

# User Guide



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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

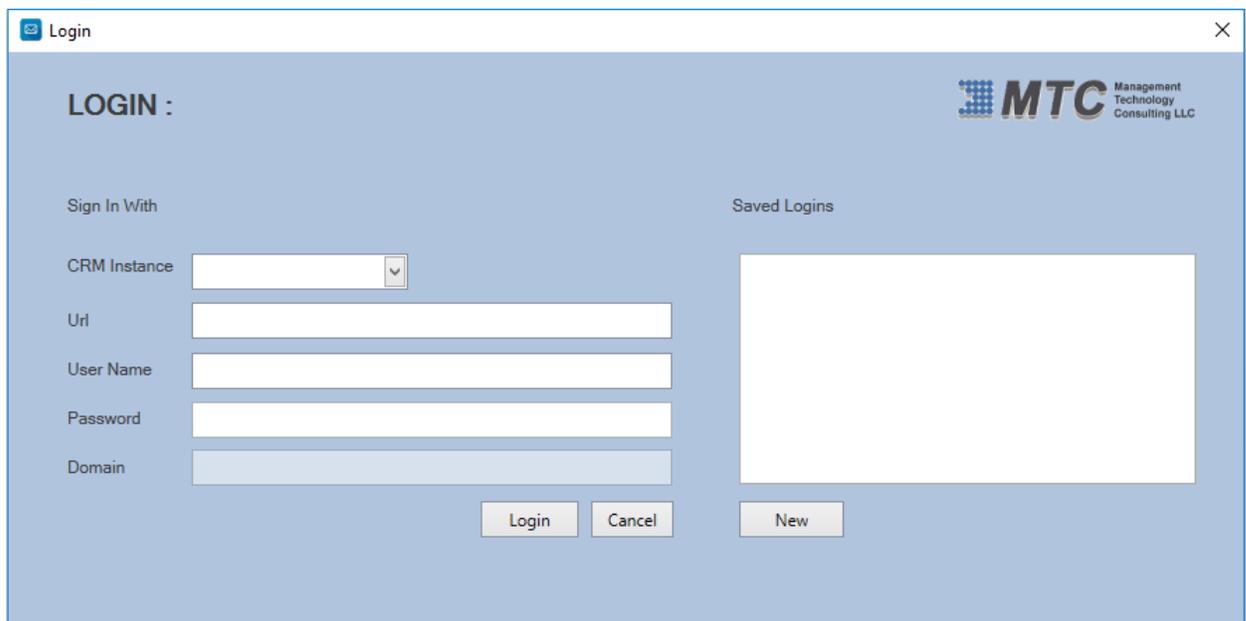
CRM Users can run a scheduler to move their notes and attachments to Microsoft Azure or SharePoint or both without having to do anything manually.

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.

## 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](mailto: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.

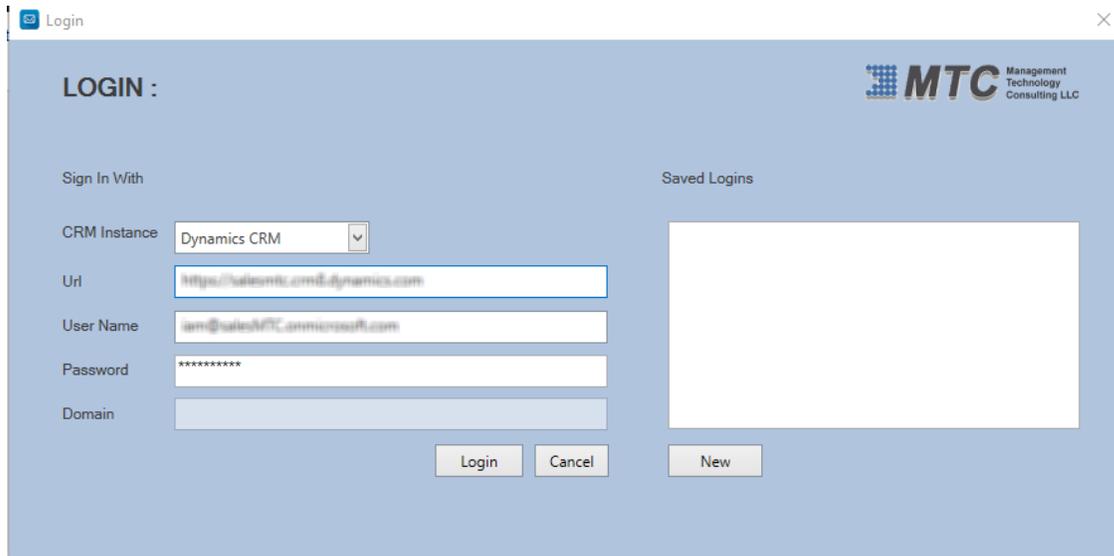


The screenshot shows a 'Login' window with a blue header and a white body. The title bar says 'Login' with a close button. The main heading is 'LOGIN :'. In the top right corner, there is the MTC logo and the text 'Management Technology Consulting LLC'. Below the heading, there are two sections: 'Sign In With' and 'Saved Logins'. The 'Sign In With' section contains a dropdown menu for 'CRM Instance', and four text input fields for 'Url', 'User Name', 'Password', and 'Domain'. The 'Saved Logins' section is a large empty white box. At the bottom, there are three buttons: 'Login', 'Cancel', and 'New'.

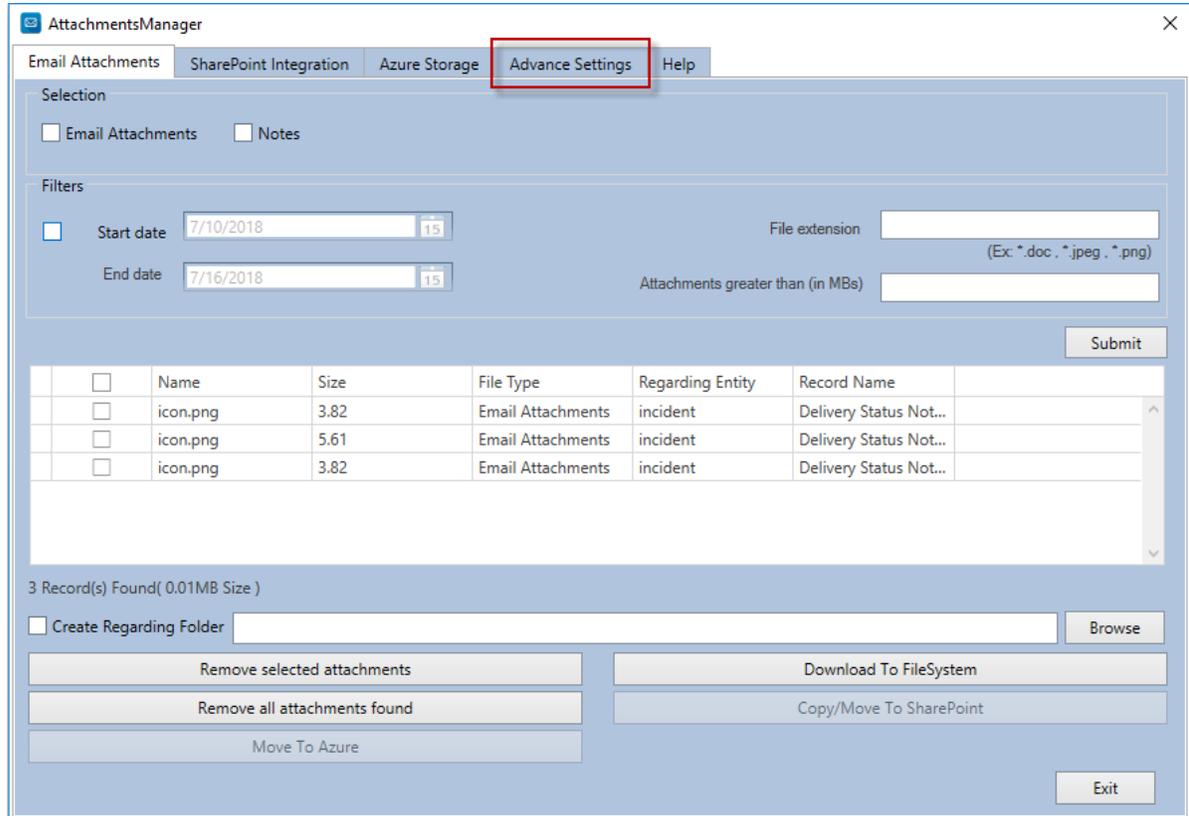
6. Enter the CRM credentials and click Login.
  - **CRM Instance:** It can be Online, On-Premise, IFD, Dynamics CRM, Office 365
  - **Url:** Enter the CRM instance URL.

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

Here for instance we are going with Dynamics CRM.

