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AttachmentExtractor

Getting Started from AppSource

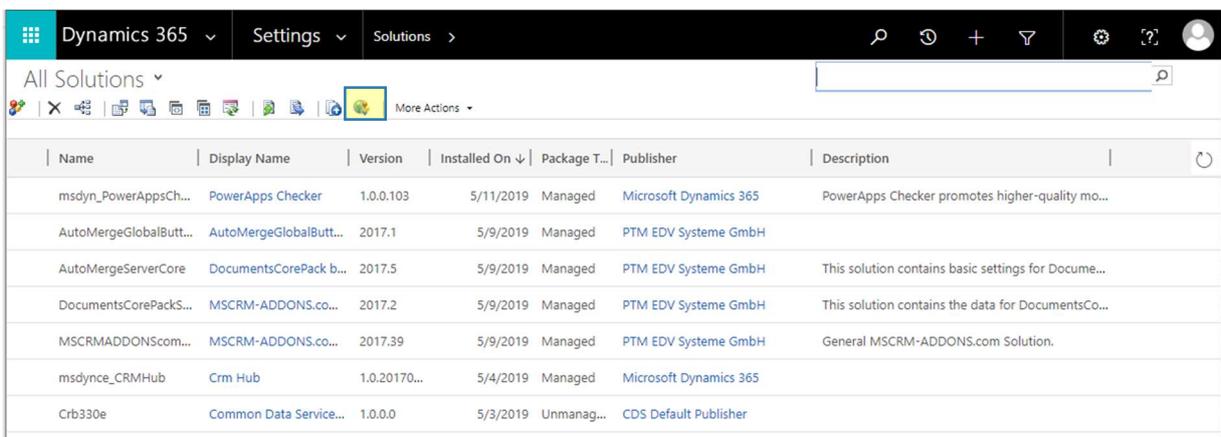
Hello!

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.



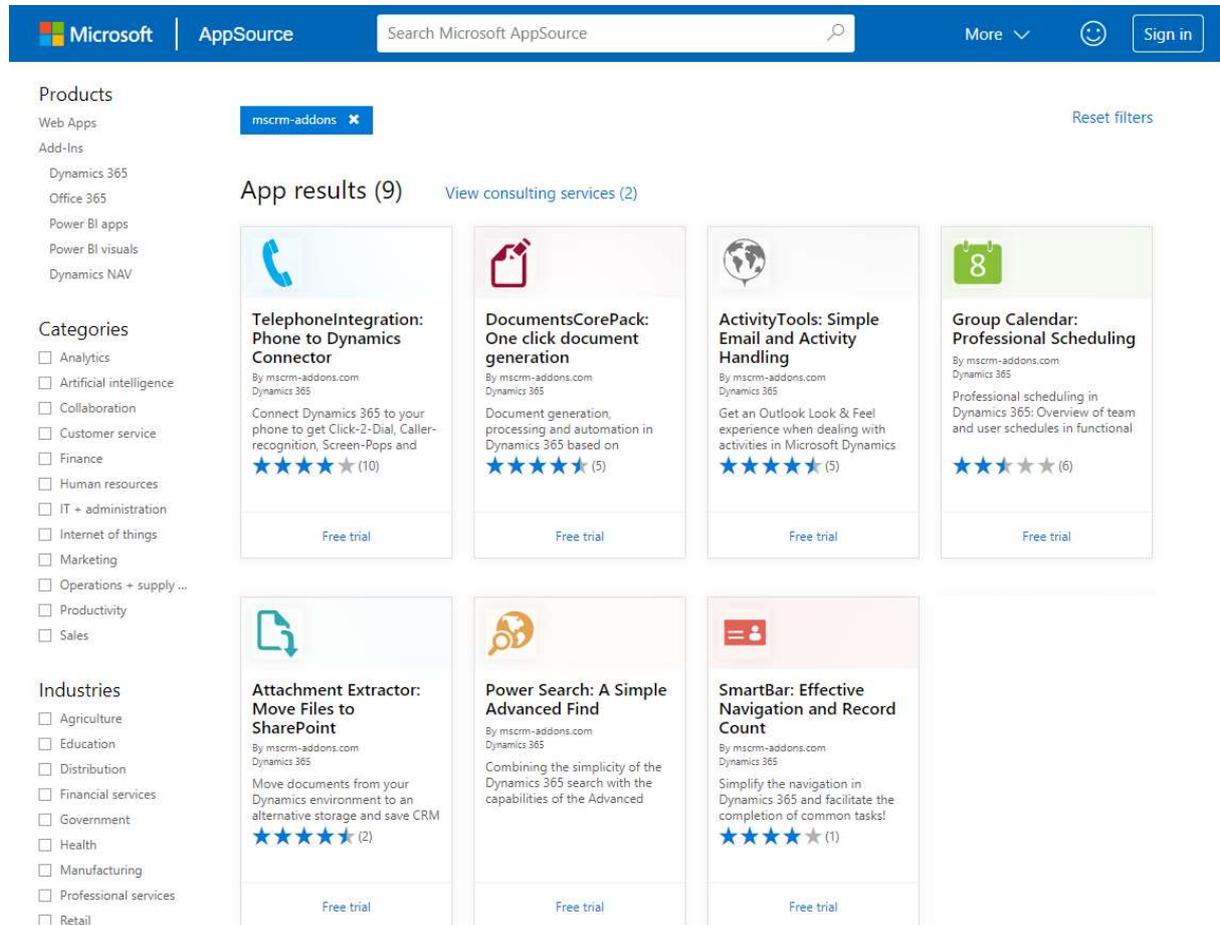
Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONScom...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

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 AttachmentExtractor. Use this [link](#) to find all add-ons provided by mscrm-addons.com (figure below).



