User Guide

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MTC
THE CRM SERVICES VALUE SOURCE

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Product Overview

Email Attachment Manager from MTC is aimed to help CRM users to manage their CRM email attachments and notes in a variety of ways. With Email Attachment Manager, CRM users can fetch email attachments and notes for a particular period with preset file extensions and data size, and do the following things:

1. Remove all selected attachments from the CRM
2. Remove all attachments from CRM
3. Download to File System
4. Move/Copy to SharePoint
5. Move to Azure

CRM Users can run a scheduler to move their notes and attachments to Microsoft Azure or SharePoint or both without having to do anything manually.

So, CRM Users can free up their CRM data base if they want or simply download the email attachments and/or notes to desired location or get rid of unwanted email attachments and/or notes.

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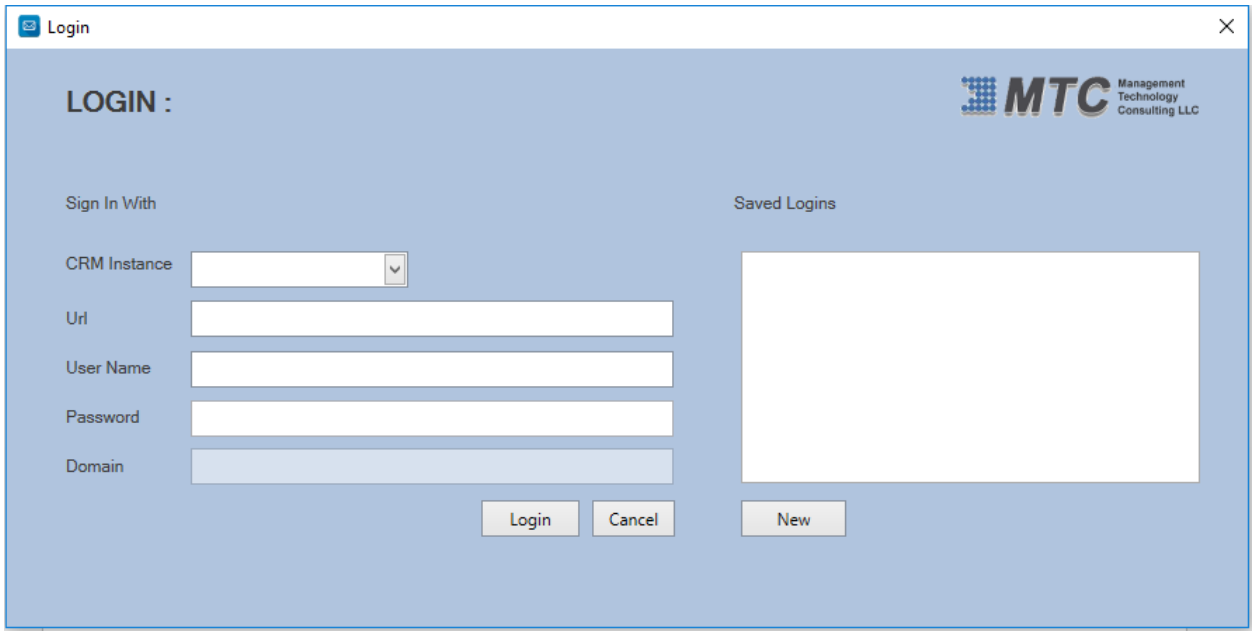
How to Install Email Attachment Manager Solution?

To start using Email Attachment Manager Functionality, you need to download and install both Email Attachment Manager Solution and MTC Licensing Solution as explained in the below steps.

1. Go to https://www.mtccrm.com/Products?ProductId=1027 and download the solution. You can notice that the solution downloaded contains two zip files – Core Solution + Licensing Solution.
2. Open the Core Solution zip file and run the .exe. The application will be installed on your desktop.
3. Open the CRM instance and import the licensing solution into it. Once done, fill the Registration Details which is a one-time activity.
4. Submit your Org Name (Settings → Customizations → Developer Resources → Unique Name) to MTC at salesteam@mtccrm.com for requesting a trial key. Usually, you should be receiving the trial key within 24 business hours
5. Upon receiving the trial key, open the Email Attachment Manager application. Email Attachment Manager Login Interface will appear as shown below.



6. Enter the CRM credentials and click Login.
   - **CRM Instance:** It can be Online, On-Premise, IFD, Dynamics CRM, Office 365
   - **Url:** Enter the CRM instance URL.

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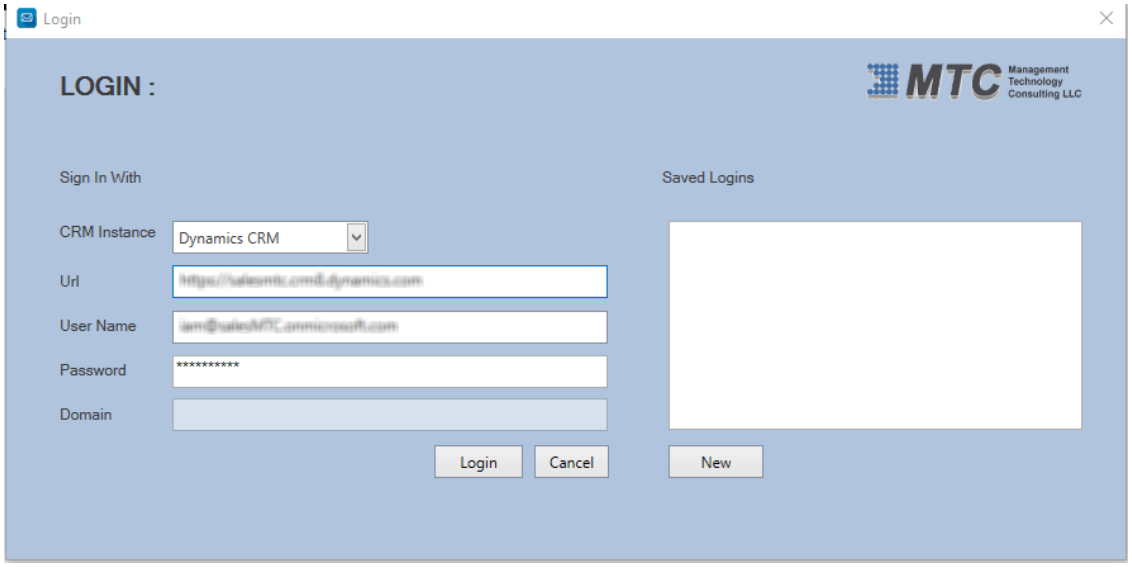
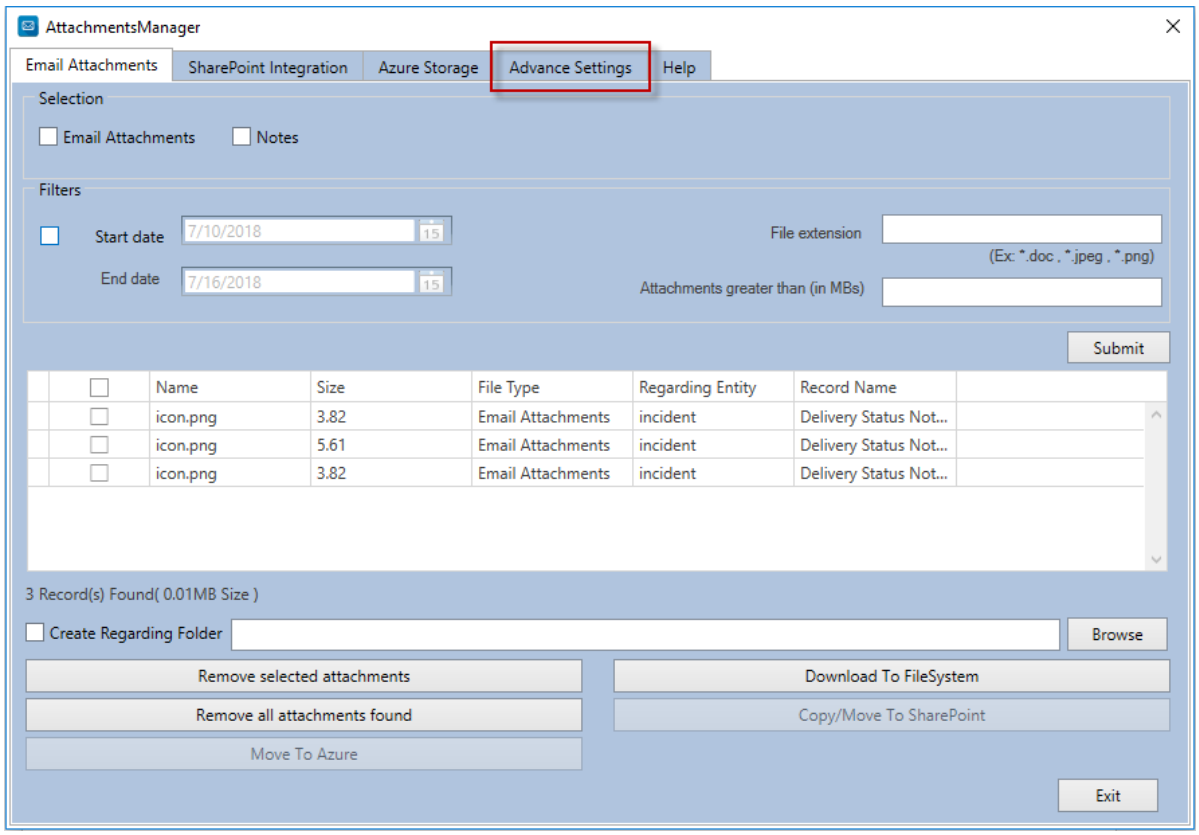
- **User Name:** Enter the user name.
- **Password:** Enter the password

Here for instance we are going with Dynamics CRM.



You will be directed to the Home Page as shown below.



