



## User Manual

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## Introduction

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Attach2Dynamics is a productivity app for Microsoft Dynamics 365 CRM which enables users to use document management systems within Dynamics 365 CRM.

The primary function of Attach2Dynamics is to store files/folders in cloud storages. Currently it supports three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

### **Salient Features:**

- Supports all types of entities
- Multiple files and folders can be dragged and dropped at one time to the configured cloud storage
- Single as well as multiple files or folders can be uploaded
- Users can download documents from configured cloud storage
- Email with file's link or file as attachment can be sent
- Files/Folders can be renamed
- Bulk copy/move Note/Email/Sales Literature Attachments to cloud storage
- Move/Copy Email/Note Attachment/Sales Literature Attachment to Cloud Storage
- Sharable links of files/folders can be created which can also be copied for external use
- Deep search can be done for the entered keyword
- Support for uploading files from home page
- Access control of user actions on Attach2Dynamics
- Delete files from cloud storages
- View files before downloading
- Support for configuring multiple connectors
- Support for single sign-on
- Support for setting default from, to, cc and bcc for email using Email Configuration
- Support for hierarchy structure to store attachments/documents in SharePoint

### **Available for:**

**Versions:** Dynamics 365 8.2 and above, Power Apps & CDS.

**Deployment:** On-Premises with IFD and Online.

**Dropbox:** Dropbox and Dropbox for Business

**SharePoint:** Online

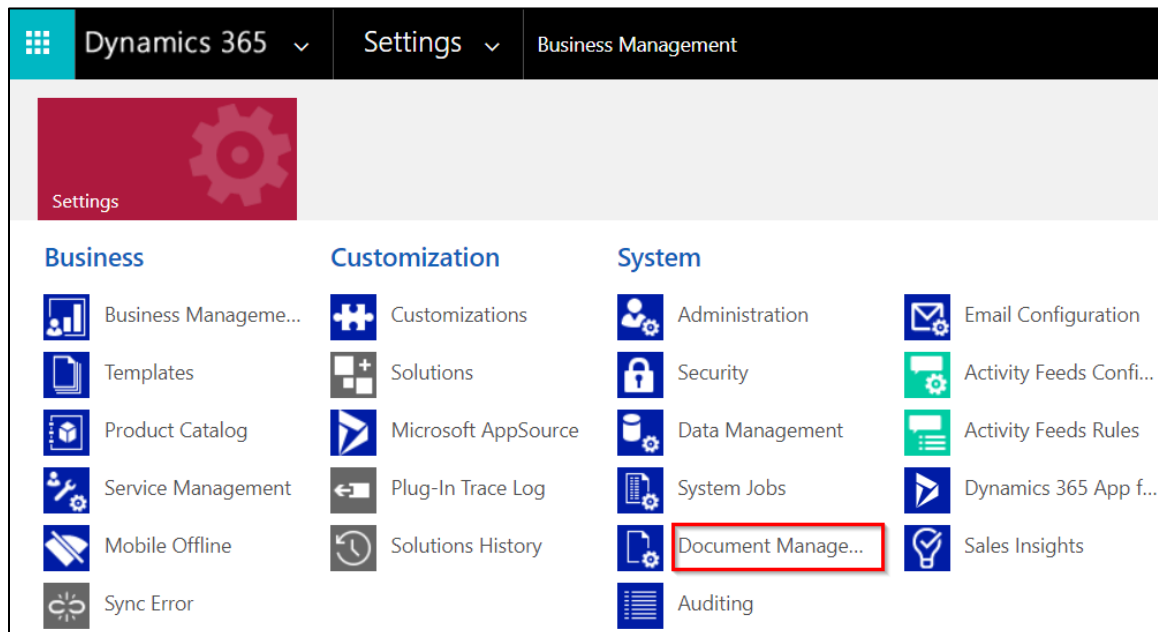
**Azure Blob Storage**

## Prerequisites

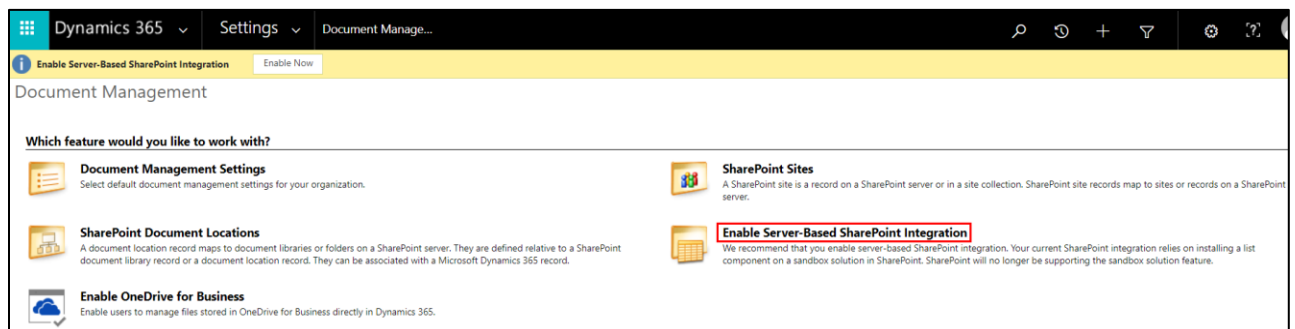
Before you start using Attach2Dynamics solution, it is necessary to enable server-based SharePoint integration for your Dynamics 365 CRM environment.

To do this, follow the steps given below:

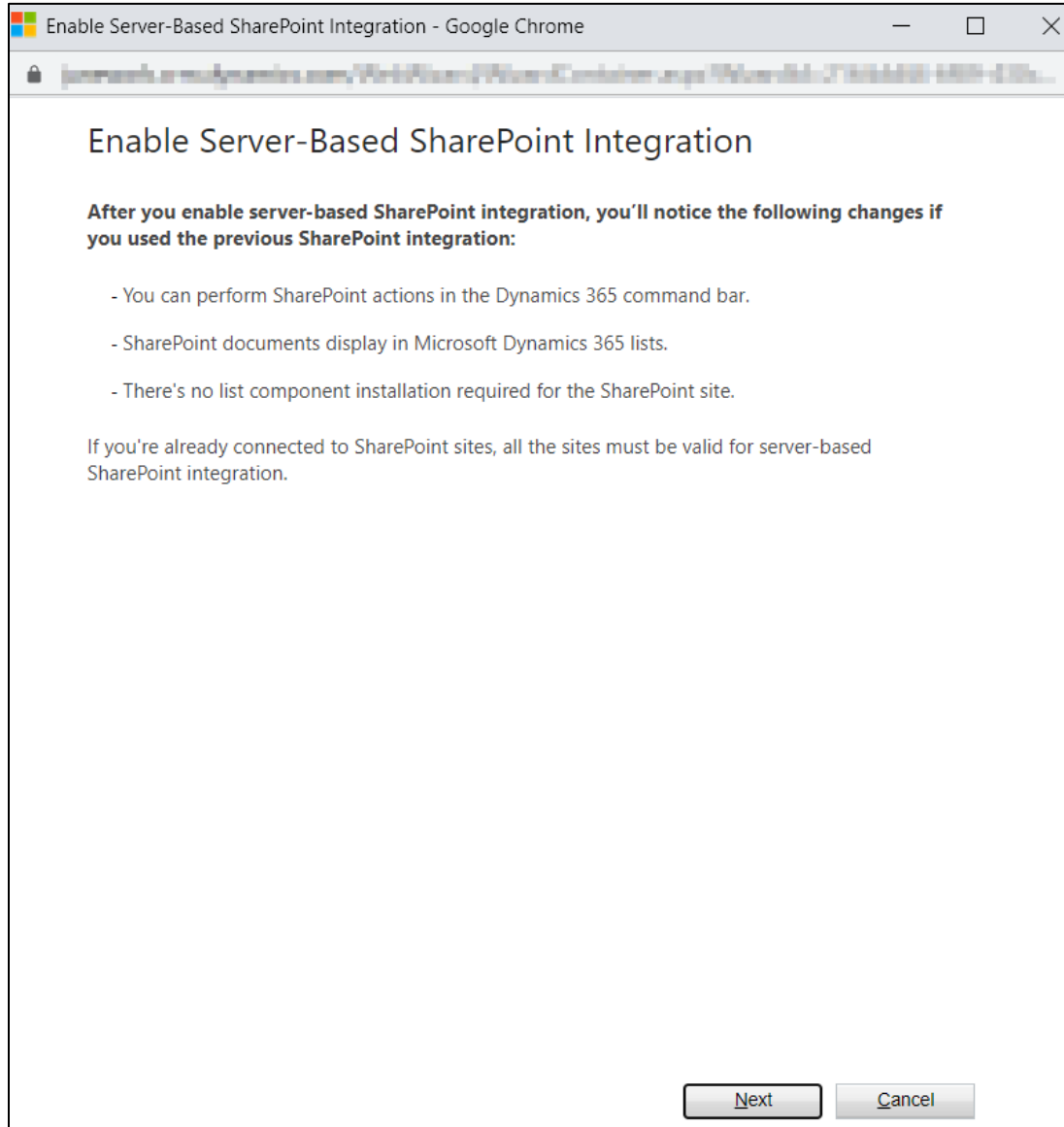
- 1) Navigate to **Advanced Settings → Settings → Document Management**.



- 2) Go to 'Enable Sever-Based Sharepoint Integration'.



3) Click on **Next**.



4) Now, select the **location of SharePoint site** and click on **Next**.

## Enable Server-Based SharePoint Integration

Define Deployment

Prepare Sites

Validate Sites

Server-based SharePoint integration can connect to online or on-premises SharePoint sites. If multiple SharePoint sites are used, all sites must be of the same deployment type.

Select where your SharePoint sites are located:

☒ Online  
☐ On-Premises

All SharePoint Online sites must be in the same tenant as Microsoft Dynamics 365.

Back

Next

Cancel

- 5) Now, enter the **URL of SharePoint site** that you want to use → Click on **Next**.

## Enable Server-Based SharePoint Integration

Define Deployment

**Prepare Sites**

Validate Sites

No additional setup requirements are required for connecting Dynamics 365 Online to SharePoint Online.

Enter the URL of the SharePoint site for use with server-based integration.

URL

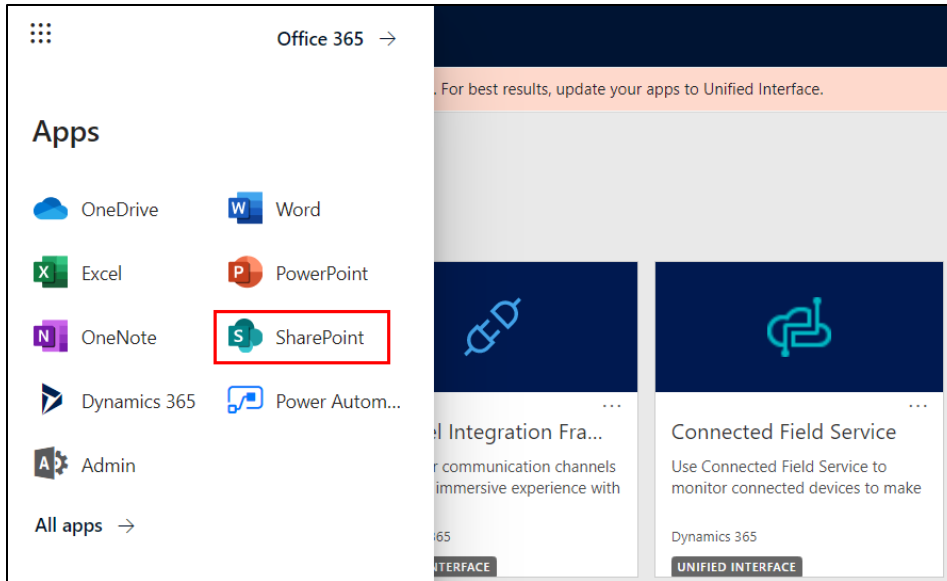
Back

**Next**

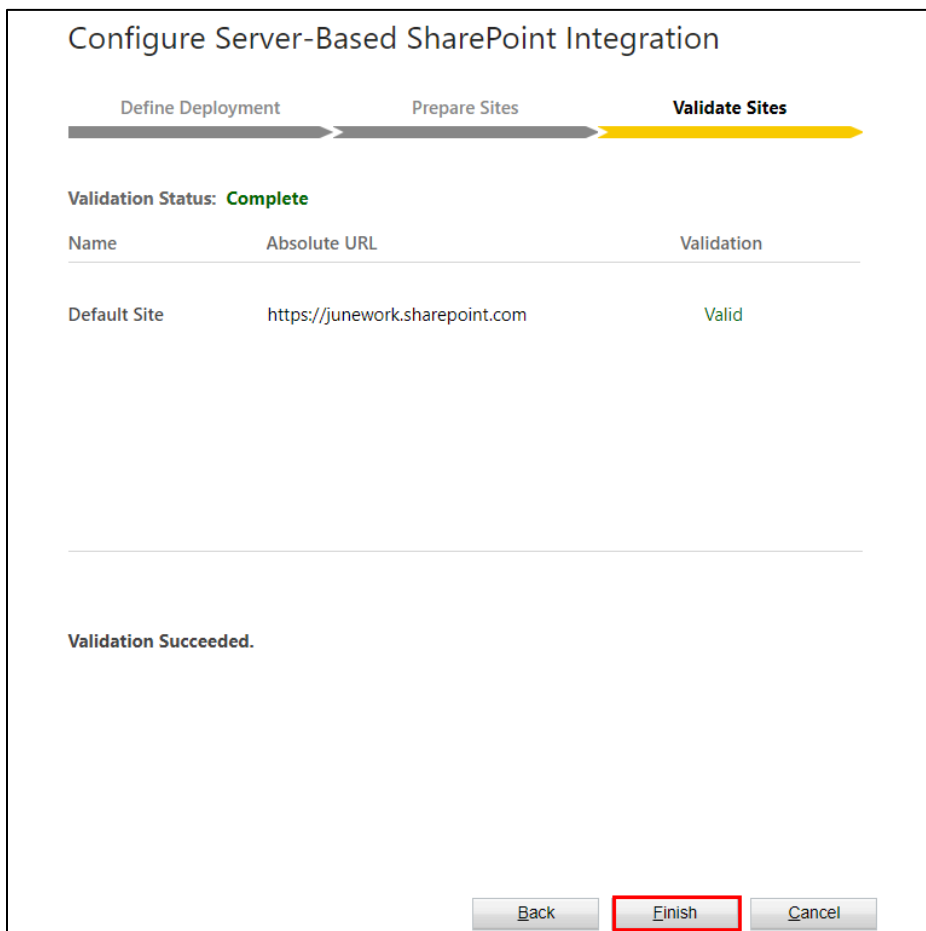
Cancel

6) You can get the URL of SharePoint site from here.

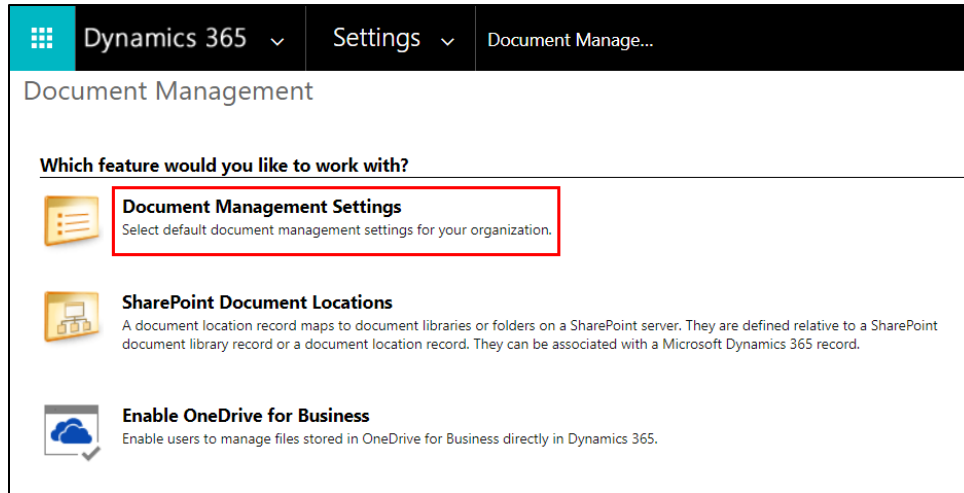




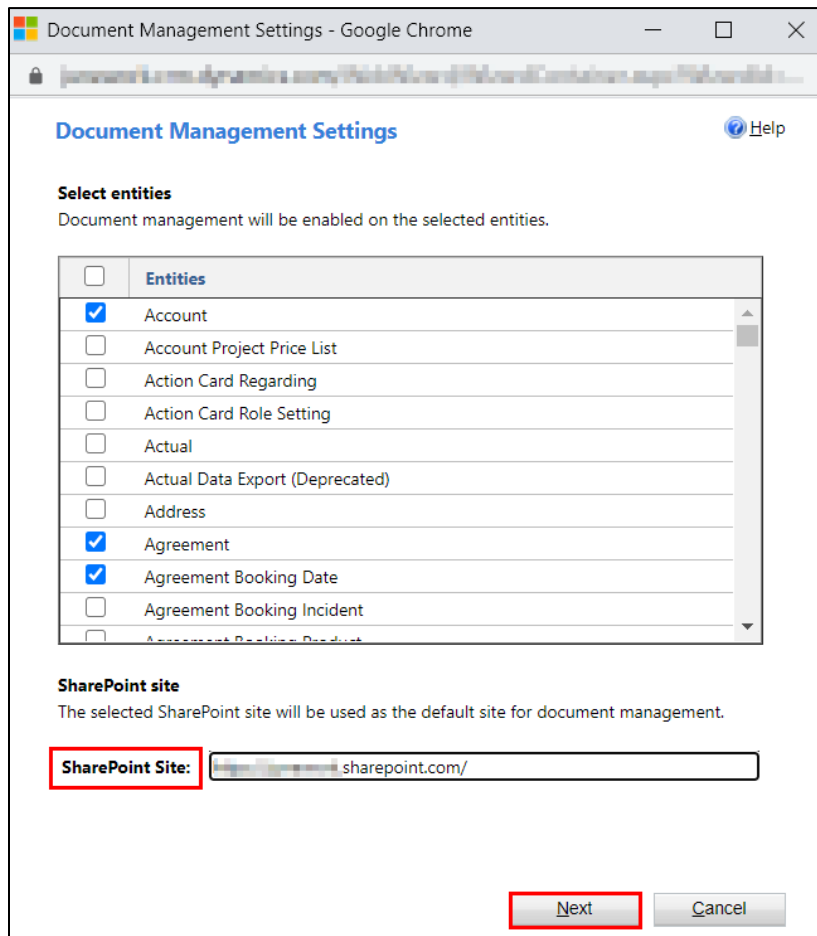
7) Once the site is validated, click on **Finish**.



- 8) The **server-based integration** of SharePoint site is now **enabled** for your Dynamics 365 CRM environment. Now, go back to **Settings → Document Management Settings**.




- 9) Select the **Entities** for which **Document Management** needs to be enabled → Enter the **URL of active SharePoint sites** where you want to store documents → Click on **Next**.



10) Click on **Next**.

### Document Management Settings

Help

 <https://junework.sharepoint.com/> is a valid URL.

**Select folder structure**

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.


☐ **Based on entity**

Back

Next

Cancel

11) Click on **Finish**.

**Document Management Settings**  Help

**Document Library Creation Status**  
To be created: 38  
Newly created: 38  
Failed: 0  
Already existing: 0

**Creation Details**

Entities	Document Library	Status	Failure Reason
Account	https://.../Account	Succeeded	
Agreement	https://.../Agreement	Succeeded	
Agreement B...	https://.../Agreement B...	Succeeded	
Agreement B...	https://.../Agreement B...	Succeeded	
Agreement In...	https://.../Agreement In...	Succeeded	
Agreement In...	https://.../Agreement In...	Succeeded	
Article	https://.../Article	Succeeded	
Booking Time...	https://.../Booking Time...	Succeeded	
Category	https://.../Category	Succeeded	
Expense	https://.../Expense	Succeeded	
Fullfillment D...	https://.../Fullfillment D...	Succeeded	

Back **Finish** Cancel

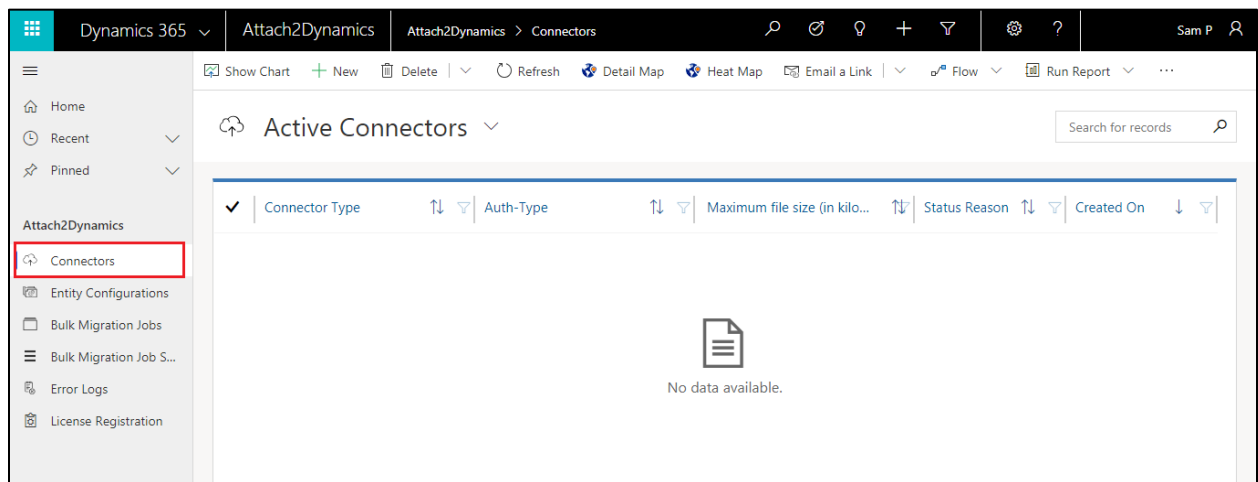
Once this is done, you can easily store Documents/Attachments related to selected Entities in the respective SharePoint site using Attach2Dynamics.

