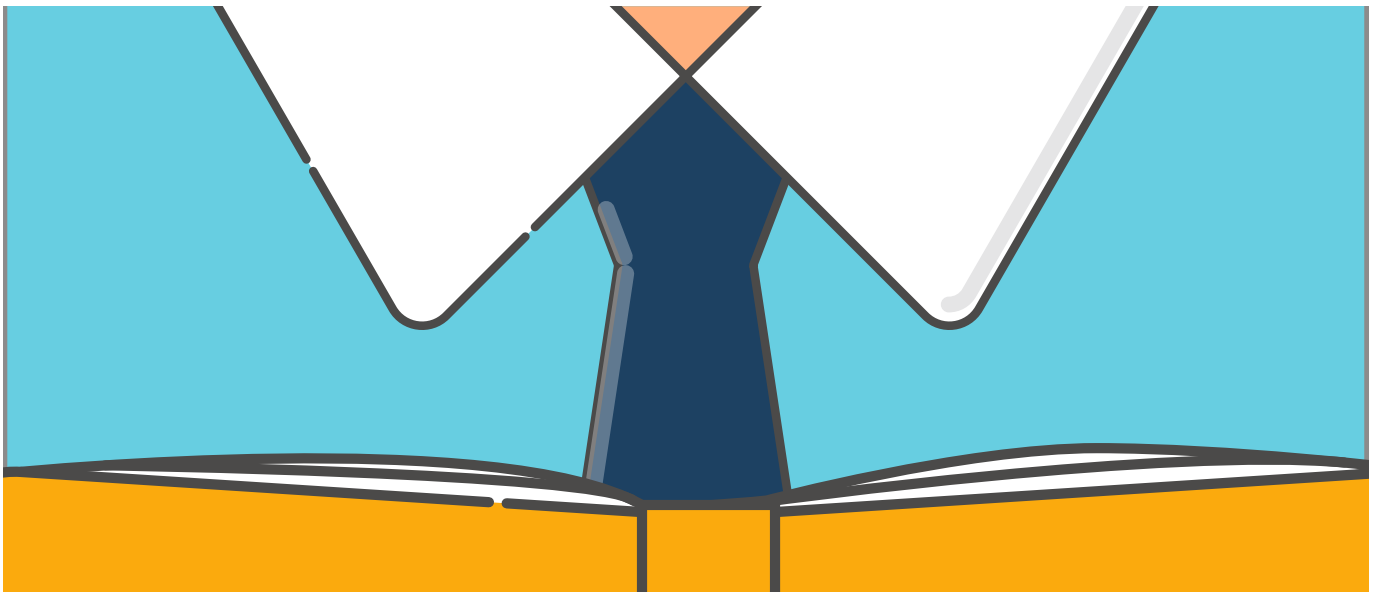# proStorageSaver

User Guide

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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 plug-in 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.
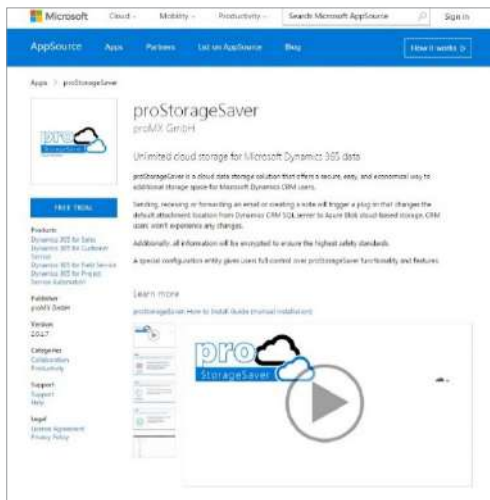
1.2 Installation

