AttachmentExtractor
Getting Started from AppSource

Hello!

Thank you for your interest in AttachmentExtractor.This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our guides or blogs.

There are basically two ways to install AttachmentExtractor from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to open AppSource directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the *[Get Solutions from Marketplace]*-button, highlighted in yellow in the figure below.

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for AttachmentExtractor and is described below.

2. Get solution from AppSource

The second option is to go to the AppSource website and search for DocumentsCorePack. Use this link to find all add-ons provided by mscrm-addons.com (figure below).
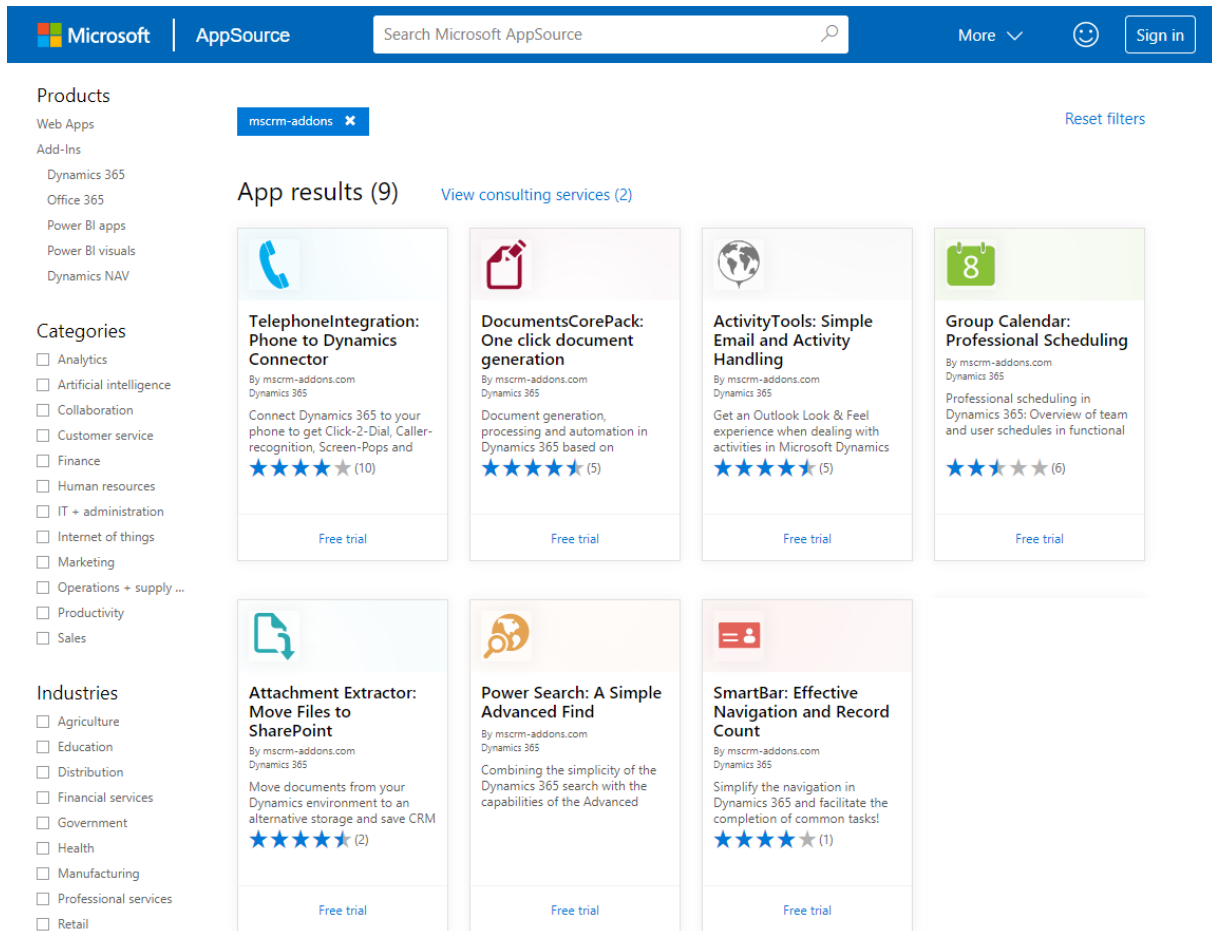

Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select AttachmentExtractor. The so opened window provides you with information regarding AE. Here, please click on the *[FREE TRIAL]*-button on the left side.
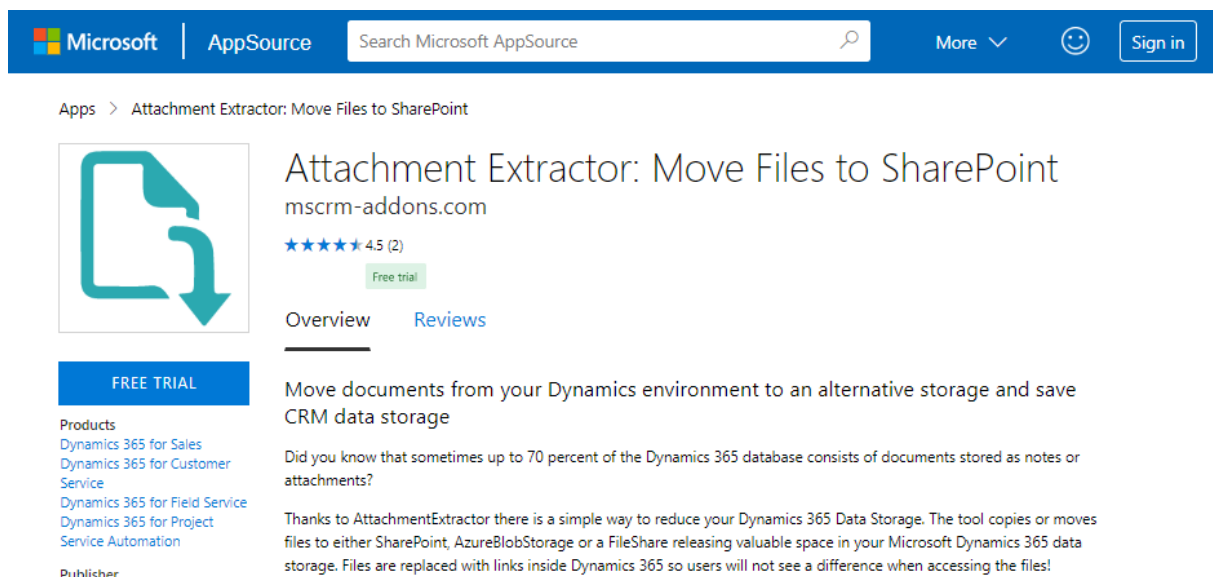

Figure 3: AppSource – AttachmentExtractor

2

Next, please sign into Microsoft AppSource. Enter your e-mail address and hit the *[Sign in]*-button as you can see in the figure below.
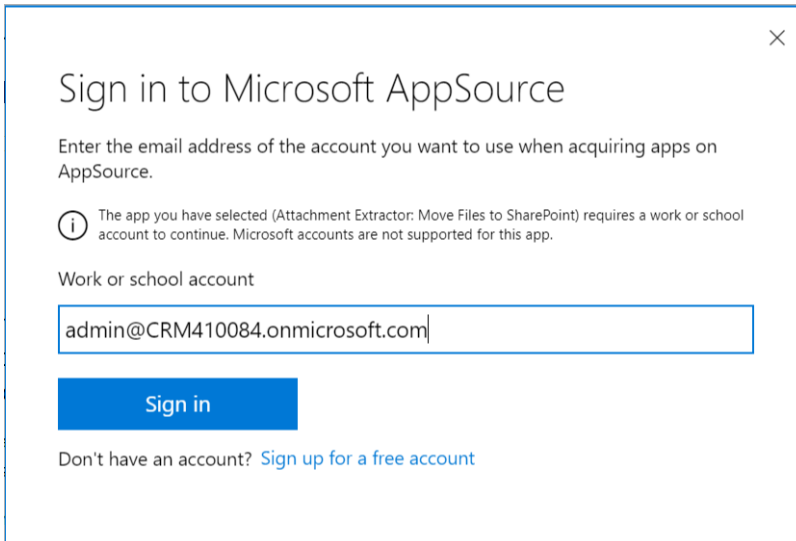