Now, let's move on to the next stage → **Configuring Connectors**.

## Configuring Connectors


In Attach2Dynamics the user can configure multiple connectors for all three cloud storages – SharePoint, Dropbox and Azure Blob Storage. For example: The user can create multiple connectors such as SharePoint\_1, SharePoint\_2, SharePoint\_3, etc. for SharePoint. Similarly, multiple connectors can also be created for Dropbox and Azure Blob Storage. To configure connectors follow the given steps:

Navigate to **Attach2Dynamics** App and then click '**Connector**' Entity. Next, click '**New**' to create a new '**Connector**.'



## Configuring SharePoint Connector

- Name:** Give name to the connector  
**Connector Type:** Choose **SharePoint** from the drop-down.  
**Default Connector:** If required, enable the checkbox to set SharePoint\_1 as default connector.
- SharePoint Site:** This is valid only for SharePoint. It is the location of SharePoint, where files and folders will be stored. Select the valid SharePoint site here. This field is not visible for Dropbox and Azure Blob Storage.



CONNECTOR  
New Connector

General
Credentials
Additional Settings
Entity Configurations

General

Name \*

SharePoint\_1

Connector Type \*

SharePoint

Default Connector

☒

SharePoint Site \*

Look for SharePoint Site

Default Site


https://[redacted].sharepoint.com

Auth-Type \*

Change View

**Note:** The user has to create new SharePoint site for each new connector.

- c) **Auth-Type:** You can select the value '**App**' or '**Credential**' here. This indicates whether Authentication with the connector is done through App or Credential.  
 For **SharePoint** both **App** and **Credential** are supported.  
 For **Dropbox** only **App** is valid.  
 For **Azure Blob Storage** only **Credential** is valid.

 CONNECTOR  
SharePoint\_1

General

Credentials

Additional Settings

Entity Configurations


Related

General

Name \* SharePoint\_1

Connector Type \* SharePoint

Default Connector ☒

SharePoint Site \*  Default Site

Auth-Type \* 

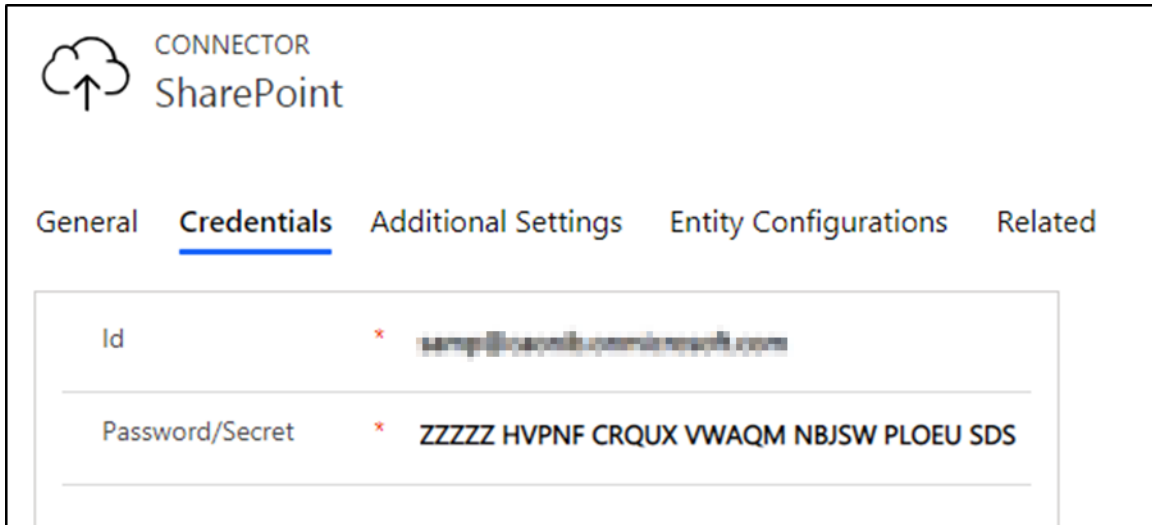
Credential | v

--Select--

Credential

App

- d) **Credentials:** This indicates that Authentication with the connector is done through Credential i.e. id and password. It is mandatory to enter credentials in order to create a new Connector. For authentication through credentials, for any attachment action, the name of user appears who has authenticated the Connector. Enter value for Id and Password/Secret. Next authenticate the credentials.



CONNECTOR  
SharePoint

General **Credentials** Additional Settings Entity Configurations Related

Id \* user@domain.com

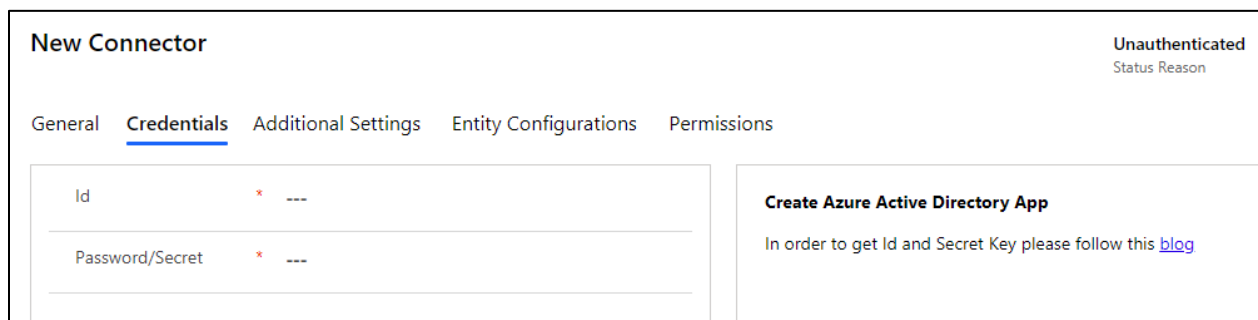
Password/Secret \* ZZZZZ HVPNF CRQUX VWAQM NBSW PLOEU SDS

**Note:**

The Id/Password origin differs for SharePoint, Dropbox and Azure Blob Storage.

- **Id and Password for SharePoint:** In the **Id** field enter your username and in **Password** enter password. It can be your normal Dynamics 365 CRM credentials.
- **Id and Password/Secret for Dropbox:** Enter your 'Developer' **App Key** and **App secret** for the app you are developing.
- **Id and Password for Azure Blob Storage:** Enter your **Storage Account Name** and **Access Key** as password.

- e) **App:** This is to provide authentication with App. In App authentication, if any action is performed then the name of logged-in user appears.



New Connector Unauthenticated Status Reason

General **Credentials** Additional Settings Entity Configurations Permissions

Id \* ---

Password/Secret \* ---

**Create Azure Active Directory App**

In order to get Id and Secret Key please follow this [blog](#)

In order to know how to generate Id and Password/Secret for App [click here](#).

After you have generated the Id and Password enter them in the fields provided.



SharePoint\_1  
Connector

Unauthenticated  
Status Reason

General
CredentiaIs
Additional Settings
Entity Configurations
Permissions
Related

Id
\*
HoY2qe1MKnc+TvAQTNdTButy4KrAyhvnYYNDvP...

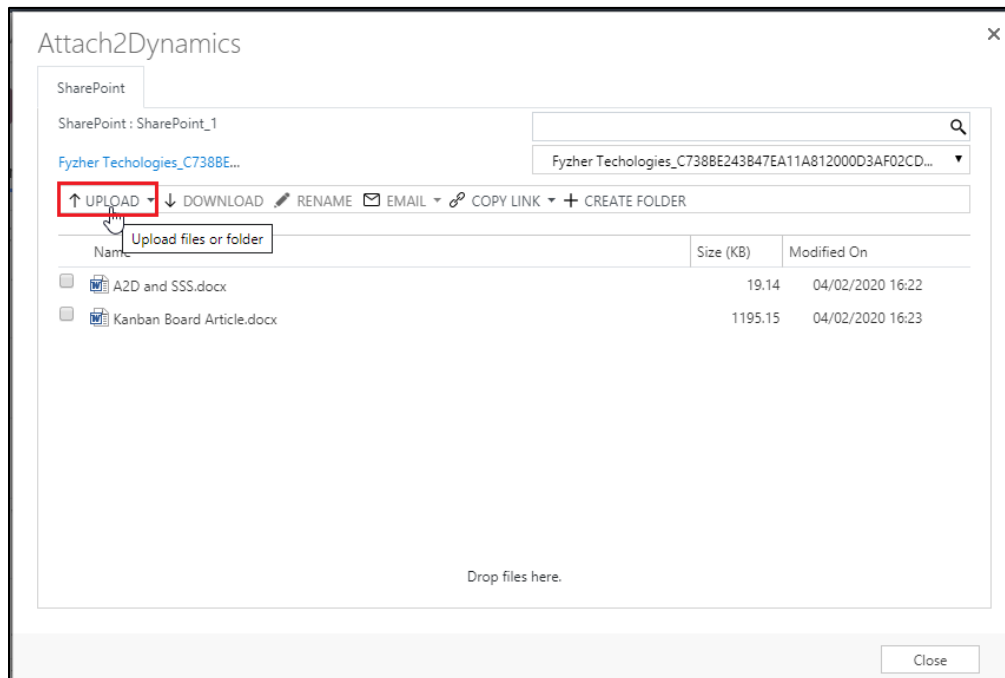
Password/Secret
\*
ZZZZZ BRSXF NXBIM QBNEU UCXSG LEURT UGSKJ

Create Azure Active Directory App

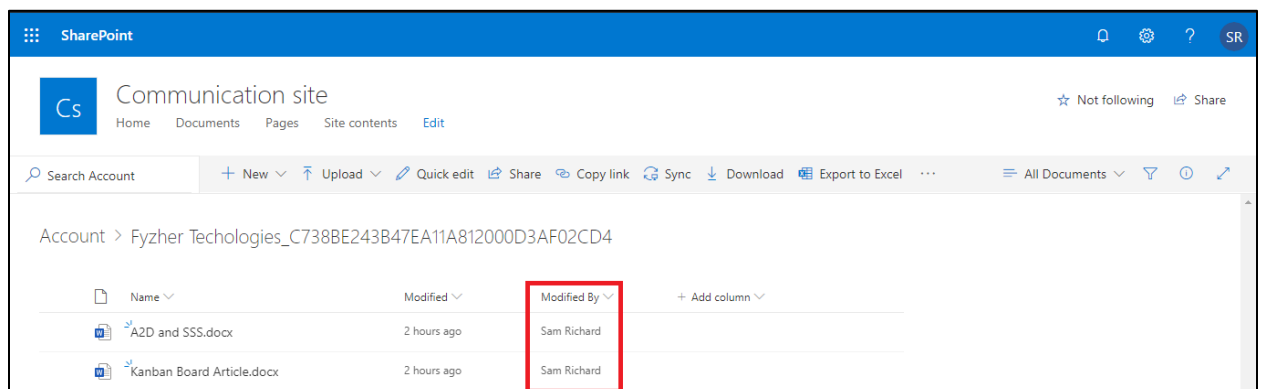
In order to get Id and Secret Key please follow this [blog](#)

Now if any logged in user uploads or performs any attachment action on files in SharePoint, their name will appear for the action.

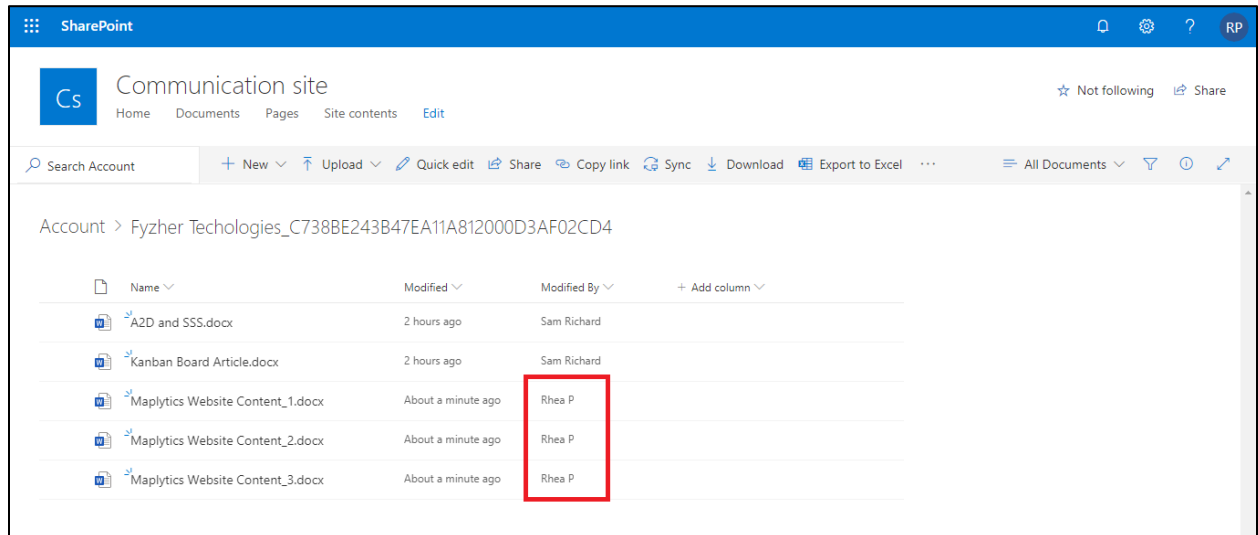
Let's upload few files and see how it works.



Here the name of the admin appears when they are logged in and have uploaded the file.



Now let's take another use-case when a user, who is not an admin uploads a file. Rhea is a Sales Manager who does not have admin rights. Now she uploads the files while being logged in, and her name appears as the user uploading the file.



## Configuring Dropbox Connector

- Name:** Give name to the connector.
- Connector Type:** Choose **Dropbox** from the drop-down.
- Default connector:** If required, enable the checkbox to set Dropbox\_1 as default connector.

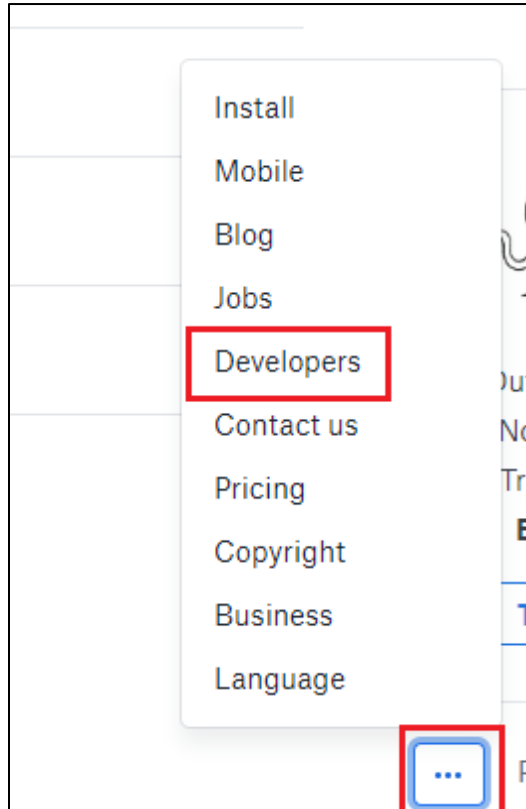
The screenshot shows the 'New Connector' configuration form. The 'General' tab is selected, and the form contains the following fields:

- Name:** \* Dropbox\_1
- Connector Type:** \* Dropbox
- Default Connector:** ☐

**Note:** The user has to create new app for each new dropbox connector.

Now to get the **Id/Secret for Dropbox** follow the below steps:

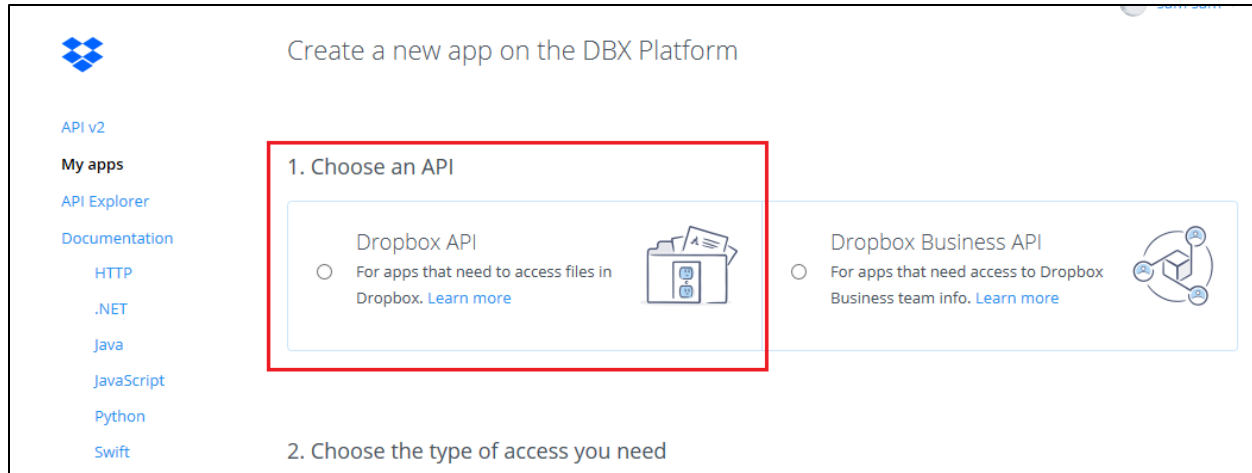
Go to [www.dropbox.com](https://www.dropbox.com) and enter your login credentials for Dropbox. After you are logged in you will land on the '**Home Page.**' At the bottom right corner of the screen click on the 'Points of Ellipsis (the three dots)' and then select **Developers** from the view.



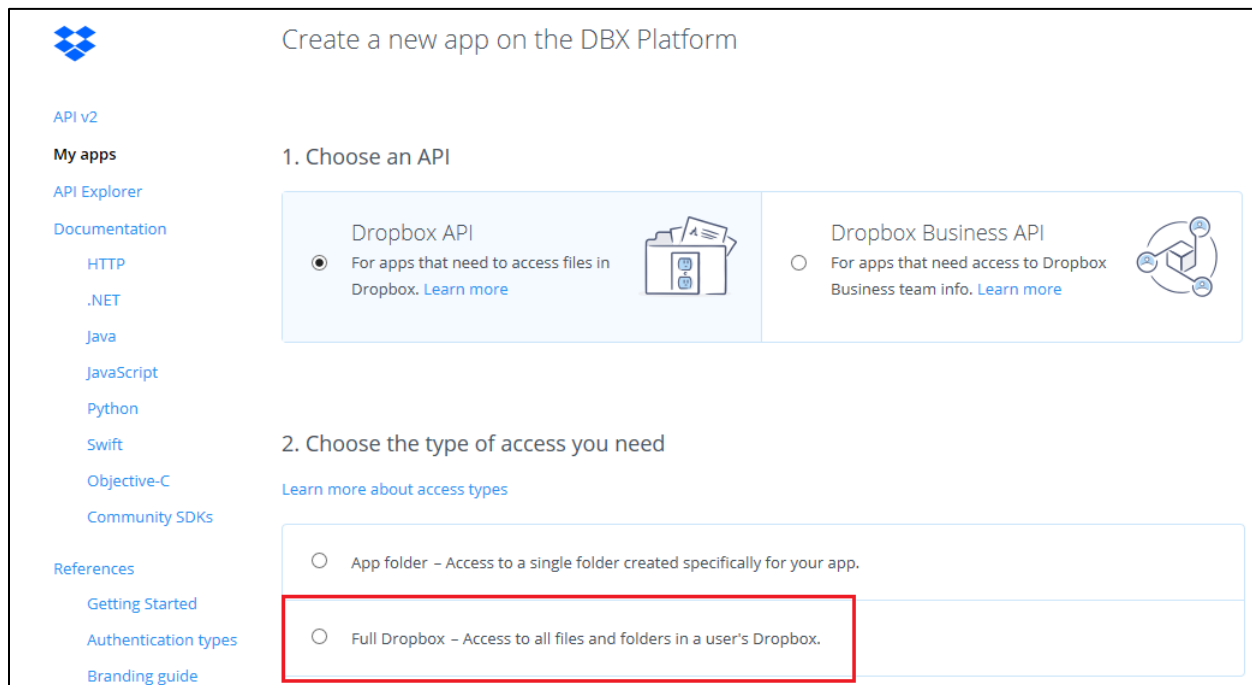
Now, click on **My apps** on the list in left.

If you have already created an app click on the 'app icon'. You will be redirected to the App's home page. Scroll down and you will find **App Key** and **App Secret**.

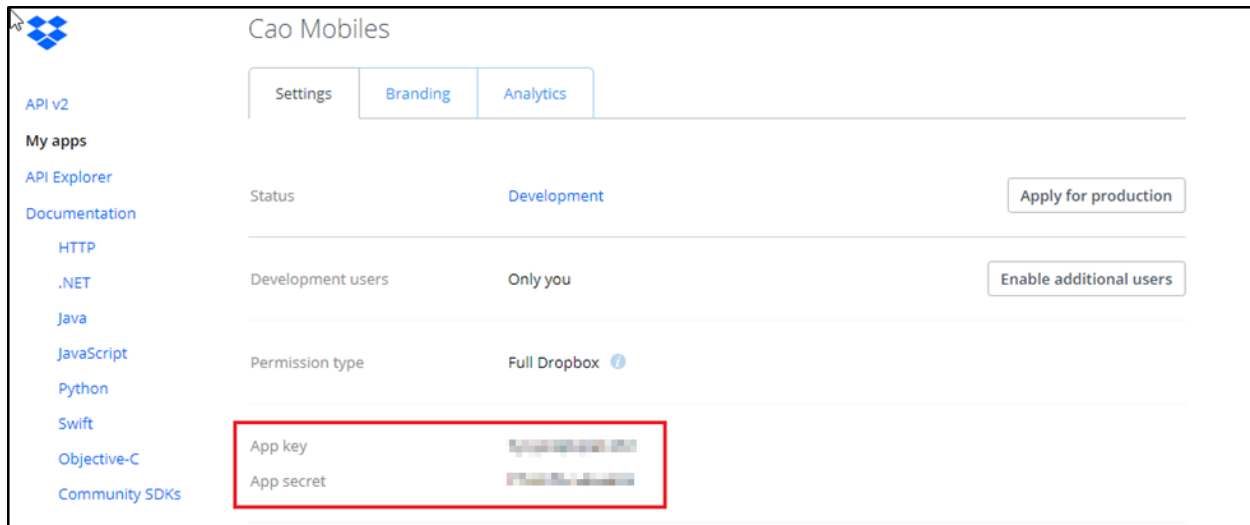
If you don't have an app Click on **Create App**. From **Choose an API** Click on **Dropbox API** button.