There are two platforms from which you can download a free trial version of proStorageSaver.
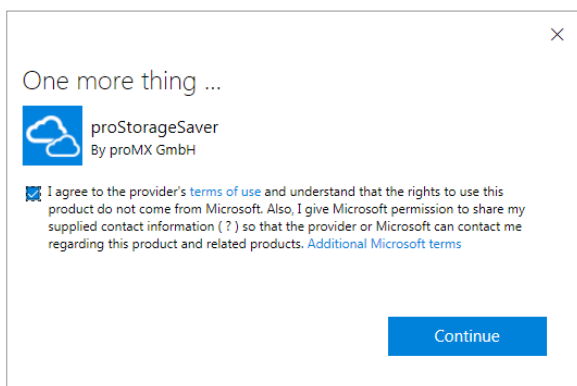
Please note: You require the administrator security role in Dynamics 365 to perform these installations.
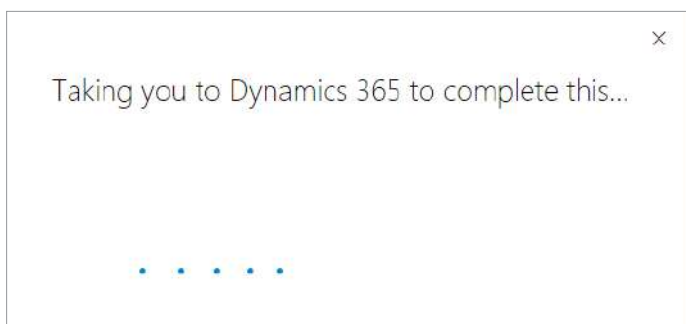
1.2.1 Download from Microsoft AppSource

To download a free trial version of proStorageSaver from Microsoft AppSource, please click here

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 here. Insert your Dynamics 365 URL and click **Install Now!**

The installation process will start automatically.

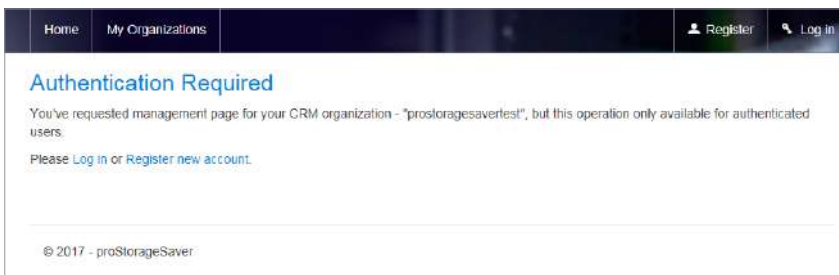| Company News Timeline | 1.0.0.0 | 12/31/2050 | Not installed |
FantasySalesTeam	1.4.6	1/1/2050	Not installed
Field Service	6.1.1.39	1/1/2050	Not installed
Gamification	2016.12.2	1/1/2050	Not installed
Office 365 Groups	2.6.0.0	1/1/2050	Not installed
proStorageSaver (AzureBl...	2.0.1.7	9/5/2099	Installing

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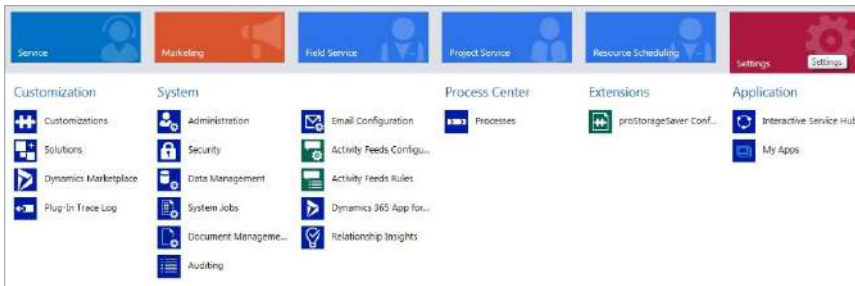
2. Double-click to open proStorageSaver. You will automatically be redirected to the Web-Service.

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 Organization with proStorageSaver.

Registration will create explicit link between Organization and your proStorageSaver account. After that proStorageSaver will create a data storage for your files and activate your subscription.