The screenshot shows the Microsoft AppSource search results page for 'mscrm-addons'. The search bar at the top contains 'Search Microsoft AppSource'. On the left, there are filters for 'Products' (Web Apps, Add-Ins, Dynamics 365, Office 365, Power BI apps, Power BI visuals, Dynamics NAV) and 'Categories' (Analytics, Artificial intelligence, Collaboration, Customer service, Finance, Human resources, IT + administration, Internet of things, Marketing, Operations + supply..., Productivity, Sales). Below these are 'Industries' (Agriculture, Education, Distribution, Financial services, Government, Health, Manufacturing, Professional services, Retail). The main content area displays 'App results (9)' and 'View consulting services (2)'. There are seven app cards visible, each with an icon, title, description, star rating, and a 'Free trial' button. The apps shown are: TelephoneIntegration: Phone to Dynamics Connector, DocumentsCorePack: One click document generation, ActivityTools: Simple Email and Activity Handling, Group Calendar: Professional Scheduling, Attachment Extractor: Move Files to SharePoint, Power Search: A Simple Advanced Find, and SmartBar: Effective Navigation and Record Count.

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.



The screenshot shows the detailed page for the 'Attachment Extractor: Move Files to SharePoint' app. The header includes the Microsoft AppSource logo and search bar. Below the header, the breadcrumb 'Apps > Attachment Extractor: Move Files to SharePoint' is visible. The main content area features a large icon of a document with a circular arrow, the app title 'Attachment Extractor: Move Files to SharePoint', the publisher 'mscrm-addons.com', a star rating of 4.5 (2), and a 'Free trial' button. There are tabs for 'Overview' and 'Reviews'. A prominent blue 'FREE TRIAL' button is located on the left side. The 'Overview' section contains the following text: 'Move documents from your Dynamics environment to an alternative storage and save CRM data storage'. Below this, there is a question: 'Did you know that sometimes up to 70 percent of the Dynamics 365 database consists of documents stored as notes or attachments?'. The final paragraph states: 'Thanks to AttachmentExtractor there is a simple way to reduce your Dynamics 365 Data Storage. The tool copies or moves files to either SharePoint, AzureBlobStorage or a FileShare releasing valuable space in your Microsoft Dynamics 365 data storage. Files are replaced with links inside Dynamics 365 so users will not see a difference when accessing the files!'

Figure 3: AppSource – AttachmentExtractor

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.

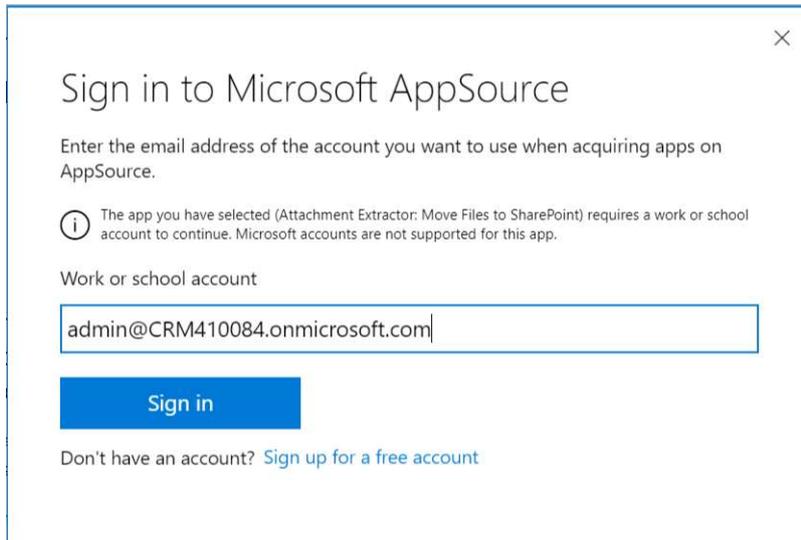


Figure 4: Sign into Microsoft AppSource

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.