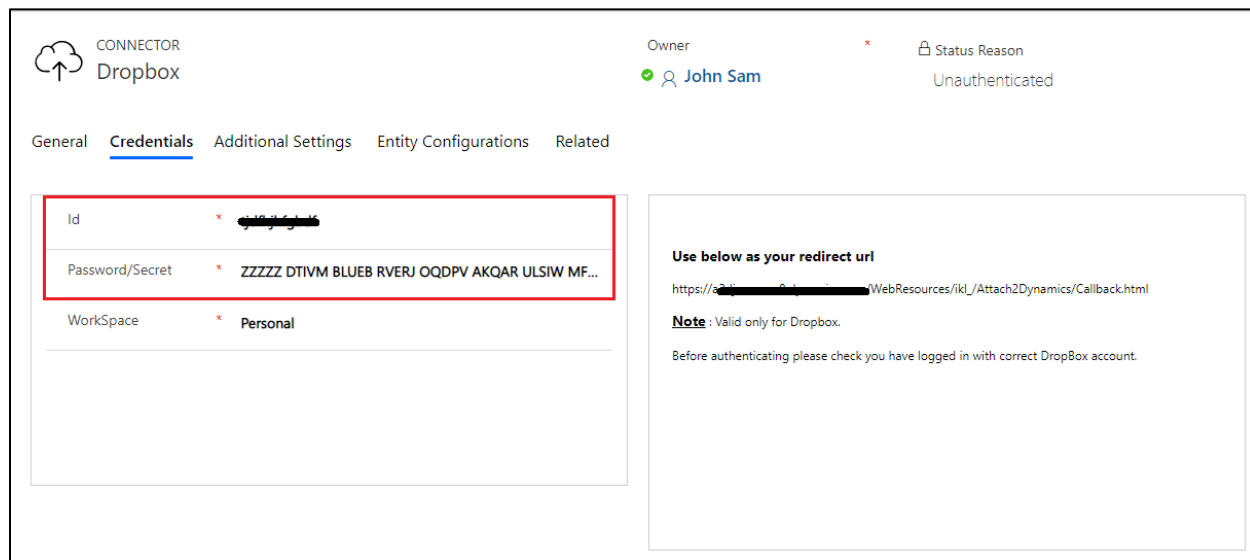
In **Choose the type of access you need** Select **Full Dropbox**.



**Name your app** – Here enter the **name** of the app you are going to create. Check '**agree to terms**' and click on **Create App** button. After clicking on **Create App** button you will be redirected to home page of the created app. Select your **App Key** and **App Secret** from here.



Enter these credentials in the **'New Connector' Credentials**. After you enter the Password/Secret (Dropbox App **Secret**) it immediately gets encrypted as shown below.



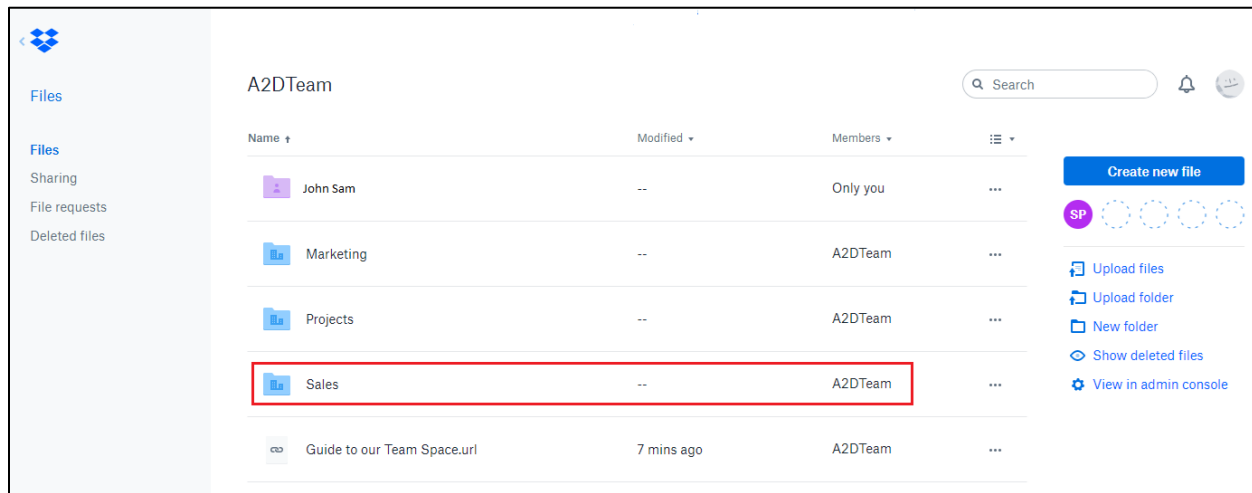
The user can give access of this workspace created in Dropbox cloud storage to their team members if necessary. Go to **WorkSpace** field and select **Team**. After selecting Team another field will appear termed **Team Folder**. Give name to the team folder.

## Attach2Dynamics – User Manual

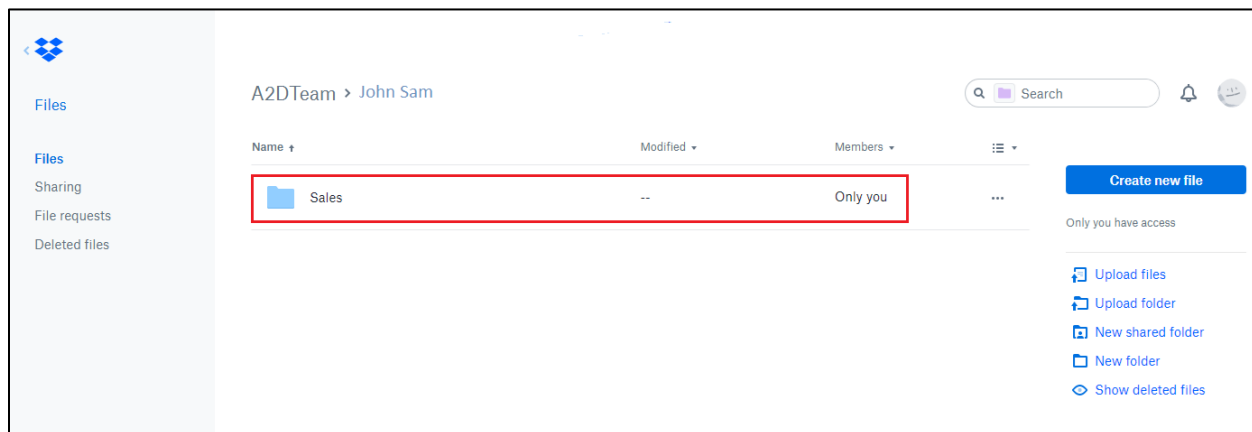
The screenshot shows the 'Connector' configuration page for 'Dropbox'. The 'Credentials' tab is selected. The 'Id' field is redacted. The 'Password/Secret' field contains 'ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ ...'. The 'WorkSpace' field is set to 'Team' and the 'Team Folder' field is set to 'Sales', both highlighted with a red box. On the right, the 'Owner' is 'John Sam' and the 'Status Reason' is 'Unauthenticated'. A note indicates the redirect URL should be 'https://[redacted]/WebResources/ikd\_/Attach2Dynamics/Callback.html'.

Field	Value
Id	[Redacted]
Password/Secret	ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ ...
WorkSpace	Team
Team Folder	Sales

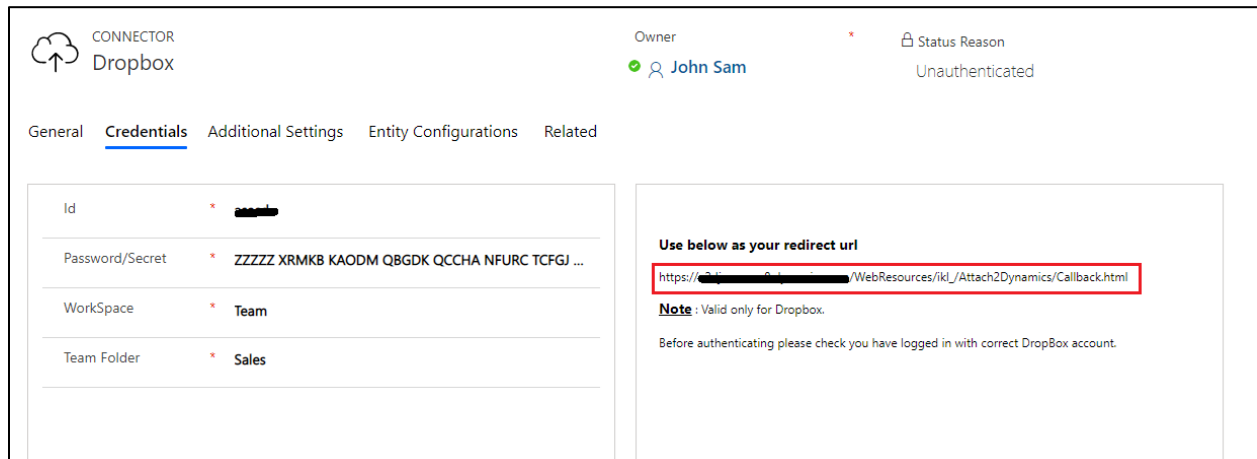
This folder will appear outside App folder.



If the WorkSpace field is set as **Personal** then the files and folders will be stored inside App folder.



Next the **Redirect URL** in connector page needs to be added in the Dropbox App as in below Screenshot. This URL is mentioned on the Connector entity.



CONNECTOR  
Dropbox

Owner  
John Sam

Status Reason  
Unauthenticated

General **Credentials** Additional Settings Entity Configurations Related

Id \* [redacted]

Password/Secret \* ZZZZZ XRMKB KAODM QBGDK QCCHA NFURC TCFGJ ...

WorkSpace \* Team

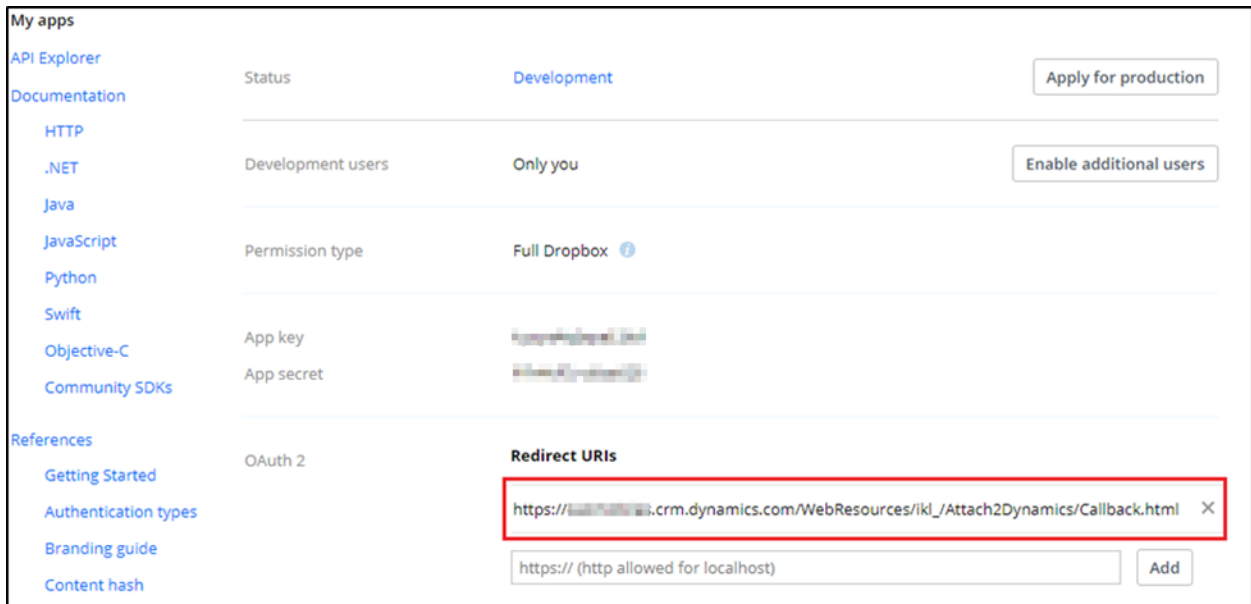
Team Folder \* Sales

Use below as your redirect url

[https://\[redacted\].crm.dynamics.com/WebResources/ikl\\_/Attach2Dynamics/Callback.html](https://[redacted].crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html)

**Note:** Valid only for Dropbox.  
Before authenticating please check you have logged in with correct DropBox account.

Copy this URL and paste it in the App on Dropbox as shown below:



My apps

API Explorer

Documentation

HTTP

.NET

Java

JavaScript

Python

Swift

Objective-C

Community SDKs

References

Getting Started

Authentication types

Branding guide

Content hash

Status

Development

Apply for production

Development users

Only you

Enable additional users

Permission type

Full Dropbox

App key

App secret

OAuth 2

Redirect URIs

[https://\[redacted\].crm.dynamics.com/WebResources/ikl\\_/Attach2Dynamics/Callback.html](https://[redacted].crm.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html)

[https:// \(http allowed for localhost\)](https:// (http allowed for localhost))

Add

After entering the link click on **“Add.”** This step must not be skipped.

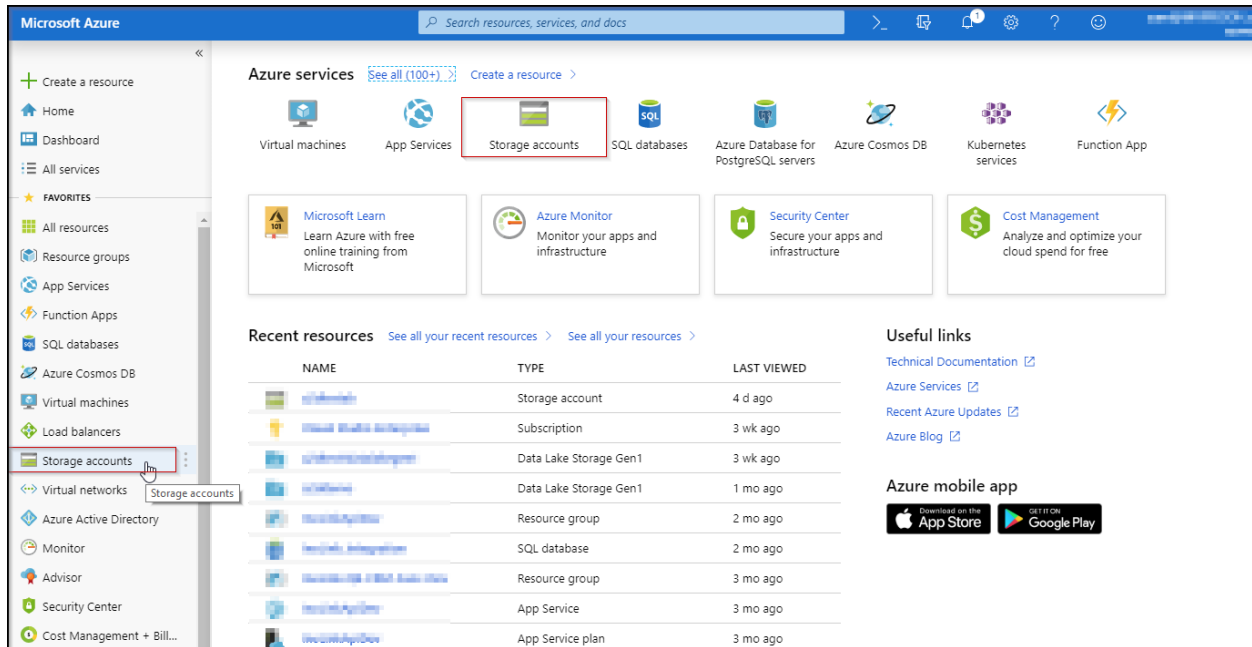
## Configuring Azure Blob Storage Connector

To get **Storage Account Name & Access Key** for **Azure Blob Storage**, follow the below steps:

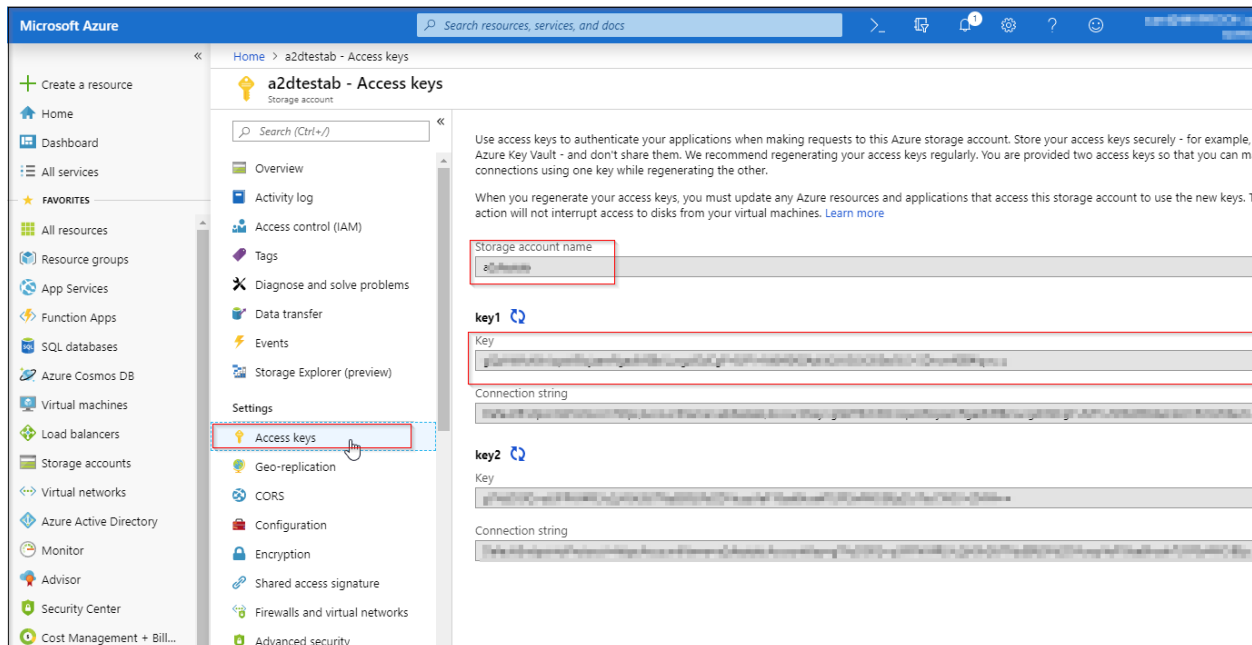
Open URL: <https://portal.azure.com/> and enter your Microsoft Azure Credentials

Next go to storage account section.

## Attach2Dynamics – User Manual




Select your storage account and open it, look for Access Keys (as shown in the below screenshot), get the Storage account name and Key from it.





Now Create a new **Connector**.

- a) **Name:** Give name to the connector.
- b) **Connector Type:** Choose **Azure Blob Storage** from the drop-down.
- c) **Default connector:** If required, enable the checkbox to set Azure\_1 as default connector.



CONNECTOR  
New Connector

General
Credentials
Additional Settings
Entity Configurations

General

Name
\*
Azure\_1

Connector Type
\*
Azure Blob Storage

Default Connector
☐

**Note:** *The user can add other storage accounts from Azure Blob Storage.*

Now add the **Storage Account Name** and **Access Key**. Next authenticate the credentials. Your connector is now ready to function.

## Additional Settings:

- a) **Set file size limit for attachments** – Maximum file upload size can be 50 MB.
- b) **Set blocked file extensions for attachment** – This contains the list of file extensions (semicolon separated) which the Connector won't be able to upload on Cloud. You can enter it as per your preference.

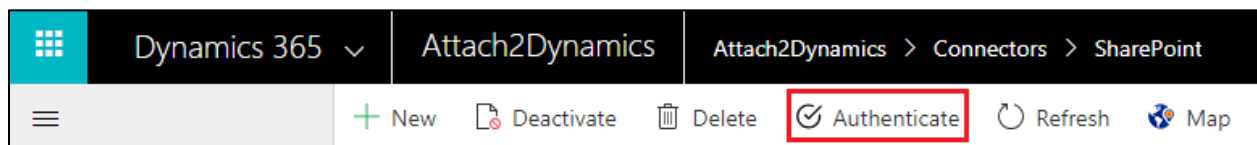
e.g., txt;docx

Click on save and the '**New Connector**' is created with a form notification as "**Click on Authenticate button to authenticate the connector**".

## Authenticate

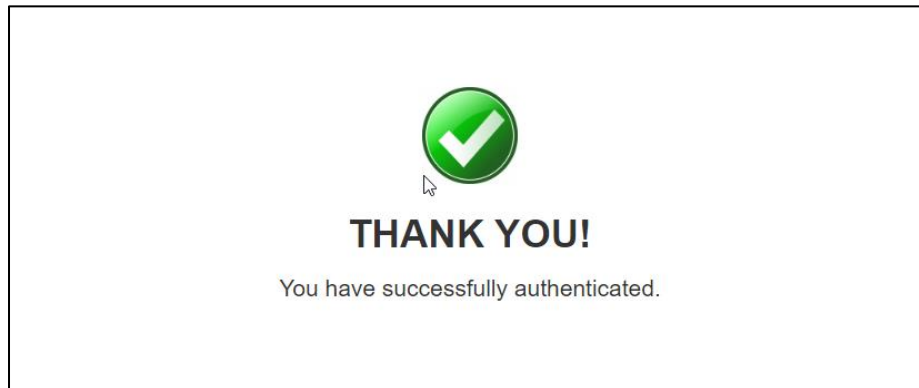
After the Connector record is created the connector credentials need to be authenticated.