Figure 4: Sign into Microsoft AppSource

In the window below please enter your basic profile information and check the Microsoft permission checkbox at the bottom. Click on the *[Continue]*-button to proceed.
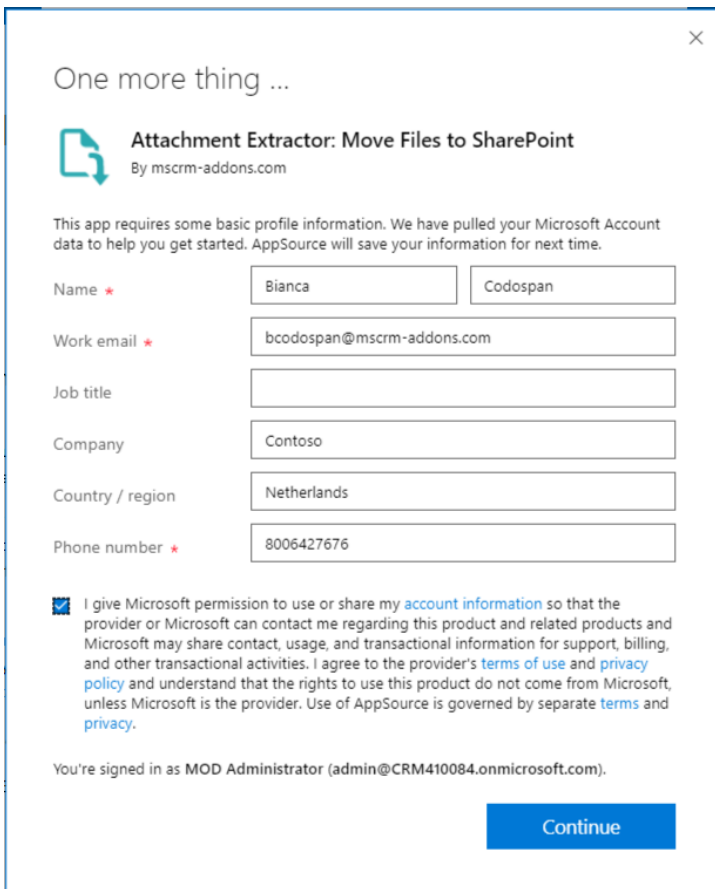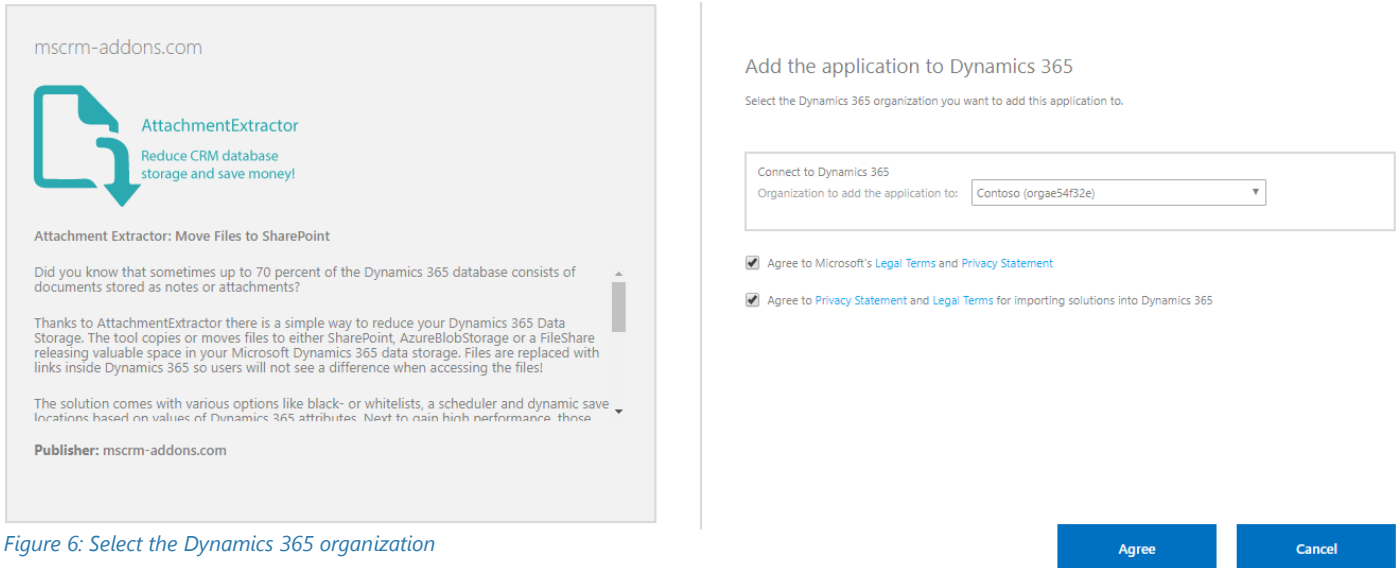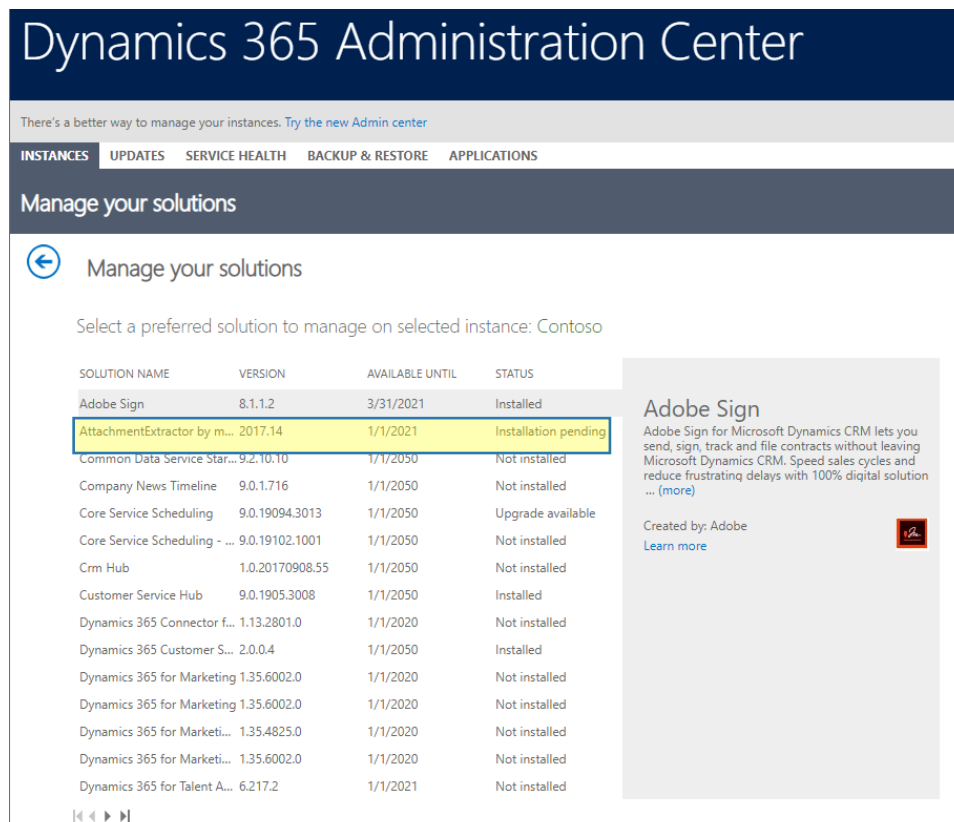

Figure 5: Enter your basic profile information

Next, please enter the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the *[Agree]*-button.