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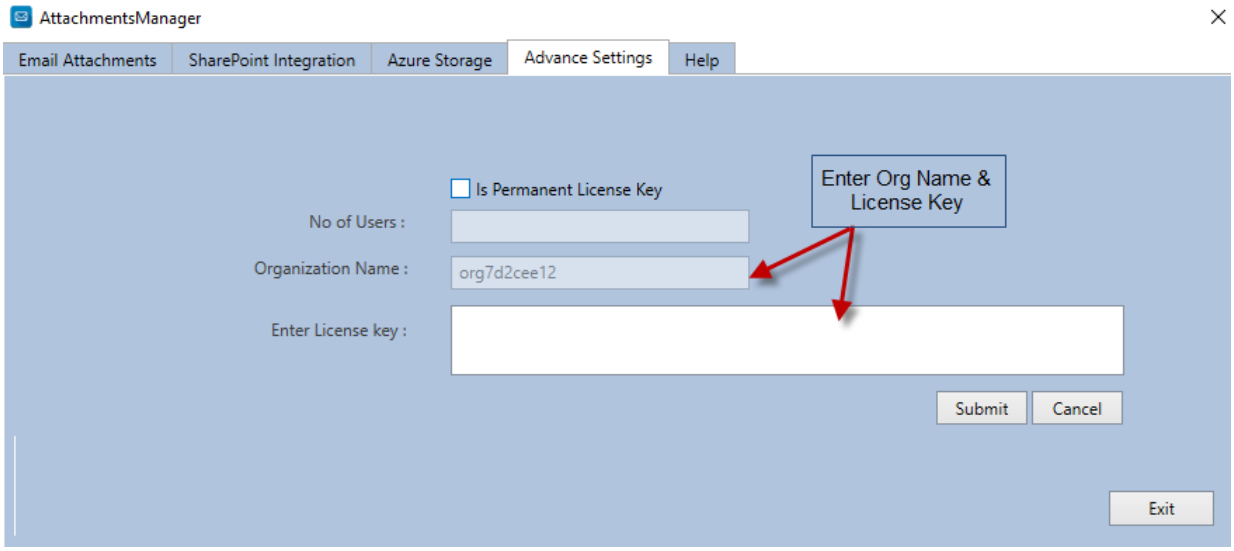
7. Go to **Advance Settings** tab as highlighted in the above image.
8. Enter Organization Name (Unique Name) and license key, and click Submit.



The license key will be validated and you can start using the application.

Note: For getting permanent license key, you need to purchase the solution for the required user count from MTC.

Activating permanent license key requires you to tick the check box Is Permanent License Key, Enter the No of Users along with Organization and License Key.

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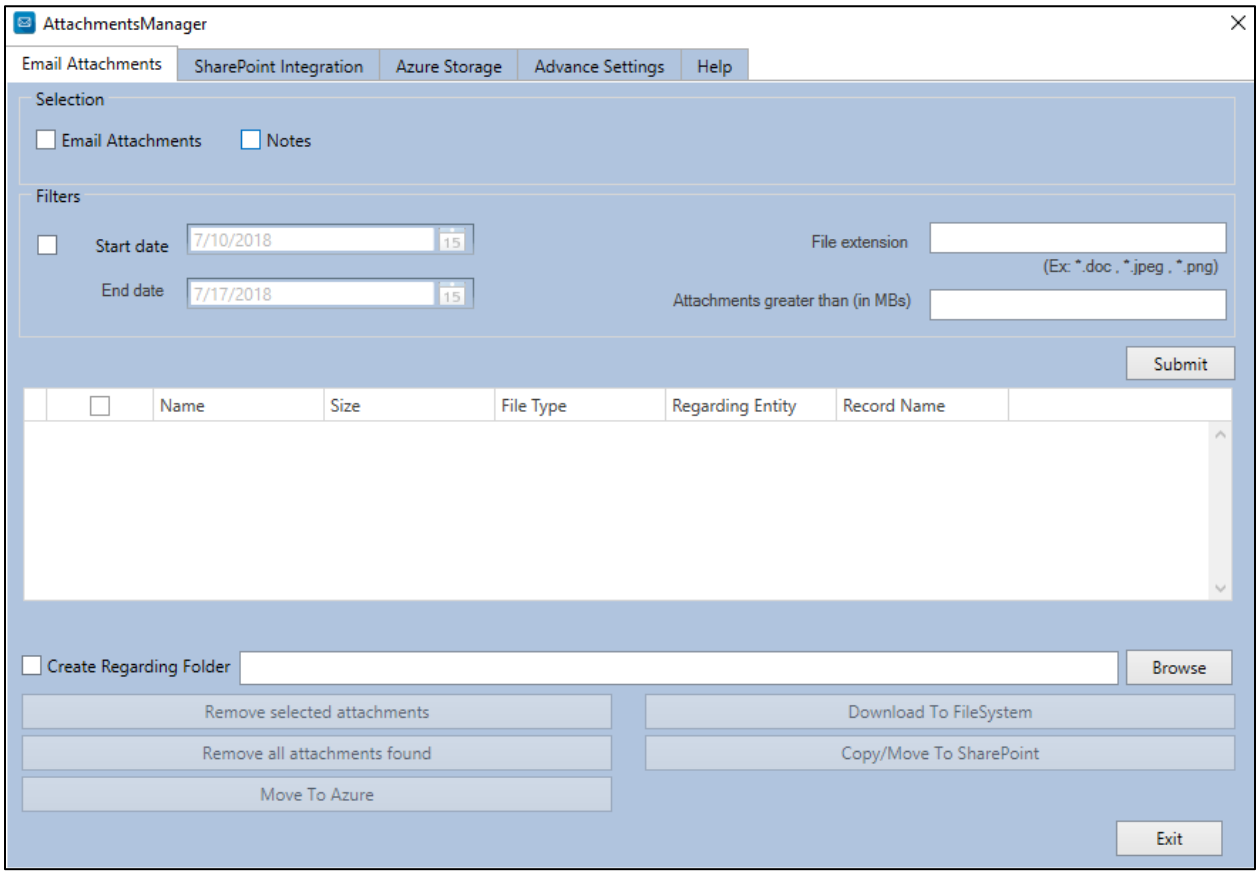
Email Attachment Manager Functionality

Email Attachment Manager can be used to free up your CRM data base by moving email attachments and notes to Azure and SharePoint or simply download email attachments and notes to file system or get rid of unwanted email attachments and notes.

After successfully logging into the application, you will be directed to the home screen as shown below.



In the above image, you can notice there are 5 tabs namely, Email Attachments, SharePoint Integration, Azure Storage, Advance Settings and Help.

By default, you will be directed to Email Attachments tab. Here you will notice a variety of options.

- Under Selection you can choose Email Attachments or Notes or both.

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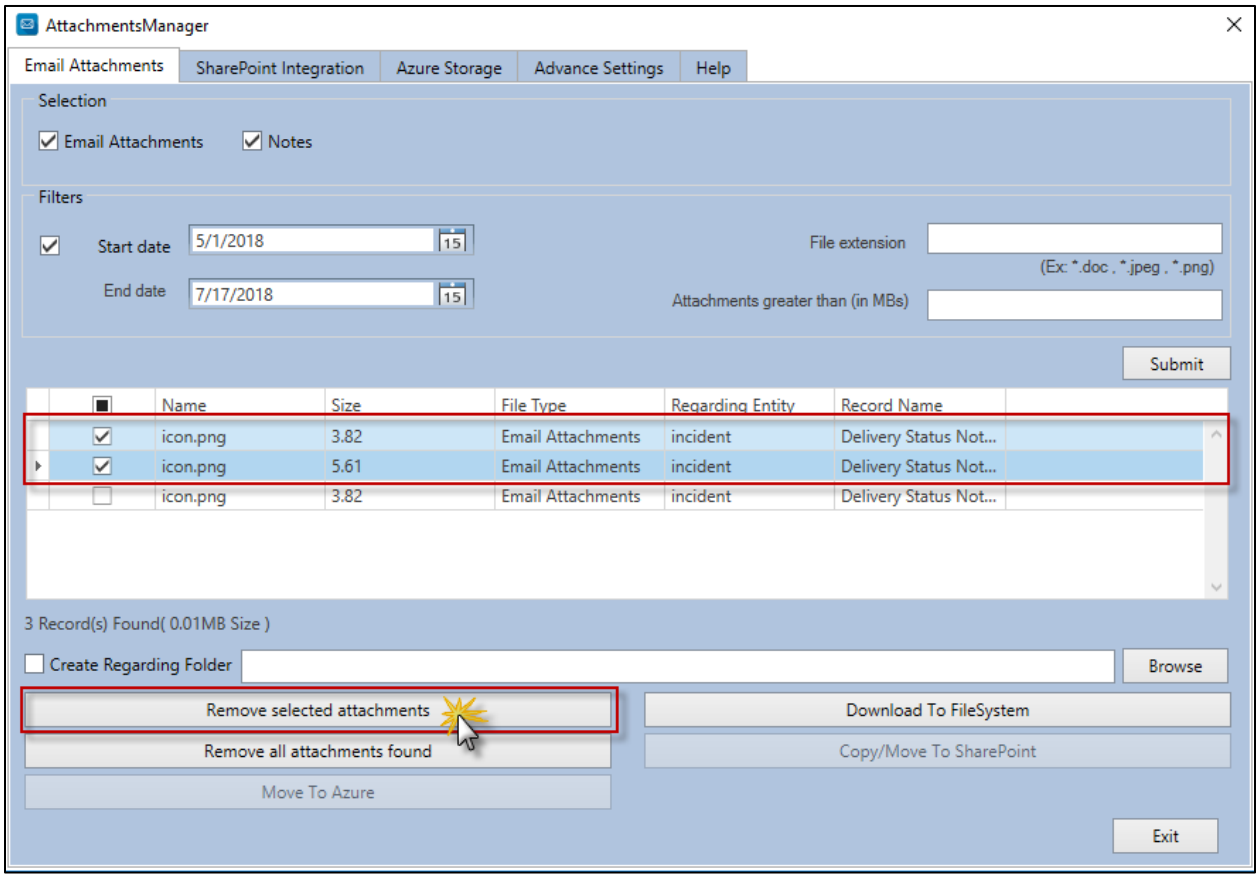
- Under Filters, you can enter the data range on which you want to fetch the attachments and notes.
- In the File Extension, you can mention the type of files you would like to fetch.
- In the Attachments Greater Than (in MBs), you can enter the data size of the files you want to fetch.