To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with System Administration or Attach2Dynamics Administrator role.

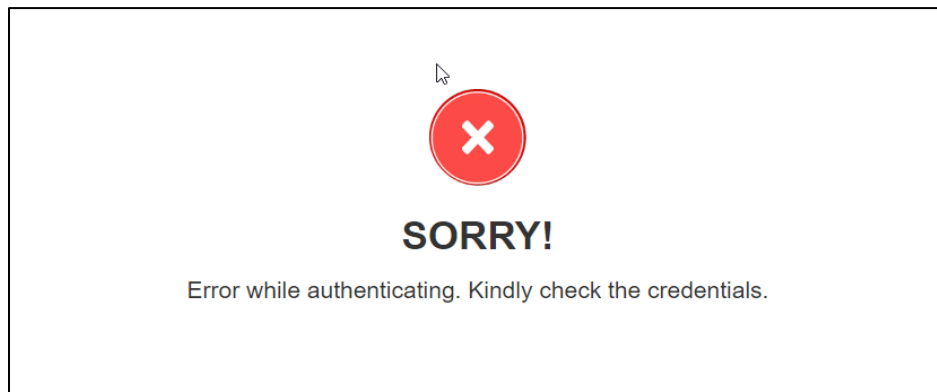


After the Connector is Authenticated, create Entity Configuration record.

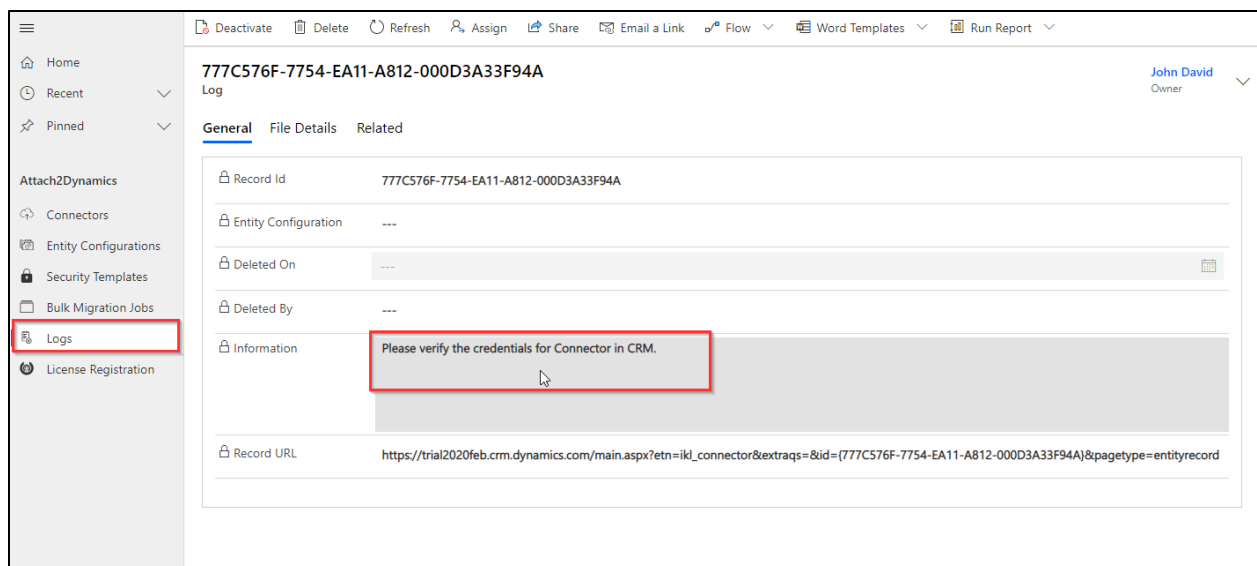
If Connector is authenticated successfully, the following success pop up will appear:



If Connector authentication fails, then the following error pop up will appear:

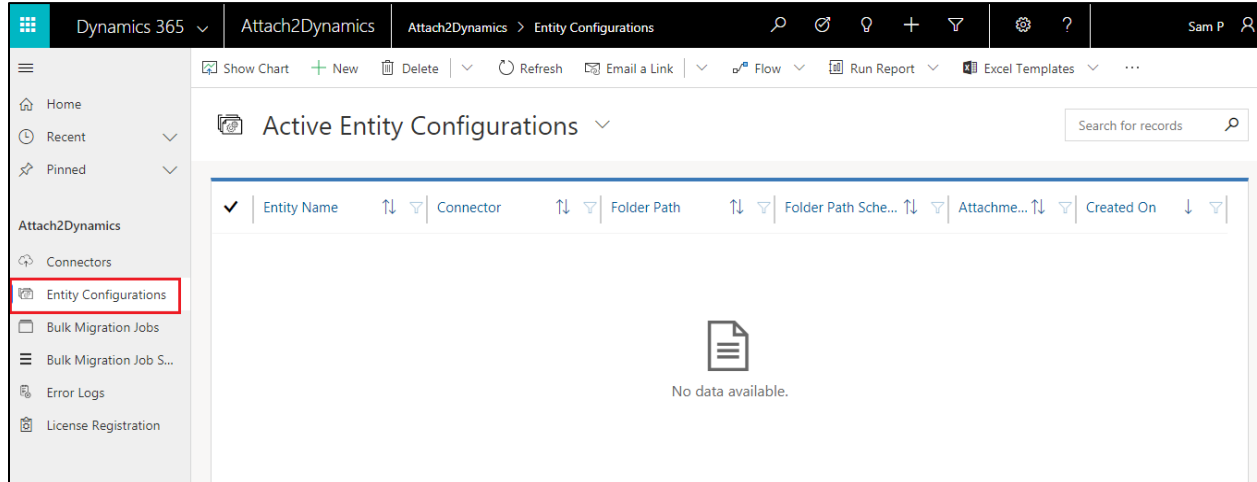


And to see the what exactly the error is, navigate to 'Logs Entity', check the error and retry the authentication.

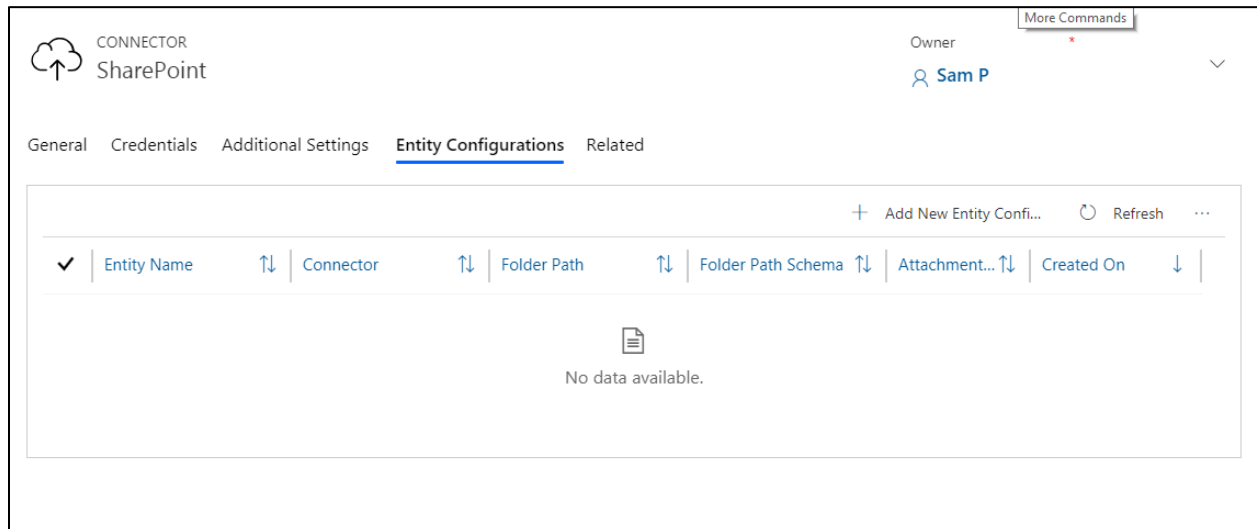


## Entity Configuration

For 'Entity Configuration Entity' go to **Attach2Dynamics → Entity Configuration**.



**Entity Configurations** can be created from the Connector form too, just click on Entity Configuration Tab on Connector page.



The screenshot shows the 'account - Dropbox\_1' entity configuration page. The top toolbar contains icons for New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and Run Report. The main content area has three tabs: General, Email Configuration, and Related. The General tab is selected, displaying the following configuration details:

Connector	Dropbox_1
Entity Name	Account
Folder Path Schema	traversedpath
Folder Path	/account
Attachment Action	Move
Override Files	<input checked="" type="checkbox"/>

## General:

- a) **Connector:** Select the Connector (SharePoint, Dropbox or Azure Blob Storage) for which you want to configure the Entity.
- b) **Entity Name:** Mention the Entity for which you are configuring.
- c) **Folder Path Schema:** This field is **visible** only for Dropbox and Azure Blob Storage. In this select the field in which the folder path schema will be stored. This can be any field attribute of the Entity selected.  
eg: name  
Data already present in the selected field(name) gets overridden.
- d) **Folder Path:** This field is visible only for Dropbox and Azure Blob Storage. This is auto populated depending upon the entity selected.
- e) **Attachment Action:** You can either **Copy** or **Move** the attachment.
  - i) **Copy:** If you Select **Copy**, the attachment will be also be copied to SharePoint, Dropbox or Azure Blob Storage and its cloud storage path will be copied in Dynamics CRM next to attachment's location.
  - ii) **Move:** If you Select **Move**, the attachment will be moved/migrated to Cloud Storage and its cloud storage path will be left behind in Dynamics CRM next to attachment's location.

**Attachment Actions can be enabled only for one entity with one Connector.**
- f) **Override files:** If checked, means trying to upload file with same name will be overridden. If unchecked, then a new file with number appended is created and uploaded in the cloud storage.

**Email Configuration:**

The next is Email Configuration tab. With this tab you can send the documents as attachments/links through email to the required recipients. You can set this tab as shown in below screenshot.

The screenshot shows the 'Email Configuration' tab for an entity named 'account - Dropbox\_1'. The interface includes three tabs: 'General', 'Email Configuration' (which is active), and 'Related'. Below the tabs, there are four rows of configuration options: 'From', 'To', 'Cc', and 'Bcc'. Each row has a dropdown menu and a corresponding text field. The 'From' dropdown is set to 'Me'. The 'To' dropdown is set to 'Users', and the text field contains 'Chris Matt'. The 'Cc' dropdown is set to 'Dynamic', and the text field contains 'ModifiedBy'. The 'Bcc' dropdown is set to 'Manager', and the text field contains 'OwningUser.Manager'.

- From – The sender i.e. the person who sends the email
- To – Recipient i.e. the person to whom the email is to be sent
- CC – Carbon Copy i.e. the person to whom a copy of the email information is to be sent
- BCC – Blind Carbon Copy i.e. the person you have kept in the loop and do not want the other recipients to see that particular contact
- Types of Email addresses to select
  - a. Users – If you select Users then all the CRM users present in the environment will be enlisted while selecting the data.
  - b. Queue – If you select Queue then all the queues present in the environment will be enlisted while selecting the data.
  - c. Team – If you select Team then all the teams created in the environment will be enlisted while selecting the data.
  - d. Dynamics – E.g. If you have selected quote as an entity then all the lookup fields on quote which are allowed to send email will be enlisted while selecting the data.
  - e. Manager – E.g. If you have selected quote as an entity then, all the system-user lookup fields on quote entity will be enlisted while selecting the data, and recipient would be the manager of the selected data.

**Note:**

- 1) To use Attach2Dynamics functionalities on an **Entity** it is mandatory that you create an **Entity Configuration** record for the same. Without Entity Configuration record Attach2Dynamics button will not be displayed for the respective Entity.
- 2) Connector and Entity Configuration are editable if user has System Administrator or Attach2Dynamics Administrator role.
- 3) Attach2Dynamics User can only read the Connector and Entity Configuration.

- 4) Also, in order to configure an entity with SharePoint connector we need to enable SharePoint for that entity.
- 5) **Product, Sales Literature & Competitor** entity can be configured only in **Classic** User Interface.

## Configuration for Moving/Copying Email Attachments

In order to enable Email Attachment movement whether Copy or Move, we need to define the Entity Configuration.



email - Dropbox\_1

Entity Configuration

General


Email Configuration

Related

Connector	*	 Dropbox_1
Entity Name	*	Email
 Folder Path	*	/email attachments
Attachment Action		---
Override Files		<input type="checkbox"/>

Based on settings the Email Attachments would be Moved/Copied from Dynamics 365 CRM.


If **Regarding field** is **not set** for email then the email attachments will be moved/copied in a common folder named Email Attachment as shown below:




Email: Attach2Dynamics Form ▼  
**Sales Files CRM:0001099**  
🔒 Read only

Priority  
Normal

Email   Related

From  
 John Sam

To  
 Canvas Pvt LTD


Cc  
---

Bcc  
---

Subject  
Sales Files CRM:0001099

Regarding  
---



Duration  
30 minutes






Files  
My files  
Sharing  
File requests  
Deleted files

AttachManage > Sales

Search

Name ↑	Modified ↓	Members ↓	
 account	--	Only you	...
 contact	--	Only you	...
 Email Attachments	--	Only you	...




Create new file  
Share folder

Only you have access.

Upload files  
Upload folder  
New folder  
Show deleted files


If **Regarding field** is **set** then the Email Attachments would be Moved/Copied to the **Regarding Folder** in cloud storage as shown below:




 Email: Attach2Dynamics Form   
**Sales Files CRM:0001099**  
 Read only

Priority  
Normal

Email Related


From  John Sam

To  Canvas Pvt LTD

Cc ---

Bcc ---

Subject Sales Files CRM:0001099

Regarding  Canvas Pvt Ltd

Duration 30 minutes

 < Canvas Ptv-Ltd\_E4D7107BD5A3E911A981000D3AF03F9B >  Search  

Files

My files  
Sharing  
File requests  
Deleted files

Name	Modified	Members	
 Document.pdf	4 mins ago	Only you	...

Create new file

Share folder

Only you have access

 Upload files  
 Upload folder  
 New folder  
 Show deleted files

## Configuration for Moving/Copying Sales Literature Attachments

In order to define the Sales Literature Attachment movement, we need to create an Entity Configuration for Sales Literature. Here we define the action that needs to be performed on the Sales Literature Attachment i.e., Move/Copy, and once defined thereafter any Sales Literature Attachment if created would either be Moved/Copied over to the configured Cloud Storage.

ENTITY CONFIGURATION : INFORMATION

salesliterature - Dropbox

General

Connector \*

Dropbox

Entity Name \*

salesliterature

Folder Path Schema \*

new\_folderpath

Folder Path \*

/salesliterature

Attachment Action

Move

Override Files

☐

## Configuration for Moving/Copying Notes Attachments.

Unlike Email Attachments and Sales Literature Attachments, we don't have to create a different Entity Configuration record for Moving/Copying Notes Attachment, while creating an Entity Configuration for any entities (except Email and Sales Literature), if the Attachment Action is defined, then the corresponding Entity's Notes Attachment would be Moved or Copied based on the Attachment Action selected.

## Configuring Hierarchy Structure

Attachments/Documents of Dynamics 365 CRM records can be stored in SharePoint sites on the basis of hierarchy.

To achieve this, follow the steps given below:

- 1) Go to Advanced Settings → Settings → Document Management Settings.

Dynamics 365

Settings

Document Manage...

Document Management

Which feature would you like to work with?

Document Management Settings

Select default document management settings for your organization.

SharePoint Document Locations

A document location record maps to document libraries or folders on a SharePoint server. They are defined relative to a SharePoint document library record or a document location record. They can be associated with a Microsoft Dynamics 365 record.

Enable OneDrive for Business

Enable users to manage files stored in OneDrive for Business directly in Dynamics 365.

SharePoint Sites

A SharePoint site is a record on a SharePoint server.

OneNote Integration

Set up OneNote Integration for selected entities record. Users will be able to easily access a note 365 mobile apps.

Manage Document Suggestions

Set up intelligent document suggestions.

- 2) Select Entities → Enter the URL of respective SharePoint site.

**Document Management Settings** [Help](#)

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

<input type="checkbox"/>	Entities
<input type="checkbox"/>	Accounting Company
<input type="checkbox"/>	Action Card Regarding
<input type="checkbox"/>	Action Card Role Setting
<input type="checkbox"/>	Address
<input type="checkbox"/>	AI Builder Dataset File
<input type="checkbox"/>	Alert
<input type="checkbox"/>	Alerts4Dynamics Log
<input type="checkbox"/>	ApiSettings
<input type="checkbox"/>	Applied Transactions
<input type="checkbox"/>	Appointment

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

**SharePoint Site:**

[Next](#) [Cancel](#)

- 3) Enable the Checkbox 'Based on Entity' → Select either of the entities, Account or Contact → Complete the process by clicking on 'Next' and 'Finish'.

Document Management Settings - Google Chrome

inogicdemo.crm8.dynamics.com/WebWizard/WizardContainer.aspx?Wizar...

## Document Management Settings [Help](#)

<https://inogicdemo.sharepoint.com/sites/teamhierarchy> is a valid URL.

### Select folder structure

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.

☒ **Based on entity**

Contact ▼

Account

Contact

[Back](#) [Next](#) [Cancel](#)

4) Next, go to Entity Configurations → Click on New.

Save
 Save & Close
 New
 Flow

### New Entity Configuration

**General**
Email Configuration

Connector	*	---
Entity Name	*	--Select--
Attachment Action		---
Override Files		<input type="checkbox"/>

Error Logs

5) Populate the following fields → Click on Save.

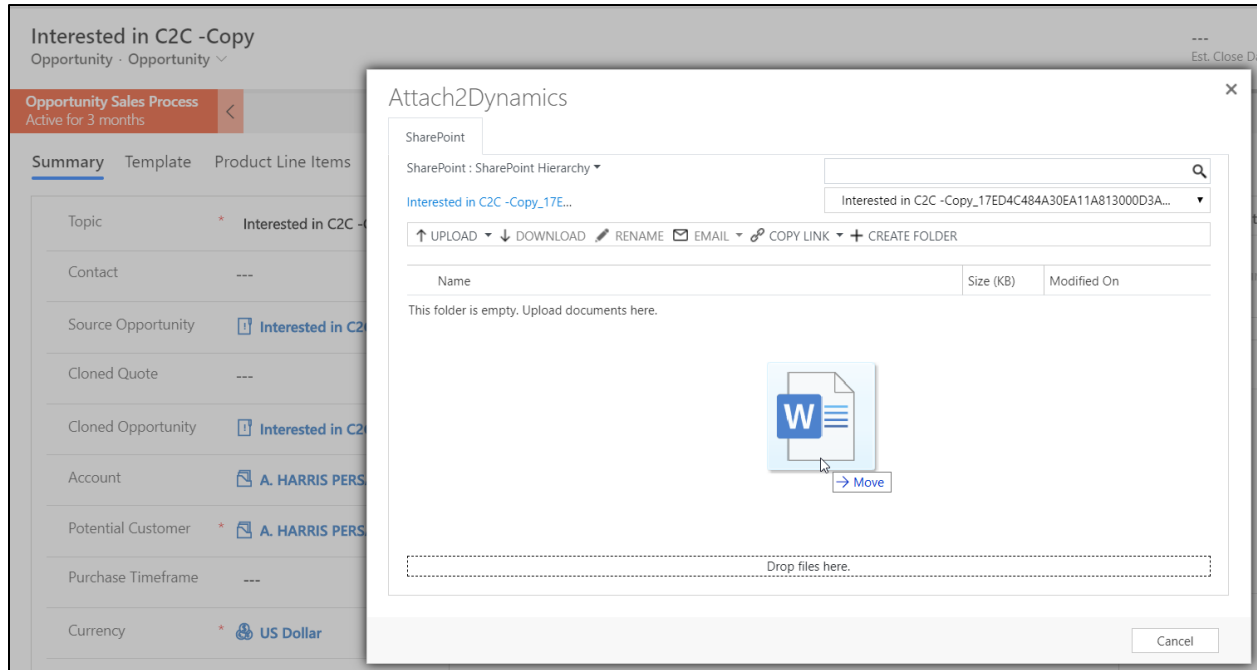
- Connector:** Select the connector for the particular SharePoint site
- Entity Name:** Select the entity.
- Attachment Action:** Select either move or copy
- Override Files:** Enable the checkbox if required
- Folder Structure Fields:** This field appears on selection of the entity for which hierarchy structure is configured. In this field, customized entity with Account or Contact lookups will be populated. Select either of the entities.

**opportunity - SharePoint Hierarchy**  
 Entity Configuration

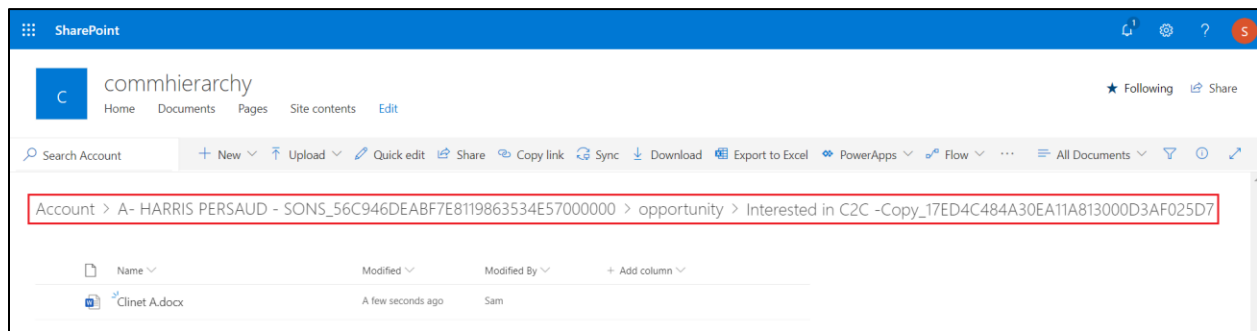
**General**
Email Configuration
Related

Connector	*	<a href="#">SharePoint Hierarchy</a>
Entity Name	*	<b>Opportunity</b>
Attachment Action		<b>Move</b>
Override Files		<input type="checkbox"/>
Folder Structure Field *		<input type="text" value="Account"/>

- 6) Now go to Opportunity → Select an opportunity → Click on Attach2Dynamics button → Drag and Drop required file.