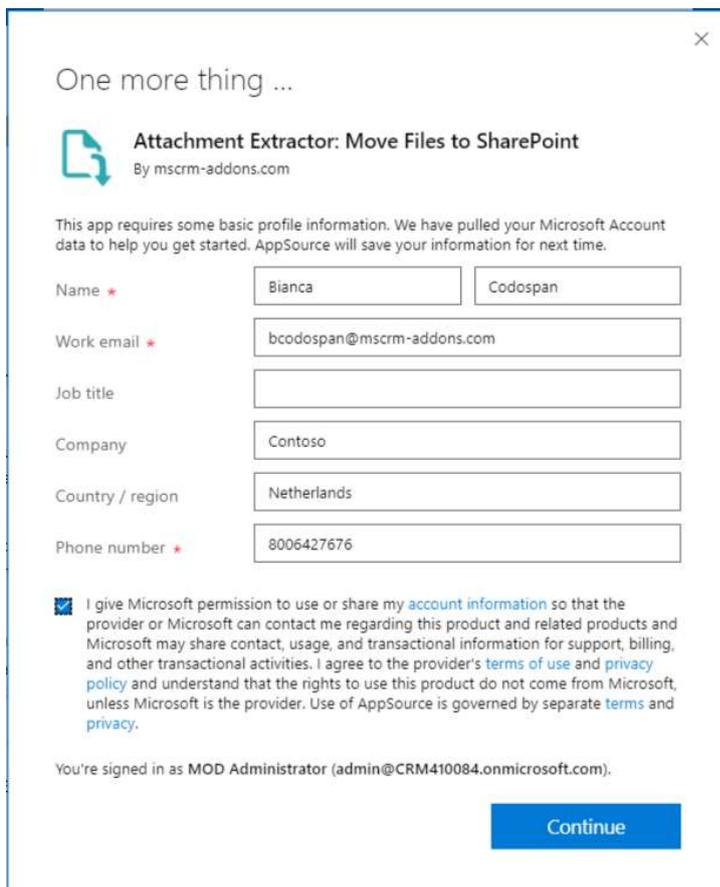


Figure 5: Enter your basic profile information

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

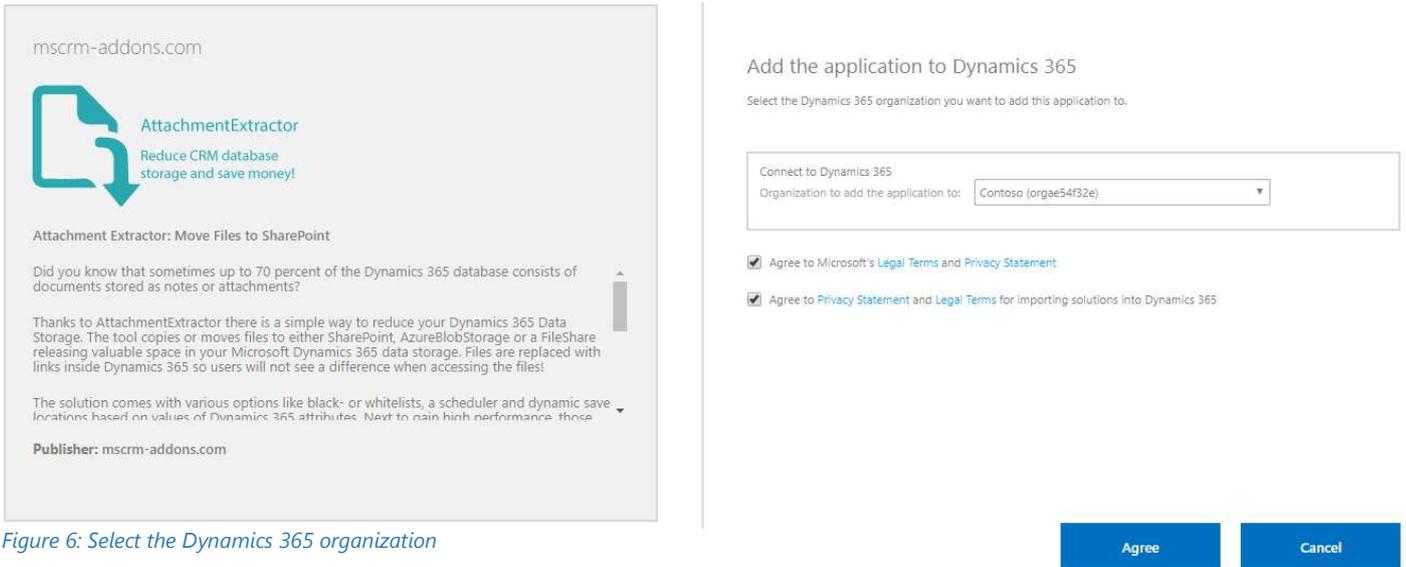
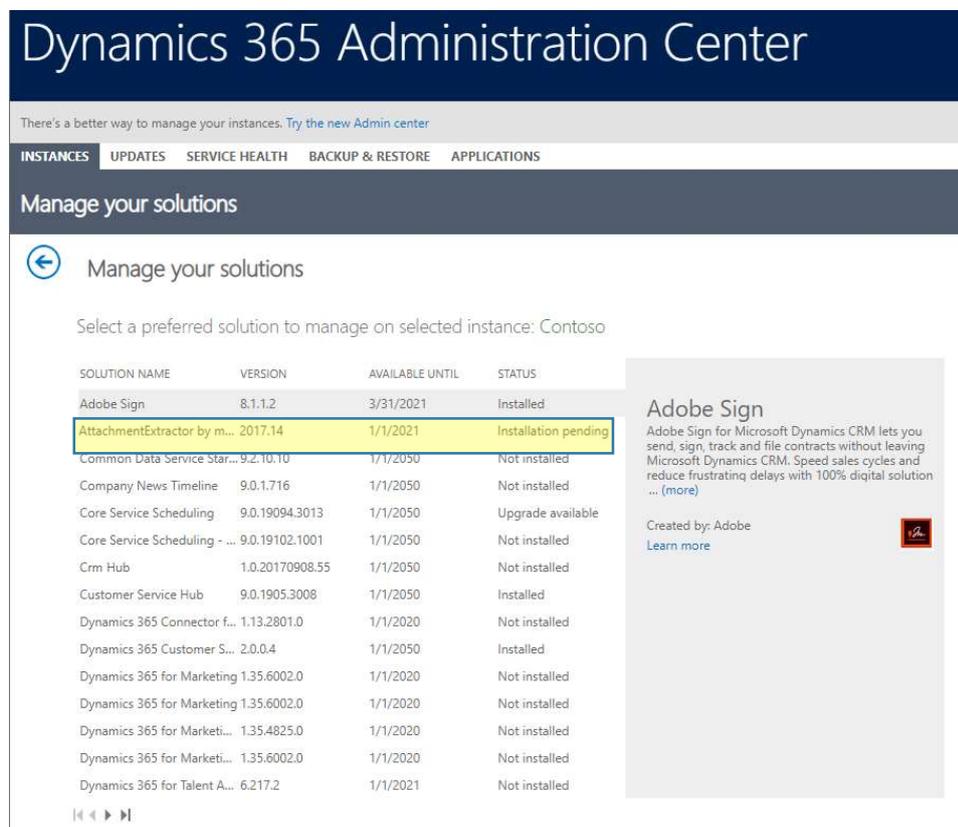