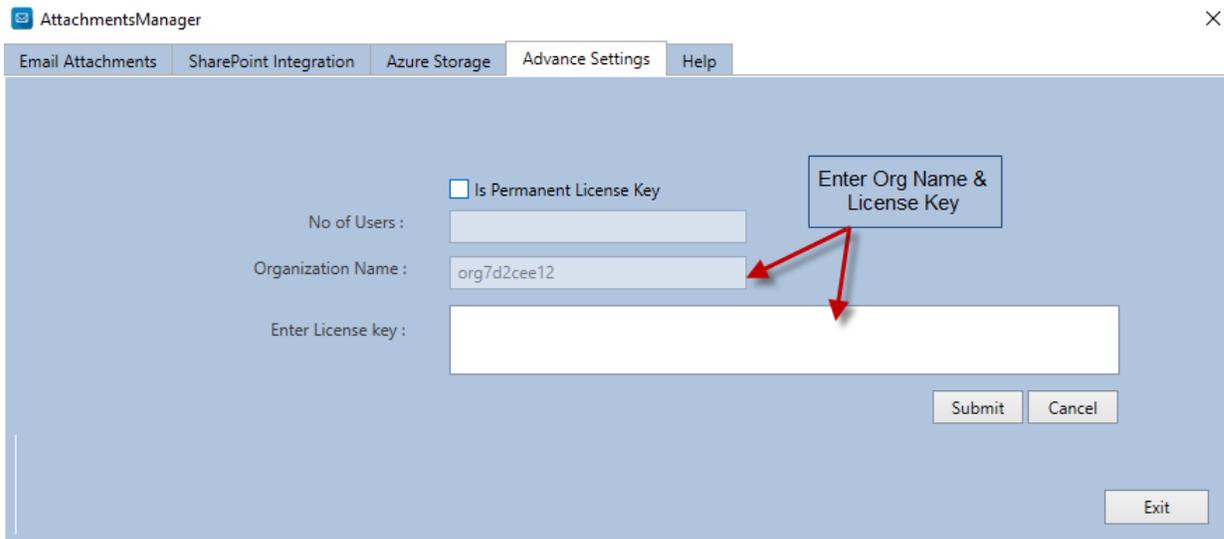


You will be directed to the Home Page as shown below.



	Name	Size	File Type	Regarding Entity	Record Name
<input type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...
<input type="checkbox"/>	icon.png	5.61	Email Attachments	incident	Delivery Status Not...
<input type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...

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



AttachmentsManager

Email Attachments | SharePoint Integration | Azure Storage | **Advance Settings** | Help

Is Permanent License Key

No of Users :

Organization Name :

Enter License key :

Submit Cancel

Exit

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

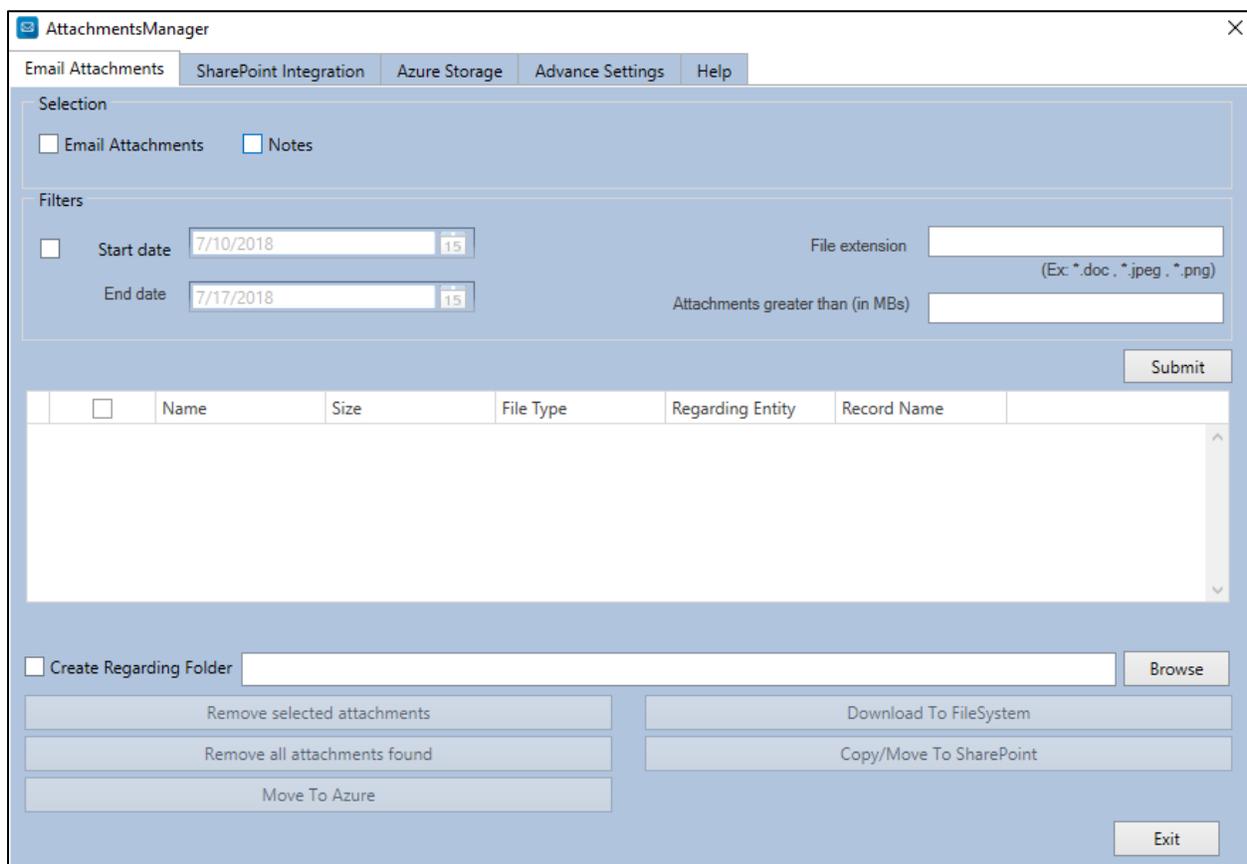
**Note: For getting permanent license key, you need to purchase the solution for the required user count from MTC.**

**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.**

## 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.



The screenshot shows the AttachmentsManager application interface. It features a navigation bar with five tabs: "Email Attachments", "SharePoint Integration", "Azure Storage", "Advance Settings", and "Help". The "Email Attachments" tab is currently selected. Below the navigation bar, there is a "Selection" section with two checkboxes: "Email Attachments" and "Notes". The "Filters" section includes a "Start date" field with a date picker set to 7/10/2018, an "End date" field with a date picker set to 7/17/2018, a "File extension" field with a dropdown menu (showing "(Ex: \*.doc, \*.jpeg, \*.png)"), and an "Attachments greater than (in MBs)" field with a dropdown menu. A "Submit" button is located to the right of the filters. Below the filters is a table with columns: "Name", "Size", "File Type", "Regarding Entity", and "Record Name". The table is currently empty. At the bottom of the interface, there is a "Create Regarding Folder" checkbox and a "Browse" button. Below this, there are five buttons: "Remove selected attachments", "Remove all attachments found", "Move To Azure", "Download To FileSystem", and "Copy/Move To SharePoint". An "Exit" button is located in the bottom right corner.

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.

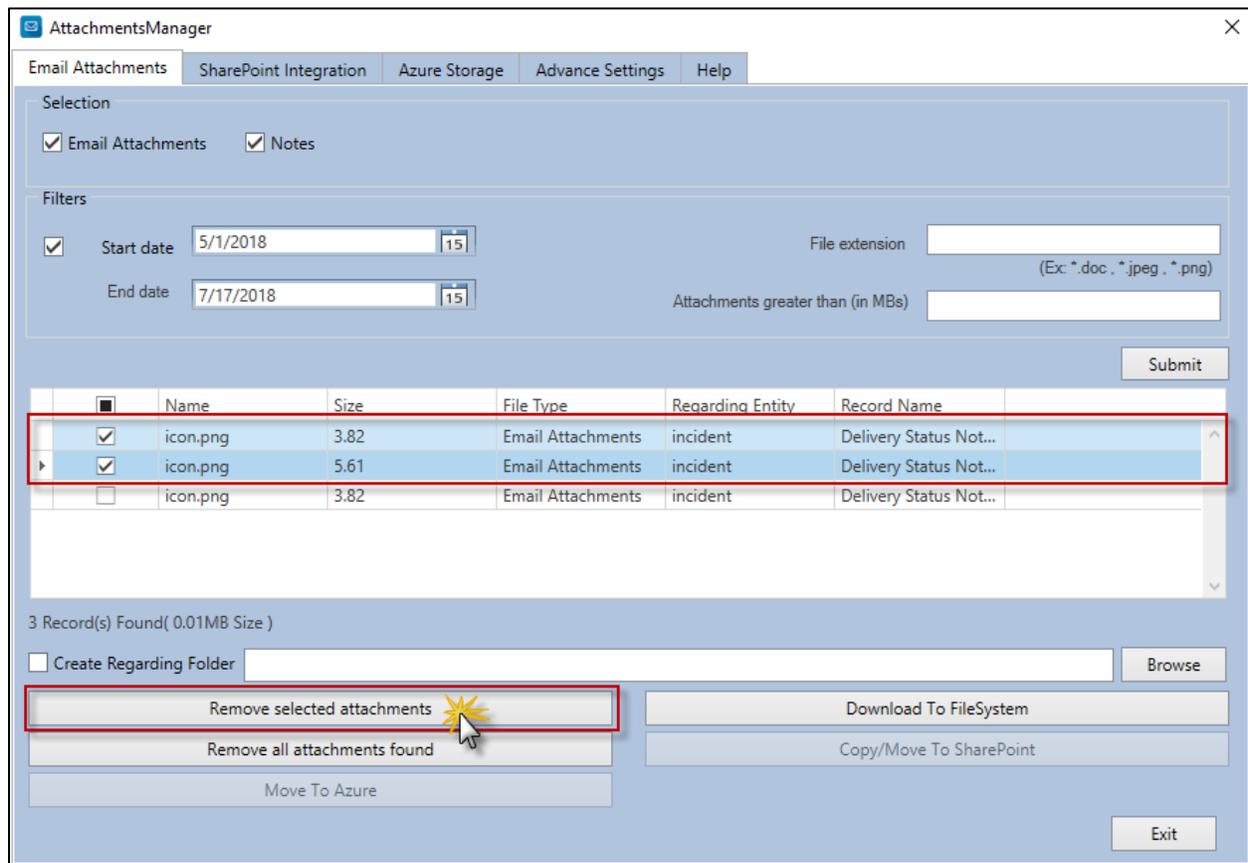
- Under Selection you can choose Email Attachments or Notes or both.

- 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.”

