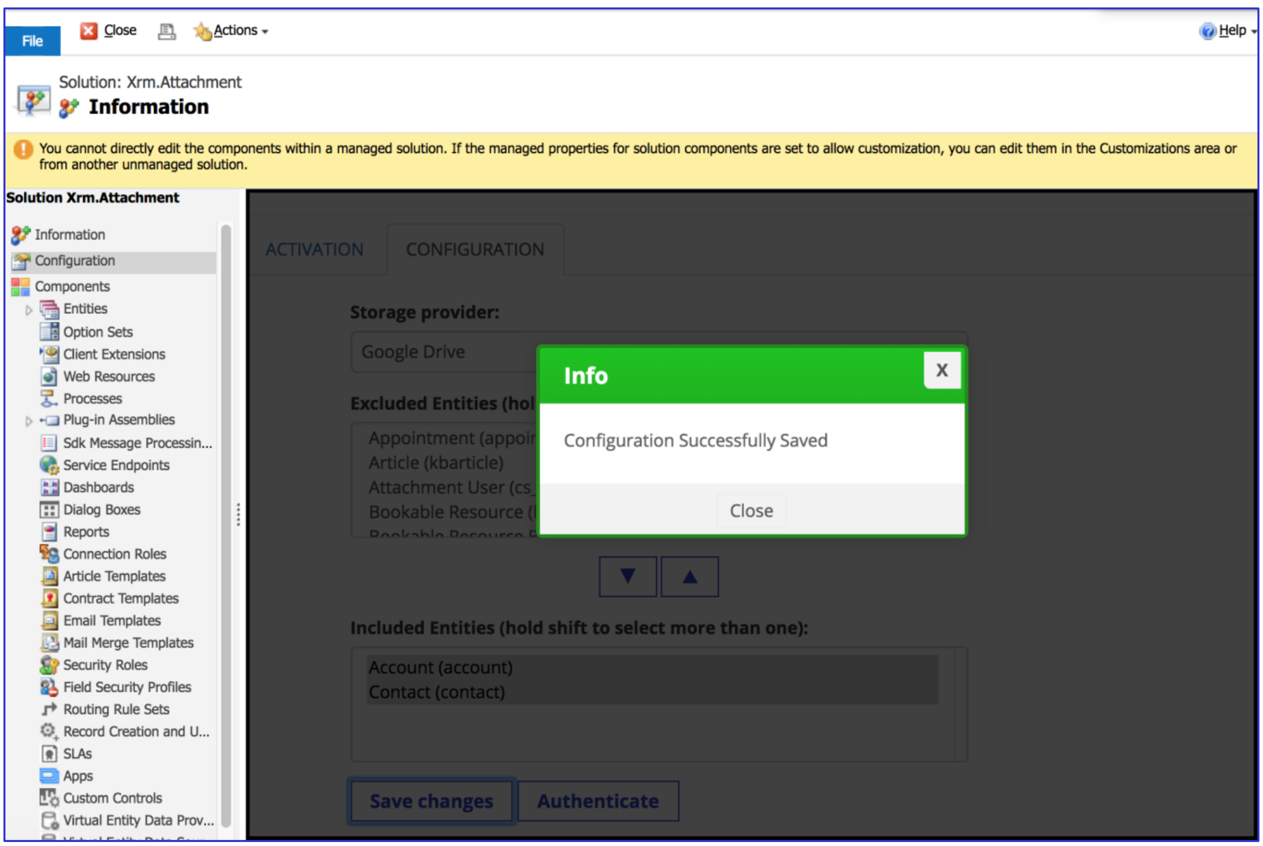


Figure 7. Changes saved

After successful configuration of solution, user can now proceed with using XRM.Attachment solution. User can attach any kind of file to note and it will be uploaded to selected 3rd party storage provider. Also, files which are attached to email will be uploaded to 3rd part storage provider and after successfully upload a link to file will be appended to email body.