Figure 6: Select the Dynamics 365 organization

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).



SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Adobe Sign	8.1.1.2	3/31/2021	Installed
AttachmentExtractor by m...	2017.14	1/1/2021	Installation pending
Common Data Service Star...	9.2.10.10	1/1/2050	Not installed
Company News Timeline	9.0.1.716	1/1/2050	Not installed
Core Service Scheduling	9.0.19094.3013	1/1/2050	Upgrade available
Core Service Scheduling - ...	9.0.19102.1001	1/1/2050	Not installed
Crm Hub	1.0.20170908.55	1/1/2050	Not installed
Customer Service Hub	9.0.1905.3008	1/1/2050	Installed
Dynamics 365 Connector f...	1.13.2801.0	1/1/2020	Not installed
Dynamics 365 Customer S...	2.0.0.4	1/1/2050	Installed
Dynamics 365 for Marketing	1.35.6002.0	1/1/2020	Not installed
Dynamics 365 for Marketing	1.35.6002.0	1/1/2020	Not installed
Dynamics 365 for Marketi...	1.35.4825.0	1/1/2020	Not installed
Dynamics 365 for Marketi...	1.35.6002.0	1/1/2020	Not installed
Dynamics 365 for Talent A...	6.217.2	1/1/2021	Not installed

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).

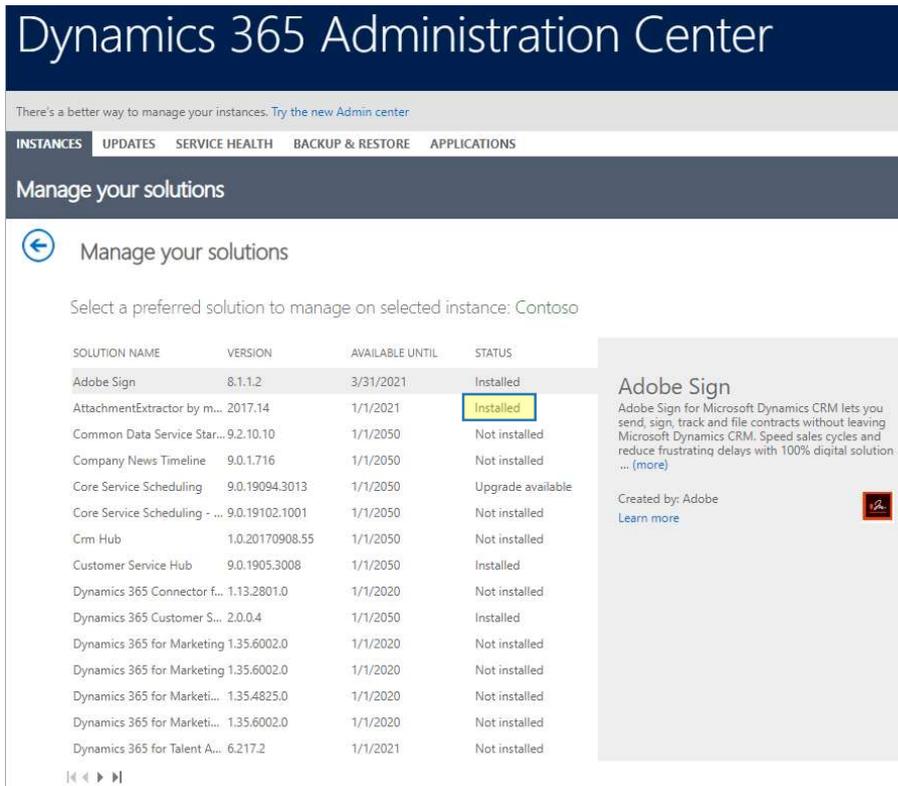


Figure 8: Organization overview – AE installation finished

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).