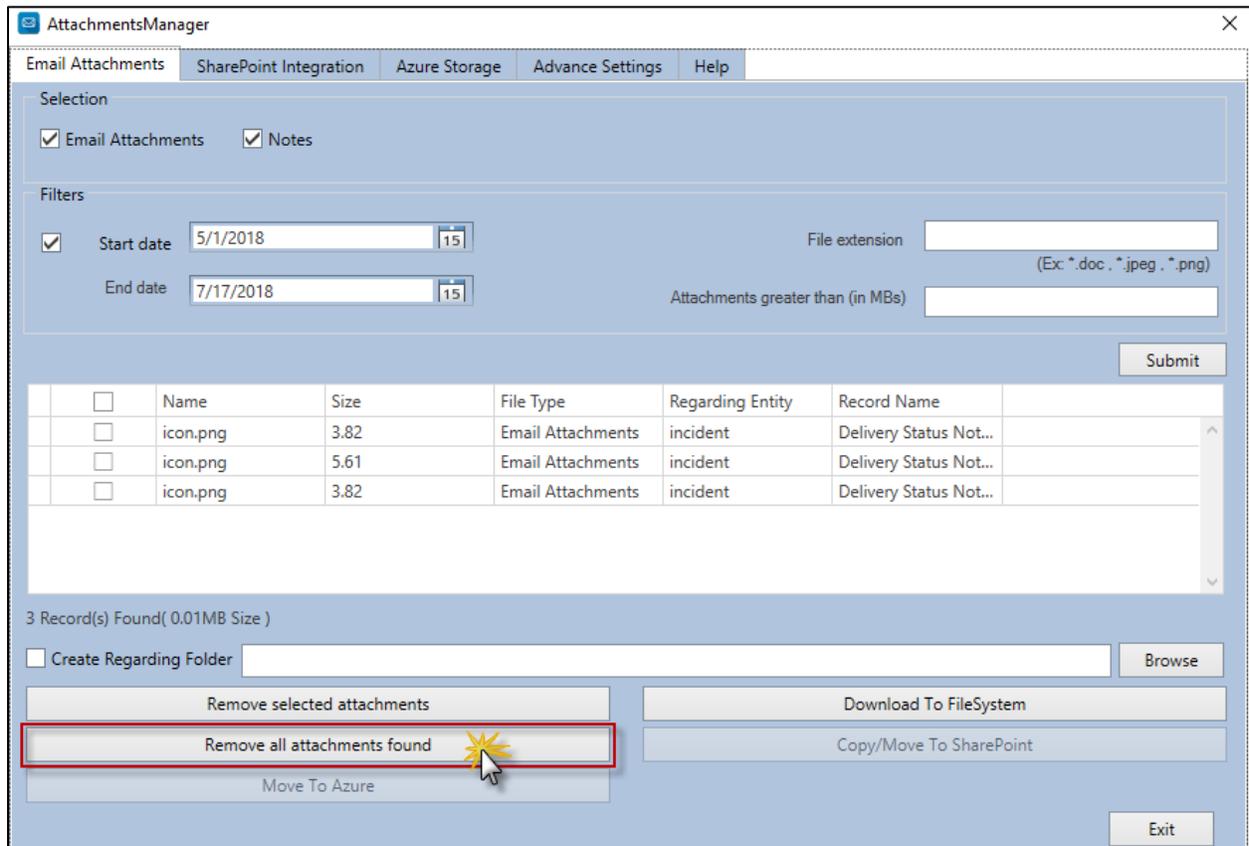


The screenshot shows the AttachmentsManager application window. It has tabs for "Email Attachments", "SharePoint Integration", "Azure Storage", "Advance Settings", and "Help". The "Email Attachments" tab is active. Under "Selection", both "Email Attachments" and "Notes" are checked. The "Filters" section includes "Start date" (5/1/2018), "End date" (7/17/2018), "File extension" (with a hint: (Ex: \*.doc, \*.jpeg, \*.png)), and "Attachments greater than (in MBs)". A "Submit" button is at the bottom right of the filters. Below is a table with 7 columns: Name, Size, File Type, Regarding Entity, Record Name, and two empty columns. Three rows are visible, all with "icon.png" as the name and "Email Attachments" as the file type. The first two rows are selected (checked in the first column). Below the table, it says "3 Record(s) Found( 0.01MB Size)". There are several buttons: "Create Regarding Folder" (with a "Browse" button), "Remove selected attachments" (highlighted with a red box and a mouse cursor), "Remove all attachments found", "Move To Azure", "Download To FileSystem", "Copy/Move To SharePoint", and "Exit".

	Name	Size	File Type	Regarding Entity	Record Name		
<input checked="" type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...		
<input checked="" type="checkbox"/>	icon.png	5.61	Email Attachments	incident	Delivery Status Not...		
<input type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...		

### 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.”



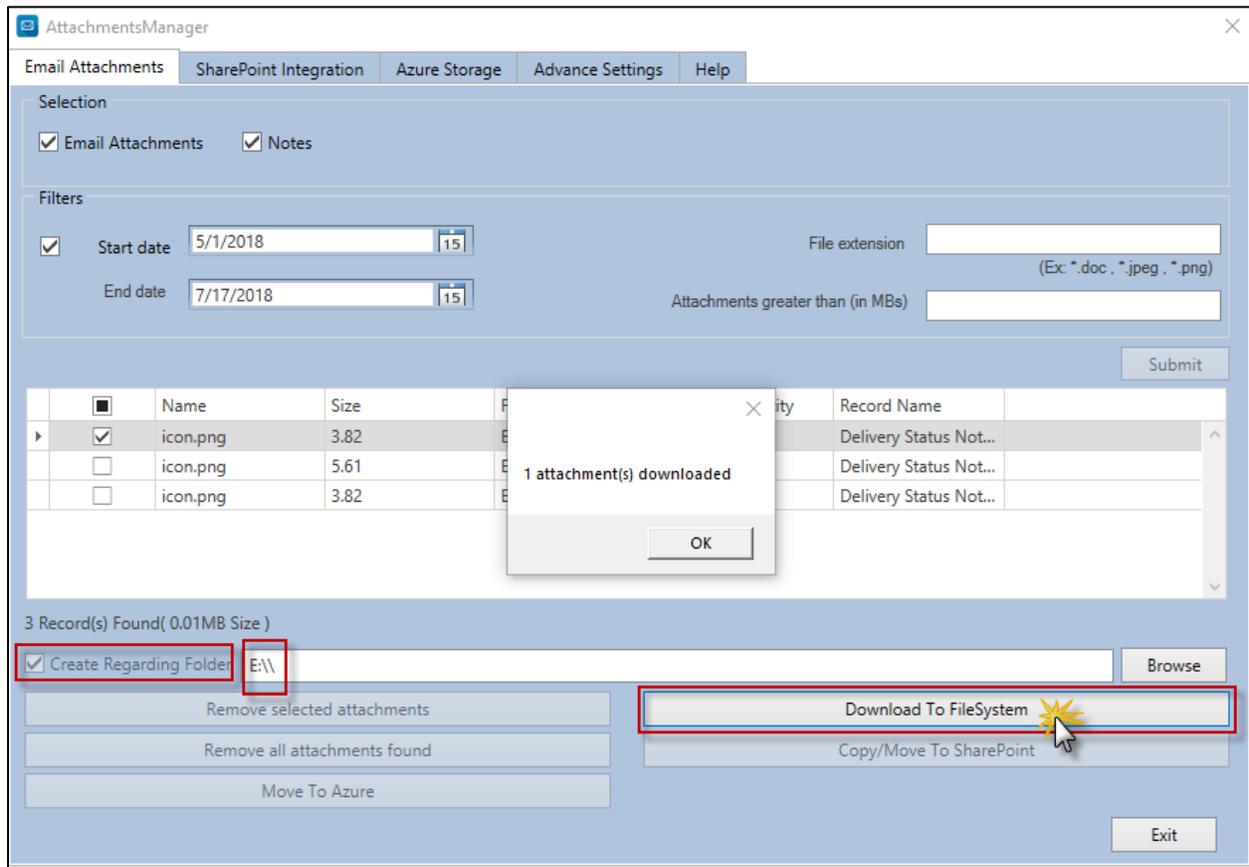
The screenshot shows the AttachmentsManager application window. It has a title bar with a close button. Below the title bar are tabs for "Email Attachments", "SharePoint Integration", "Azure Storage", "Advance Settings", and "Help". The "Email Attachments" tab is active. The interface includes a "Selection" section with checkboxes for "Email Attachments" and "Notes". Below that is a "Filters" section with "Start date" (5/1/2018), "End date" (7/17/2018), "File extension" (with a hint "(Ex: \*.doc, \*.jpeg, \*.png)"), and "Attachments greater than (in MBs)". A "Submit" button is located to the right of the filters. Below the filters is a table with columns: Name, Size, File Type, Regarding Entity, and Record Name. The table contains three rows of "icon.png" files. Below the table, it says "3 Record(s) Found( 0.01MB Size )". There is a "Create Regarding Folder" checkbox and a "Browse" button. At the bottom, there are several buttons: "Remove selected attachments", "Remove all attachments found" (highlighted with a red box and a mouse cursor), "Move To Azure", "Download To FileSystem", "Copy/Move To SharePoint", and "Exit".

	Name	Size	File Type	Regarding Entity	Record Name
<input type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...
<input type="checkbox"/>	icon.png	5.61	Email Attachments	incident	Delivery Status Not...
<input type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...

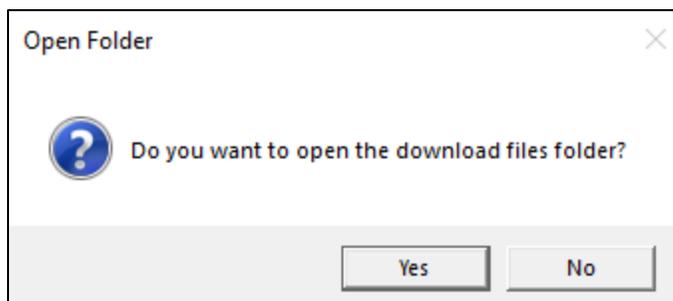
### Download to File System

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.



