



Cloud Solution

proStorageSaver User Guide

proMX AG Nordring 100 90409 Nuremberg

E-Mail: sales@proMX.net



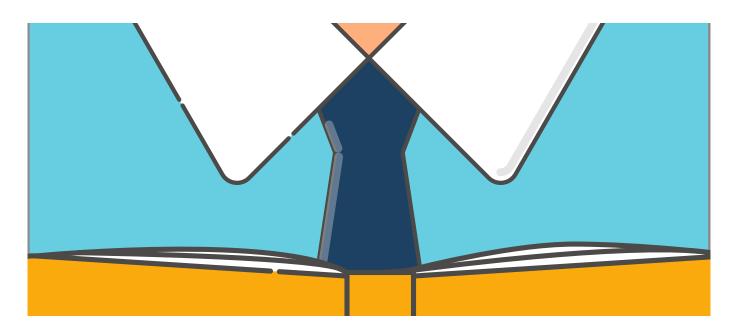


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Introduction

1.1 What is proStorageSaver?

To reduce the amount of storage space used up in Dynamics 365, Microsoft recommends moving attachments to external storage. proStorageSaver, an application developed by proMX AG, does just that by extracting documents and files from internal Dynamics 365 storage and saving them in external storage. These files may include e-mail attachments as well as any Dynamics 365 entity attachments (price-lists, quotes, etc.).

proStorageSaver is made up of two components: Web-Service and Dynamics 365 solution. The latter contains a plug-in which will be triggered on specific events for the Dynamics 365 entities Email and Note.

When triggered, the plug-in will check if the record in question contains any attachments. If this is the case, the plug-in will try to move these attachments to the Azure Storage by sending a special request to the Web-Service. Once the plugin receives confirmation that the file was successfully stored in external storage, it will replace the attachment with a link to the stored file and .url will be added to the attachment's file name. If something goes wrong, the attachment remains in Dynamics 365.

Please note: By default, the .url file extension is blocked in Dynamics 365. The script, which runs in the background, checks if it should be blocked and removes the block if necessary.



1.2 Installation

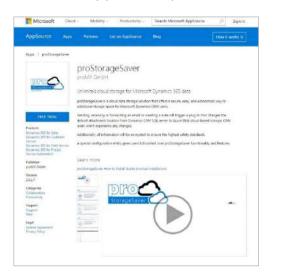
There are two platforms from which you can download a free trial version of proStorageSaver.



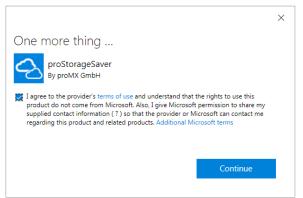
Please note: You require the administrator security role in Dynamics 365 to perform these installations.

1.2.1 Download from Microsoft AppSource

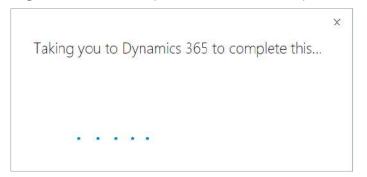
To download a free trial version of proStorageSaver from Microsoft AppSource, please click <u>here</u>



After clicking Free Trial, accept the terms of use and click Continue.



You will automatically be redirected to your Dynamics 365 organization to complete the installation process.





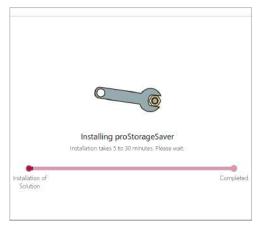
Gamification	2016.12.2	1/1/2050	Not installed
Office 365 Groups	2.6.0.0	1/1/2050	Not installed
proStorageSaver (AzureBl	2.0.1.7	9/5/2099	Installation pending

1.2.2 Download from proMX AppStore

To download a free trial of proStorageSaver from the proMX AppStore, please click <u>here</u>. Insert your Dynamics 365 URL and click **Install Now!**

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	Hypu don't have Microsoft Dynamics 355 please click here
N 0510	CRM URL
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The installation process will start automatically.