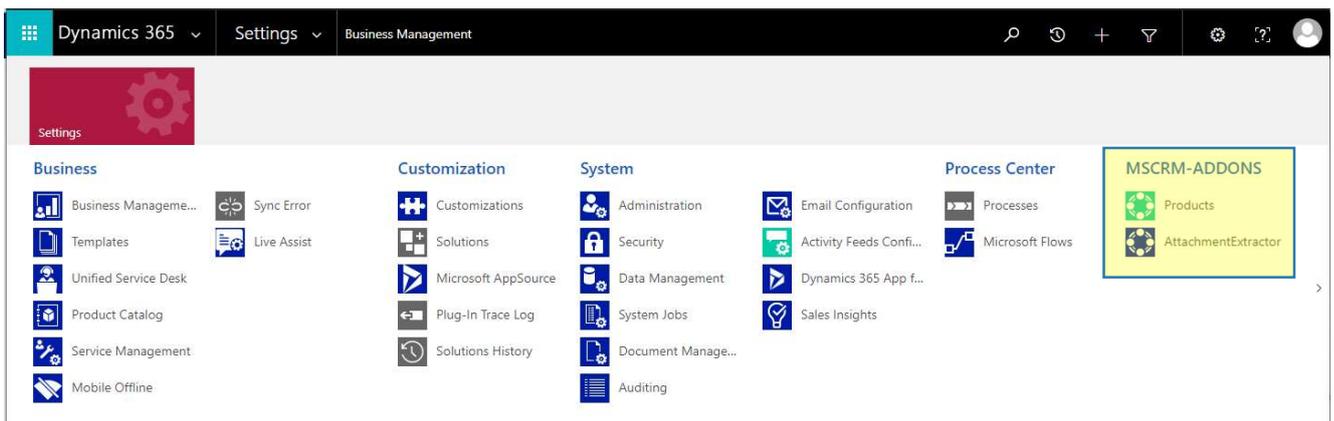


Figure 9: Dynamics 365 Settings > MSCRM-ADDONS: AttachmentExtractor

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.

Getting Started with AttachmentExtractor  mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Thank you for installing AttachmentExtractor for Microsoft Dynamics CRM!

The final piece missing is to configure the document generation service below.

- 1 Enter your email address in the form below or login with an existing mscrm-addons.com user account
- 2 Configure the service and watch our short video on [Getting Started](#) with the Service Configuration

Email address:

Or

Username:

Password:

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.

Getting Started with AttachmentExtractor  mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Thank you for installing AttachmentExtractor for Microsoft Dynamics CRM!

Hello bcodospan Version 2017.52.7188.25777

On this page you can configure DocumentsCorePack or AttachmentExtractor for your CRM organization.

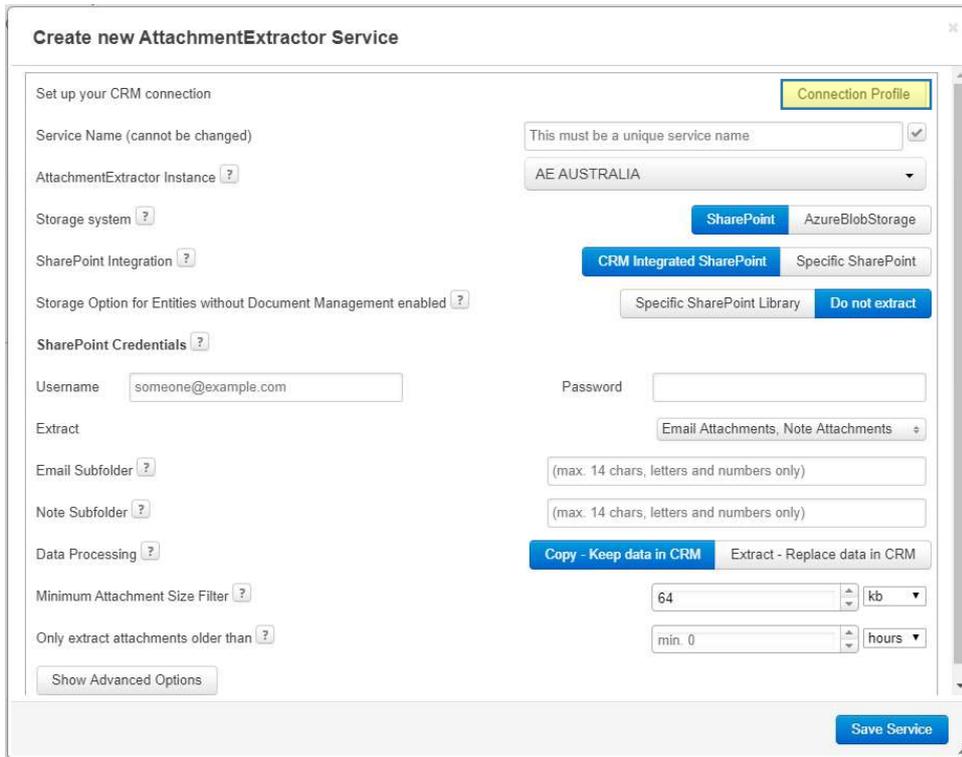
DocumentsCorePack ServerBased (3) **AttachmentExtractor (0)**