You will receive a prompt message like shown below.

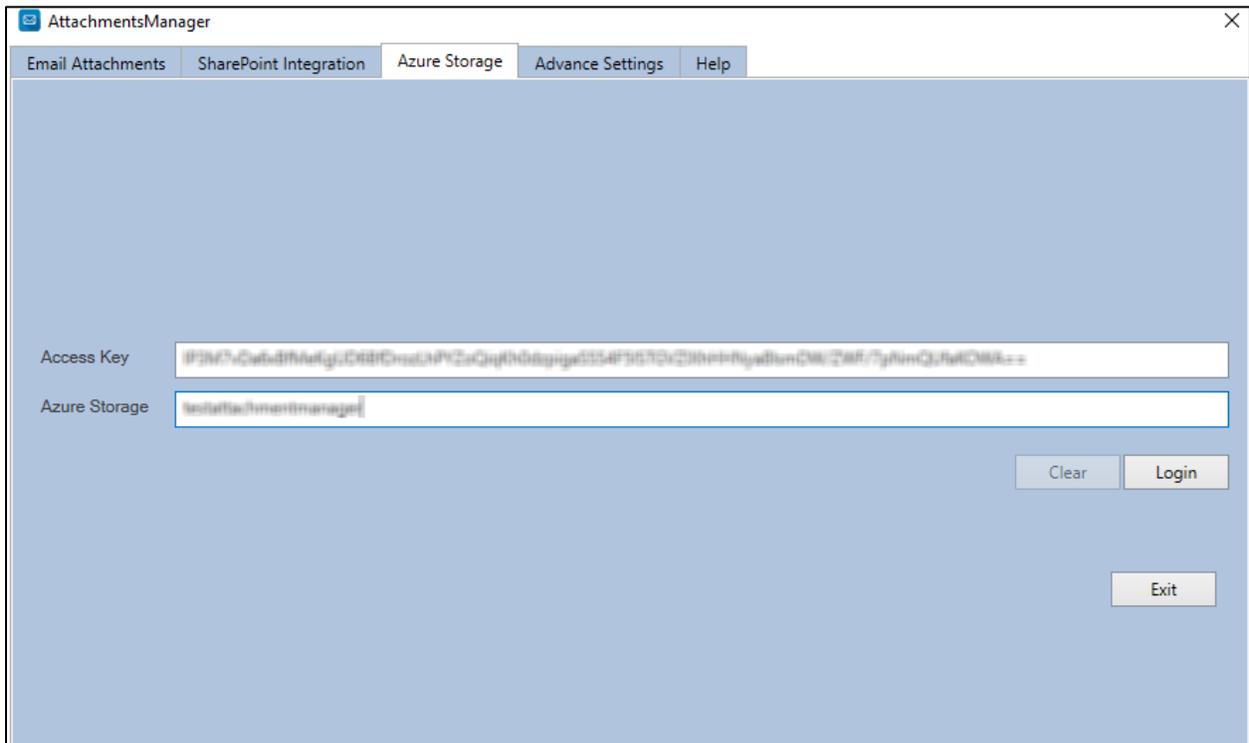


Click "Yes" to see the downloaded attachments.

### 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.



The screenshot shows a web application window titled "AttachmentsManager" with a close button (X) in the top right corner. The interface has a light blue background and a navigation bar at the top with five tabs: "Email Attachments", "SharePoint Integration", "Azure Storage" (which is currently selected), "Advance Settings", and "Help". Below the navigation bar, there are two input fields. The first is labeled "Access Key" and contains a long alphanumeric string: "lP3V7\_Cu6d8Nw4g\_C08fDru5AP2eQy0k0spyeG55F7575x20v4vnyd8m0M/2MF7yAnQ4f4DMkz=". The second is labeled "Azure Storage" and contains the text "testattachmentmanager[". To the right of these fields are two buttons: "Clear" and "Login". Below these buttons, centered at the bottom of the main content area, is an "Exit" button.

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.

AttachmentsManager
✕

Email Attachments | SharePoint Integration | Azure Storage | Advance Settings | Help

**Selection**

Email Attachments     Notes

**Filters**

Start date:        File extension:  (Ex: \*.doc, \*.jpeg, \*.png)

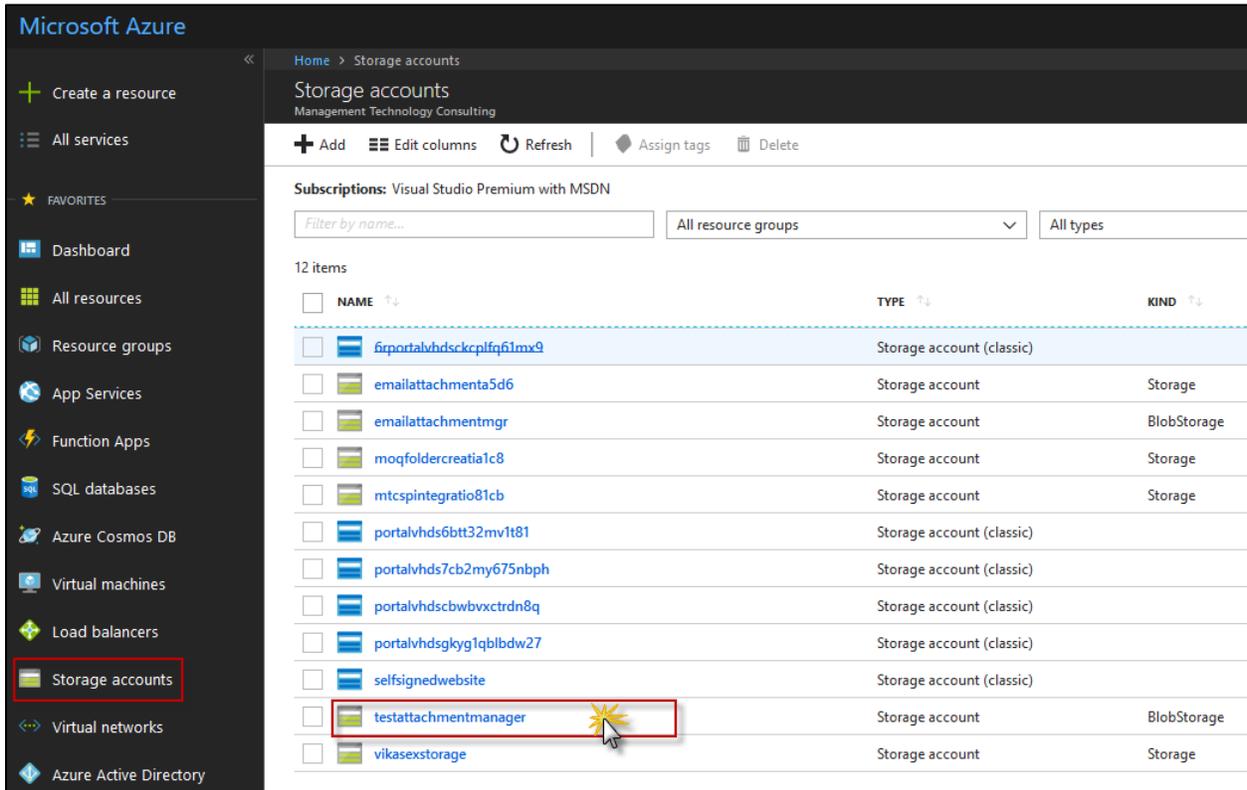
End date:        Attachments greater than (in MBs):

		Name	Size	File Type	Regarding Entity	Record Name	
<input checked="" type="checkbox"/>		Home.png	40.73	Notes	account	A. Datum	^
<input checked="" type="checkbox"/>		license key.png	20.66	Notes	account	A. Datum	
<input checked="" type="checkbox"/>		Login.png	19.98	Notes	account	A. Datum	v

3 Record(s) Found( 0.08MB Size )

Create Regarding Folder

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.



Microsoft Azure

Home > Storage accounts

Storage accounts  
Management Technology Consulting

+ Add Edit columns Refresh Assign tags Delete

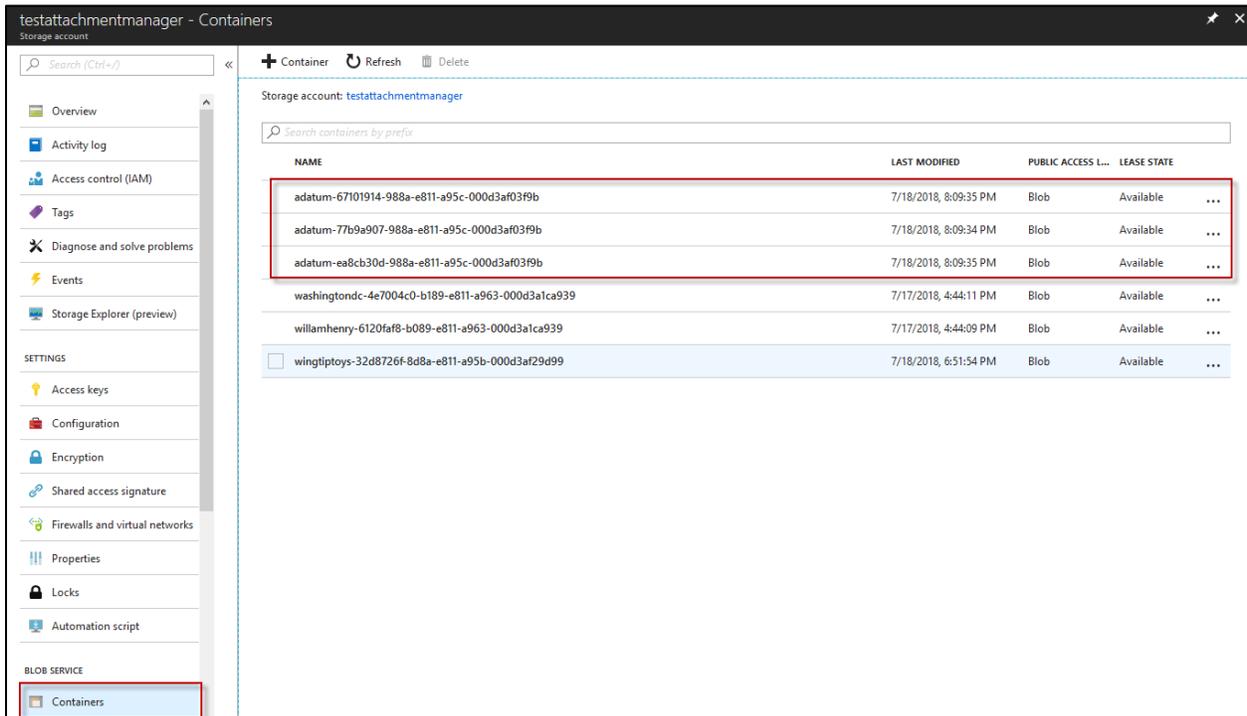
Subscriptions: Visual Studio Premium with MSDN