Figure 6: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see AttachmentExtractor has the Status "Installation pending" until the installation is completed (highlighted in yellow).

Figure 7: Organization overview – AE installation pending

Meanwhile, you will receive an e-mail with more information about AE and its usage.

To see when the installation is finished, please refresh the page in between. Only when the status is on "Installed" you can continue with the process (highlighted in yellow below).
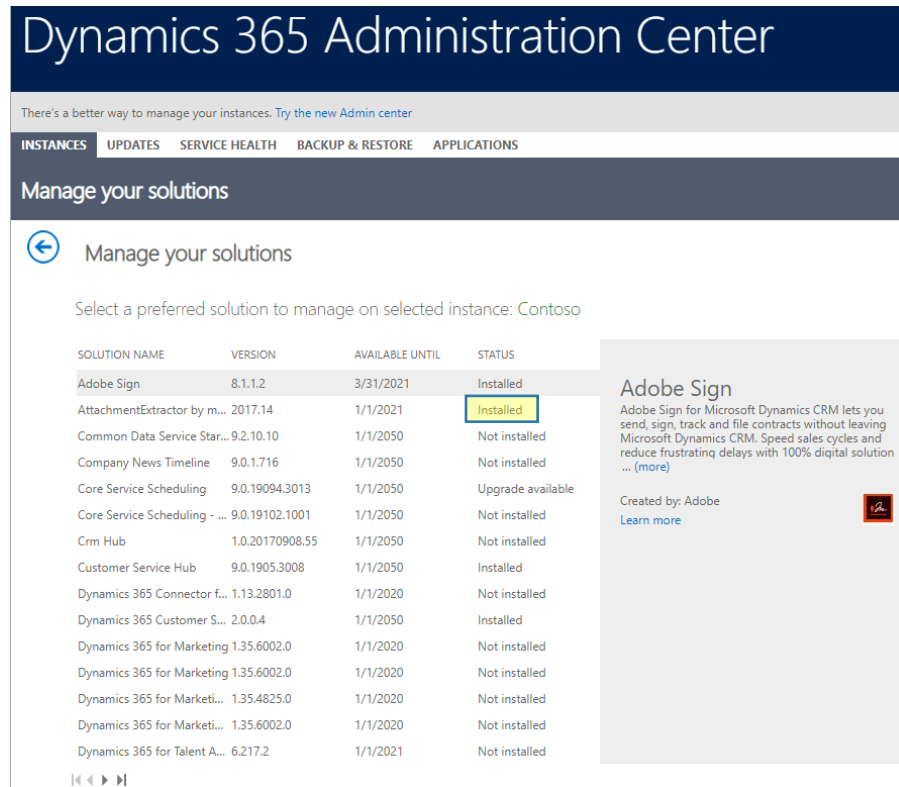
Figure 8: Organization overview – AE installation finished

Congratulations! You have successfully completed the installation of AttachmentExtractor from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – AttachmentExtractor (highlighted in yellow).
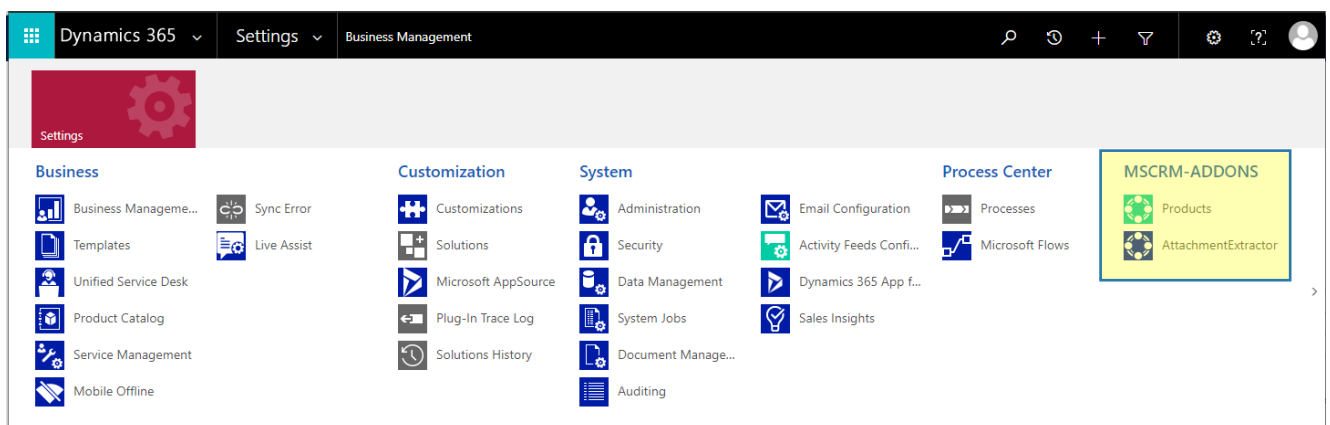
Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: AttachmentExtractor

A click on AttachmentExtractor leads you to the AttachmentExtractor *Getting Started* page. Please enter the user credentials you have registered on our website and hit the **[Continue]**-button in order to proceed. In case you are not registered on our website, please enter your email address below and a user account will be automatically created for you.