If for any reason upload or delete of file fails, user can open Failed Upload entity and using Compusight Retry Workflow, retry to upload that file again. Also in record on Failed upload entity, user will be presented with reason of failed upload or delete.

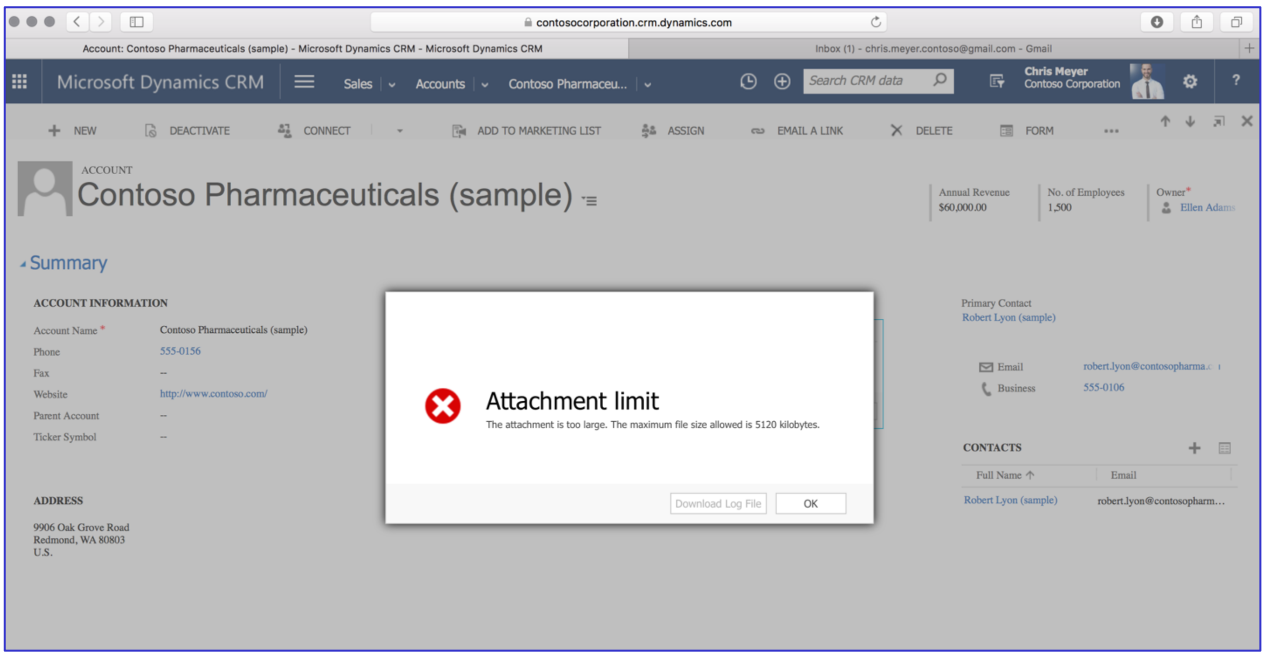


Figure 8.There is a file Attachment limit, usually se tup to 5 MB that can be extended up to 32 MB, in Dynamics CRM.

Upload Info and Failed Upload entites

Every user in CRM organisation can track all of their files, that they have uploaded to or removed from remote storage using Xrm.Attachment. In Upload Info entity, successfull uploads and deletes, or in Failed Upload entity for erroneous uploads or deletes will be shown.

First time when user attaches files to note, after file is successfully uploaded to remote storage, a new relationship is created between parent entity (entity where files is attached) and Upload Info entity. With this user can add sub-grid to entity form where he can see all files of that entity records that are located on remote storage.

If for some reason upload or delete action to remote storage fails, user can see all the information on Failed Upload entity and can start Compusight Retry Workflow that will retry failed action if all the errors are fixed.

Uninstall the Solution

The process of uninstalling the solutions is to delete the Add-on solutions in the reverse order that they were installed.