Filter by name... All resource groups All types

12 items

NAME	TYPE	KIND
6rportalvhdsckrplfq61mv9	Storage account (classic)	
emailattachenta5d6	Storage account	Storage
emailattachmentmgr	Storage account	BlobStorage
moqfoldercreatia1c8	Storage account	Storage
mtcspintegratio81cb	Storage account	Storage
portalvhds6btt32mv1t81	Storage account (classic)	
portalvhds7cb2my675nbph	Storage account (classic)	
portalvhdsbwbvxctrdn8q	Storage account (classic)	
portalvhdsqkyg1qblbdw27	Storage account (classic)	
selfsignedwebsite	Storage account (classic)	
testattachmentmanager	Storage account	BlobStorage
vikasexstorage	Storage account	Storage

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



testattachmentmanager - Containers

Storage account

+ Container Refresh Delete

Storage account: testattachmentmanager

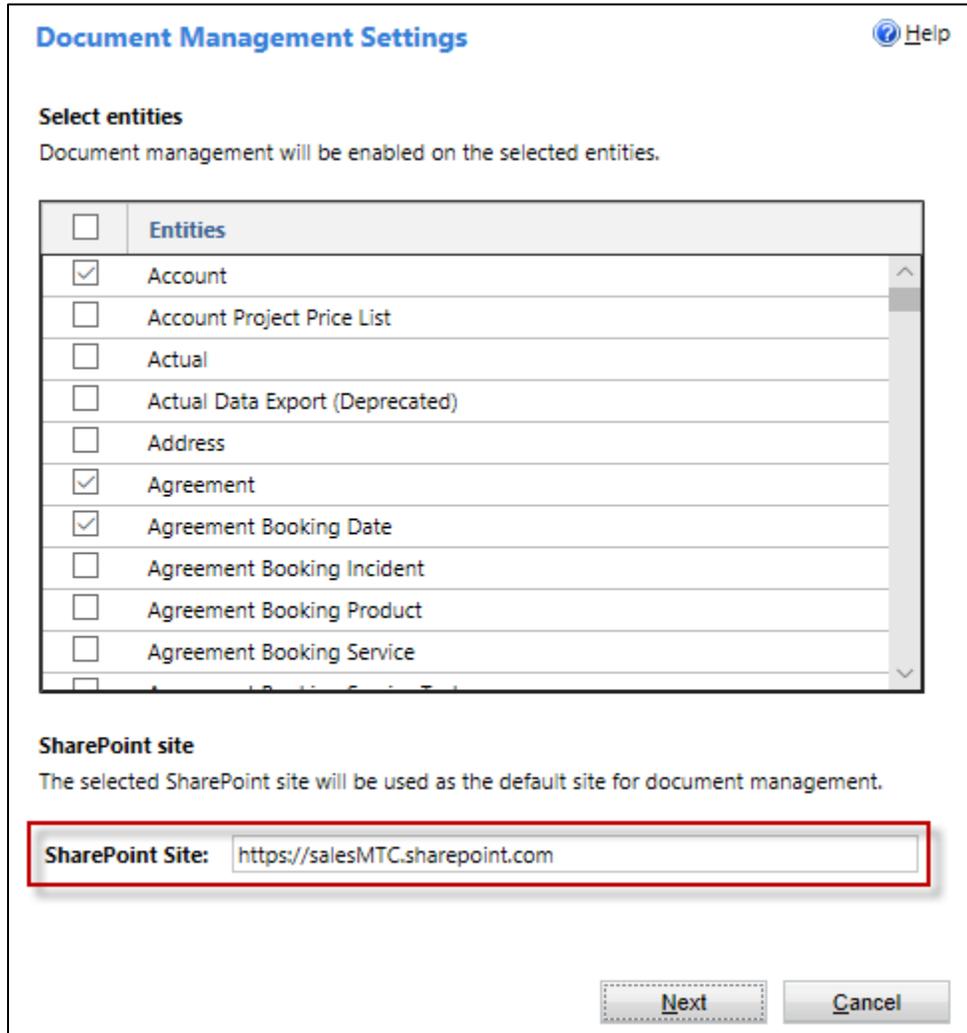
Search containers by prefix

NAME	LAST MODIFIED	PUBLIC ACCESS L...	LEASE STATE
adatum-67101914-988a-e811-a95c-000d3af03f9b	7/18/2018, 8:09:35 PM	Blob	Available ...
adatum-77b9a907-988a-e811-a95c-000d3af03f9b	7/18/2018, 8:09:34 PM	Blob	Available ...
adatum-ea8cb30d-988a-e811-a95c-000d3af03f9b	7/18/2018, 8:09:35 PM	Blob	Available ...
washingtondc-4e7004c0-b189-e811-a963-000d3a1ca939	7/17/2018, 4:44:11 PM	Blob	Available ...
willamhenry-6120faf8-b089-e811-a963-000d3a1ca939	7/17/2018, 4:44:09 PM	Blob	Available ...
wingtip toys-32d8726f-8d8a-e811-a95b-000d3af29d99	7/18/2018, 6:51:54 PM	Blob	Available ...

## 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.



**Document Management Settings** Help

**Select entities**  
Document management will be enabled on the selected entities.

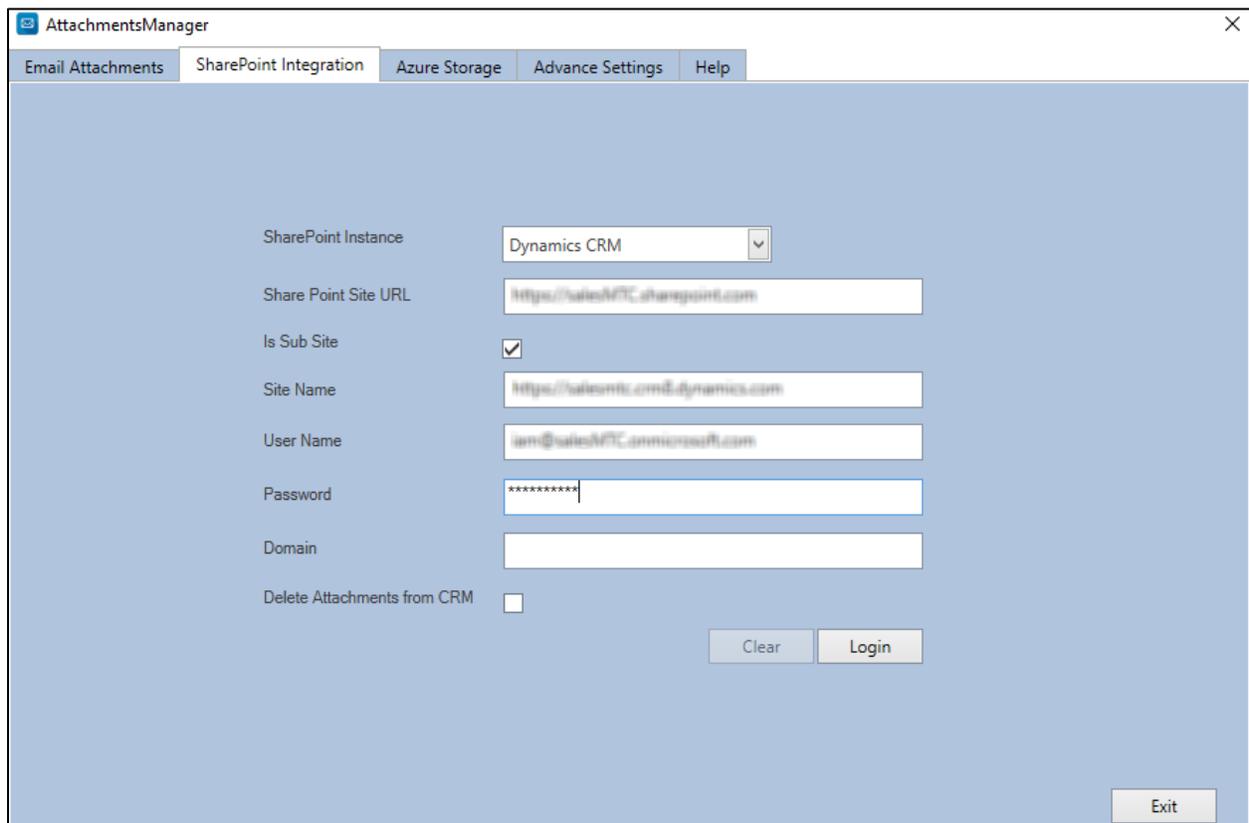
<input type="checkbox"/>	Entities
<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	Account Project Price List
<input type="checkbox"/>	Actual
<input type="checkbox"/>	Actual Data Export (Deprecated)
<input type="checkbox"/>	Address
<input checked="" type="checkbox"/>	Agreement
<input checked="" type="checkbox"/>	Agreement Booking Date
<input type="checkbox"/>	Agreement Booking Incident
<input type="checkbox"/>	Agreement Booking Product
<input type="checkbox"/>	Agreement Booking Service

**SharePoint site**  
The selected SharePoint site will be used as the default site for document management.

**SharePoint Site:**

Next Cancel

Enter the credentials as shown below.