Your available AttachmentExtractor services

ID	Name	Status	Mode	Organization	CRM	Instance

Figure 11: AttachmentExtractor Online configuration window

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



Create new AttachmentExtractor Service

Set up your CRM connection Connection Profile

Service Name (cannot be changed)

AttachmentExtractor Instance

Storage system

SharePoint Integration

Storage Option for Entities without Document Management enabled

SharePoint Credentials

Username Password

Extract

Email Subfolder

Note Subfolder

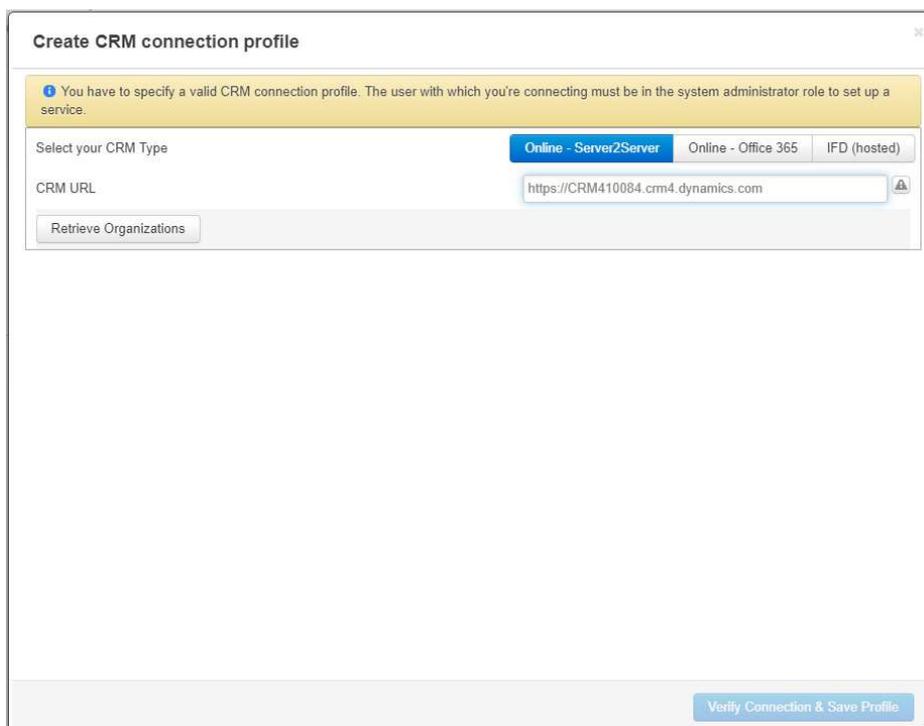
Data Processing

Minimum Attachment Size Filter

Only extract attachments older than

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 **[Retrieve Organizations]**-button.



Create CRM connection profile

You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

Select your CRM Type

CRM URL

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!

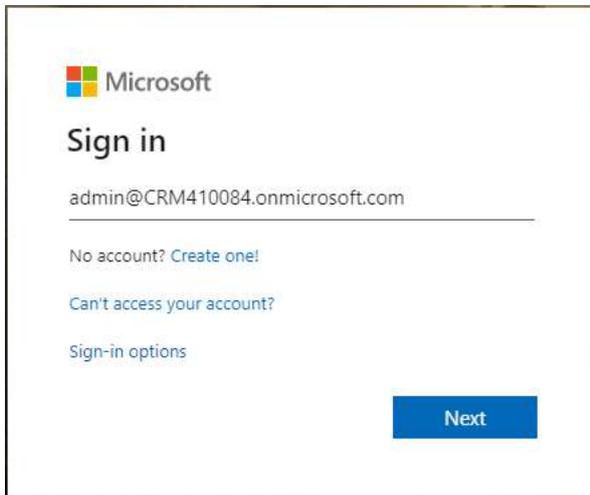


Figure 14: Login with administrator account

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.