Figure 10: AttachmentExtractor Getting Started page

Once you have logged in, you will be provided with the Online Configuration window. Please click on the **[Add]**-button to add a new service.
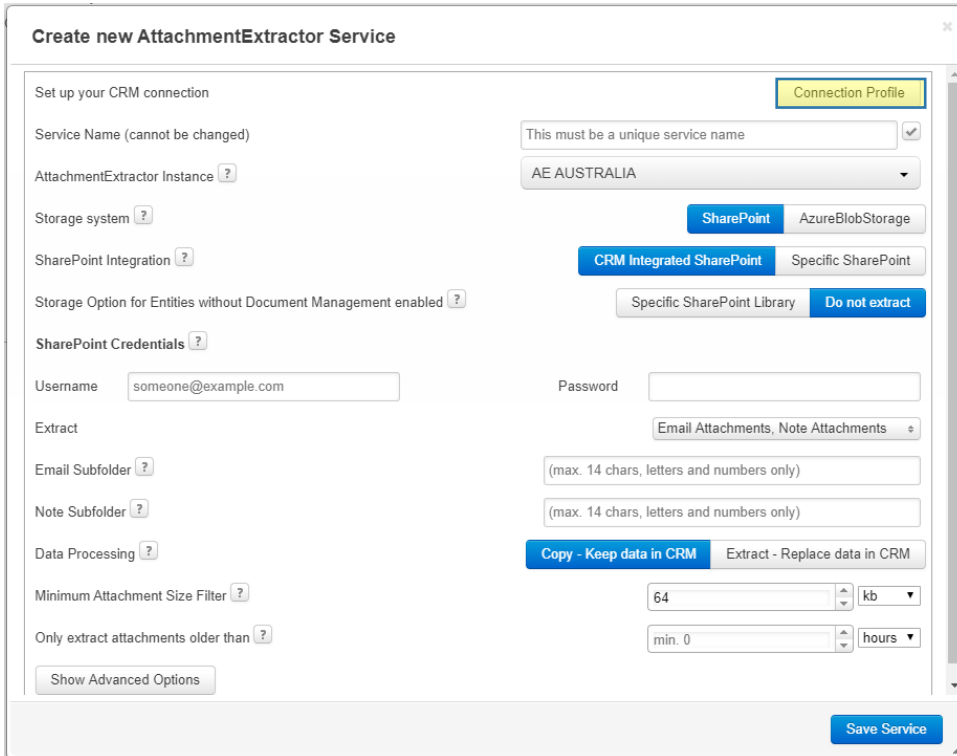
Figure 11: AttachmentExtractor Online configuration window

First, click on the *[Connection Profile]*-button highlighted in yellow.

Figure 12: Create new AE service

Next, the below window appears. Here, you can select your Microsoft Dynamics 365 type: Server2Server, Office 365, Live ID or IFD (hosted). In this case, please select Server2Server as CRM Type, enter your CRM URL and hit the *[Retreive Organizations]*-button.

Figure 13: Create a CRM connection profile

Next, please log in with the user that should be used to connect the service with your Dynamics 365 instance. Dynamics 365 administrator privileges are required!
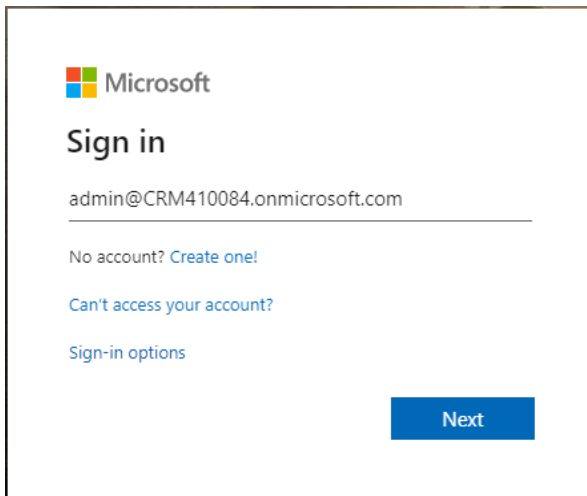
Figure 14: Login with administrator account