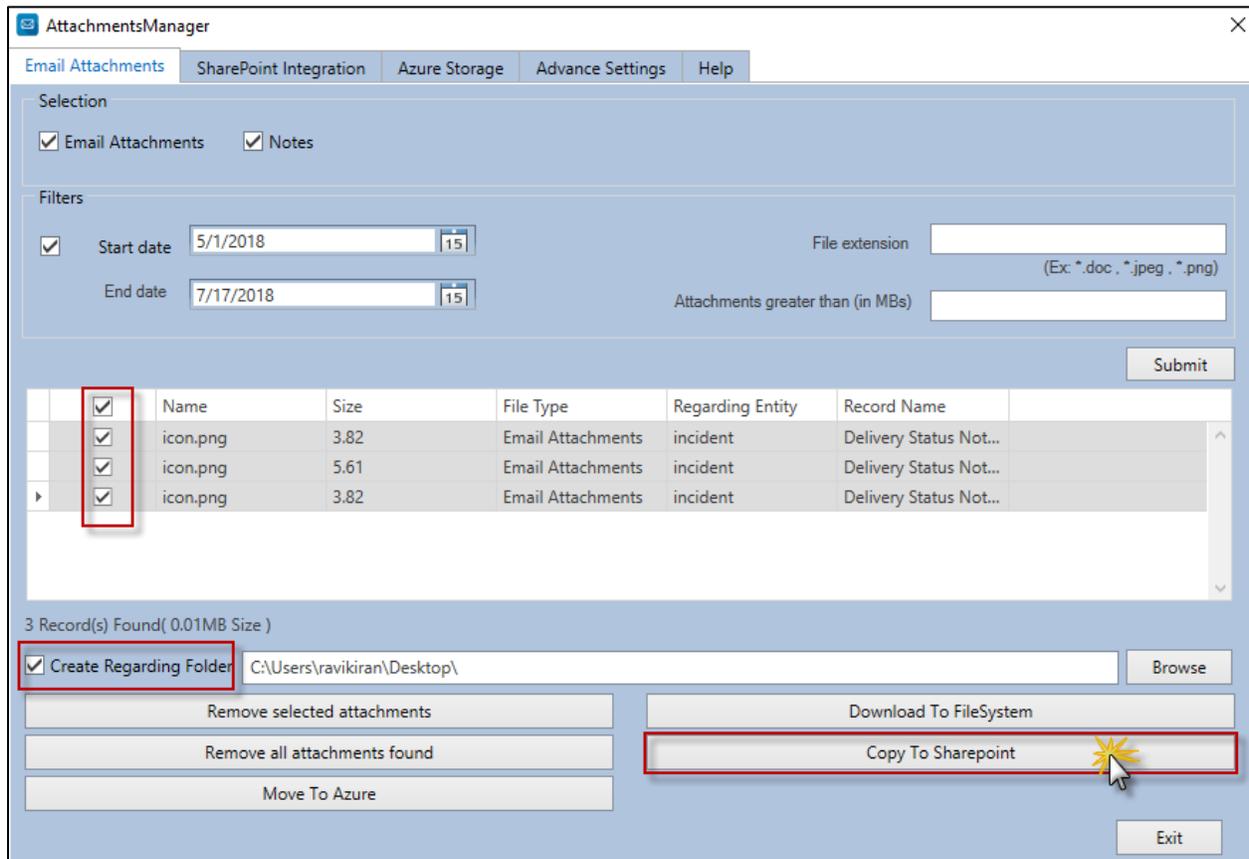


The screenshot shows a web application window titled "AttachmentsManager" with a close button (X) in the top right corner. Below the title bar is a navigation menu with five tabs: "Email Attachments", "SharePoint Integration", "Azure Storage", "Advance Settings", and "Help". The "SharePoint Integration" tab is currently selected. The main content area has a light blue background and contains the following form fields:

- SharePoint Instance: A dropdown menu with "Dynamics CRM" selected.
- Share Point Site URL: A text input field containing "https://salesMTC.sharepoint.com".
- Is Sub Site: A checked checkbox.
- Site Name: A text input field containing "https://salesMTC.crm.dynamics.com".
- User Name: A text input field containing "iam@salesMTC.onmicrosoft.com".
- Password: A text input field containing "\*\*\*\*\*".
- Domain: An empty text input field.
- Delete Attachments from CRM: An unchecked checkbox.

At the bottom right of the form area, there are two buttons: "Clear" and "Login". At the bottom right of the entire window, there is an "Exit" button.

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.

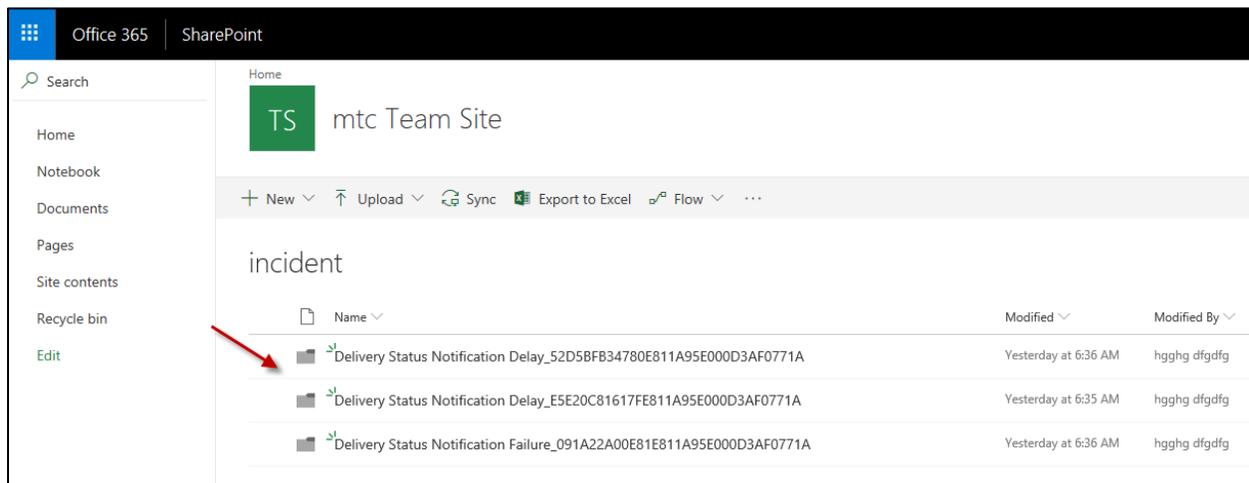


The screenshot shows the AttachmentsManager application window with the following details:

- Selection:**  Email Attachments,  Notes
- Filters:**
  - Start date: 5/1/2018
  - End date: 7/17/2018
  - File extension: (Ex: \*.doc, \*.jpeg, \*.png)
  - Attachments greater than (in MBs):
- Table:**

<input checked="" type="checkbox"/>	Name	Size	File Type	Regarding Entity	Record Name
<input checked="" type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...
<input checked="" type="checkbox"/>	icon.png	5.61	Email Attachments	incident	Delivery Status Not...
<input checked="" type="checkbox"/>	icon.png	3.82	Email Attachments	incident	Delivery Status Not...
- Summary:** 3 Record(s) Found( 0.01MB Size)
- Actions:**
  - Create Regarding Folder: C:\Users\ravikiran\Desktop\
  - Remove selected attachments
  - Remove all attachments found
  - Move To Azure
  - Download To FileSystem
  - Copy To Sharepoint** (highlighted with a red box and a mouse cursor)
  - Exit