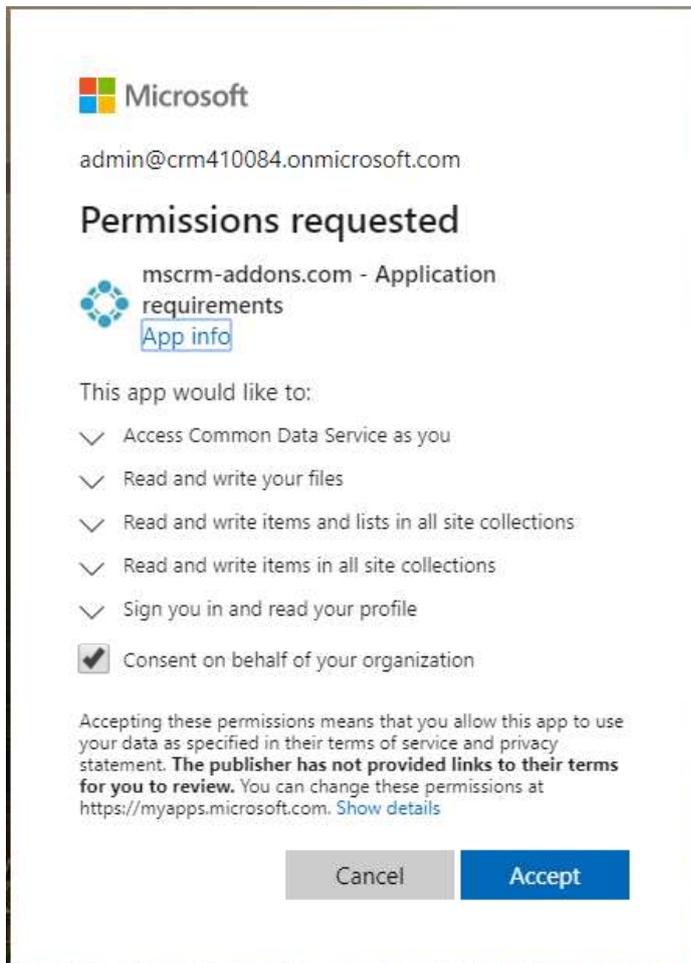
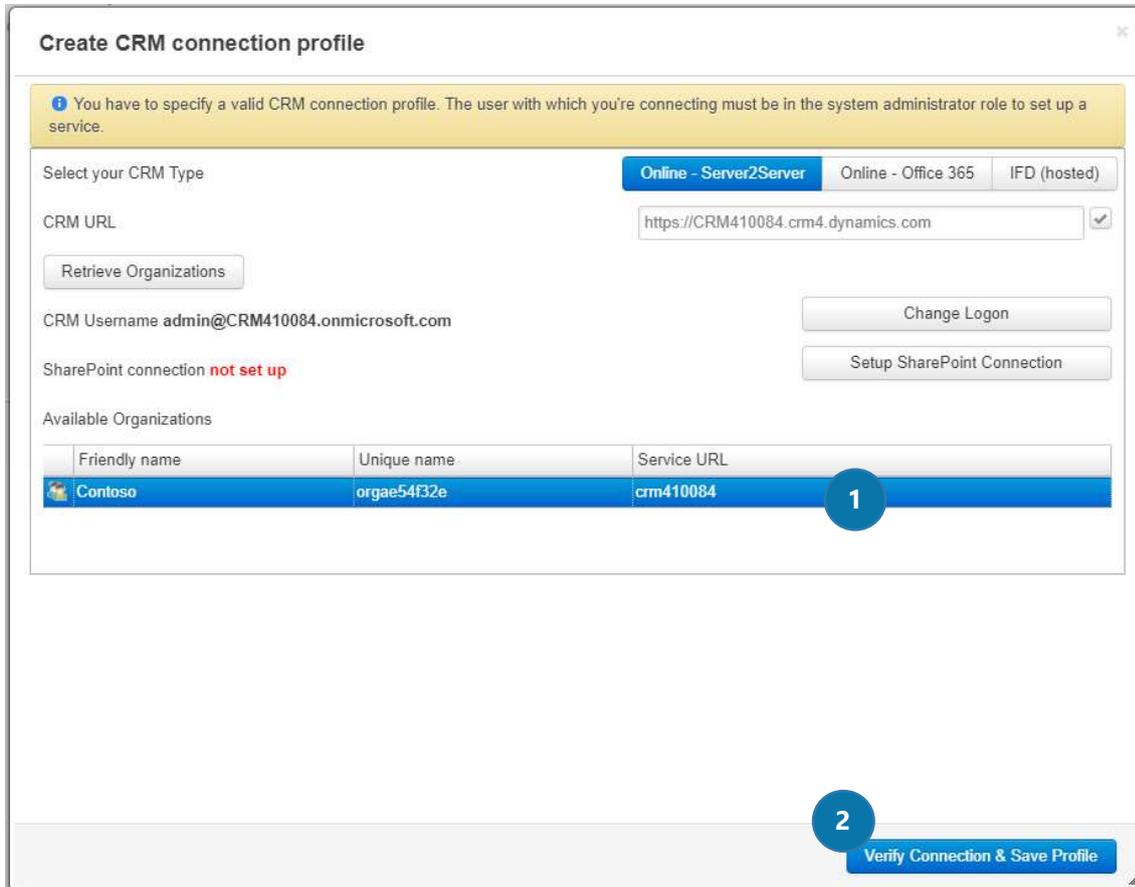


Figure 15: Accept requested permissions

As soon as your organization appears in the Available Organizations section **1**, click on the **[Verify Connection & Save Profile]**-button **2**.



Create CRM connection profile

i You have to specify a valid CRM connection profile. The user with which you're connecting must be in the system administrator role to set up a service.