Company News Timeline	1.0.0.0	12/31/2050	Not installed
FantasySalesTeam	1.4.6	1/1/2050	Not installed
Field Service	6.1.1.39	1/1/2050	Not installed
Gamification	2016.12.2	1/1/2050	Not installed
Office 365 Groups	2.6.0.0	1/1/2050	Not installed
proStorageSaver (AzureBI	2.0.1.7	9/5/2099	Installing





1.3 Configuration

Once you have downloaded proStorageSaver from either Microsoft AppSource or proMX AppStore, configure the solution:

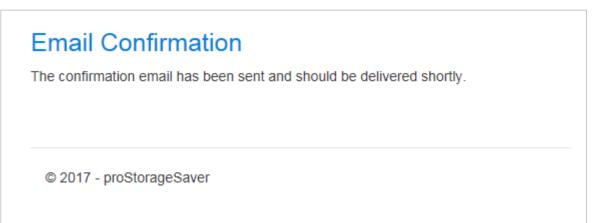
1. Navigate to Settings panel and click on Solutions settings.

Service	Marketing	Field Service	Project Service	Resource Scheduling	settings Settings
Customization	System		Process Center	Extensions	Application
Customizations	administration	Email Configuration	Processes	proStorageSaver Conf	Interactive Service Hub
5olutions	G Security	Activity Feeds Configu			My Apps
Dynamics Marketplace	Data Management	Activity Feeds Rules			
Plug-In Trace Log	System Jobs	Dynamics 365 App for			
	Document Manageme	Relationship Insights			
	Auditing				

2. Double-click to open proStorageSaver. You will automatically be redirected to the Web-Service.

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3. All attachments will be stored at the Web-Service. Register a new account.





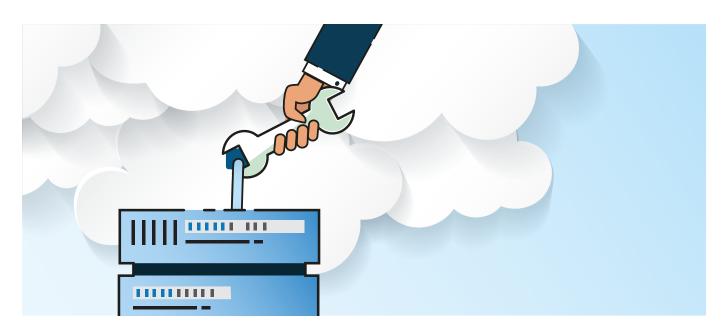


4. Confirm your account by clicking the link in the confirmation e-mail. Click **Log In** and then **Confirm Ownership**. proStorageSaver is configured, enabled and ready to process attachments.

You are about to register your CRM Organiz	ation with proStorageSaver.
Registration will create explicit link between Organ storage for your files and activate your subscription	ization and your proStorageSaver account. After that proStorageSaver will create a data n.
OrganizationId	
8320fc8c-4632-4ba3-b8c4-c7b496ac2166	
Name	
prostoragesavertest	
Owner	
Confirm Ownership	
© 2017 - proStorageSaver	







2. Usage

proStorageSaver is now configured and ready to process attachments.

2.1 Extracting attachments

As mentioned above, proStorageSaver runs in the background. Here's an example of how it works:

Organization ID	8320fc8c-4632-4ba3-b8c4-c7b496ac2166
Organization Name	prostoragesavertest
Owner	
Subscription Active	Ø
Active Users	0
Storage Size	0.8
Number of Files	0
Number of "Store" Requests	0
Number of "Retrieve" Requests	0
Incoming Traffic	0.8
Outgoing Traffic	0 B

Every time you add an attachment, in this case to a contact (as a note), an asynchronous process will be created. This process will extract the original attachment into external storage. These



processes are scheduled by Dynamics 365. If the system is working at high capacity, it may take some time to execute.

DSTS ACTIVITIES N	OTES		
A Simple Note to test pro	oStorageSaver		
<pre> proStorageSaver1.jpg </pre>	9		
You - Just now			

Simply refresh the page to see the result.