- 7) Next go to SharePoint site. Here, the respective file will be stored in the following manner:  
**Account > Account Name\_guid > Opportunity > Opportunity Name\_guid.**



## Security Templates

**Security Templates** Entity enables to control access given to the users over various features of Attach2Dynamics such as Upload, Download, Email, Copy Link, Rename etc. in all three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

**Note:** If two records are created for the same user then the user will get highest access permission from either of the records.

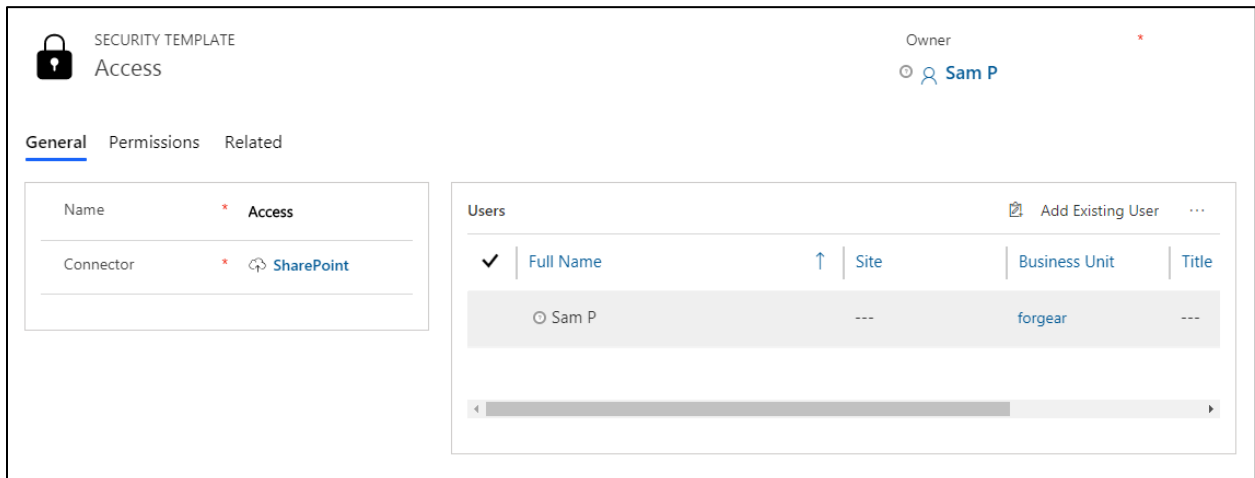
## 1. General

This section is where you define the name of record and the connector to a particular cloud storage.



The screenshot shows the 'New Security Template' form. At the top left is a lock icon and the text 'SECURITY TEMPLATE' and 'New Security Template'. At the top right, it says 'Owner' followed by a user icon and 'Sam P'. Below this are two tabs: 'General' (selected) and 'Permissions'. The 'General' tab contains two input fields: 'Name' and 'Connector', both with a red asterisk and a dropdown arrow. To the right of these fields is a large empty text area.


Populate the given fields and save the changes. After the changes are saved you need to select users to whom this security template should apply.



The screenshot shows the 'Access' tab of the security template configuration. At the top left is a lock icon and the text 'SECURITY TEMPLATE' and 'Access'. At the top right, it says 'Owner' followed by a user icon and 'Sam P'. Below this are three tabs: 'General', 'Permissions' (selected), and 'Related'. The 'Permissions' tab contains two input fields: 'Name' and 'Connector', both with a red asterisk. The 'Name' field has the value 'Access' and the 'Connector' field has the value 'SharePoint'. To the right of these fields is a large table titled 'Users'. The table has columns: 'Full Name', 'Site', 'Business Unit', and 'Title'. The first row shows a user named 'Sam P' with a dropdown arrow in the 'Site' column and the value 'forgear' in the 'Business Unit' column. There is a checkbox in the first column of the table. Above the table is a link 'Add Existing User' and a dropdown arrow. Below the table is a scrollbar.

## 2. Permissions


Next tab is **Permissions** which comprises of all the Attach2Dynamics features. To provide access to Attach2Dynamics features just enable the checkbox given against each and every feature.



SECURITY TEMPLATE

Access

Owner



Sam P

General

Permissions

Related

All	<input type="checkbox"/>
Upload	<input checked="" type="checkbox"/>
Download	<input type="checkbox"/>
View Files	<input checked="" type="checkbox"/>
Rename	<input type="checkbox"/>

Email	<input type="checkbox"/>
Copy A Link	<input checked="" type="checkbox"/>
Create Folder	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>

## Note:

- If no template is created for a user, then all the features would be enabled except the Delete feature.
- For Delete feature a Security Template is must.

## Bulk Migration Jobs

**Bulk Migration Job** Entity enables users to configure the bulk movement of the attachments from CRM to the configured cloud storage and also it shows the details and status of the **migrating Emails, Notes and Sales Literature Attachments**.


## Note:

- Users are advised to do the migration during off business hours for minimum interruption as there may be bulk of data to be moved.
- Only the Entities where the Attachment Action is defined as Move in the Entity Configuration will be considered for Bulk Migration.

## 1. General

This section is where you define the period and Email/Note/Sales Literature attachment we are moving to cloud storage.






BULK MIGRATION JOB

Emails - Last X Weeks

Status Reason

Scheduled

Owner




 John Sam

General

Information

Bulk Migration Job Status


Related

For ?	* Emails	Operator	* Last X Weeks
Connector	*  SharePoint_TeamSite	Value	* 2
Schedule Date	* 09-08-2019  13:30 		
Attachment Action	* Move		

- For ?**: This specifies whether we are doing **Bulk Migration** for **Emails, Notes or Sales Literature**.
- Connector**: In this field we specify the connector support i.e. SharePoint, Dropbox or Azure Blob Storage.
- Schedule Date**: Scheduled date keeps track of the date from which the migration job will start.
- Attachment Action**: In this field we specify the action ie. Copy or Move.
- Operator**: In this field we specify the period for which we have to migrate Note/Email Attachment/Sales Literature Attachments to cloud storage. Here, X represents Numeric Value. For e.g. Last 10 days, Last 3 weeks, etc. where the number 10 and 3 specifies the Value.
  - Last X Days**: Specifiy data of how many(X) days has to be migrated to cloud storage.
  - Last X Weeks**: Specify data of how many(X) weeks has to migrated to cloud storage.
  - Last X Months**: Specifies data of how many(X) months has to be migrated to cloud storage.
  - Last X Years**: Specifies data of how many(X) years has to be migrated to cloud storage.
  - Older Than**: This moves all the Notes/Email attachments prior and inclusive of the date to cloud storage.
  - Custom**: This specifies the period **Process From** date to **Process Till** date between which the data is to be moved to cloud storage.

**Note:** The Notes and Sales Literature Attachments will be moved to their corresponding record folder and Email attachments will move to a common folder named **Email Attachment or Regarding Folder**.

## 2. Information



**BULK MIGRATION JOB**  
**Emails - Last X Weeks**  
Read only

Status Reason

Completed

Owner

👤 John Sam

General   **Information**   Bulk Migration Job Status   Related

<div>Total Records Processed</div> <div>161</div> <div>Last updated: 08-09-2019 14:37</div>	
<div>Total Succeeded Records</div> <div>160</div> <div>Last updated: 08-09-2019 14:37</div>	<div>Total Succeeded Size (KB)</div> <div>46,234.85</div> <div>Last updated: 08-09-2019 14:37</div>
<div>Total Ignored Records</div> <div>1</div> <div>Last updated: 08-09-2019 14:37</div>	<div>Total Ignored Size (KB)</div> <div>0.89</div> <div>Last updated: 08-09-2019 14:37</div>
<div>Total Failed Records</div> <div>0</div> <div>Last updated: 08-09-2019 14:37</div>	<div>Total Failed Size (KB)</div> <div>0.00</div> <div>Last updated: 08-09-2019 14:37</div>

The next tab is **Information** which comprises the details of processed records.

- 1) **Total Records Processed:** Total number of Emails/Notes/Sales Literatures that are processed.
- 2) **Total Succeeded Records:** Total number of records that have successfully migrated to cloud storage.
- 3) **Total Ignored Records:** Number of records that were ignored.
- 4) **Total Failed Records:** Total number of records that failed in the process of migration.
- 5) **Total Succeeded Size (KB):** The size of records that were moved to cloud storage. This tells the Dynamics 365 CRM user how much space he has freed from the CRM.
- 6) **Total Ignored Size (KB):** This is the size of files that were ignored while migrating to cloud storage.
- 7) **Total Failed Size (KB):** Size of failed files while uploading to cloud storage.

## Bulk Migration Job Status

✓ Bulk Migrati...	Name	File Size (KB)	Record Url	Status Reason	Created On
Emails - Last X Wee...	mountains_home_snow_peaks_95827_1600x1200_63...	1,186.75	https://map888.crm...	Succeeded	09-08-2019 14:26
Emails - Last X Wee...	Image 6_637009313893501055.jpeg - 4,76,910.00	476.91	https://map888.crm...	Succeeded	09-08-2019 14:26
Emails - Last X Wee...	mountains_home_snow_peaks_95827_1600x1200_63...	1,186.75	https://map888.crm...	Succeeded	09-08-2019 14:26
Emails - Last X Wee...	Image 5.jpg - 5,64,795.00	564.80	https://map888.crm...	Succeeded	09-08-2019 14:26
Emails - Last X Wee...	mountains_home_snow_peaks_95827_1600x1200_63...	1,186.75	https://map888.crm...	Succeeded	09-08-2019 14:26
Emails - Last X Wee...	mountains_home_snow_peaks_95827_1600x1200_63...	1,186.75	https://map888.crm...	Succeeded	09-08-2019 14:26

This Entity tells the status of the migration of Notes/Email Attachments/Sales Literature Attachments:

- 1) **Name:** Name of the attachment that is migrated to cloud storage.
- 2) **File Size (KB):** Size of the attachment file that is migrated to cloud storage.
- 3) **Record Url:** The URL of the attachment on Cloud Storage.
- 4) **Status Reason:** This is the status of the job whether it is successful, ignored or failed.

*Note: At a time only three jobs can be executed, one for Note, one for Email and one for Sales Literature Attachment. After completion other jobs can be created.*

## Visibility of Attach2Dynamics button

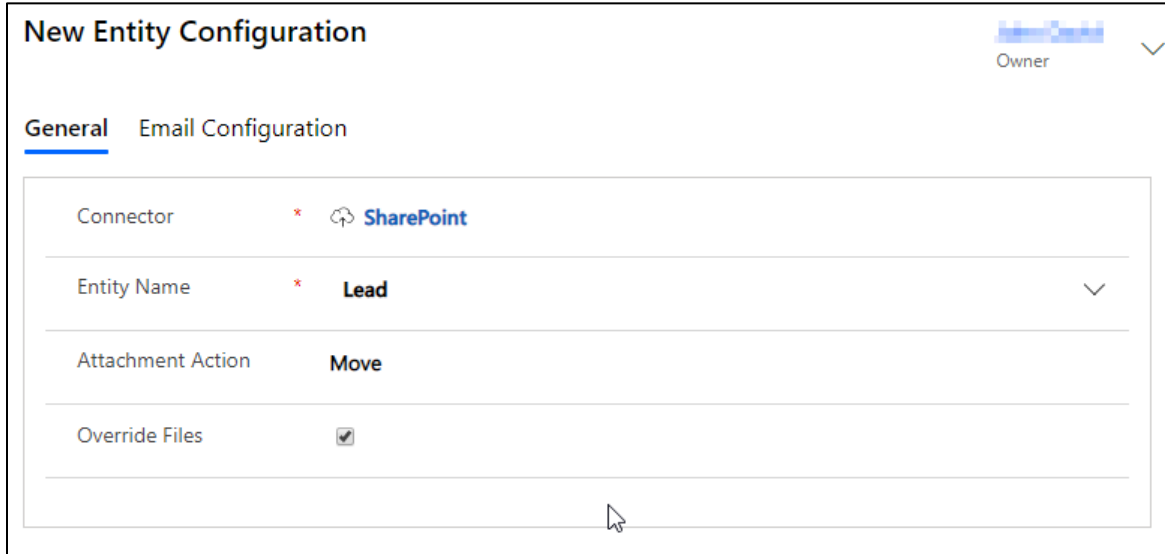
Attach2Dynamics button is visible only if;

- 1) Logged in User is either has Attach2Dynamics User or Attach2Dynamics Administrator role
- 2) Entity Configuration record exists for that entity.

## Use of Attach2Dynamics

Once Entity Configuration record is created user can start using Attach2Dynamics.


Let's take an example of Lead entity. Suppose Entity configuration record for Lead entity with SharePoint connector is created.



**New Entity Configuration**

Owner

**General** Email Configuration

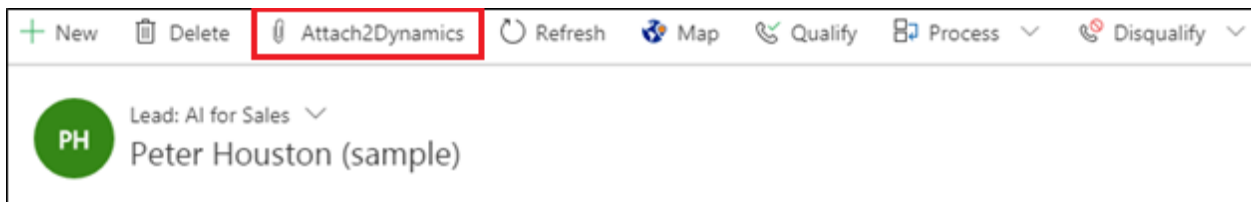
Connector \*  **SharePoint**

Entity Name \* **Lead**

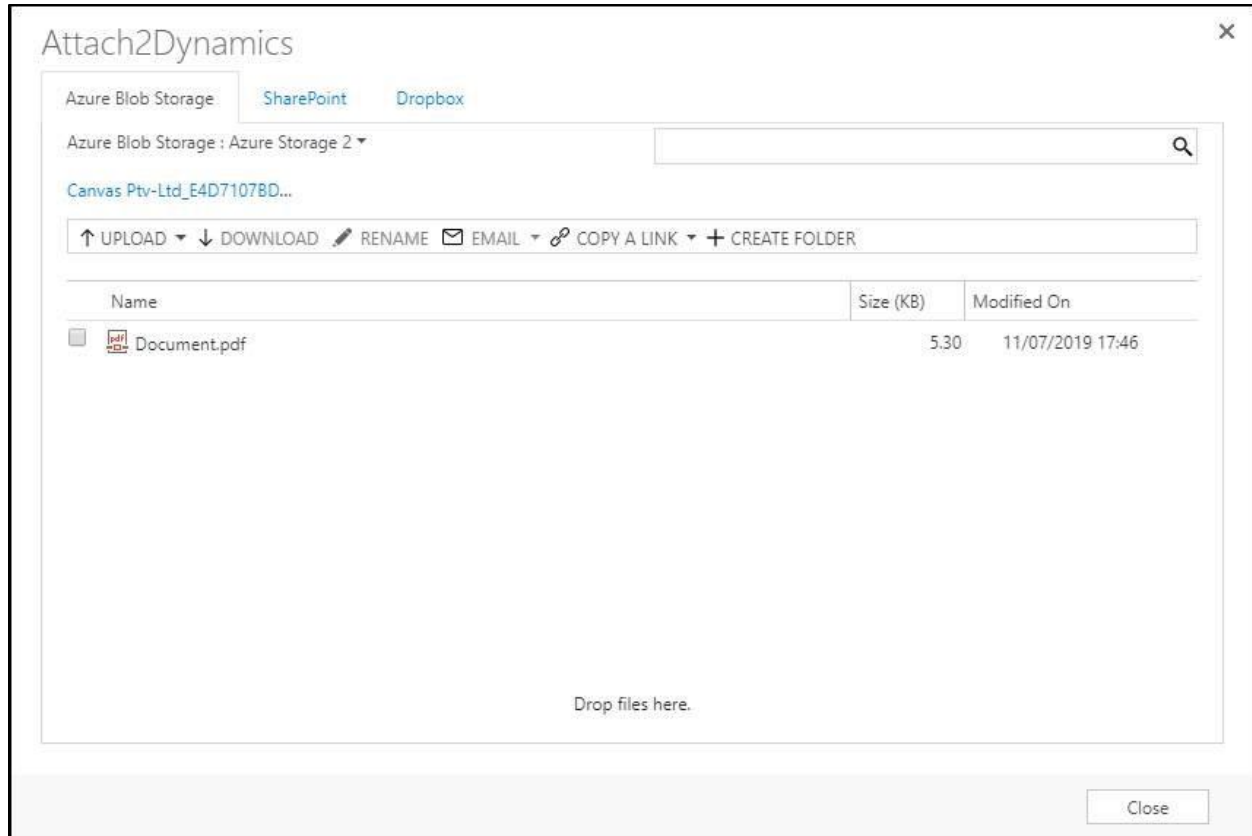
Attachment Action **Move**

Override Files ☒

Attach2Dynamics button will be seen in the Command bar.



On Click of the button, Attach2Dynamics window opens.



Below are the features:

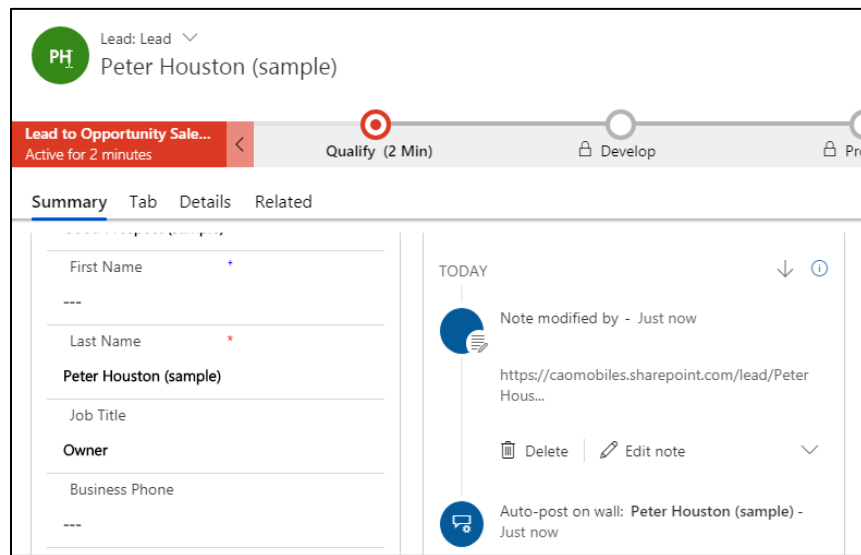
- a) **Drag and Drop Files and Folders:** Users can drag and drop multiple files and folders at one time to SharePoint, Azure Blob Storage or Dropbox from Dynamics 365 CRM.  
*Note: Drag & Drop of files and folders is not supported in IE.*
- b) **Upload:** Users can upload multiple files and single folder at a time using the solution. They get user-friendly UI to see the list of files uploaded on SharePoint, Azure Blob Storage or Dropbox against the current record. Upload Folder through button is not available on IE.
- c) **Download:** Users can get access to all documents of required storage system and download them. Bulk download of files is possible.  
  
Download of folder is not supported for SharePoint and Azure Blob Storage but is available for Dropbox.
- d) **Rename:** Users have the option to rename the documents by selecting the required files and folders. However, in Azure Blob Storage user can rename only files not folders.
- e) **Copy Link:** Users can simply copy and paste the generated link for the selected document using this option when required to be sent outside the Dynamics 365 CRM.

If only **View** is selected then the document is available in read only mode whereas, if **Edit** mode is selected then the document is available for editing.

For Dropbox, only View mode is available. This feature is also available in Azure Blob Storage.

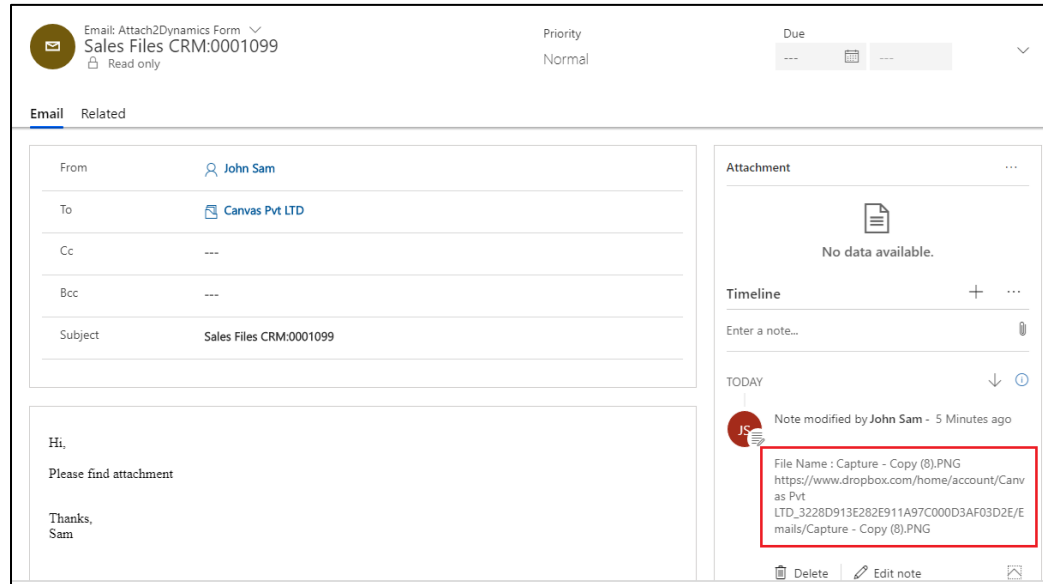
- f) **Create Folder:** Users can create the folder for all three cloud storages.
- g) **Deep search Tab:** Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search for files or folders based on your current path. If you are currently in a “/A.Datum/Sample” path and if there are more folders/files inside that path, if you search for any keyword it’ll scan till the last file and folder and return the result. Azure Blob Storage does not support deep search but user can search within the current folder.
- h) **Move/Copy Dynamics 365 CRM Attachments:** Users can move/copy Dynamics 365 CRM Notes Attachments/Email Attachments and Sales Literature Attachments to Dropbox, SharePoint or Azure Blob Storage.
  - a. **Notes:**

If enabled, it’ll move/copy the Note Attachments to the respective entity folder and leave a path in the Note Body.