Once you submit your chosen parameters, the application will communicate with your CRM and fetch the required files.

Remove Selected Attachments

After getting the necessary attachments, you can choose to delete some of the unwanted attachments permanently from your CRM by clicking “Remove selected attachments.”



Remove All Attachments Found

After getting the necessary attachments, you can choose to delete all unwanted attachments permanently from your CRM by clicking “Remove all attachments found.”

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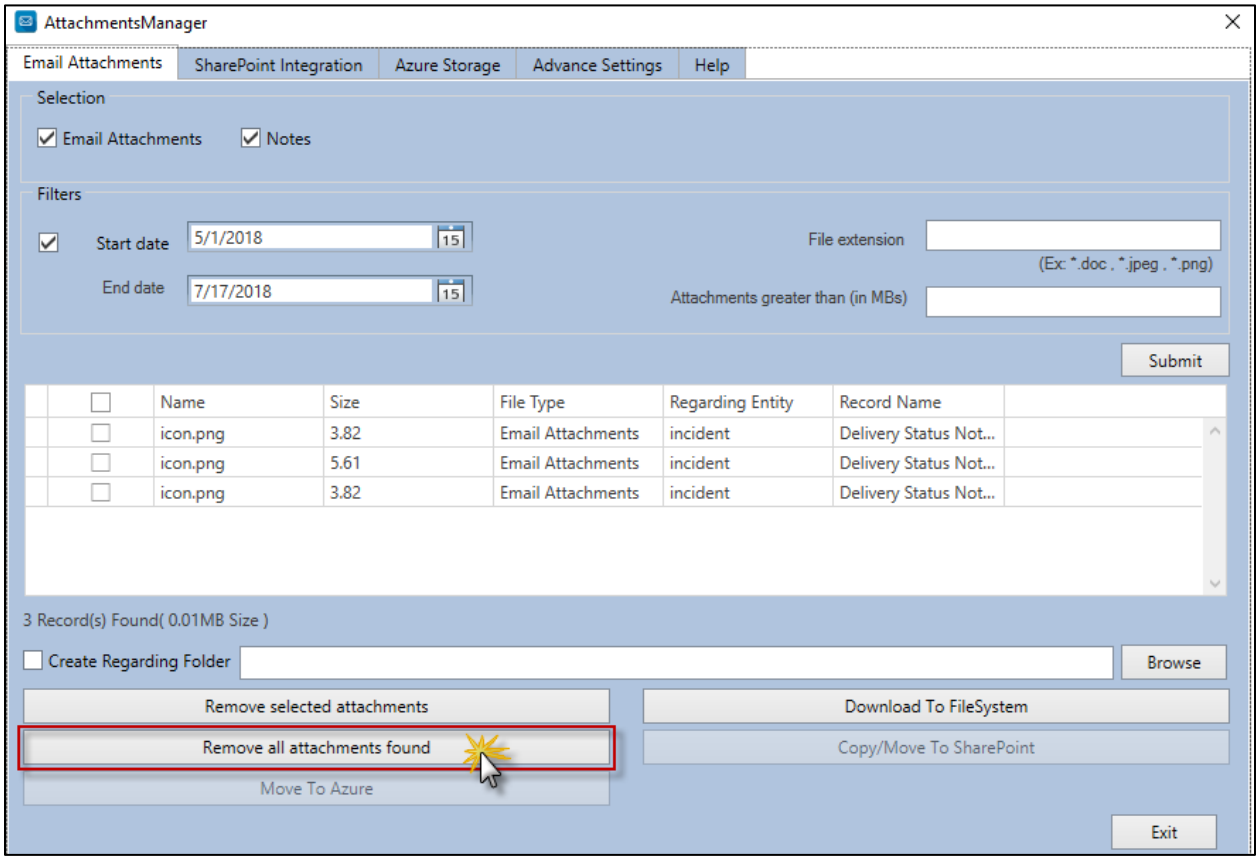

Download to File System

After getting the necessary attachments from destination CRM, you can download the same to specified destination on your system by clicking “Download to FileSystem.”

Tick the check box “Create Regarding Folder” to associate related details for the attachments you want to download and browse the path to where you want to download the attachments.

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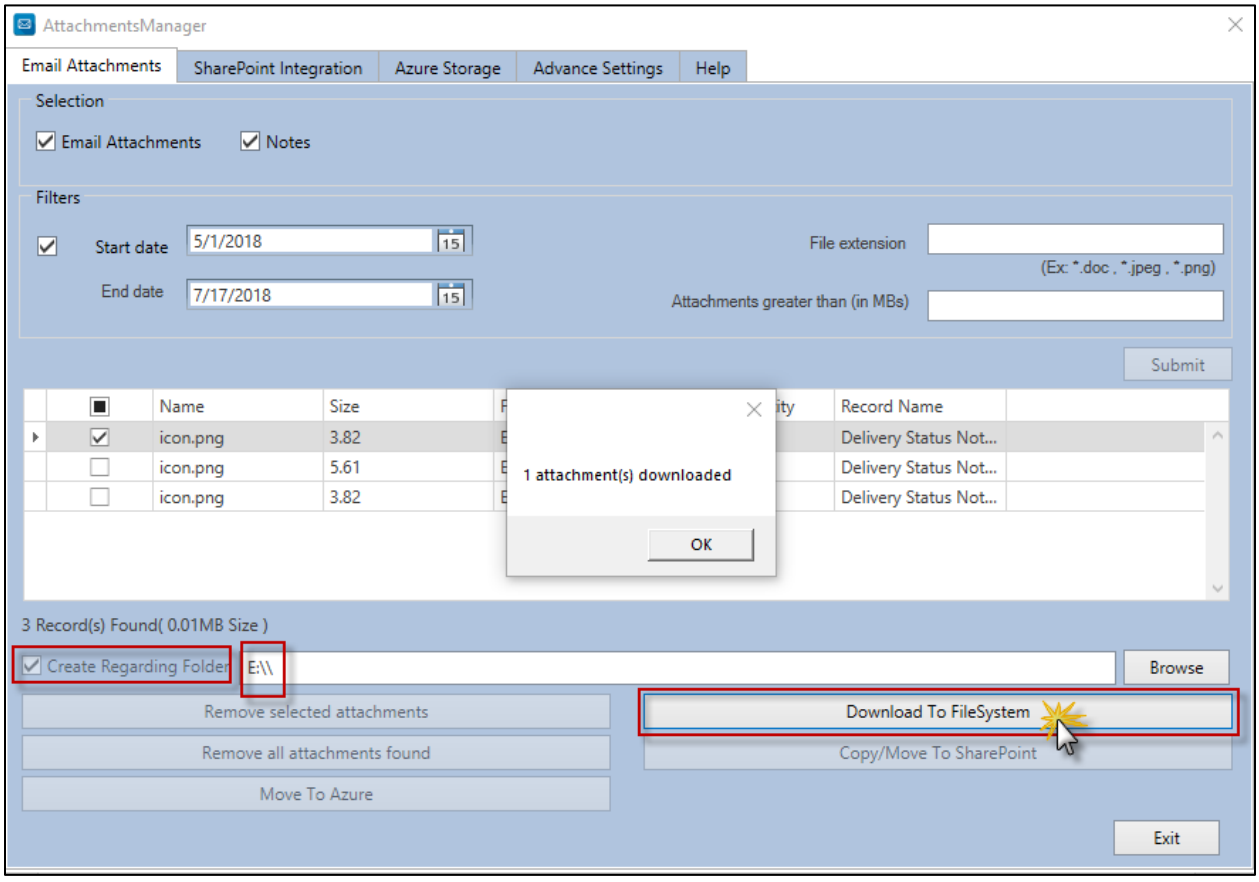
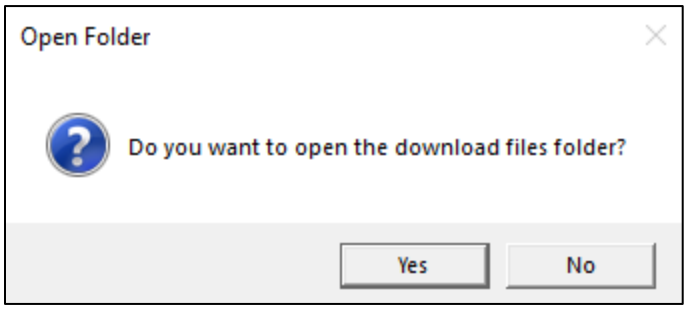


You will receive a prompt message like shown below.



Click “Yes” to see the downloaded attachments.

Move to Azure

After getting the necessary attachments from destination CRM, you can choose to move them to Microsoft Azure.

Before moving to Microsoft Azure, you are required to provide Azure credentials (Access Key & Azure Storage) by navigating to **Azure Storage** tab as shown below.