A Simple Note to	test proStorageSa	ver	
proStorageSav	/er1.jpg.url		
ProStorage Saver	- Today 13:40:20		

As you can see, an attachment has been extracted, saved to external storage and a link to your file was created. Go to the Web-Service and log-in to your account to see that it has been stored.

Manage	
Organization ID	1b0f3b79-8f8f-4a01-b127-f6694e397aa6
Organization Name	prostoragesavertest
Owner	
Subscription Active	
Active Users	3
Storage Size	165.67 KB
Number of Files	
Number of "Store" Requests	λ. (i)
Number of "Retrieve" Requests	1
Incoming Traffic	165.67 KB
Outgoing Traffic	165.67 KB
Back to Organizations	





2.2 Recalling extractions

You can restore attachments at any time using the built-in workflows.

To restore attachments navigate to **Advanced Find** icon in the top right side of the screen.



Then choose where to search for your attachments. In this case, it is **Notes**. Select the field **File Name**, operator **Ends With** and input **.url** in the last field.

🥌 Advanced Find - Microso	oft Dynamics 365 - Internet Explor	er	
https://prostoragesaver	test.crm4. dynamics.com /main.asp	x?pagetype=advancedfind#266582918	<u>a</u>
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Query Saved Views Results Show	New Save As Save Edit Columns Edit Properties View	Clear LE Group AND LE Group OR Download Fetch XML Query Debug	
Look for: Notes		Use Saved View: [new]	\sim
V File Name	Ends With	Juri	
Select			

Click on **Results** to start Advanced Find. Now you have all your notes that has been stored in proStorageSaver displayed. Highlight one or few of them and click on **Run Workflow**.

🥭 Advanced Find - Microsoft Dynamics 365 - Internet Explorer						E E 23		
s://prostoragesave	ertest.crm4.dyna	mics.com/main.asp	and pagetype-advanced	find#266582918		A		
FILE ADVANCED FIND			Microsoft Dynamics 365			ProStorage Saver 🤣 ProStorage Saver Test 🚓		
Saved Views Show	New Save	Edit Columns		<@2				
	Run Workflow	E Start Dialog	More Actions 👻					
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		A Simple Note to	test proStorageSaver	proStorageSaver1.jpg.ur/				
		Second note	1	pinpoint.jpg.uri				
		Note #3		proStorageSaver2.jpg.un				
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As you can see, proStorageSaver comes with two built-in workflows: **Process Note** and **Restore Note**. The former is a way to



Please note: Recalling attachments will require sufficient Dynamics 365 storage space, otherwise the workflow cannot be completed.





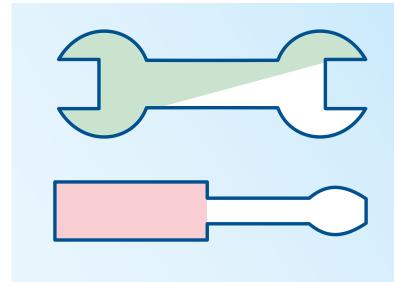
process attachments that were created prior to the installation of proStorageSaver.

	Process	✓ St	now Only My Records	
Look in	On Demand Workflows	~		
Search	Search for records	Q		
Pro	cess Name	Category	Created On Mod	Ŕ
proStorageSaver: Process Note		Workflow	1/11/2017 12:47 1/11/2	201
	StorageSaver: Restore Note	Workflow	1/11/2017 12:47 1/11/2	201
<			2	>

Select **Restore Note** and click **Add** to finalize the process. Your files will be restored to the default Dynamics 365 storage within a few minutes. These notes will no longer end with .url.







3. Trouble shooting

If you encountered any troubles during **installation**, please check if you have the security role System Administrator. If you have just installed Dynamics 365, please check that the installation process has been completed.

If you encounter any problems while **using** proStorageSaver, please contact us via our <u>support form</u>.







4. Contact



proMX AG Nordring 100 90409 Nuremberg Germany

sales@proMX.net http://proMX.net