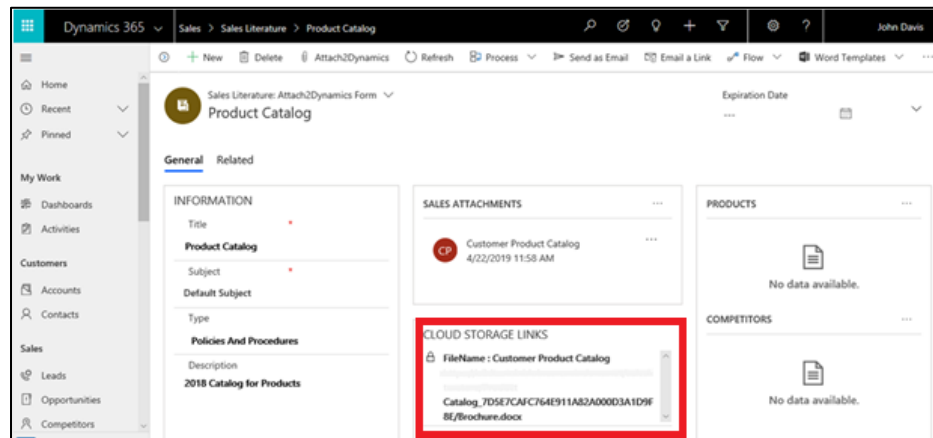
## b. Email Attachments:

If enabled, it'll move/copy the Email Attachments to a common folder called Email Attachments or Regarding folder and leave a path in the Note Body.

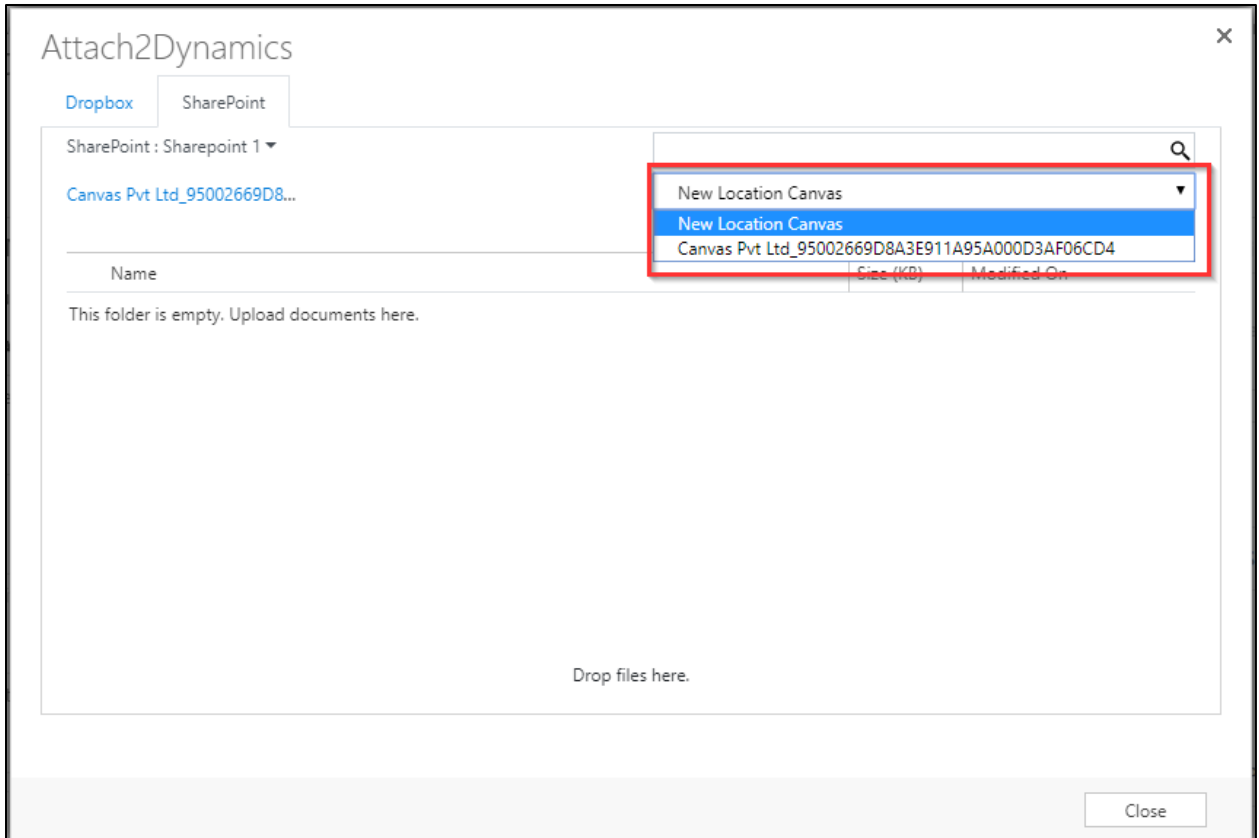


## c. Sales Literature Attachments:

If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a path back in **Cloud Storage Links** section.

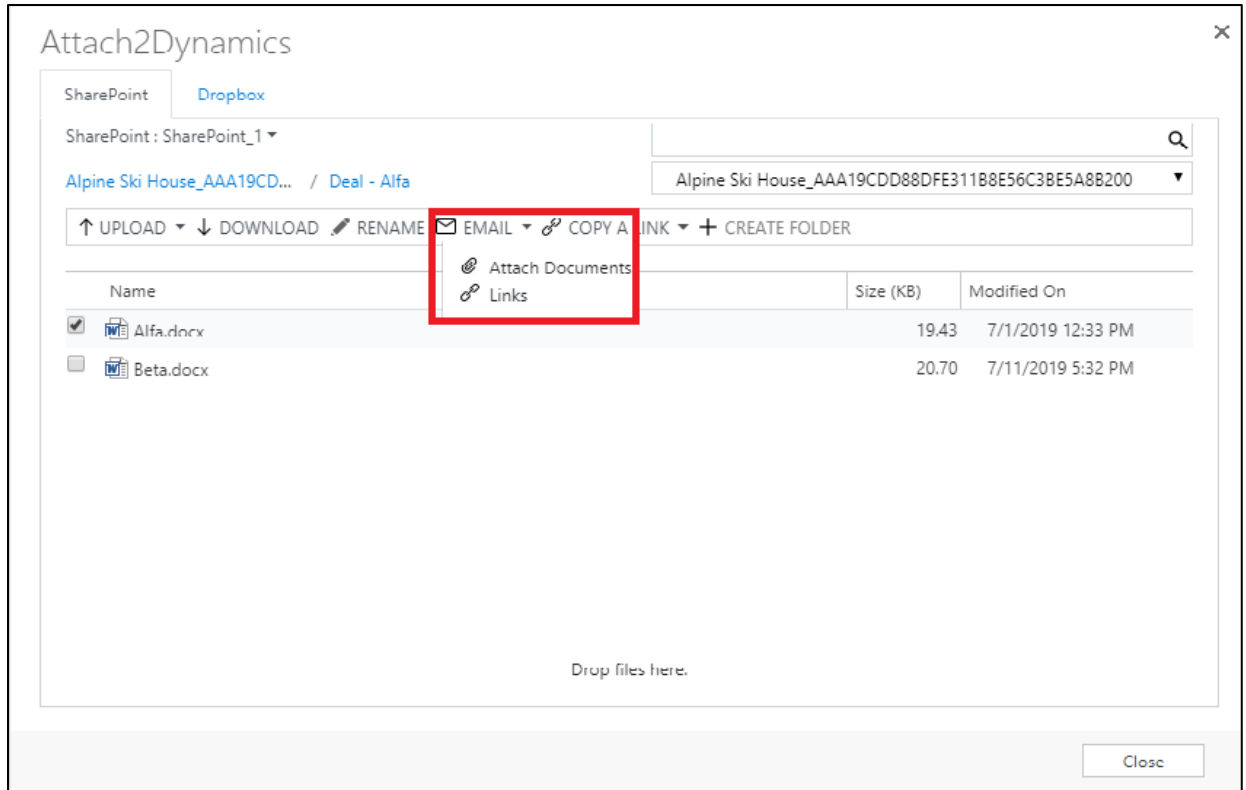


- i) **Document Location:** For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

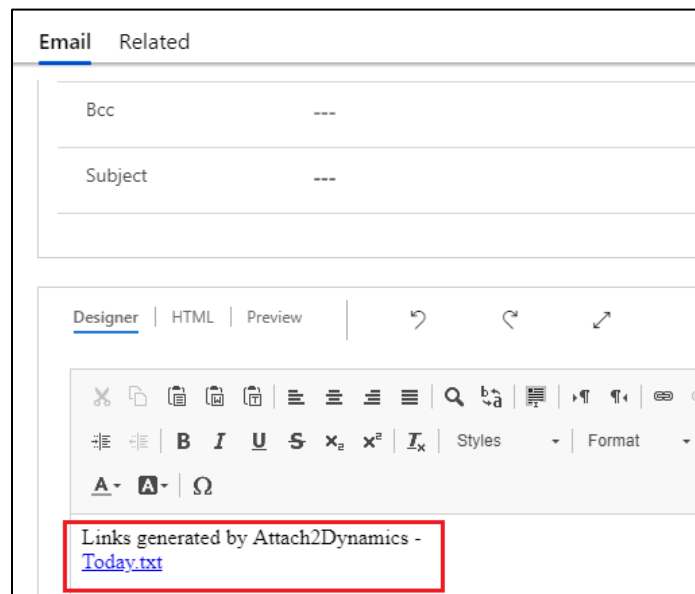


- j) **Email:** Users also have an option to send an email. There are two options for this – send as Link or Attachment.

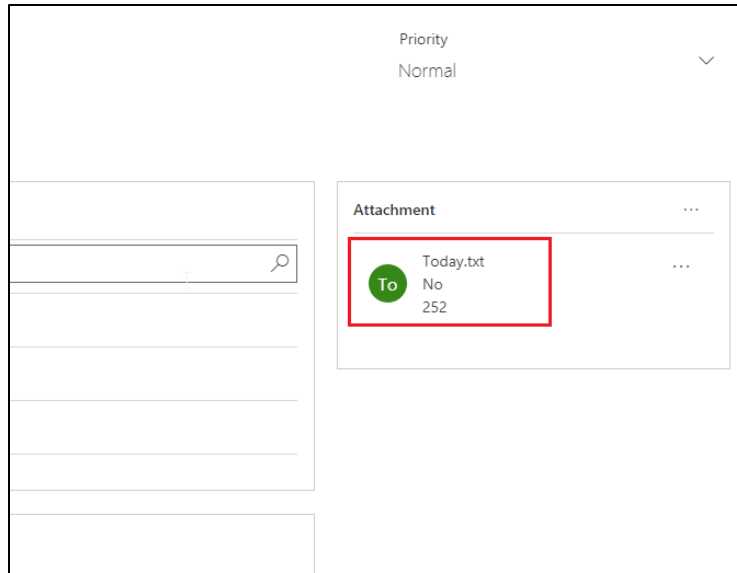




- 1) **Links:** On selecting this option you can insert the file's/folder's link in the email body. The below window opens on choosing the option 'Link' with link of file in email body.

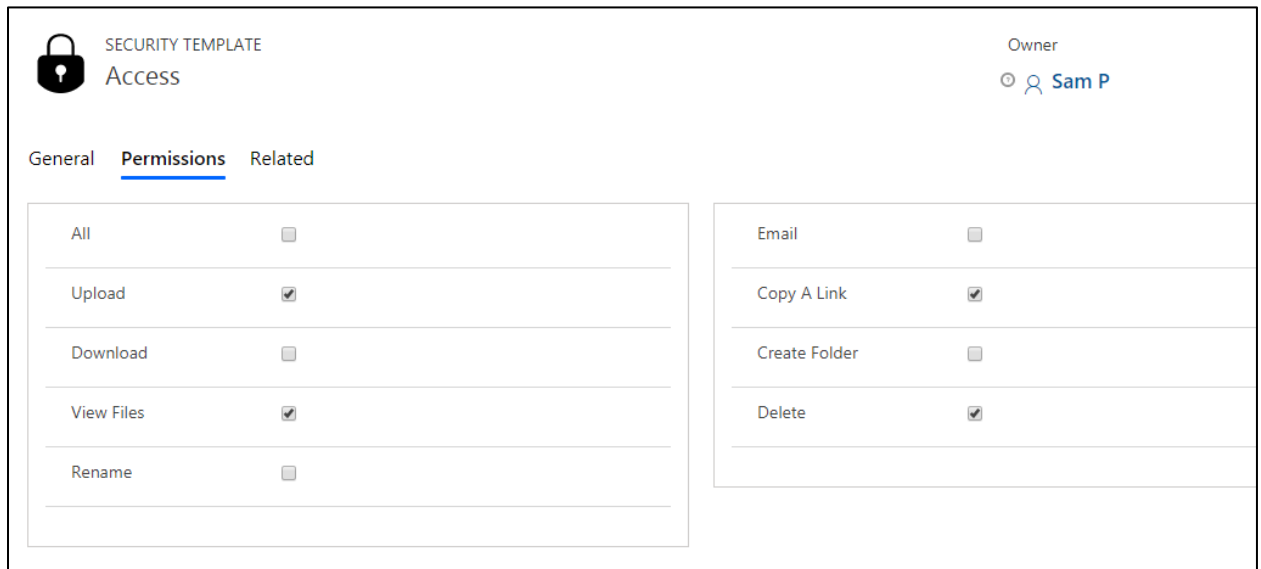


- 2) **Attach Documents:** On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'



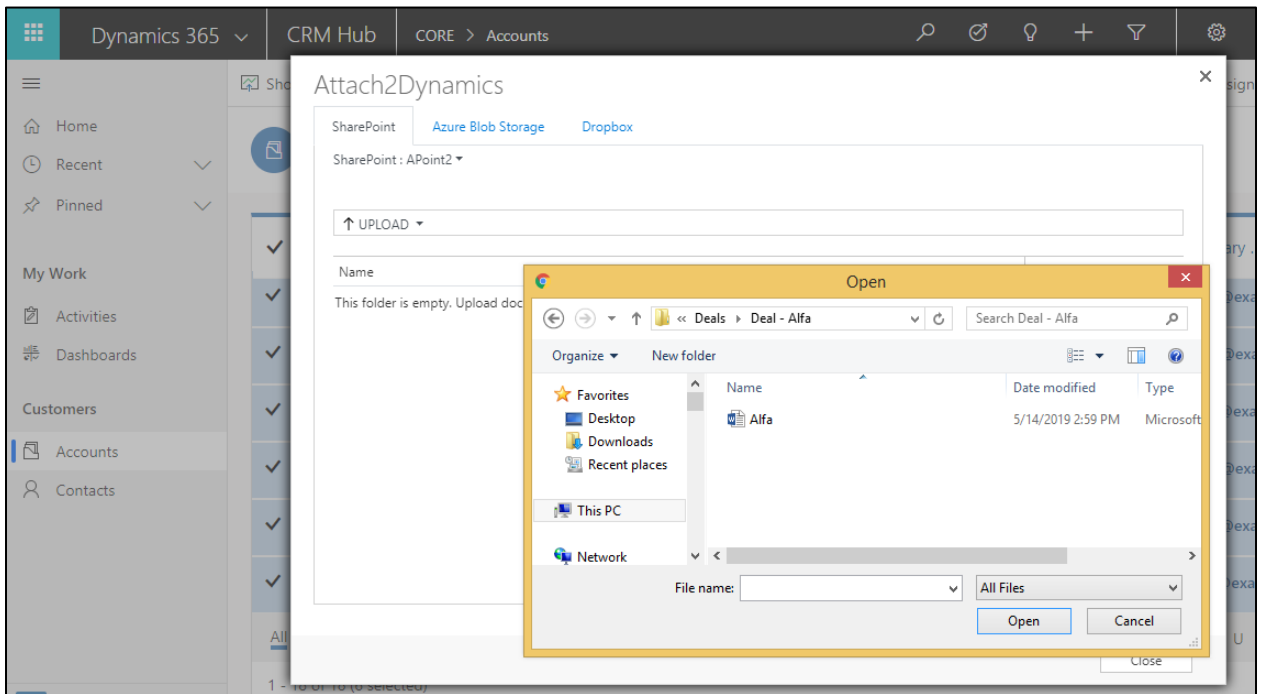
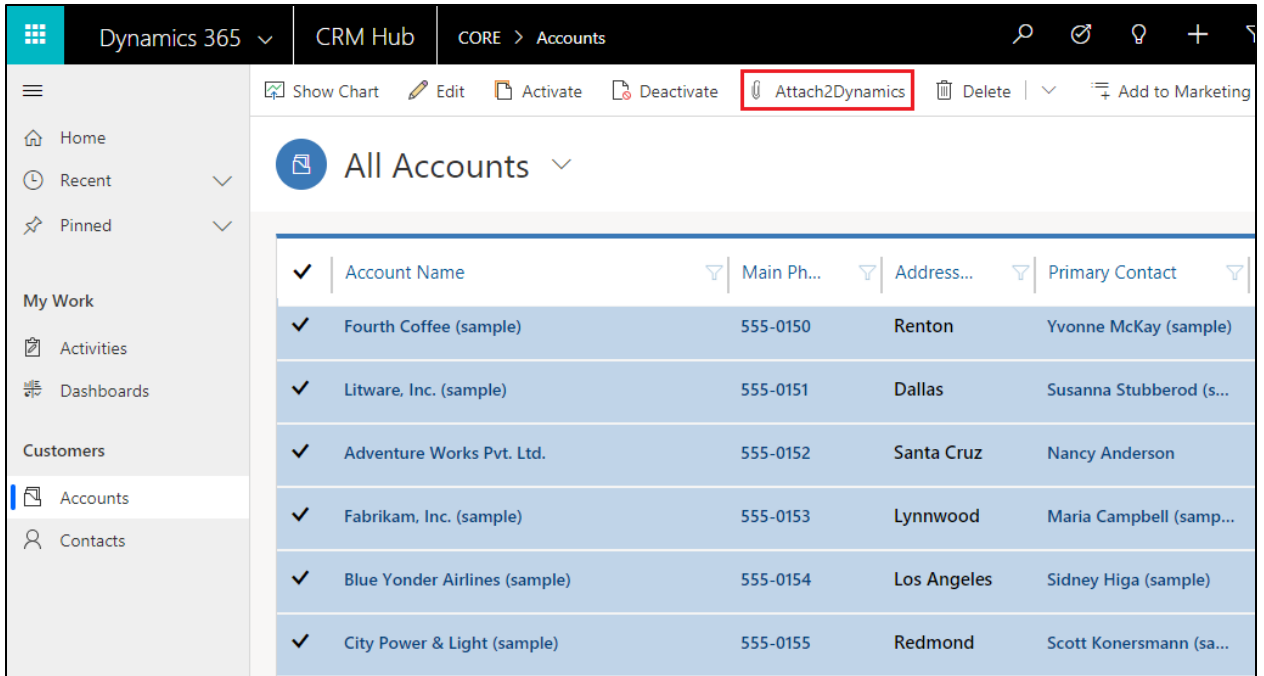
**Note:** Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

- k) Access Control of the Action:** Control the access given to users over various features of Attach2Dynamics such as Upload, Download, Email, View Files, Delete, Create Folder, Copy a Link and Rename.

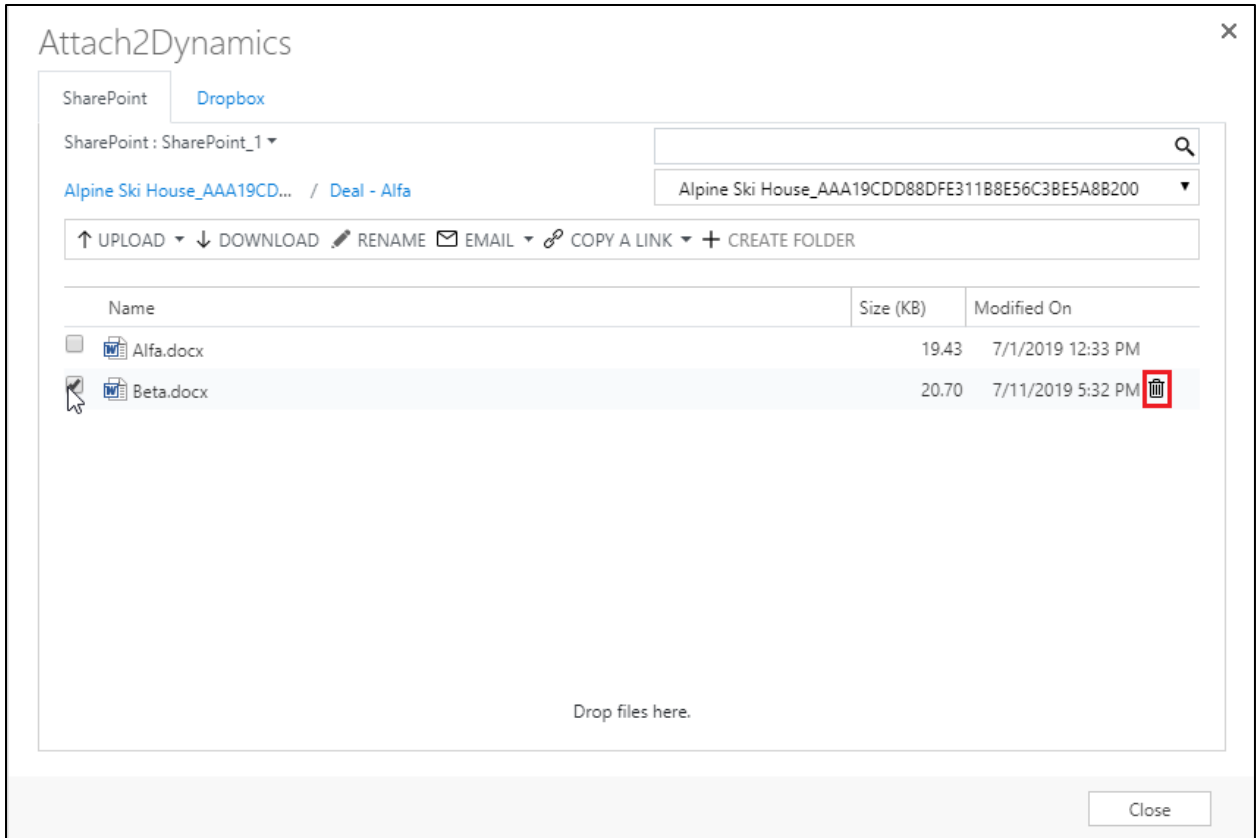


- l) Support for uploading files from Home Page:** Upload files from home page directly for the selected records.