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



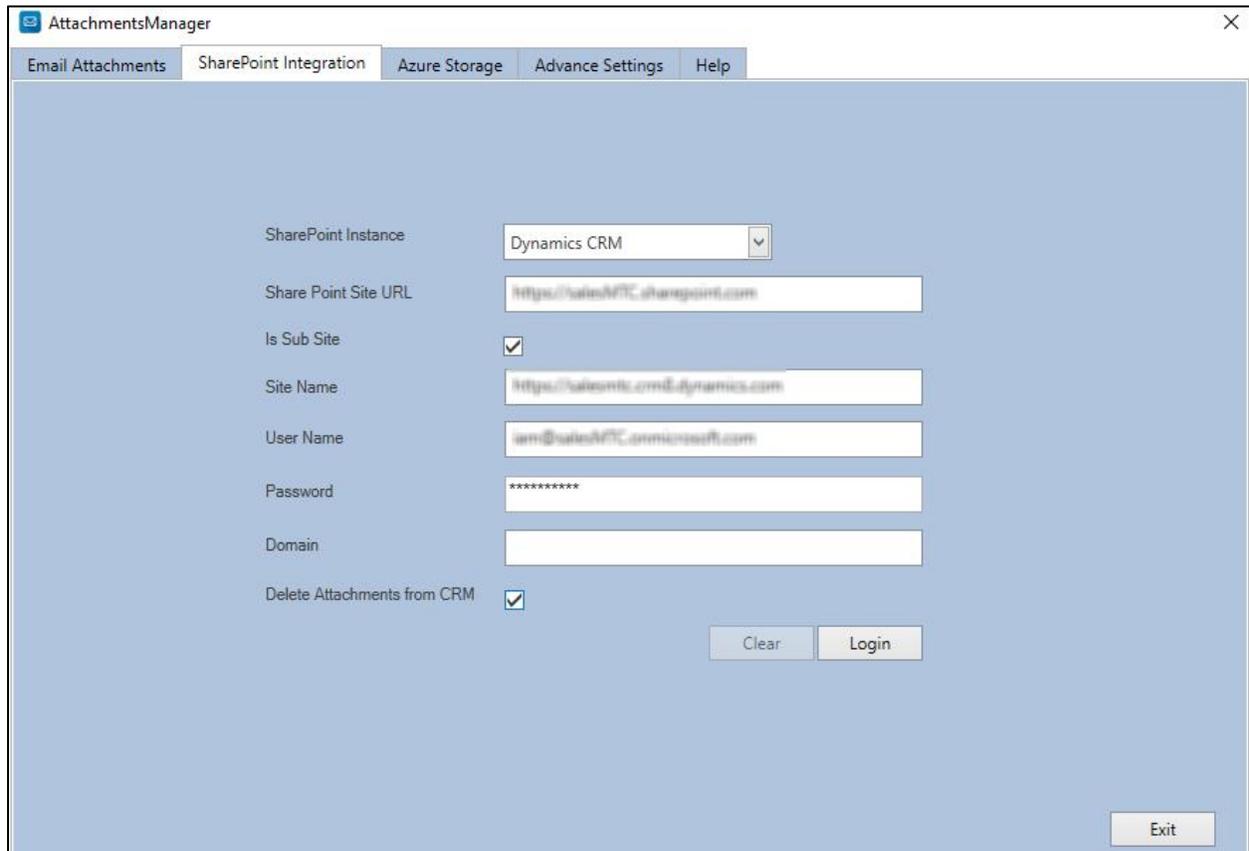
The screenshot shows the SharePoint interface for the 'mtc Team Site' with the following details:

- Navigation:** Home, Notebook, Documents, Pages, Site contents, Recycle bin, Edit
- Page Title:** incident
- Table:**

Name	Modified	Modified By
Delivery Status Notification Delay_52D58FB34780E811A95E000D3AF0771A	Yesterday at 6:36 AM	hgghg dfgdfg
Delivery Status Notification Delay_E5E20C81617FE811A95E000D3AF0771A	Yesterday at 6:35 AM	hgghg dfgdfg
Delivery Status Notification Failure_091A22A00E81E811A95E000D3AF0771A	Yesterday at 6:36 AM	hgghg dfgdfg

## 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.”

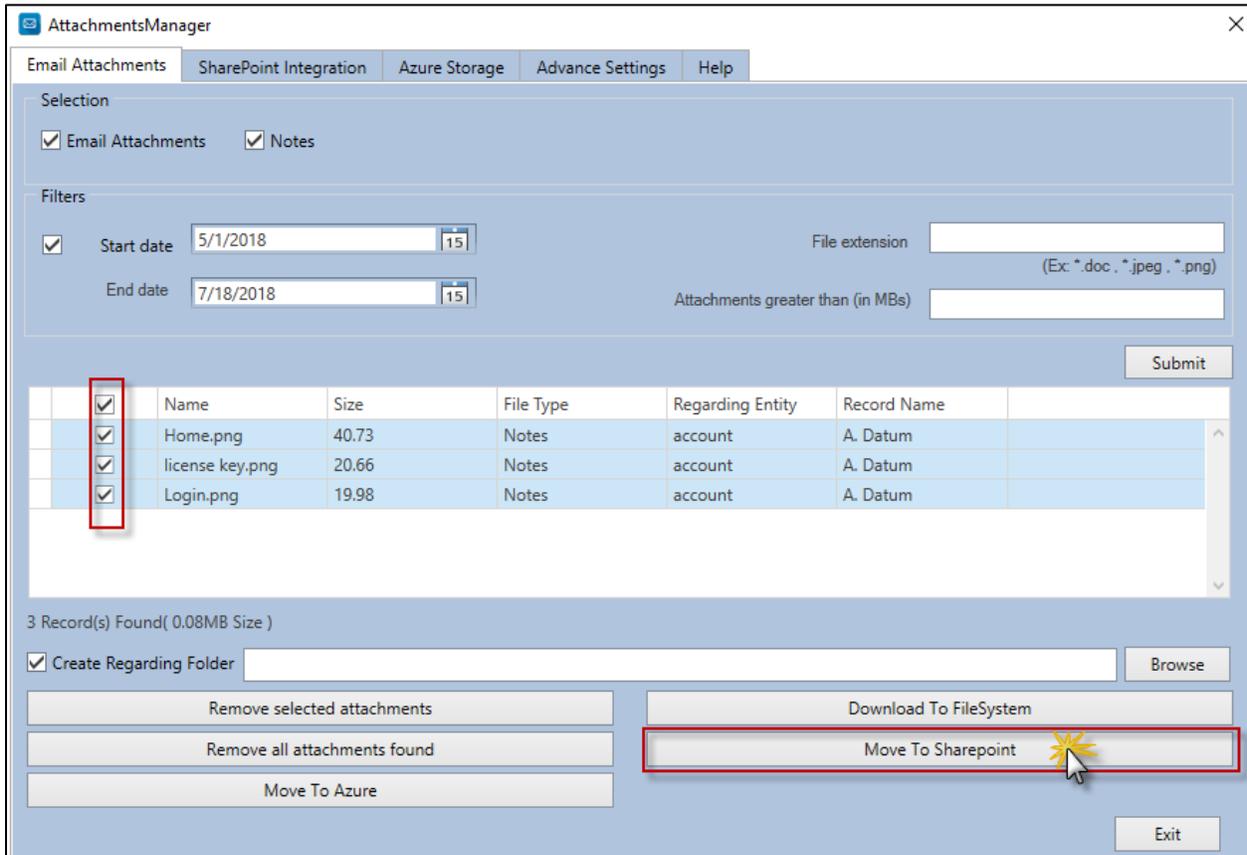


The screenshot shows the 'SharePoint Integration' tab in the AttachmentsManager application. The interface includes a navigation bar with tabs for 'Email Attachments', 'SharePoint Integration', 'Azure Storage', 'Advance Settings', and 'Help'. The main content area contains the following fields and controls:

- SharePoint Instance: Dynamics CRM (dropdown menu)
- Share Point Site URL:
- Is Sub Site:
- Site Name:
- User Name:
- Password:
- Domain:
- Delete Attachments from CRM:

Buttons: 'Clear', 'Login', and 'Exit'.

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.

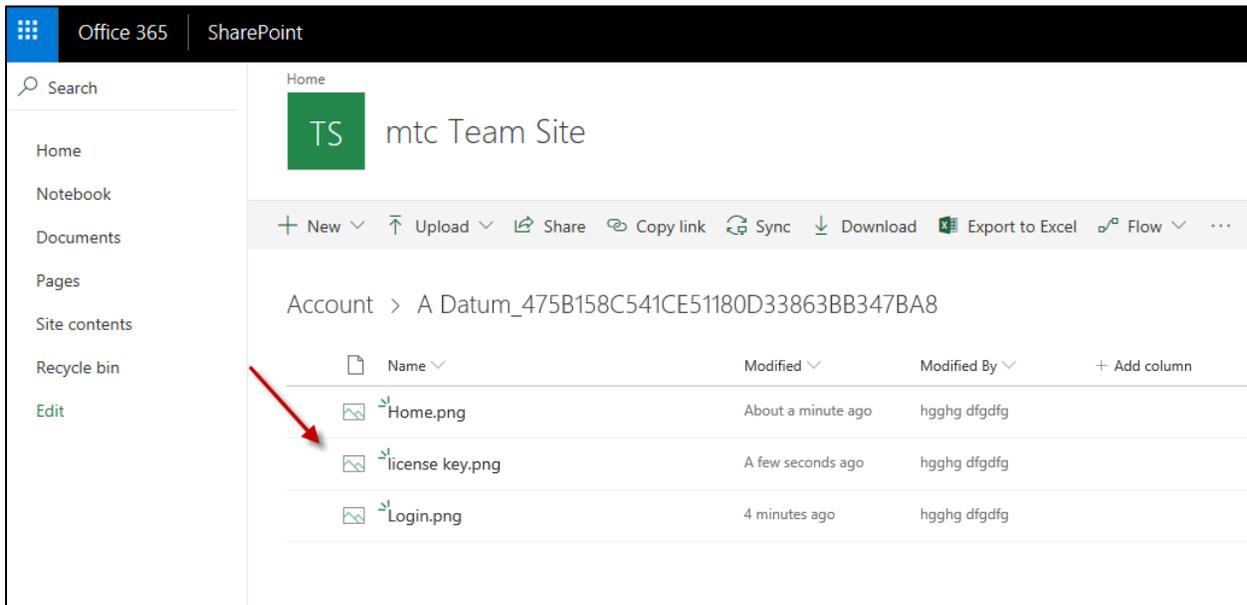


The screenshot shows the AttachmentsManager application window with the following elements:

- Selection:**  Email Attachments,  Notes
- Filters:**
  - Start date: 5/1/2018
  - End date: 7/18/2018
  - File extension: (Ex: \*.doc, \*.jpeg, \*.png)
  - Attachments greater than (in MBs):
- Table:**

<input checked="" type="checkbox"/>	Name	Size	File Type	Regarding Entity	Record Name
<input checked="" type="checkbox"/>	Home.png	40.73	Notes	account	A. Datum
<input checked="" type="checkbox"/>	license key.png	20.66	Notes	account	A. Datum
<input checked="" type="checkbox"/>	Login.png	19.98	Notes	account	A. Datum
- Summary:** 3 Record(s) Found( 0.08MB Size)
- Actions:**
  - Create Regarding Folder
  - Remove selected attachments
  - Remove all attachments found
  - Move To Azure
  - Download To FileSystem
  - Move To Sharepoint** (highlighted with a red box and a mouse cursor)
  - Exit