Accept the permissions below by checking the checkbox. With a click on the arrows on the left side, you will get a short description of the requested permissions.
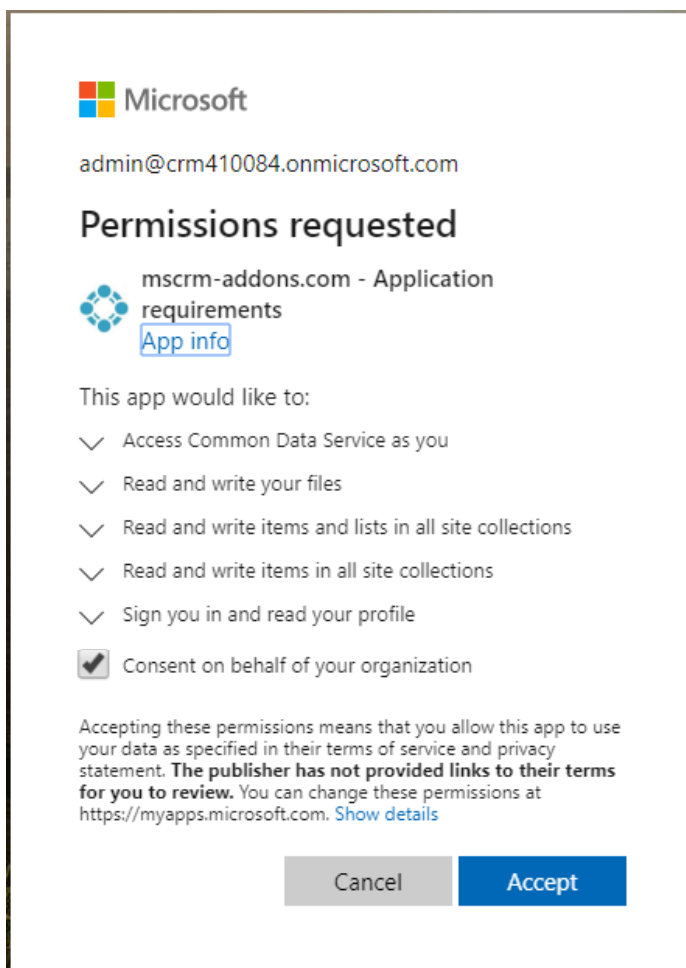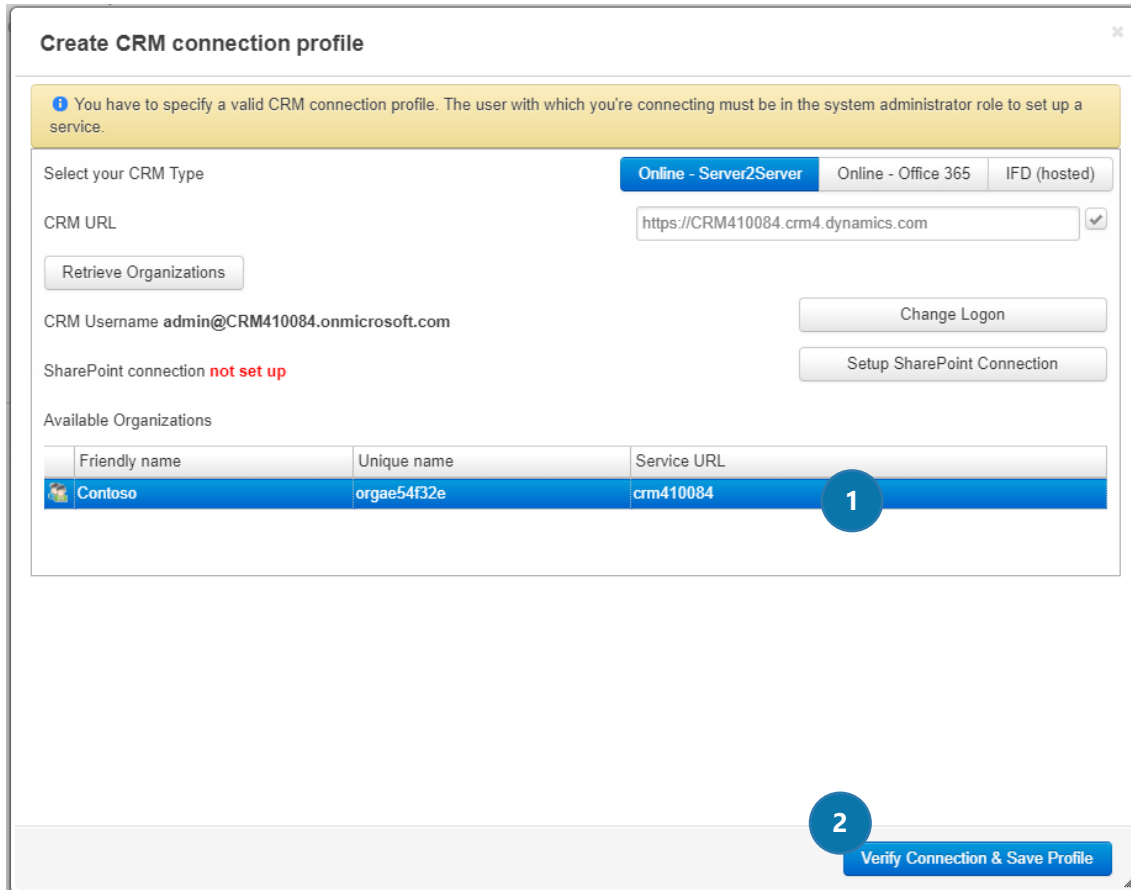
Figure 15: Accept requested permissions

As soon as your organization appears in the Available Organizations section ❶, click on the **[Verify Connection & Save Profile]**-button ❷.

Figure 16: Verify your connection and save your profile

Now the following window appears. It is important that you do not close this window or navigate away.