## Attach2Dynamics – User Manual



- m) Delete:** Users can delete files from all the three cloud storages. The details of these deleted files is then stored in the Log Entity. To view the same navigate to **Attach2Dynamics→Logs→Deleted File Status**.



The user can get complete information such as **Deleted On**, **Deleted By**, **File Name** etc. from the log.

**(n) View Files:** User can preview necessary files with a single click before downloading it. This feature is available only in SharePoint and Dropbox.

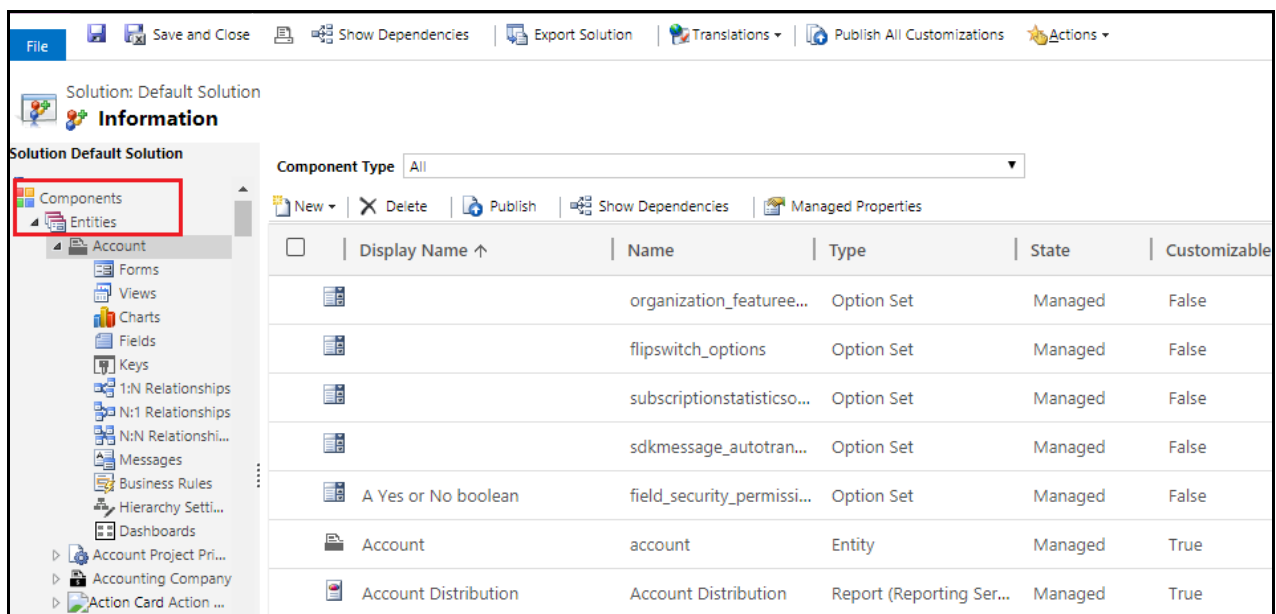
## Embedded Attach2Dynamics

It is possible to add Attach2Dynamics tab embedded in Entity record page directly without having to open it from the **Ribbon Button**.

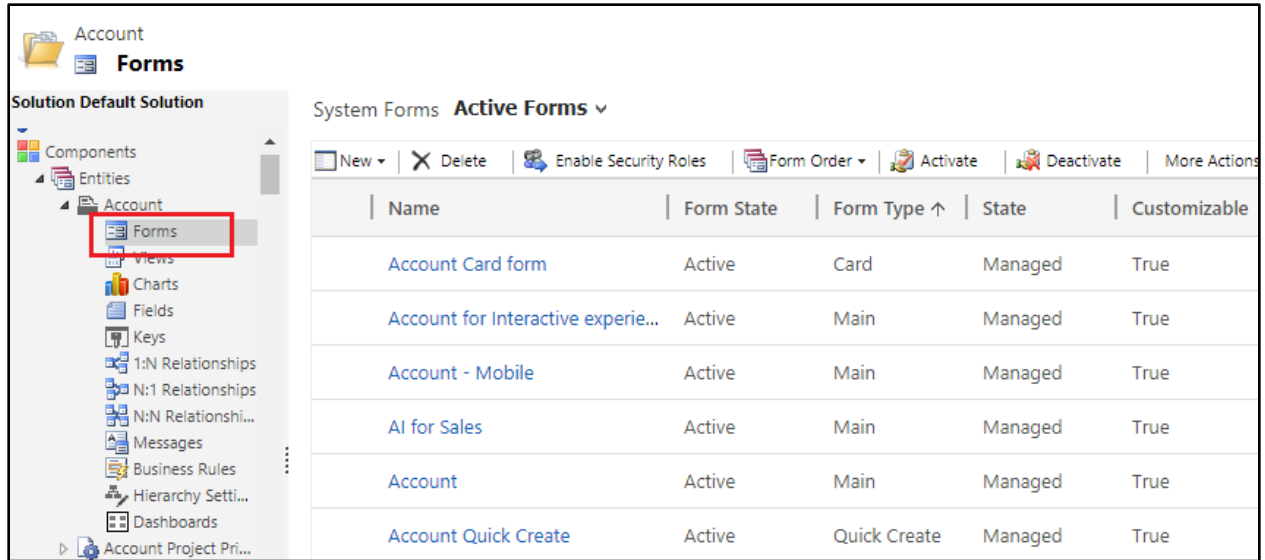
Go to **Settings -> Customizations -> Customize the System**

A Default solution will open. Here are the steps how to create embedded tab in the Form of a particular Entity.

a) On the left pane go to **Components -> Entities**



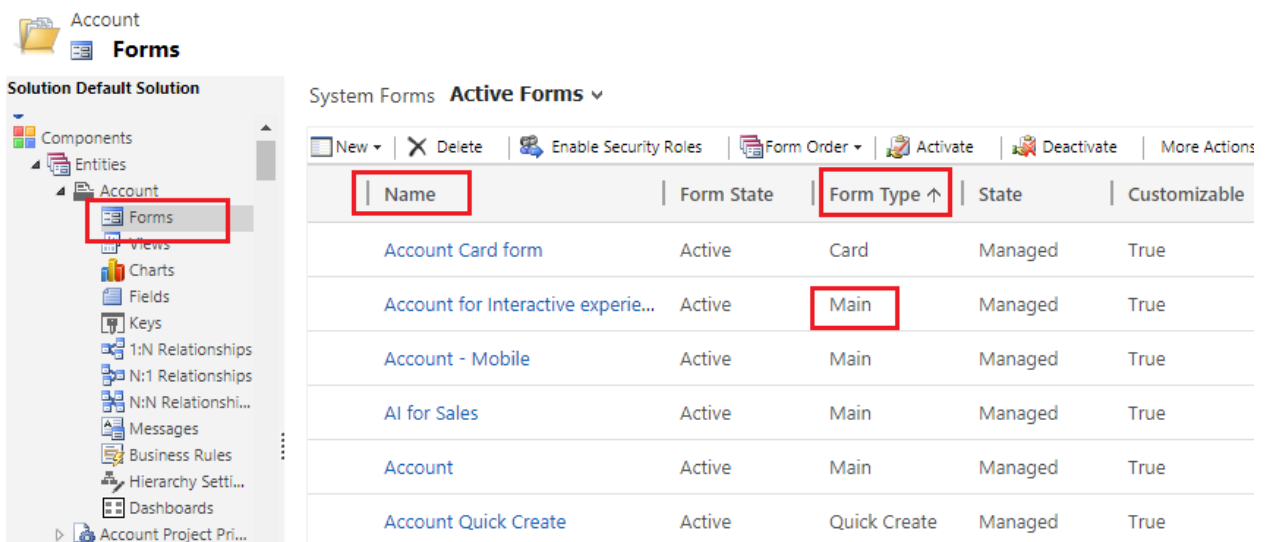
b) Expand the **Entity** Drop Down and Select **Forms** for the Entity you want to create embedded tab for.



**System Forms Active Forms**

Name	Form State	Form Type ↑	State	Customizable
Account Card form	Active	Card	Managed	True
Account for Interactive experie...	Active	Main	Managed	True
Account - Mobile	Active	Main	Managed	True
AI for Sales	Active	Main	Managed	True
Account	Active	Main	Managed	True
Account Quick Create	Active	Quick Create	Managed	True

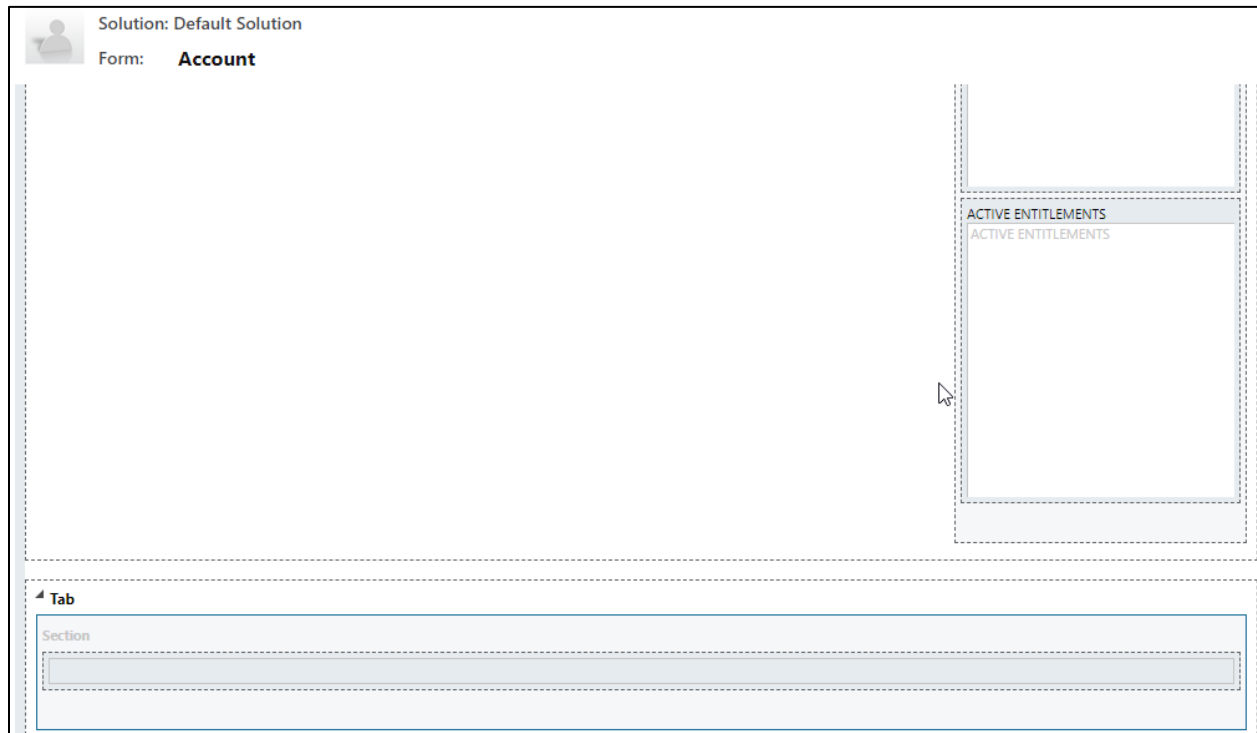
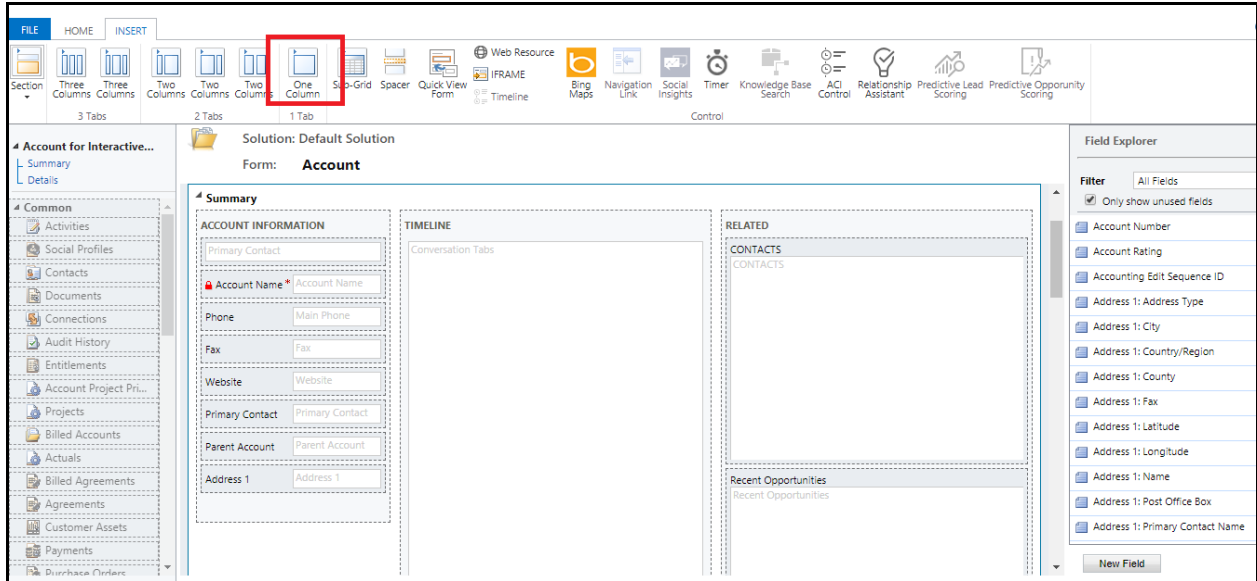
c) Under the **Active Forms** Select any **Name** for which **Form Type** is **Main**.



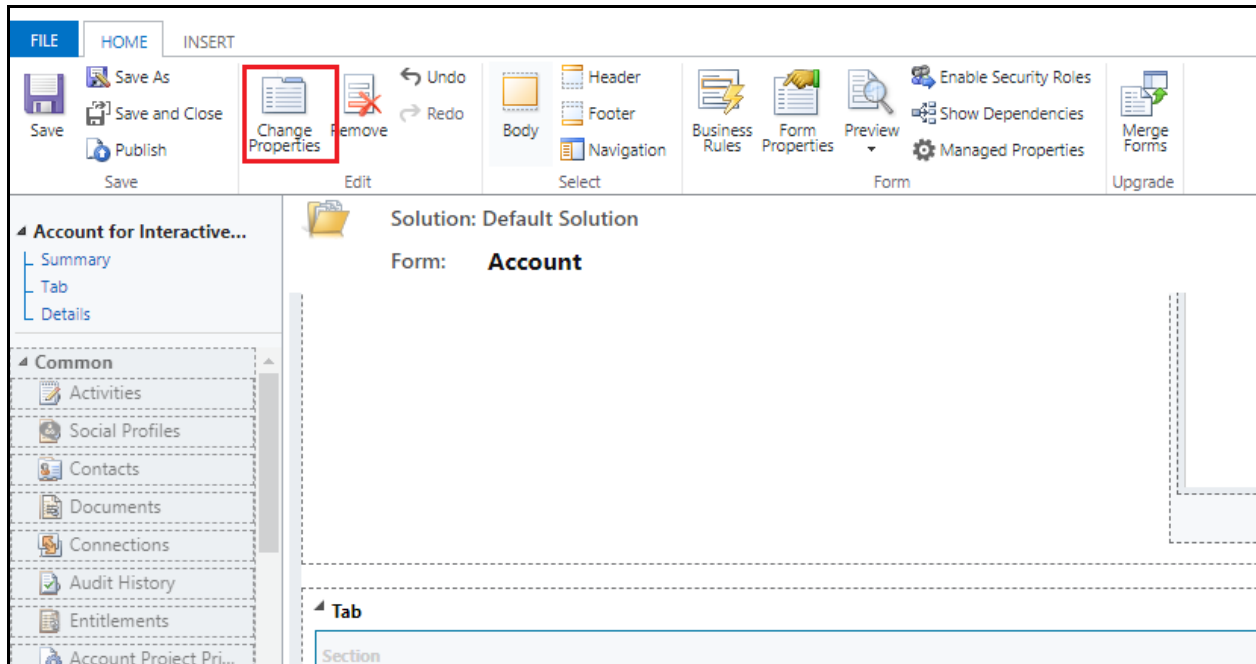
**System Forms Active Forms**

Name	Form State	Form Type ↑	State	Customizable
Account Card form	Active	Card	Managed	True
Account for Interactive experie...	Active	Main	Managed	True
Account - Mobile	Active	Main	Managed	True
AI for Sales	Active	Main	Managed	True
Account	Active	Main	Managed	True
Account Quick Create	Active	Quick Create	Managed	True

d) The **Forms** Window will open. Go to **Insert** tab and insert **One Column Tab** and insert it anywhere on the form framework.



e) Go to **Home** and click on **Change Properties**.



f) A tab **Properties Window** will be landed. In **Name** and **Label** enter the name you want to be displayed in the tab on Entity record page. Click on OK.



Display
Formatting
Events

Name
Specify a unique name.

\*Name

tab\_8

\*Label

Attach2Dynamics

☐ Show the label of this tab on the Form

☒ Expand this tab by default

Visibility
Specify the default visibility of this tab.

☒ Visible by default

Availability
Specify the default availability of this tab on phone.

☒ Available on phone

General Formatting Dependencies

Layout

Select the number of columns the control occupies:

☒ One column

☐ Two columns

☐ Three columns

☐ Four columns

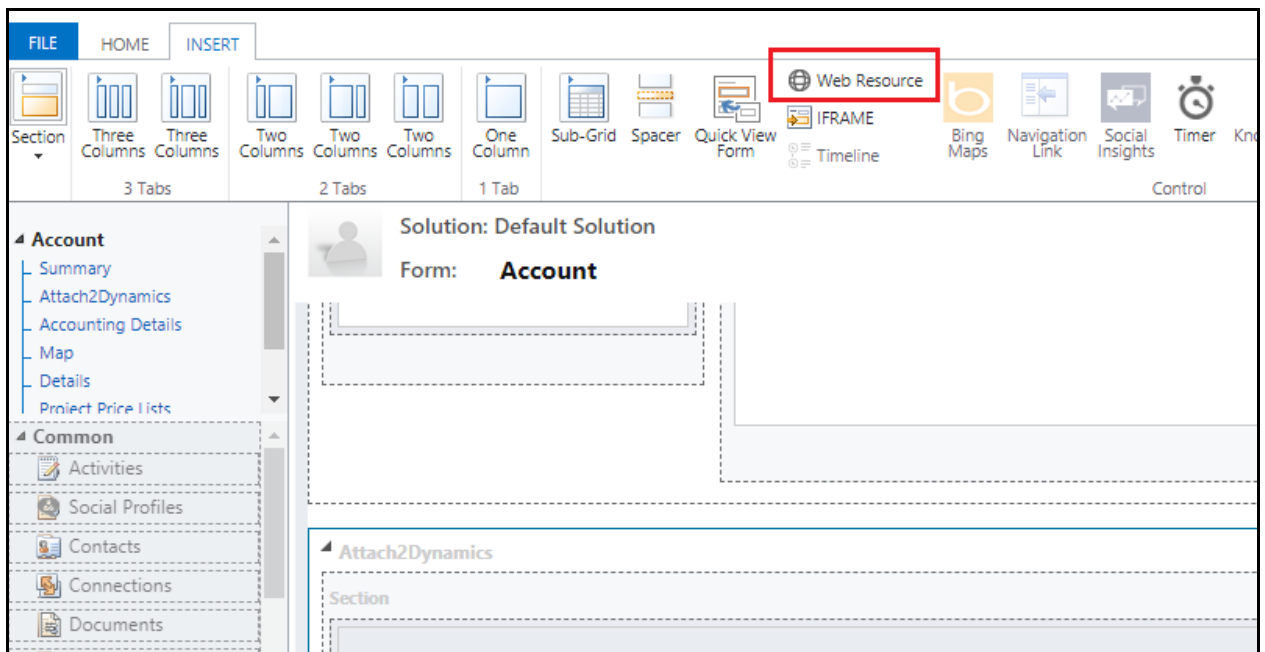
Row Layout

Select the number of rows the control occupies.

Number of Rows

☒ Automatically expand to use available space.

g) Go to **Insert** tab and click on **Web Resource**.





h) In **Web resource** field enter `ikl_/Attach2Dynamics/Library/index.html`

In **Name** and **Label** enter the name you want to be displayed.

Scroll down and check the **Pass record object-type code and unique identifier as parameters** box. Click on **OK**.

The screenshot shows a configuration form for a web resource. It is divided into four main sections: 'Web resource', 'Field Name and Properties', 'Visibility', and 'Web Resource Properties'. The 'Web resource' section has a text field containing 'ikl\_/Attach2Dynamics/Library/index.html'. The 'Field Name and Properties' section has 'Name' set to 'WebResource\_' and 'Label' set to 'Attach2Dynamics'. The 'Visibility' section has both 'Visible by default' and 'Enable for mobile' checked. The 'Web Resource Properties' section has 'Restrict cross-frame scripting, where supported.' unchecked and 'Pass record object-type code and unique identifier as parameters.' checked. Red rectangular boxes highlight the 'Web resource' field, the 'Visible by default' and 'Enable for mobile' checkboxes, and the 'Pass record object-type code and unique identifier as parameters.' checkbox.