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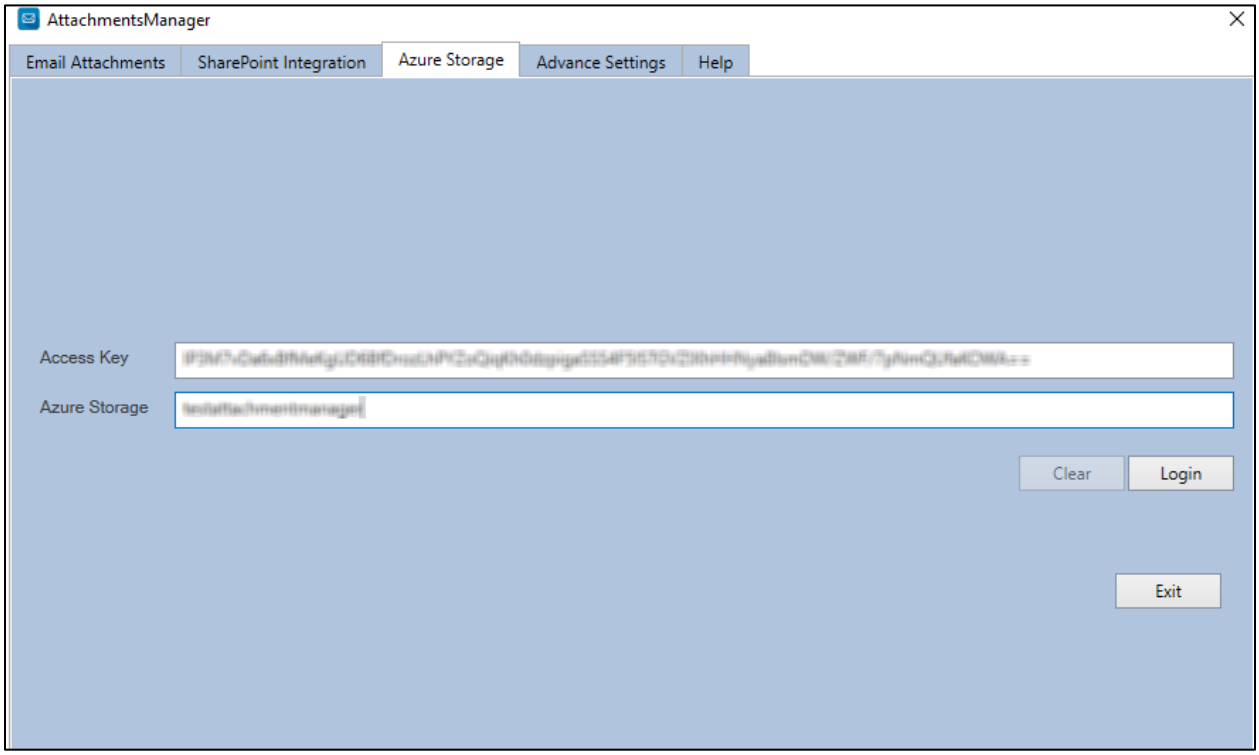

Click Login to validate the credentials. The application will take you back to Email Attachments tab upon validating the credentials. The **Move to Azure** button which was in disabled stage before inputting the credentials will now be enabled. Click on it.

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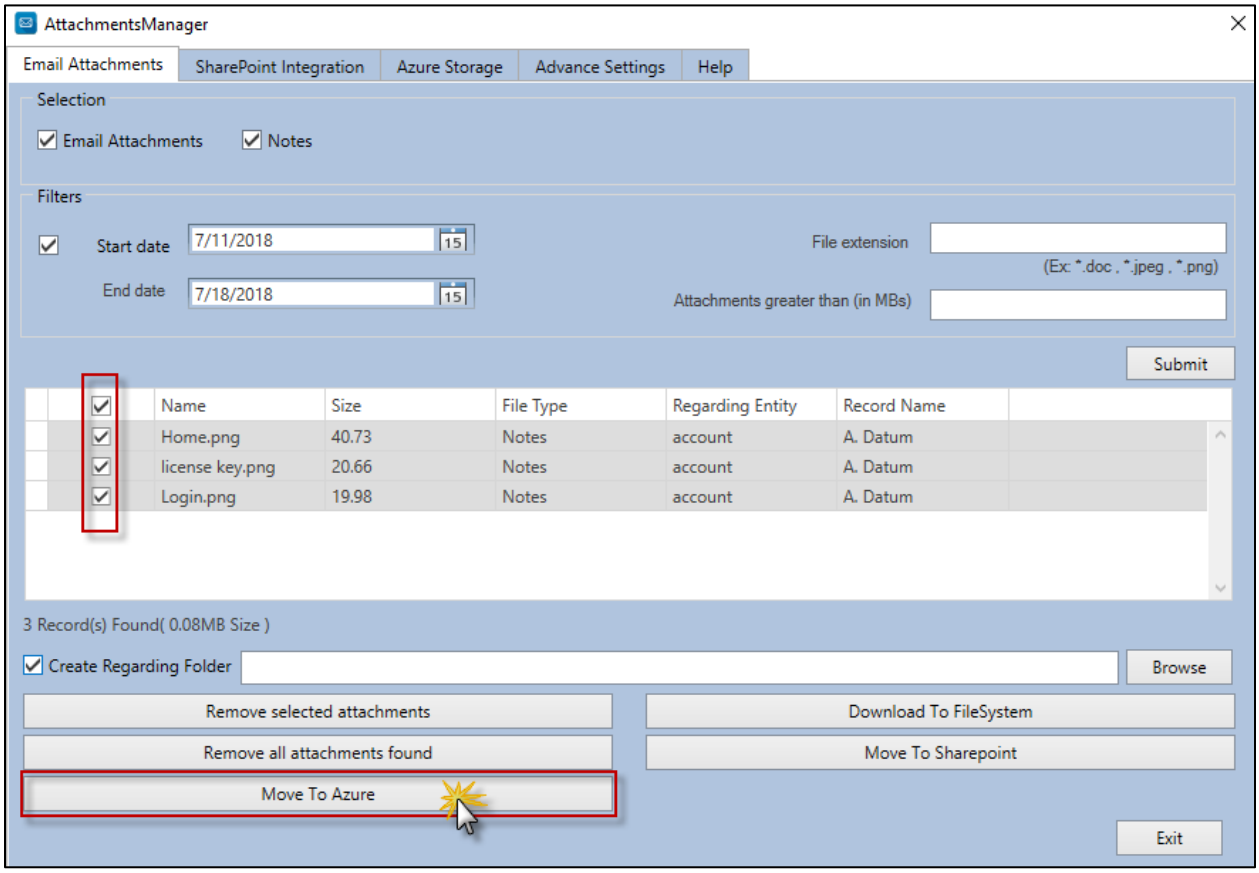

Now log into your Microsoft Azure account. Go to Storage accounts from the left navigation column and open Azure Storage that you have mentioned in the Azure Storage tab of the application.

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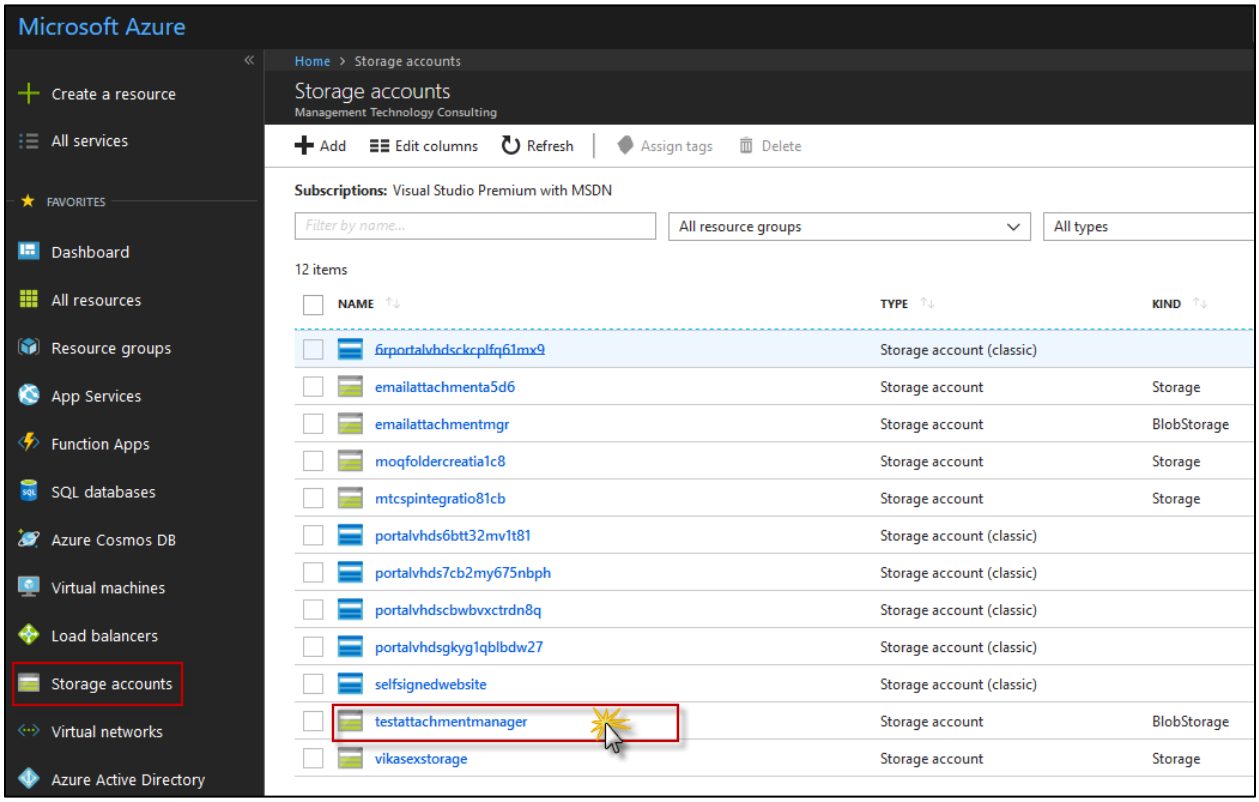
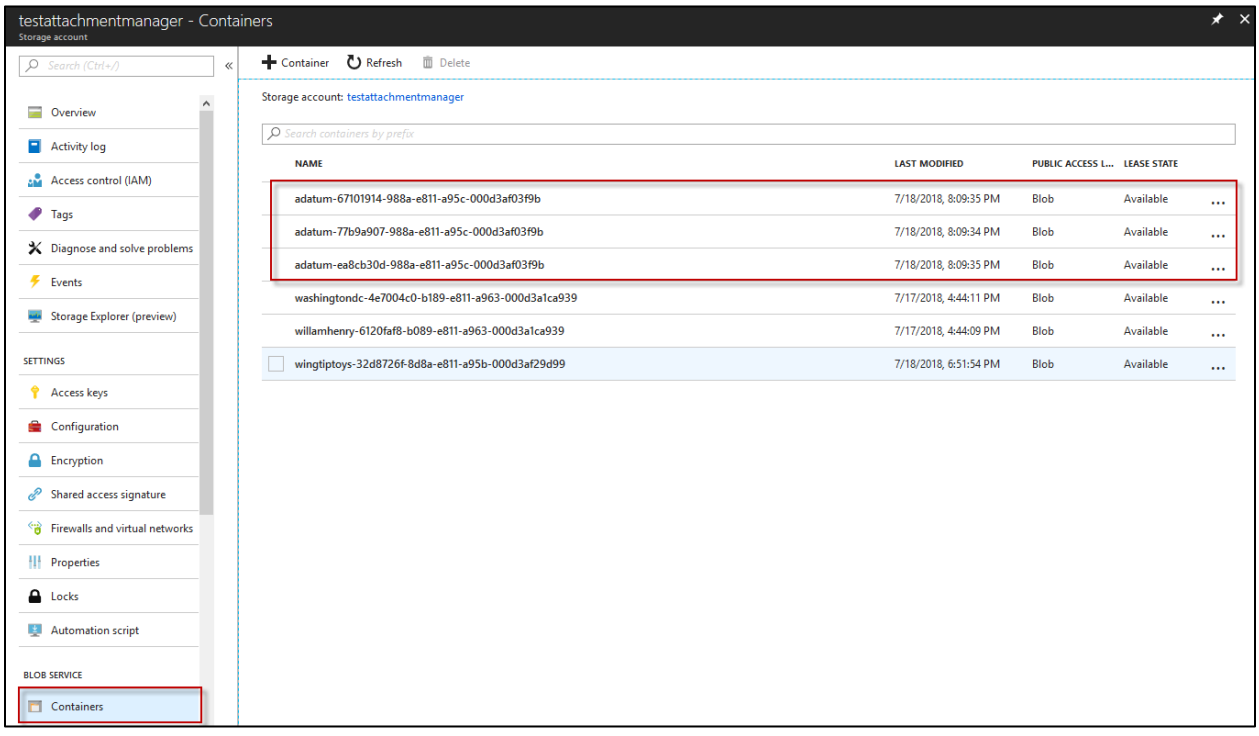