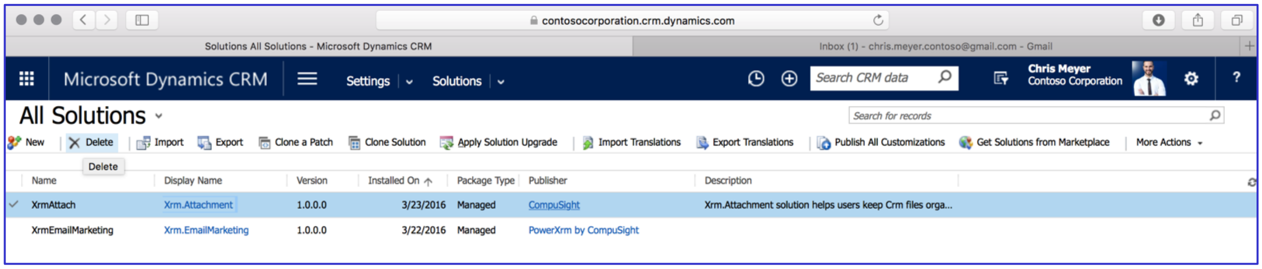


Figure 9. List of solutions

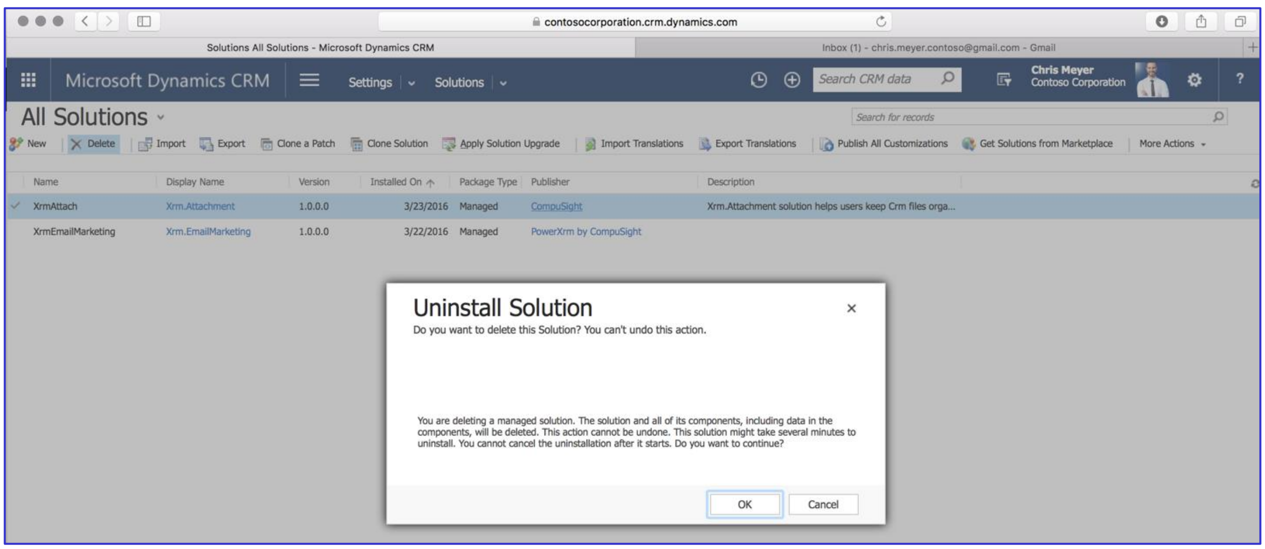


Figure 10. Confirmation of unistallation of solution

Solution Package Information

For more details regarding the XRM.Attachment solution, please visit:
http://www.powerxrm.com/xrmattachment

For more information regarding User Guide, see: User Guide

For more details regarding CRM Solution Packages please visit the following documentation on MSDN http://msdn.microsoft.com/en-us/library/gg334530

or contact PowerXRM at:

http://www.powerxrm.com/contact

contact@powerxrm.com