OrganizationId
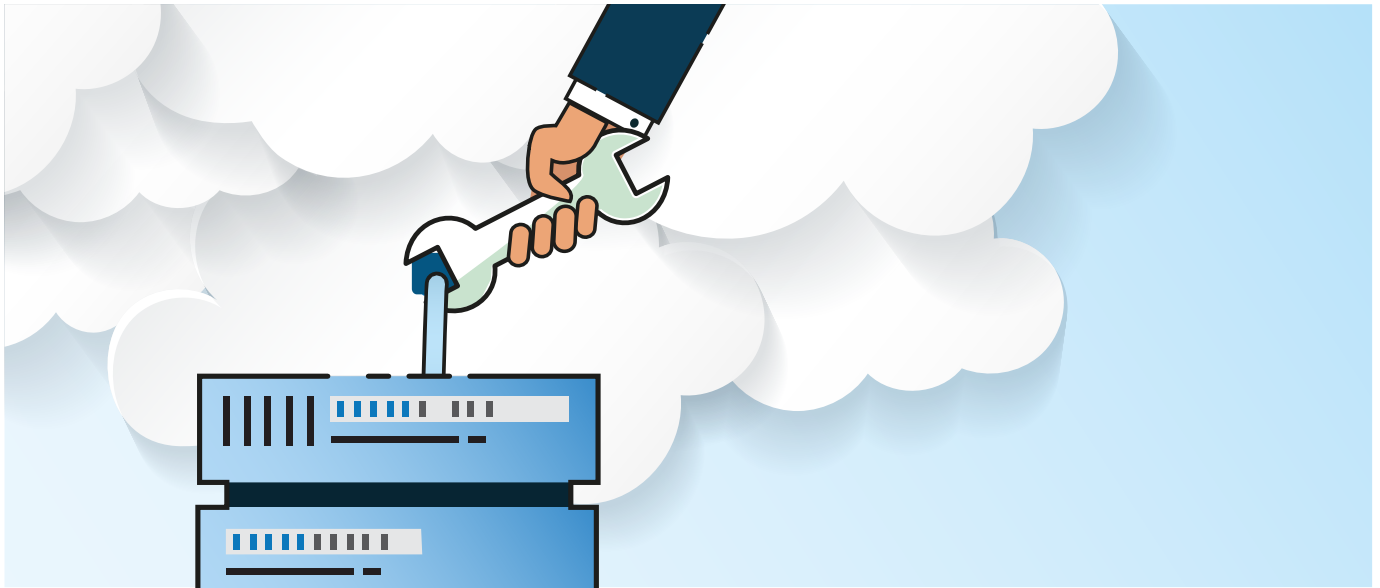
8320fc8c-4632-4ba3-b8c4-c7b496ac2166

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	☑
Active Users	0
Storage Size	0 B
Number of Files	0
Number of "Store" Requests	0
Number of "Retrieve" Requests	0
Incoming Traffic	0 B
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.

Simply refresh the page to see the result.

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.
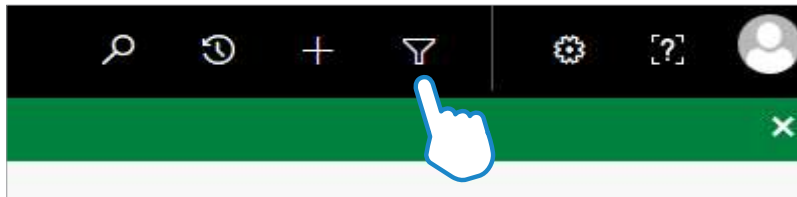
2.2 Recalling extractions