Then click Containers under Blob Service, which will show the list of attachments moved to Azure.



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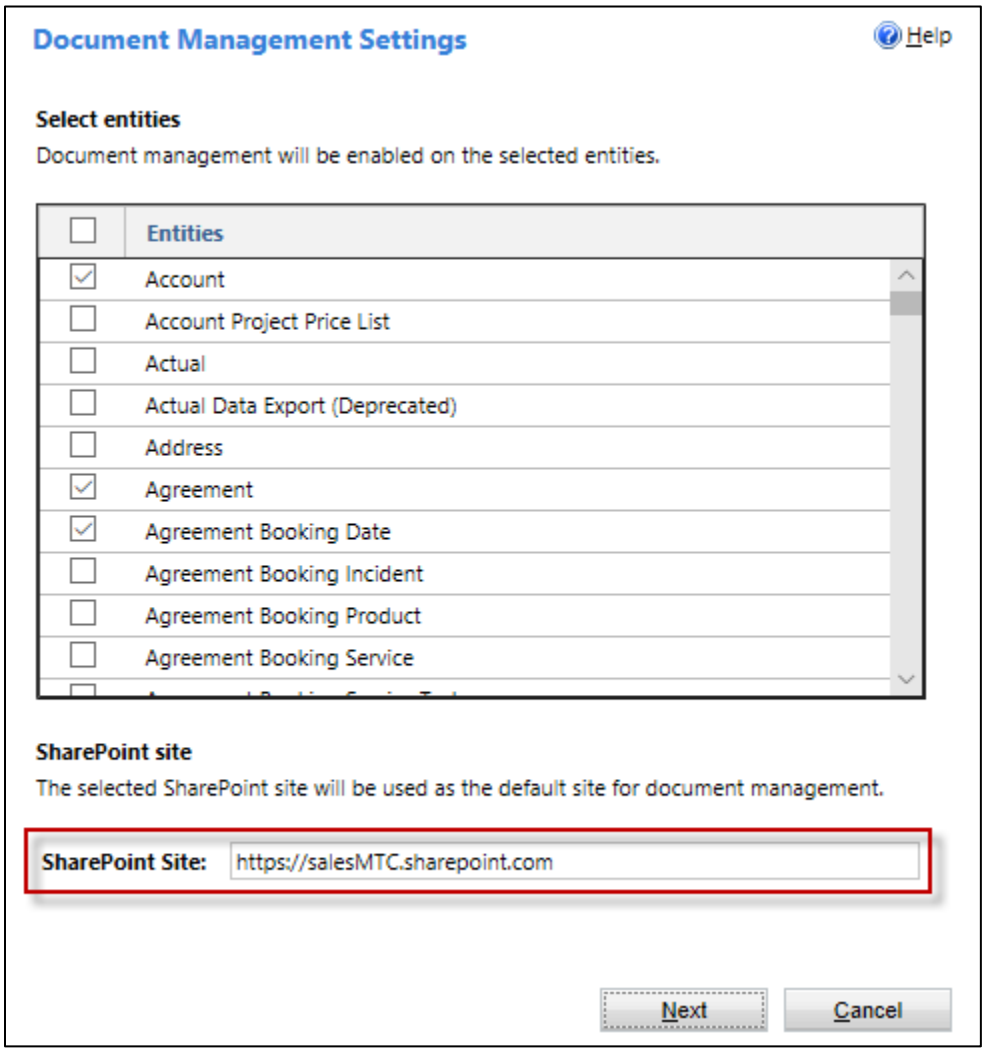
Copy to SharePoint

After getting the necessary attachments from CRM, you can choose to copy the attachments to SharePoint location. For this, you are required to navigate to SharePoint Integration tab and enter the credentials (SharePoint Site URL, Site Name, User Name, Password, and Domain).

For getting the SharePoint Site URL, go to CRM → Settings → Document Management → Document Management Settings → SharePoint Site.



Enter the credentials as shown below.

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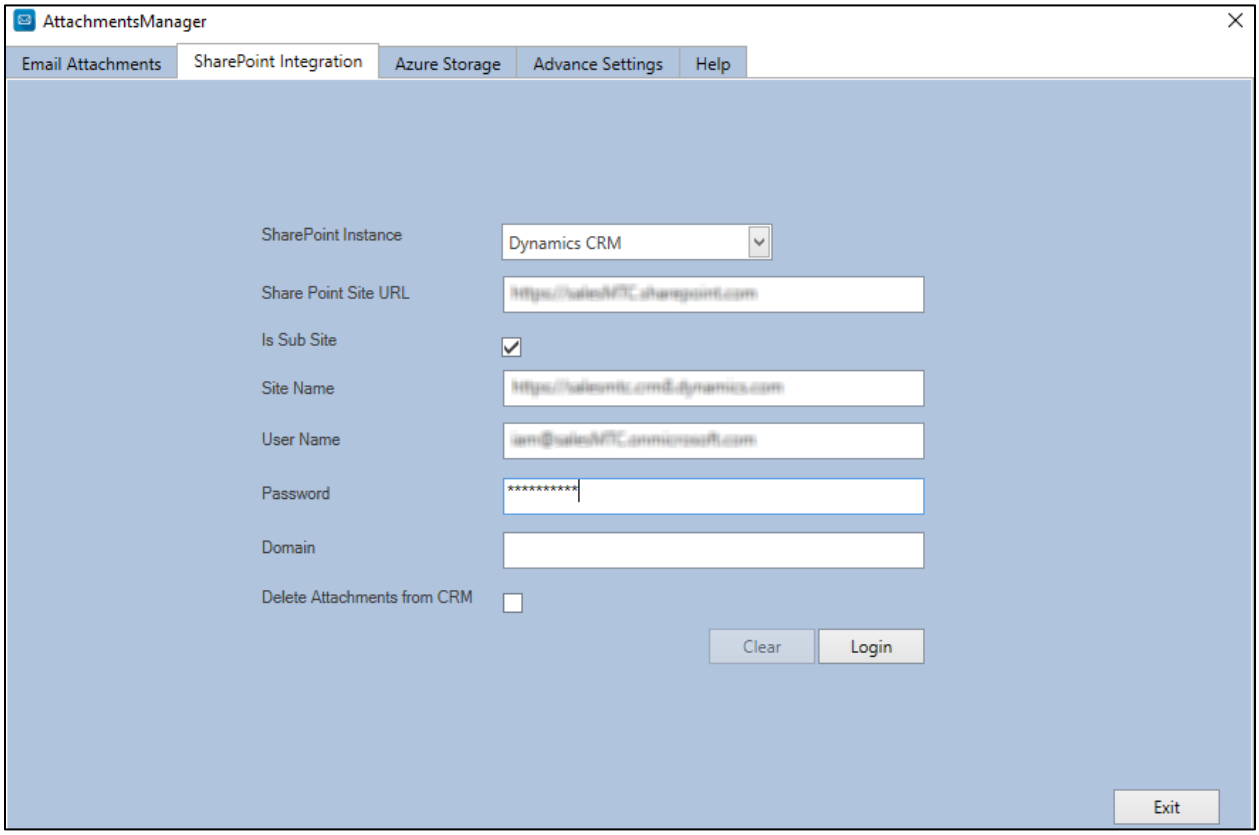

Click Login to validate the credentials. Once validated, you will be automatically redirected to **Email Attachments** tab. Select the files, tick the check box “Create Regarding Folder” and click Copy to SharePoint.