**Web resource**

Web resource \*  `ikl_/Attach2Dynamics/Library/index.html` 

**Field Name and Properties**

Name \*

Label \*

☐ Display label on the Form

**Visibility**

☒ Visible by default

☒ Enable for mobile

**Web Resource Properties**

Custom Parameter(data)

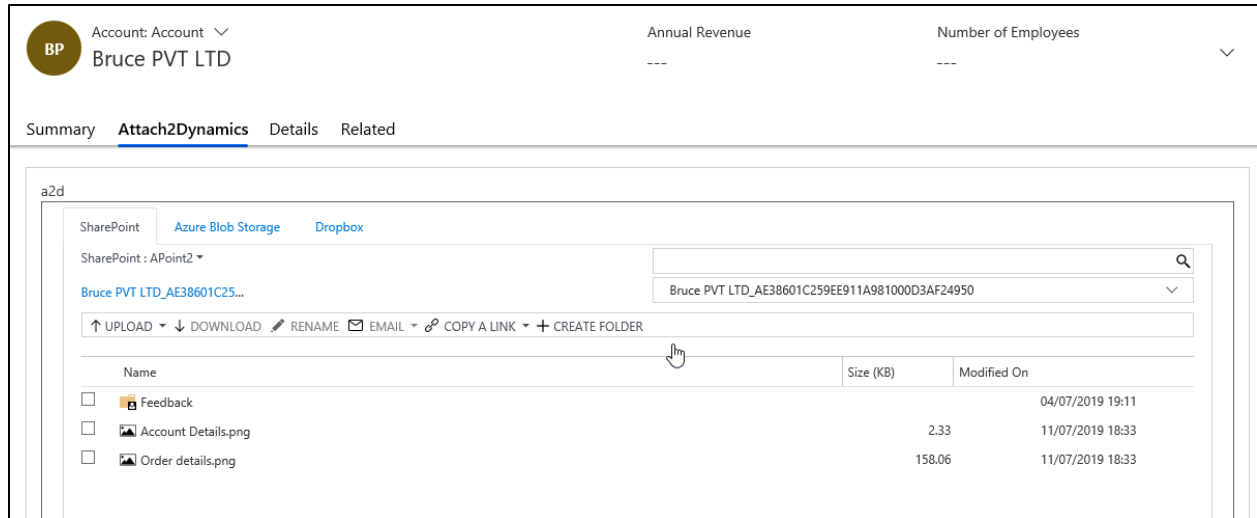
☐ Restrict cross-frame scripting, where supported.

☒ Pass record object-type code and unique identifier as parameters.

i) Go to **Home** and **Save** then **Publish**.

j) Now navigate to **Entity** (for which you have configured the Form) and open a record. Scroll down and you can see your desired tab embedded in the page.

## Attach2Dynamics – User Manual

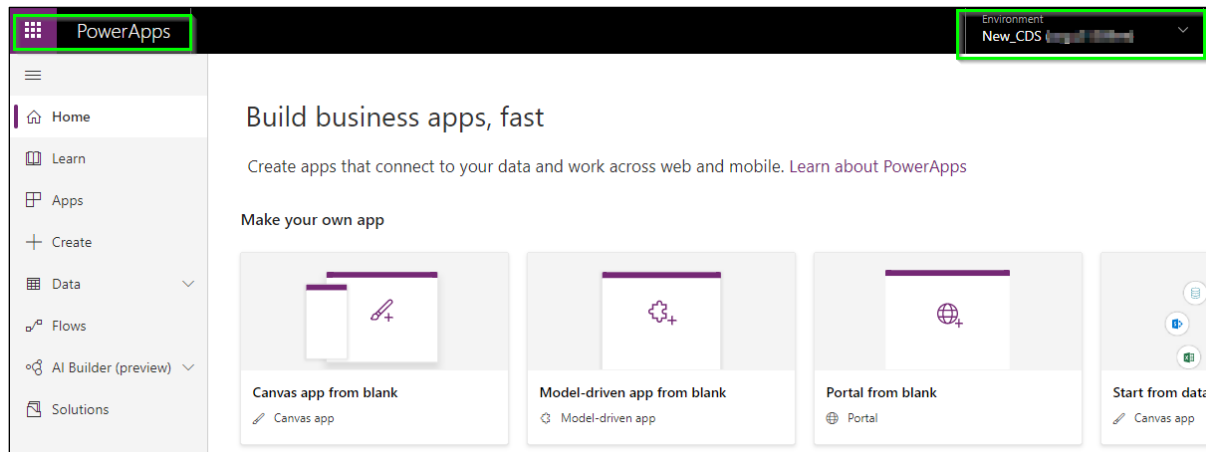


### Log

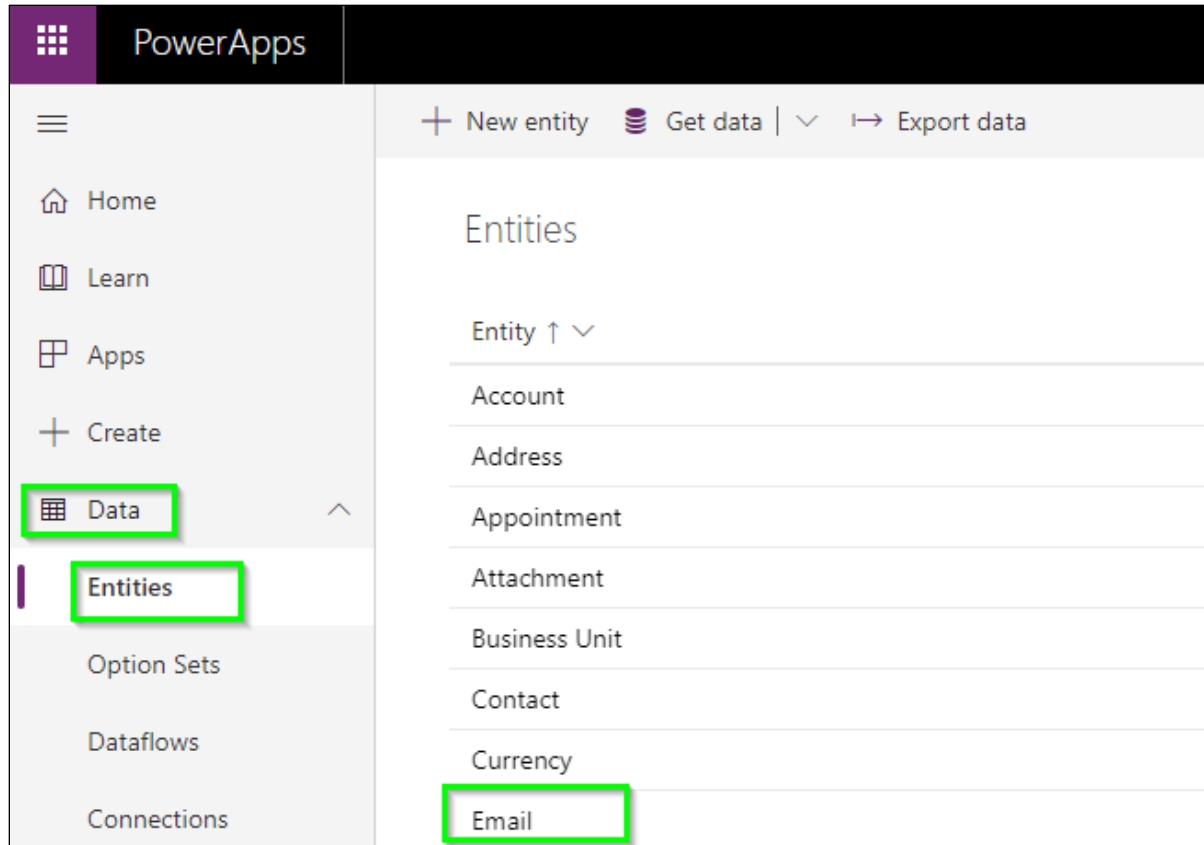
This tracks any errors occurred during the functioning of Attach2Dynamics, details of files ignored during uploading and files deleted from cloud storages.

### CDS: Add Notes section on the Email form

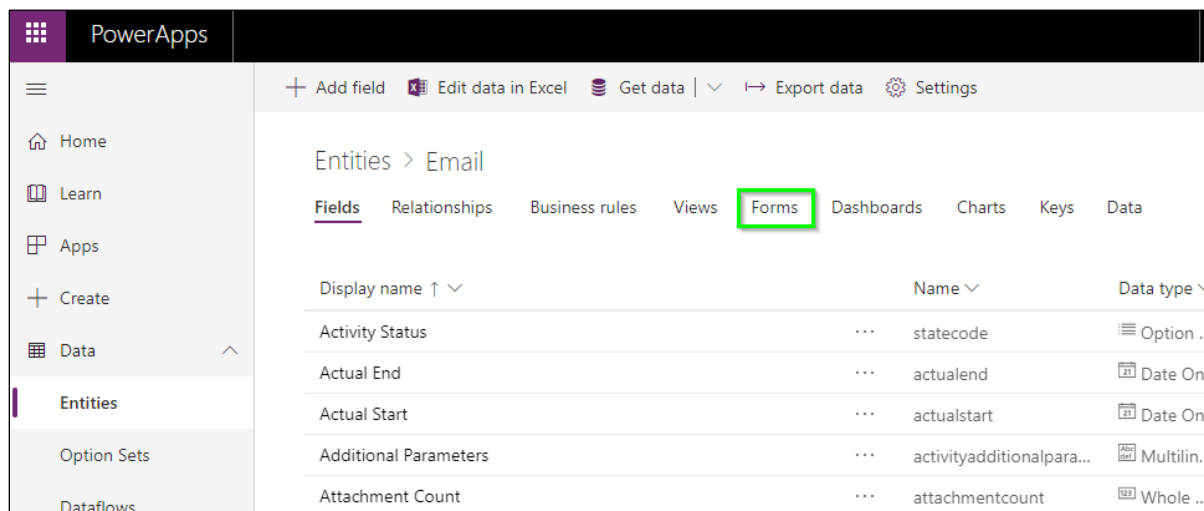
**Step 1:** Navigate to PowerApps and select your CDS environment.



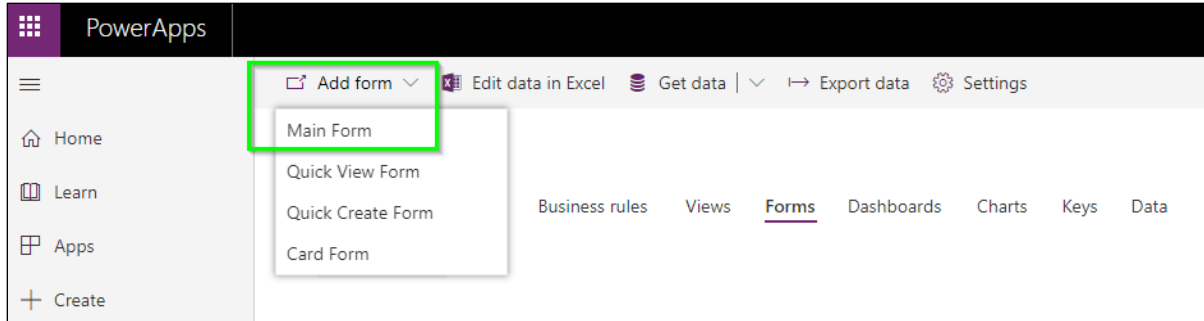
**Step 2:** Enlarge the 'Data' section and click on **Entities**.



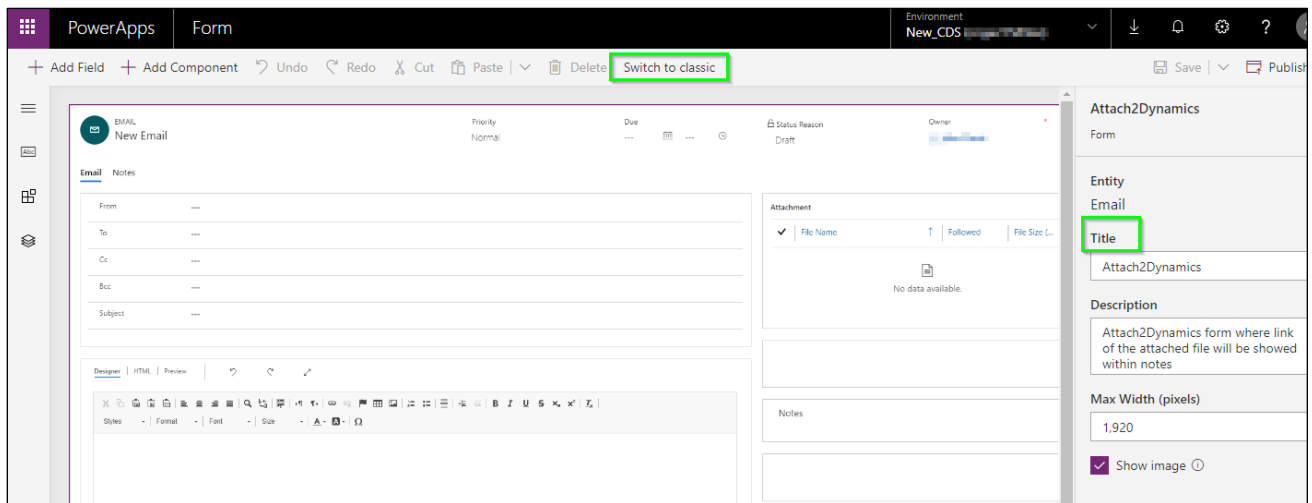
**Step 3:** Select 'Email' entity and click on 'Forms'.



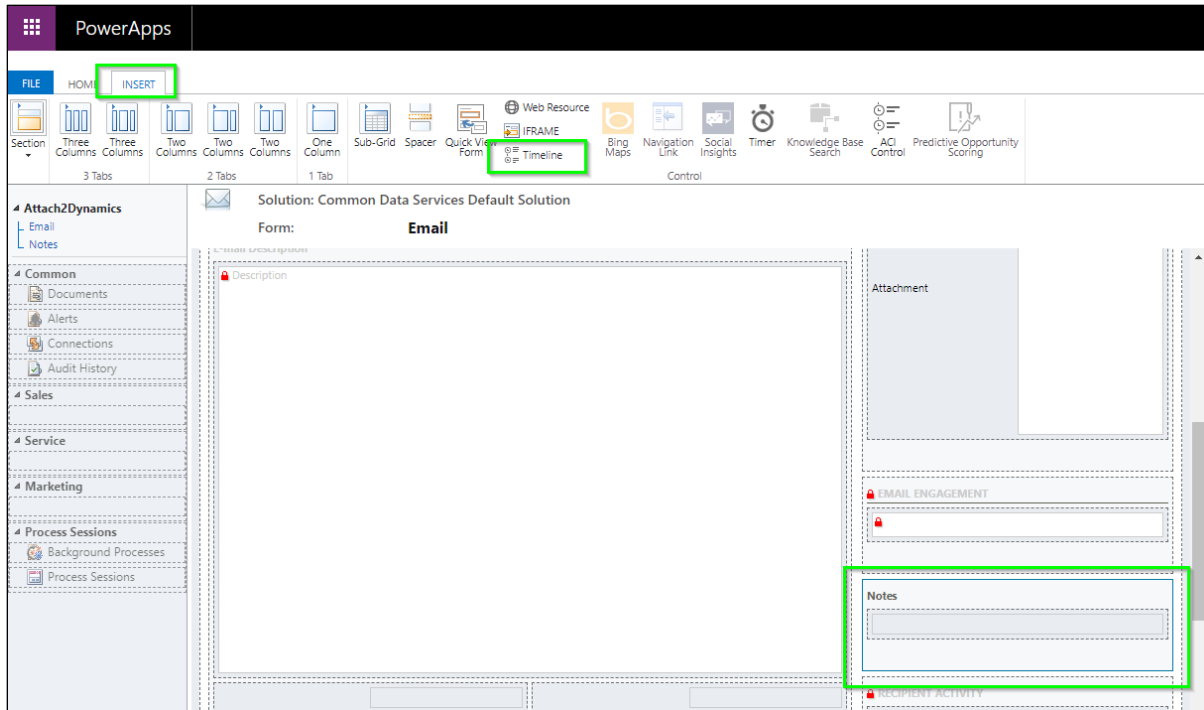
**Step 4:** Click on 'Add form' from the ribbon bar and choose the 'Main Form'.



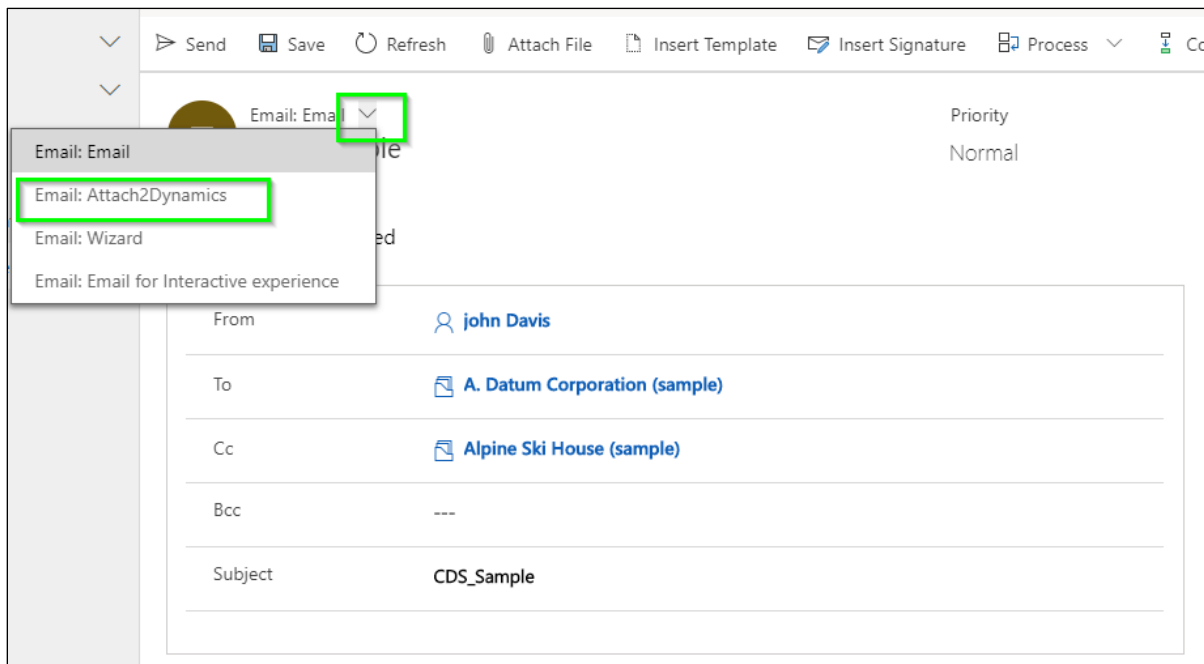
**Step 5:** You will see the window shown below, enter **Title** and **Description** and click on the '**Switch to classic**' button.



**Step 6:** Once you click on '**Switch to classic**' button you will see the below screen, then navigate to '**Insert**' tab, select '**Notes**' section and click on '**Timeline**' button.

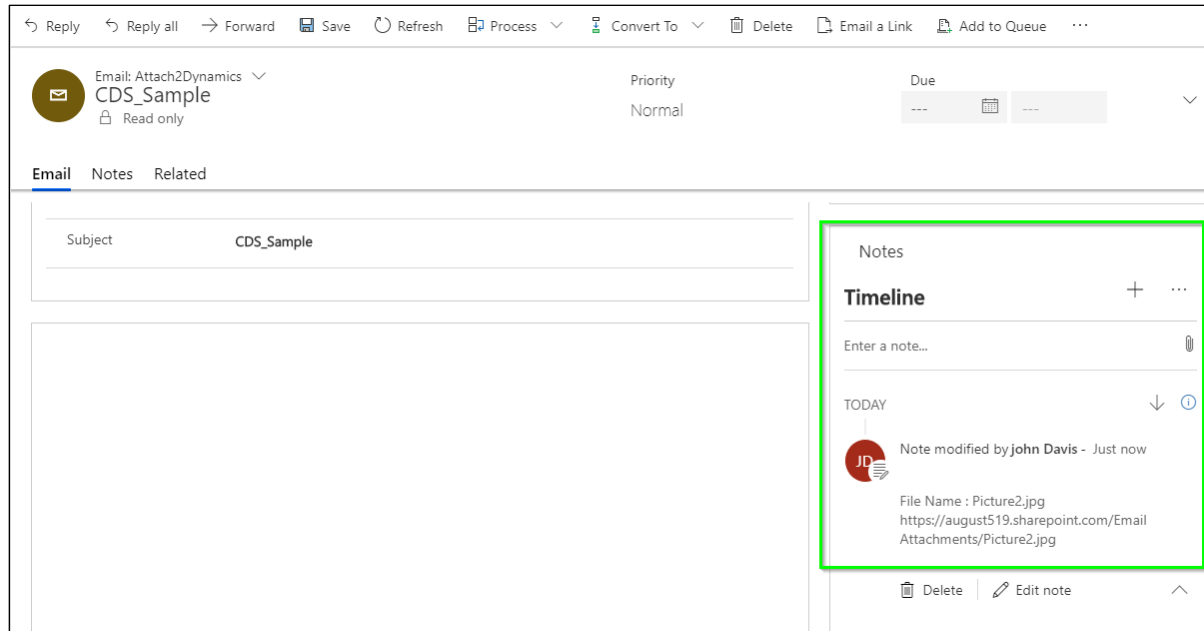


**Step 7:** Save and Publish the form. Now, navigate to Site map and create email. You will see the below screen, choose the form which you created with note section.



**Step 8:** Once you select the form, you will get the below screen where you can see link of the attachment is saved within the note section.

## Attach2Dynamics – User Manual



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## Contact Us

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