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.
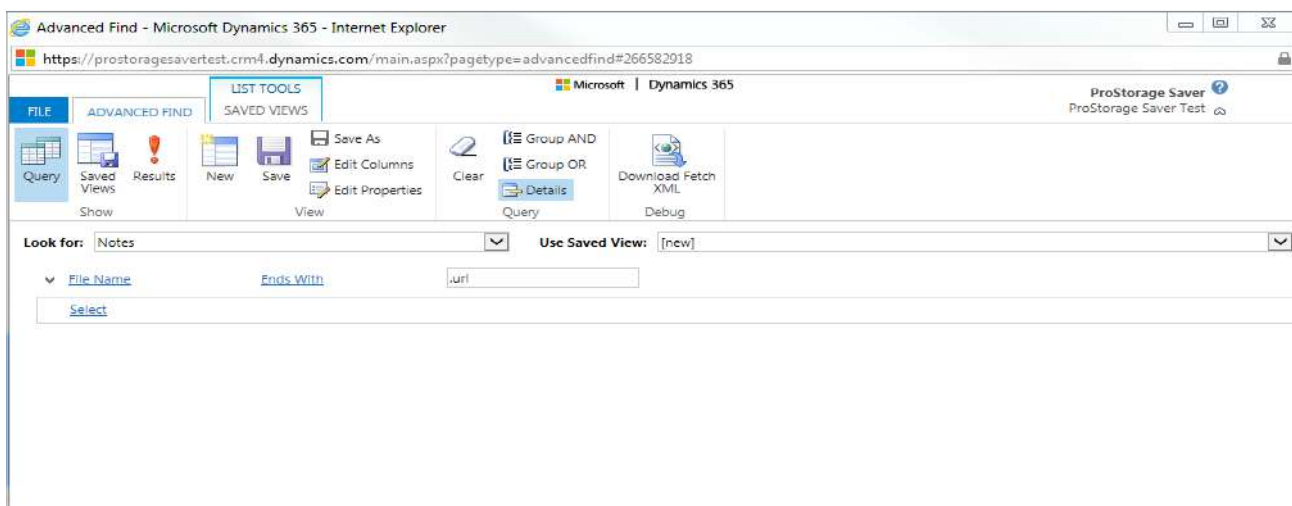
Click on **Results** to start Advanced Find. Now you have all your notes that has been stored in proStorageSaver displayed. Highlight one or few of them and click on **Run Workflow**.
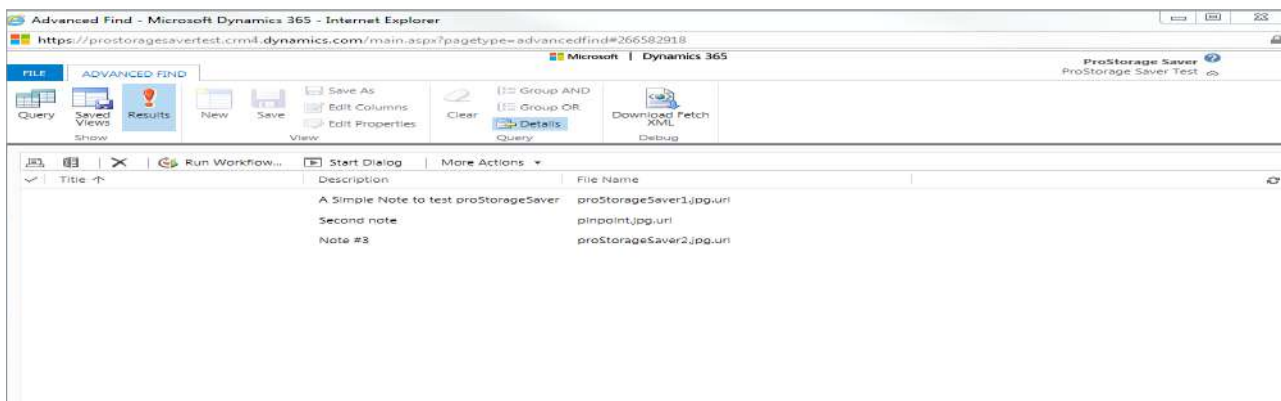
As you can see, proStorageSaver comes with two built-in work-flows: **Process Note** and **Restore Note**. The former is a way to

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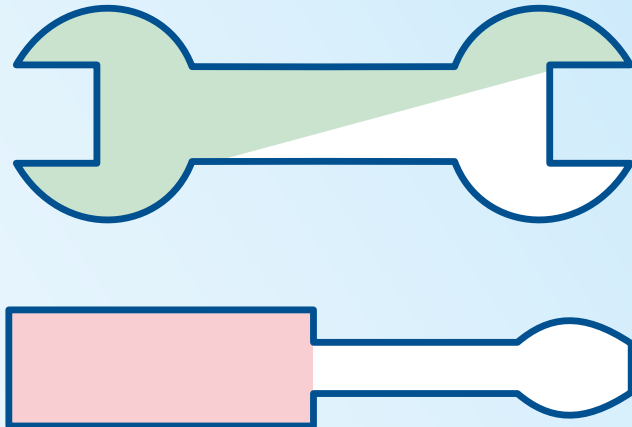

Select **Restore Note** and click **Add** to finalize the process. Your files will be restored to the default Dynamics 365 storage within a few minutes. These notes will no longer end with .url.

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page

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 support form.

4. Contact

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