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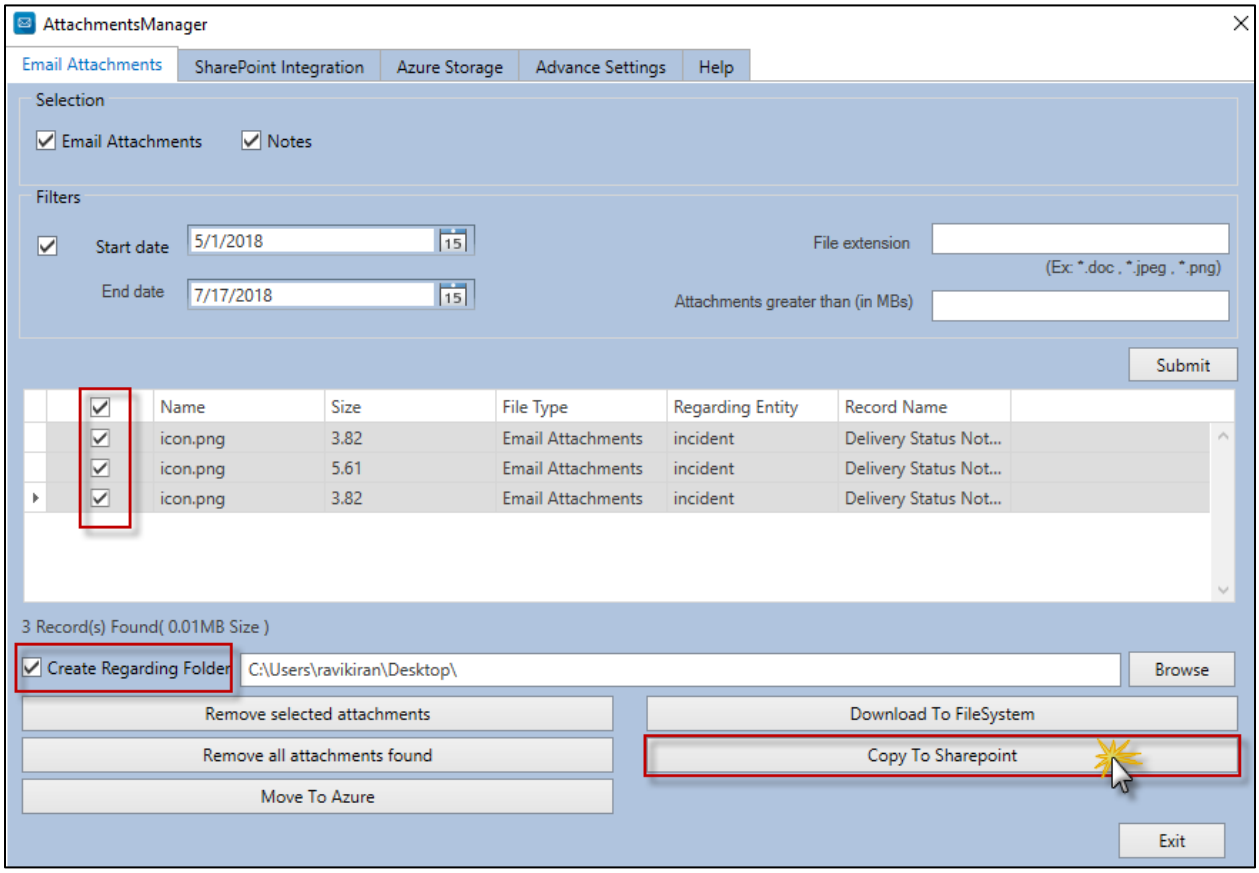
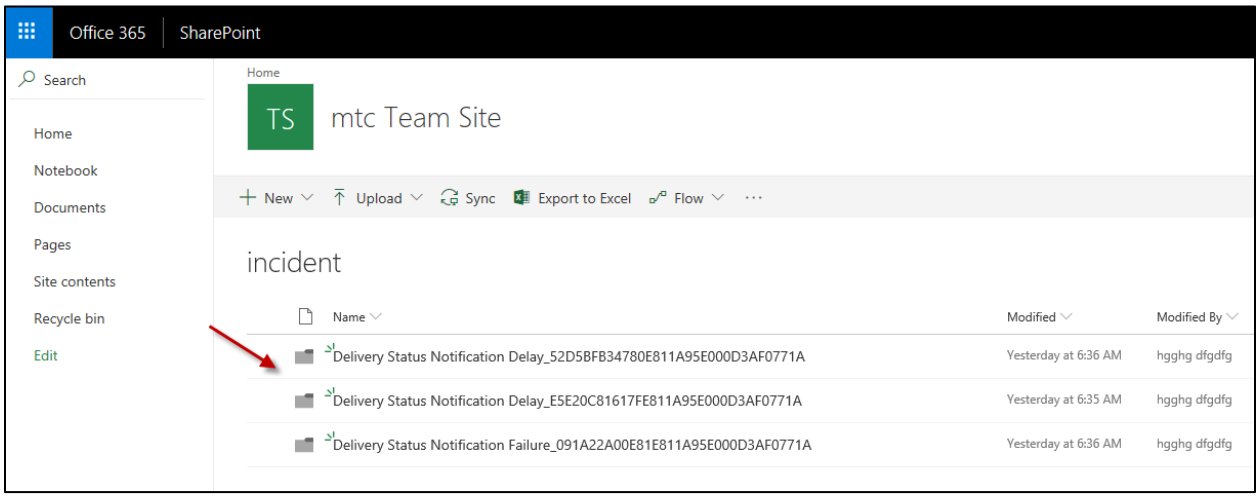


You will notice that the selected attachments have been copied to specified SharePoint location as shown below.



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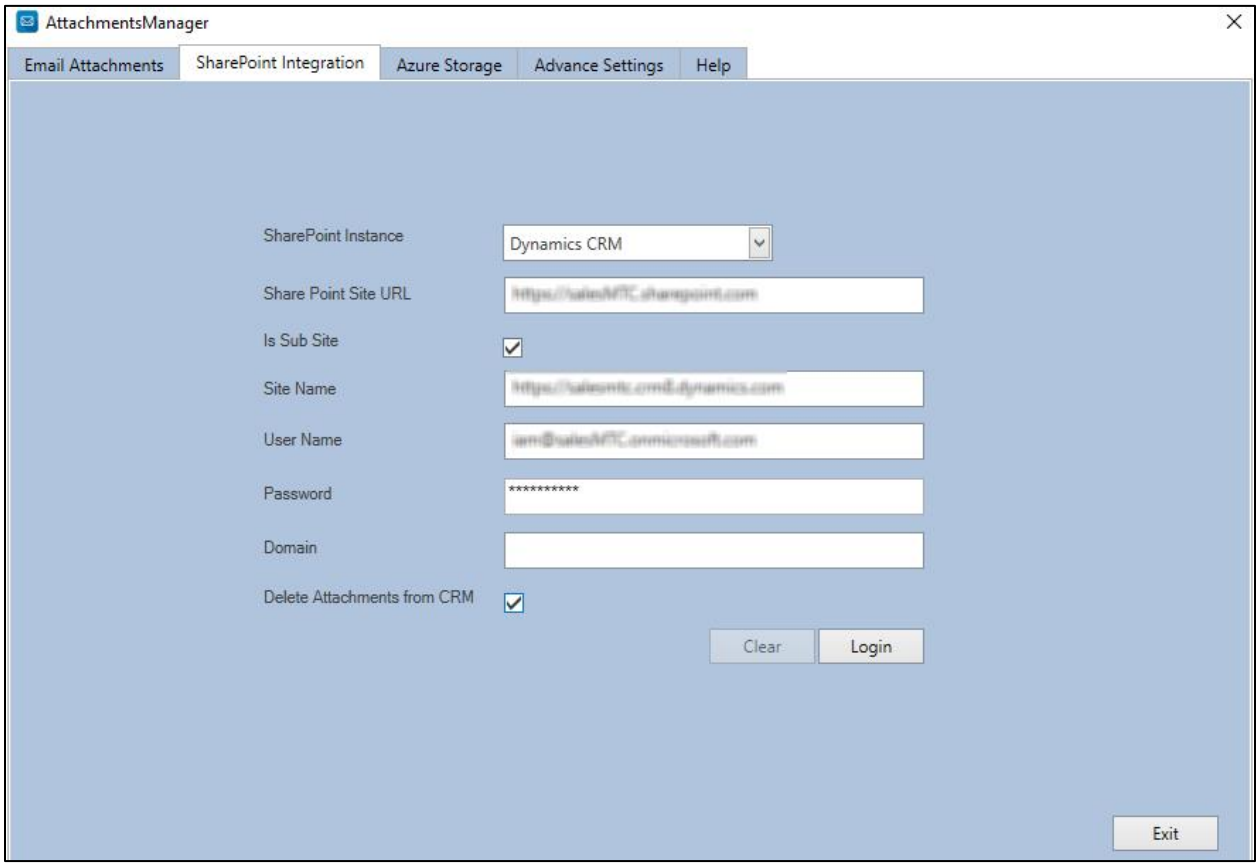
Move to SharePoint

For moving attachments to SharePoint, you are required to navigate to SharePoint Integration tab and enter the credentials as explained in Copy to SharePoint and also tick the check box "Delete Attachments from CRM."



Click Login to validate the credentials. Once validated, you will be automatically redirected to **Email Attachments** tab. Select the files, tick the check box "Create Regarding Folder" and click Move to SharePoint.