Figure 17: Verify connectivity permissions

You are now back on the same window as before. This window supports you in creating a new service.
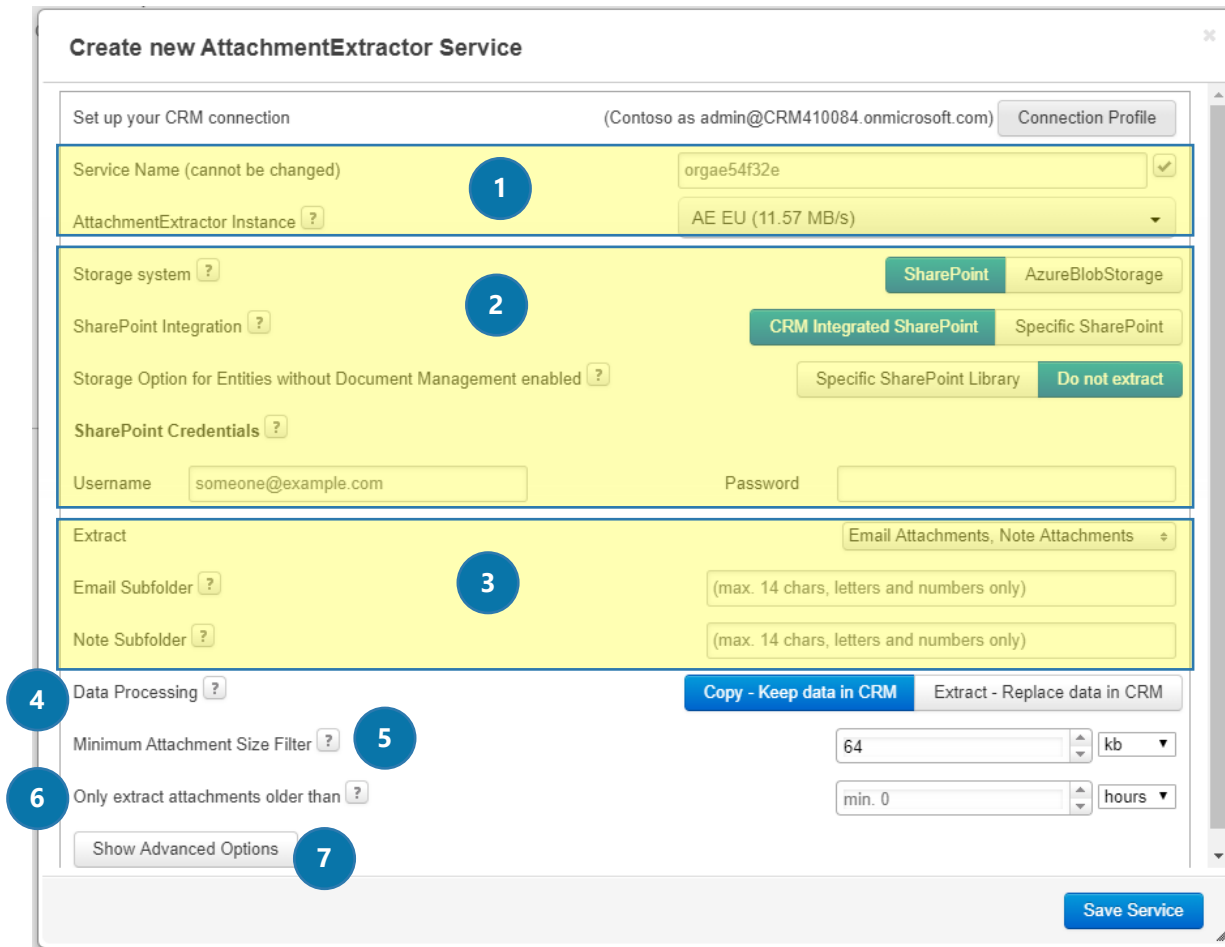
Figure 18: Create new AE online service

❶ SERVICE NAME

Please enter your service name here. But choose wise, because the name cannot be changed anymore!

ATTACHMENTEXTRACTOR INSTANCE

Please select here, on which instance the AttachmentExtractor Service should run. The instance with the highest bandwidth is automatically selected for you.

❷ STORAGE SYSTEM

Please choose, if you would like to use the Dynamics 365 integrated or a specific SharePoint or AzureBlobStorage.

• SHAREPOINT INTEGRATION

Please specify your SharePoint integration here. If you want to use a specific SharePoint, you must enter a SharePoint path, which means you must enter a SharePoint URL that includes the library.

STORAGE OPTION FOR ENTITIES WITHOUT DOCUMENT MANAGEMENT ENABLED

Entities without document management may be stored daily or weekly on a specific SharePoint library. Else, you may decide which entities not to extract. Also, attachments without regarding will be extracted to this library.

SHAREPOINT CREDENTIALS

Please insert the credentials of a SharePoint user with administrative access to your configured SharePoint here.

- ### AZUREBLOBSTORAGE CONNECTION

Please enter the Account and Container name if you decide to use AZB connection. The SAS key requires read/write/create/delete privilege and should be valid for an extend period. More information about AzureBlobStorage can be found in the corresponding AttachmentExtractor user guide on page 13.

❸ EXTRACT

Using the drop-down menu of this option, allows you to decide what you would like to extract with AttachmentExtractor. Please select all options or only some of these options. The available options are:

- EMAIL ATTACHMENTS
- NOTE ATTACHMENTS
- APPOINTMENT ATTACHMENTS

❹ DATA PROCESSING

Please specify if you only want to copy your attachments to SharePoint or if you want to extract them completely. Once extracted files will be replaced with a .url file which points to the extracted file on SharePoint. However, if you click on the *[Extract – Replace data in CRM]*-button, you will receive a warning.

Read the warning carefully, check the corresponding checkbox and select whether you want to copy or extract the files by clicking on the corresponding button.

AttachmentExtractor Service Setup   ✕

⚠ **!!! Warning !!!**

You've selected to extract the documents from CRM. This will physically extract your files from CRM and they will be replaced with a .url file pointing to the extracted files on SharePoint.

The documents will be extracted from

Contoso (orgae54f32e)

This cannot be reverted! Please confirm your choice.