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



The screenshot shows the SharePoint interface for the 'mtc Team Site'. The breadcrumb path is 'Account > A Datum\_475B158C541CE51180D33863BB347BA8'. A table lists the moved attachments:

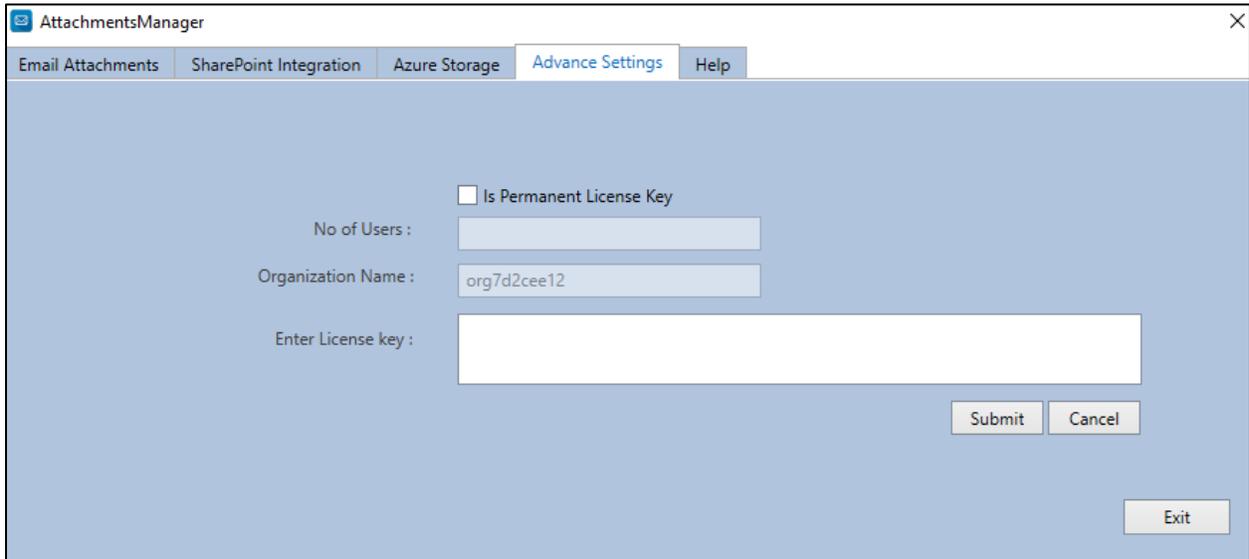
Name	Modified	Modified By
Home.png	About a minute ago	hgghg dfgdfg
license key.png	A few seconds ago	hgghg dfgdfg
Login.png	4 minutes ago	hgghg dfgdfg

A red arrow points to the first row of the table.

## 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.



AttachmentsManager

Email Attachments | SharePoint Integration | Azure Storage | **Advance Settings** | Help

Is Permanent License Key

No of Users :

Organization Name :

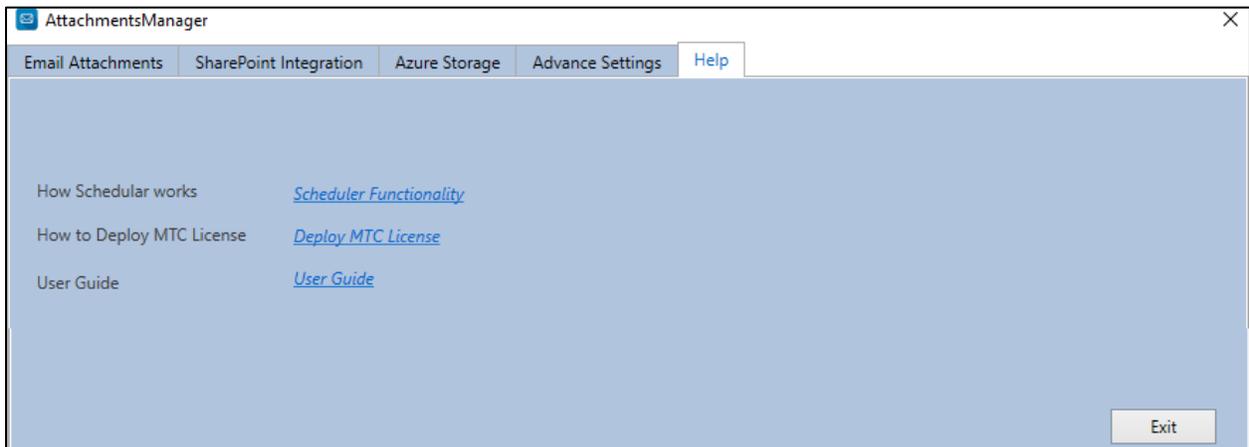
Enter License key :

Submit Cancel

Exit

## Help

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



AttachmentsManager

Email Attachments | SharePoint Integration | Azure Storage | Advance Settings | **Help**

How Scheduler works [Scheduler Functionality](#)

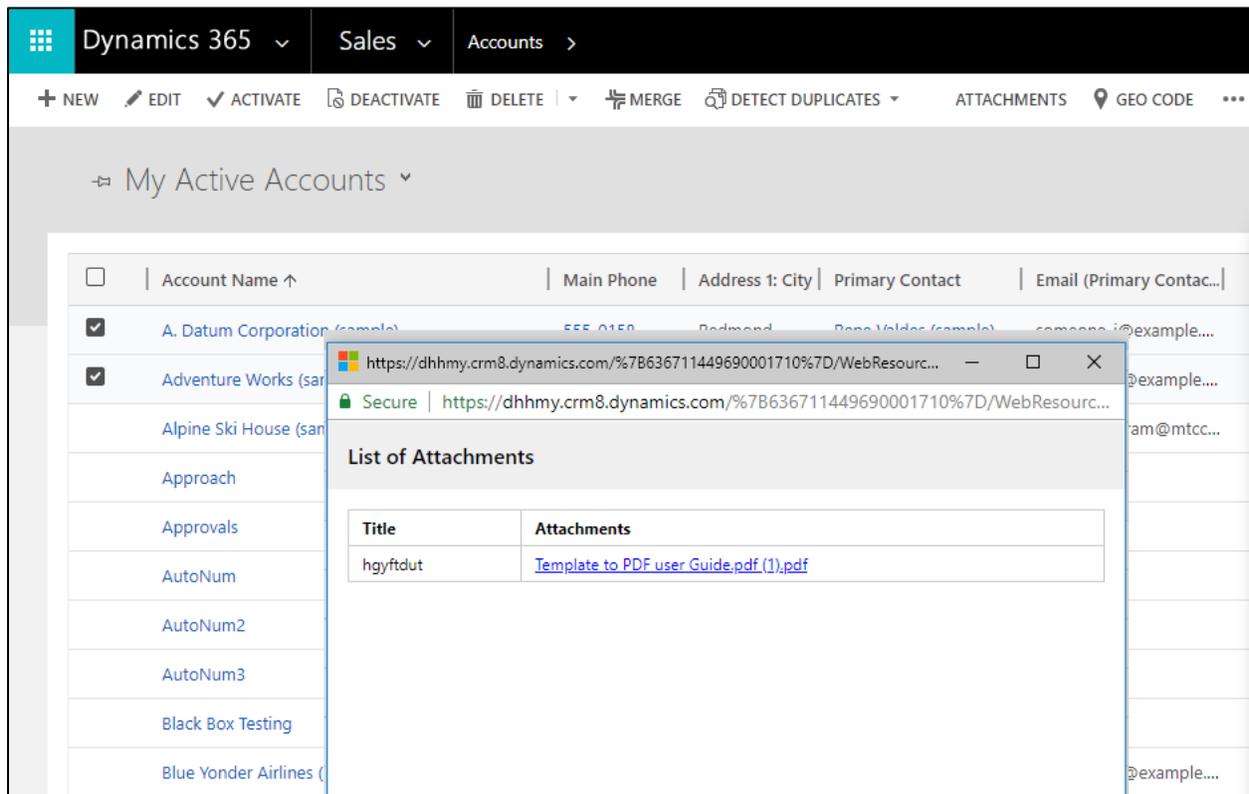
How to Deploy MTC License [Deploy MTC License](#)

User Guide [User Guide](#)

Exit

## 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.



The screenshot shows the Dynamics 365 CRM interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Accounts'. The ribbon contains buttons for '+ NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', 'DELETE', 'MERGE', 'DETECT DUPLICATES', 'ATTACHMENTS', and 'GEO CODE'. The main area displays 'My Active Accounts' with a list of account records. A modal window titled 'List of Attachments' is open, showing a table with the following data:

Title	Attachments
hgyftdut	<a href="#">Template to PDF user Guide.pdf (1).pdf</a>

**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.**

Dynamics 365 Sales Accounts

+ NEW EDIT ACTIVATE DEACTIVATE DELETE MERGE DETECT DUPLICATES ATTACHMENTS GEO CODE

My Active Accounts

<input type="checkbox"/>	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contac...
	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example...
<input checked="" type="checkbox"/>	Adventure W				eone_c@example...
	Alpine Ski Ho				achandram@mtcc...
	Approach				
	Approvals				
	AutoNum				
<input type="checkbox"/>	AutoNum2				
	AutoNum3				
	Black Box Tes				
	Blue Yonder /				eone_e@example...
	City Power &				eone_f@example...

https://dhhmy.crm8.dynamics.com/%7B636711455690001710%7D/WebResourc... - X

Secure | https://dhhmy.crm8.dynamics.com/%7B636711455690001710%7D/WebResourc...

### List of Attachments

Please download the Email Attachement Manager solution by using below link  
[click here](#)

If you are already downloaded the solution please ignore.

## 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.