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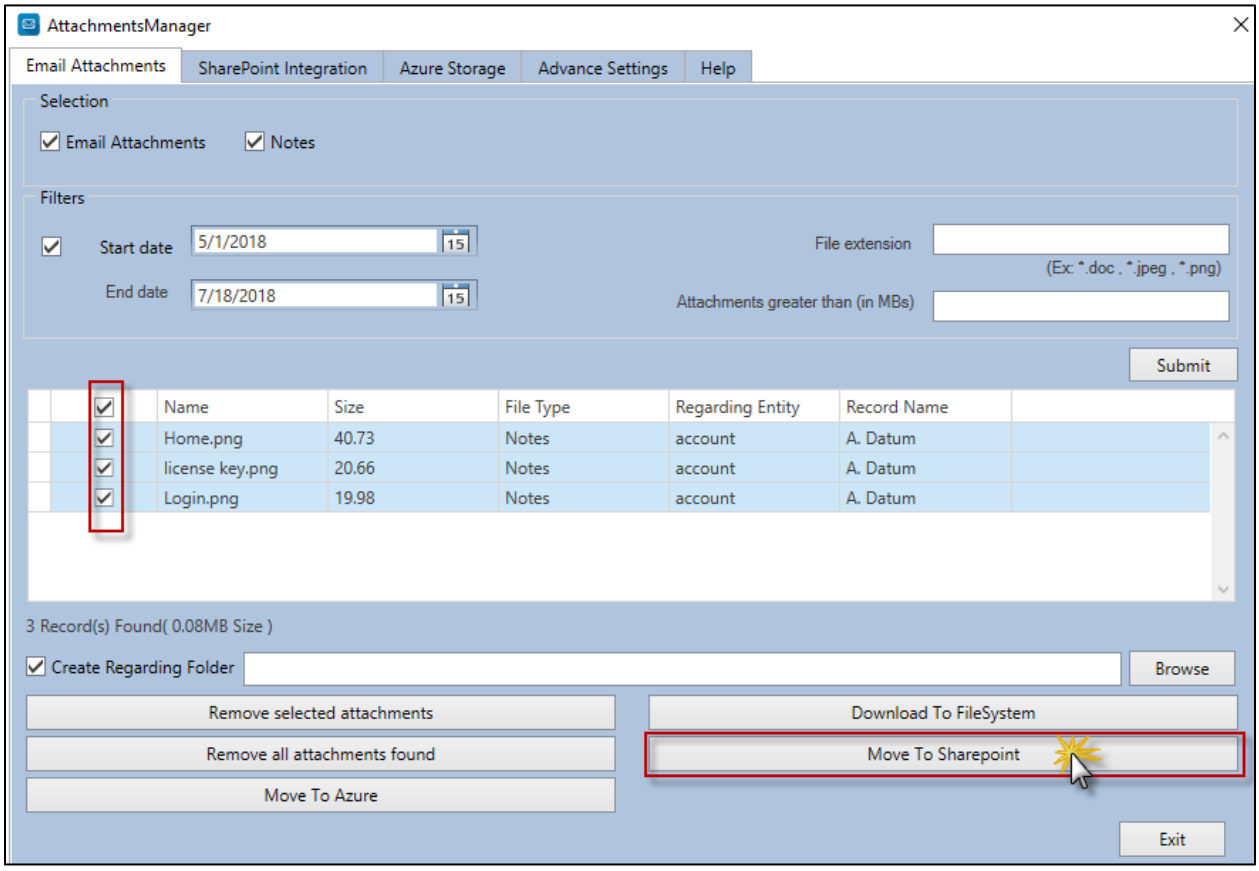
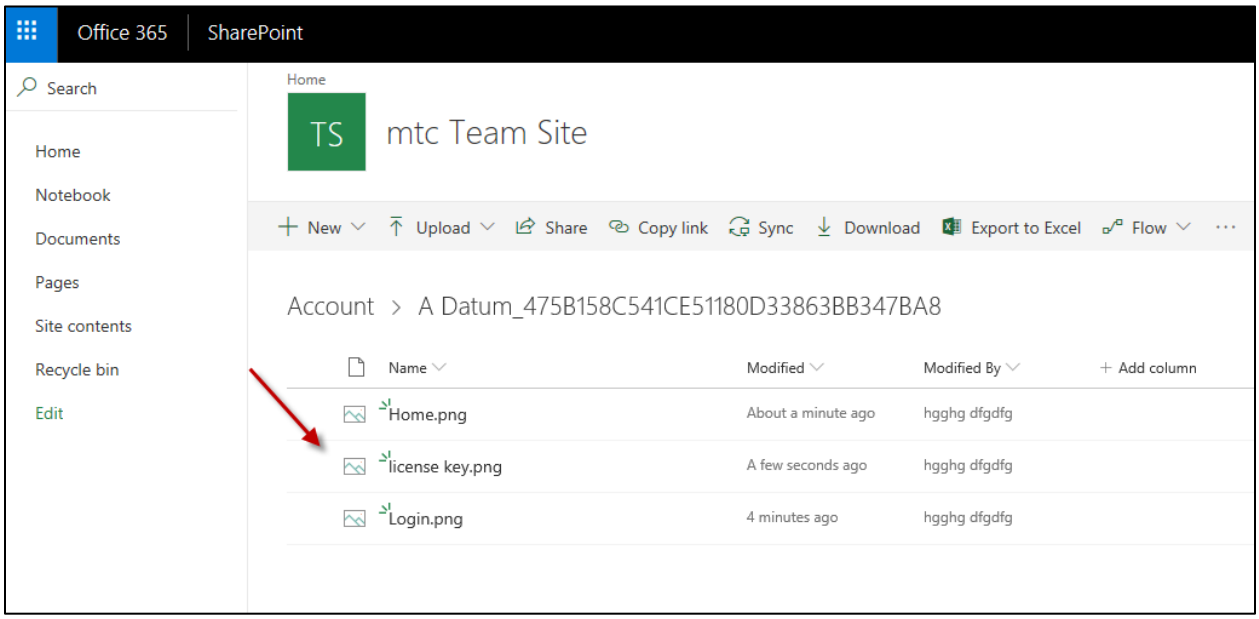


You will notice that the selected attachments have been moved to specified SharePoint location as shown below.



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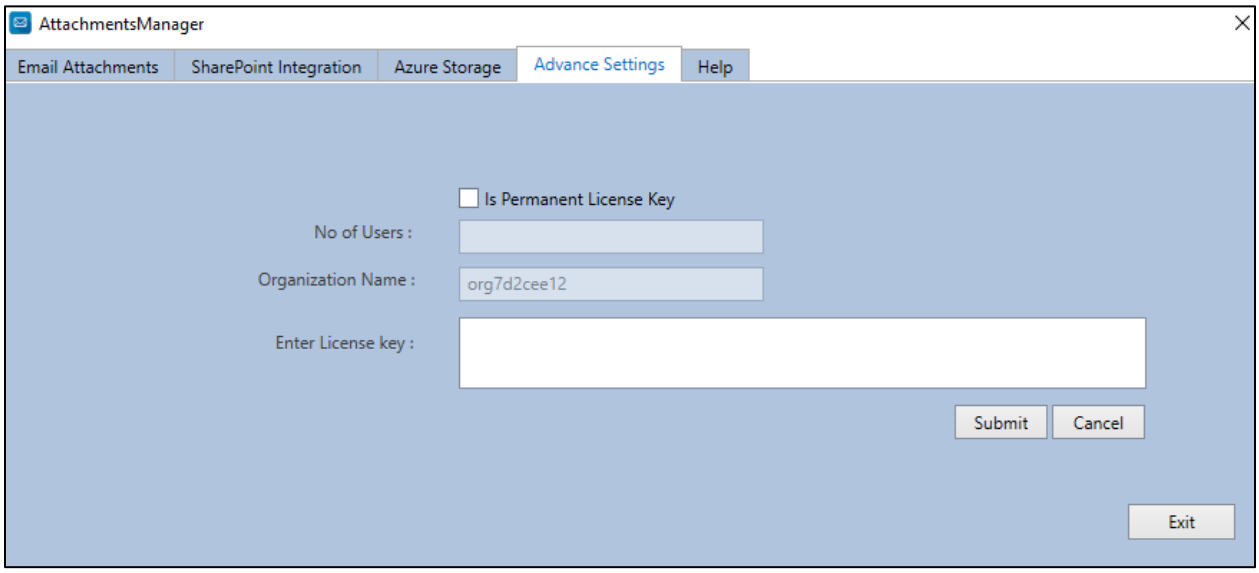
Advance Settings

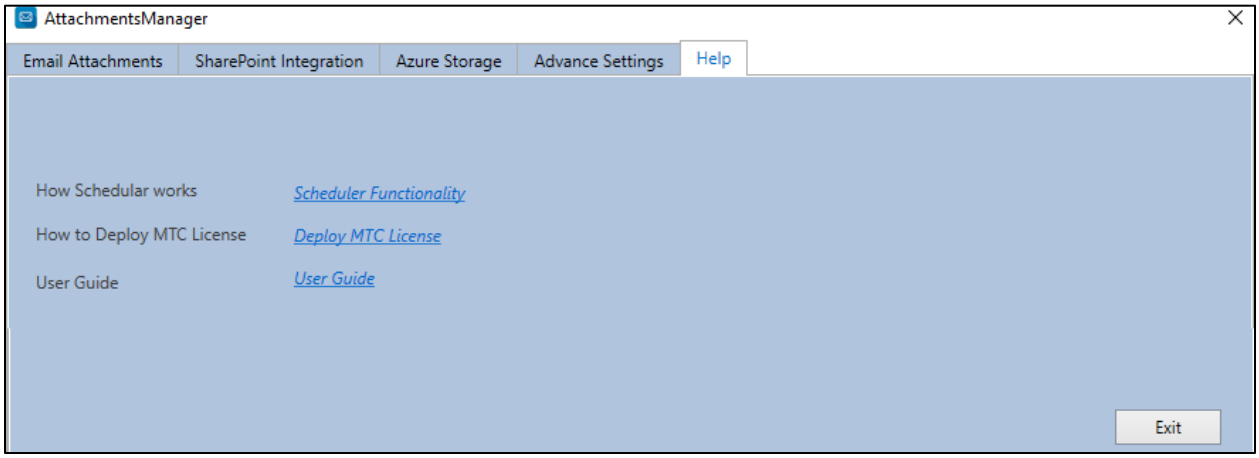
In the Advance Settings tab, you are required to enter the Organization Name and the License Key for the application to become functional.

In the case of permanent license key, tick the check box “Is Permanent License Key,” enter the no. of users, Organization Name and License Key to activate the application.



Help

Refer to Help tab to access quick help links for making the most of this solution.