☐ I've read and understand what this means and want to **extract** the files from CRM.
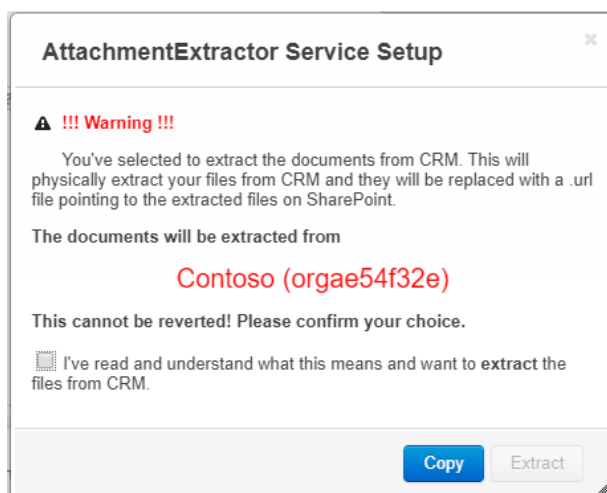
Copy   Extract

Figure 19: AttachmentExtractor online service warning

❺ Minimum Attachment Size Filter

Please insert the minimum size a file should have in order to be extracted by your AttachmentExtractor Service here.

❻ Only extract attachments older than

If you only want to extract attachments older than a certain amount of time, you can specify this here.

❼ Show Advanced Options

A click on this button expands some options for the advanced configuration.

PLEASE NOTE

If you feel that the configuration so far satisfies your needs, you can save your service now with a click on the *[Save Service]*-button in the right lower corner. But of course, the service can as well be configured on an advanced level, which can be done in the Advanced Configuration-section. This optional part of the configuration will be explained in the next chapter.

More information about the advanced options can be found in the corresponding AttachmentExtractor online configuration guide (chapter: The advanced AttachmentExtractor configuration options).

No matter how detailed you have configured your service, please click on the *[Save Service]*-button in the right lower corner in order to proceed.

Click on the *[OK]*-button in the window that appears now.

AttachmentExtractor Service Setup

⚠ The AttachmentExtractor Service Setup can take up to an hour or longer. During the setup your CRM performance decreases. **Please do not close this window or navigate away**
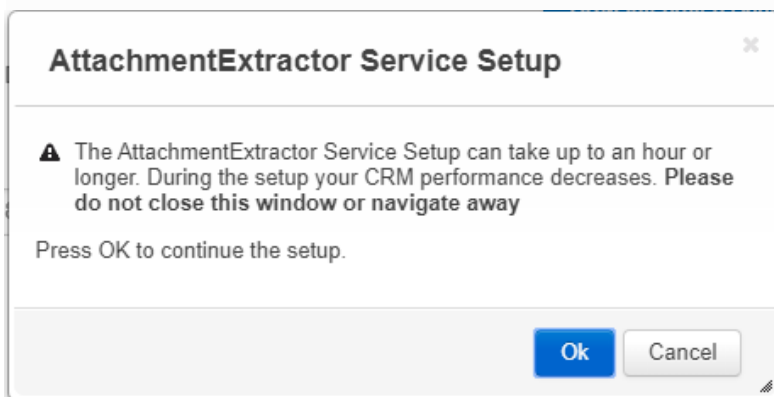
Press OK to continue the setup.

Ok   Cancel

Figure 20: AttachmentExtractor service setup

Please note: Do not close the following window or navigate away as long as the service is saved. Instead, have a break and enjoy some coffee or tea.

Figure 21: Saving the service

As soon as the service configuration is completed, you will be informed about the next steps you can take. Click on the License Status-option in order to check your license status. Please read the instructions carefully and click on the *[OK]*-button in order to proceed.
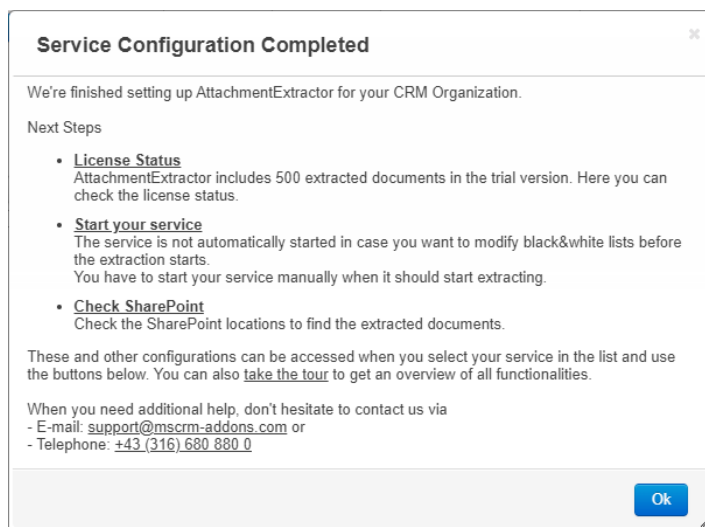

Figure 22: Service configuration completed

Congratulation! You have finished the configuration of your service. You are now redirected to the service configuration overview. Using the buttons at the end of the service overview, you can define which steps you would like to take next. Please find a brief description of the buttons in the AttachmentExtractor online configuration guide (chapter: The Advanced AttachmentExtractor configuration buttons).

Click on *[Play Service]*-button in order to start your service highlighted below.

Figure 23: AE service configuration buttons

List of figures

Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com or contact support@mscrm-addons.com.

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