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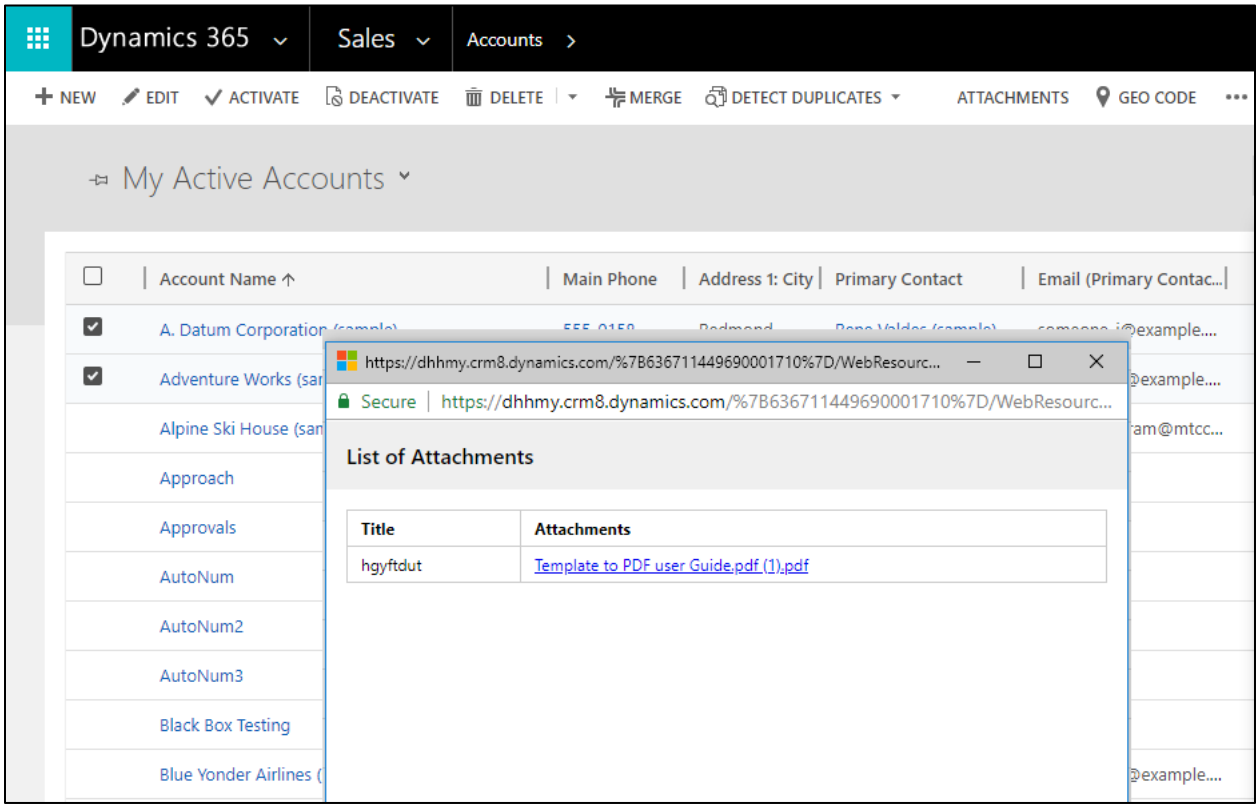
Download Attachments in CRM

After moving attachments and notes from CRM to SharePoint or Azure or both, you might want to download the attachments from CRM itself for selected Account records. By default, file location paths are replaced with attachments in CRM after the attachments are moved to SharePoint or Azure. So, to make it easy for you to detect and download the attachments, the solution provides you "Attachments" button on the ribbon. You need to select the Account records and click "Attachments" button. Then all the attachments in those selected records will shown up in a window box from where you can start downloading the attachments.



Note: If you haven't installed the solution or didn't move the attachments to SharePoint or Azure then the solution displays the below prompt.

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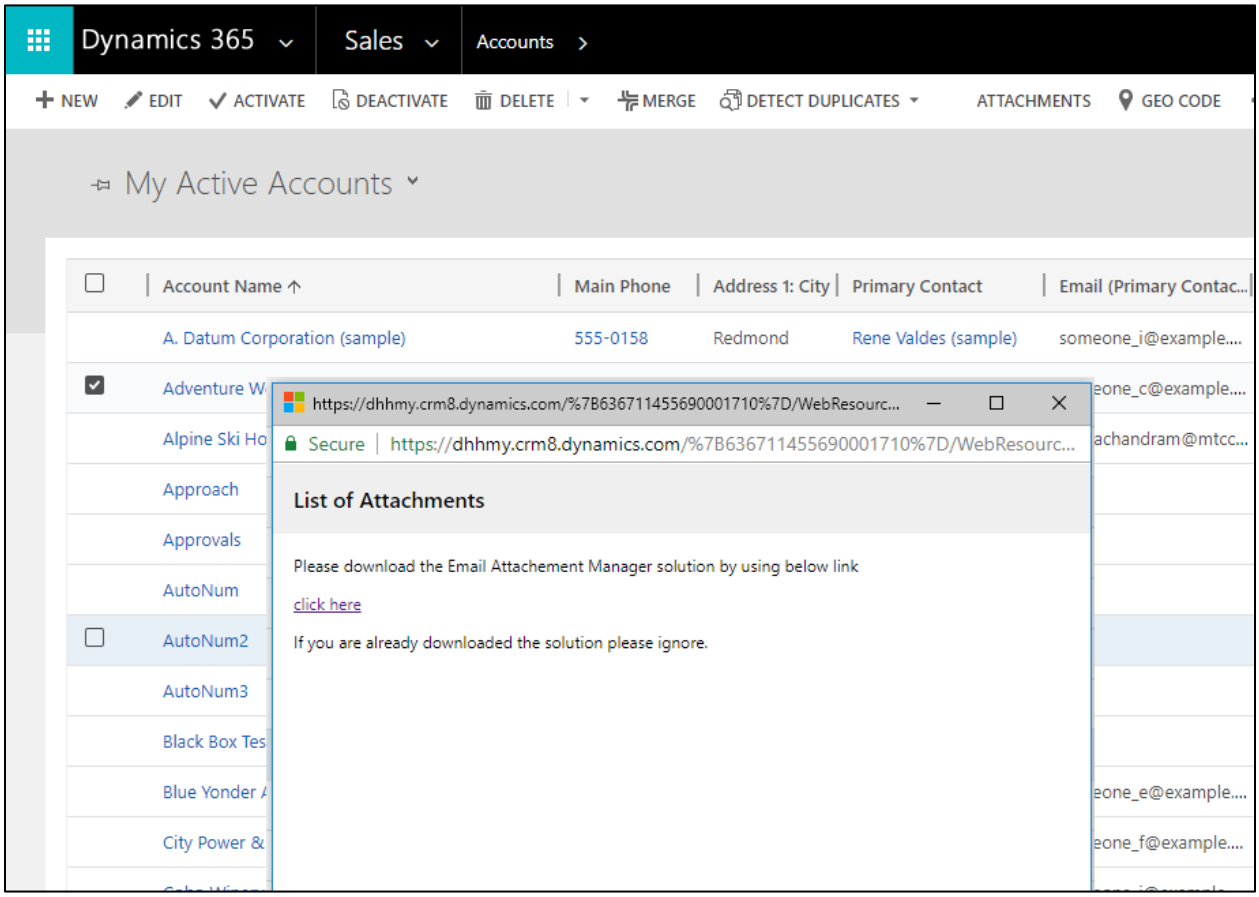

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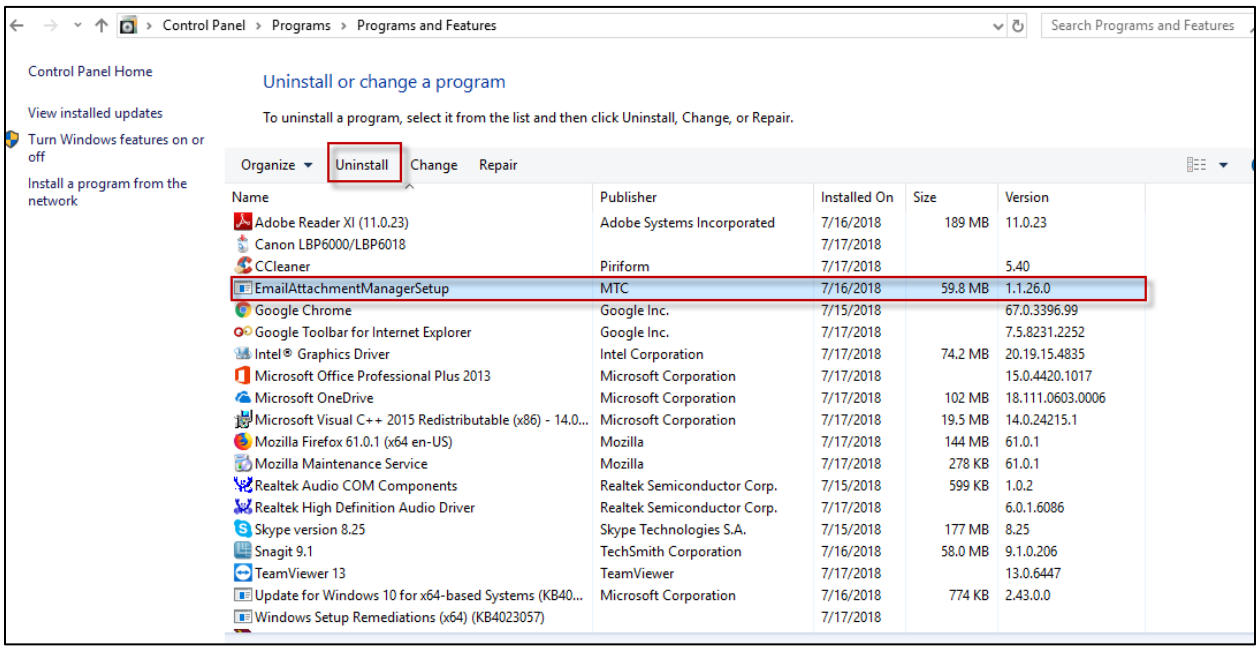
Uninstallation

To uninstall Email Attachment Manager Solution, go to control panel from your system and select “uninstall a program” under Programs.

The system will display all the installed programs on it. Select **Email Attachment Manager Setup** and click Uninstall.



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