Select your CRM Type: **Online - Server2Server** | Online - Office 365 | IFD (hosted)

CRM URL:

CRM Username:

SharePoint connection: **not set up**

Available Organizations

Friendly name	Unique name	Service URL
Contoso	orgae54f32e	crm410084

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.



Verify connectivity and permissions

i **Please DO NOT close this window or navigate away!!!**

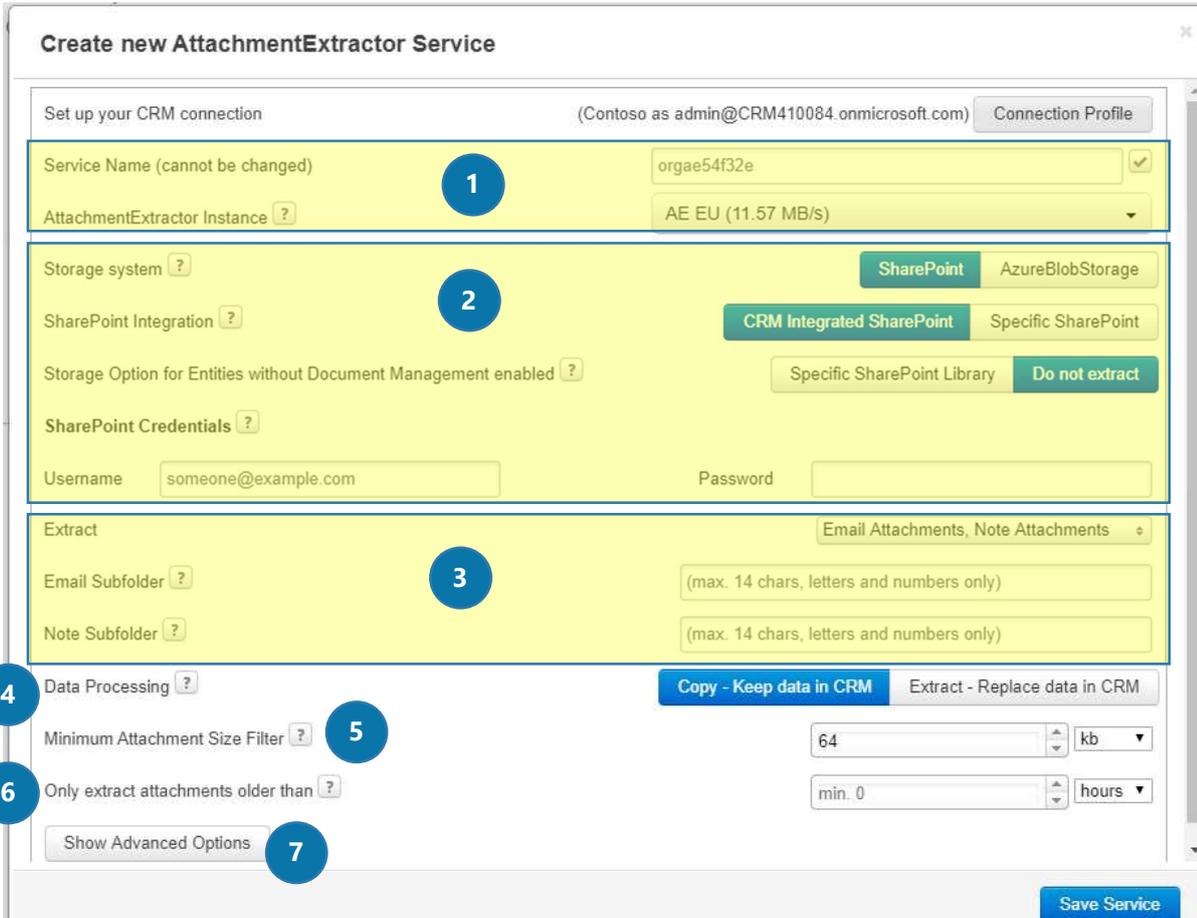
Check connectivity...

Check permissions...

Save CRM connection profile...

Figure 17: Verify connectivity permissions

You are now back on the same window as before. This window supports you in creating a new service.



The screenshot shows a web interface for creating a new AttachmentExtractor Service. The window title is "Create new AttachmentExtractor Service". At the top, it says "Set up your CRM connection" with the user "Contoso as admin@CRM410084.onmicrosoft.com" and a "Connection Profile" button. The form is divided into several sections:

- Section 1:** "Service Name (cannot be changed)" with a text input containing "orgae54f32e" and a checkmark icon.
- Section 2:** "AttachmentExtractor Instance" with a dropdown menu showing "AE EU (11.57 MB/s)".
- Section 3:** "Storage system" with buttons for "SharePoint" and "AzureBlobStorage". Below it, "SharePoint Integration" has buttons for "CRM Integrated SharePoint" and "Specific SharePoint".
- Section 4:** "Storage Option for Entities without Document Management enabled" with buttons for "Specific SharePoint Library" and "Do not extract".
- Section 5:** "SharePoint Credentials" with "Username" (input: "someone@example.com") and "Password" (input) fields.
- Section 6:** "Extract" section with a dropdown menu showing "Email Attachments, Note Attachments". Below it are "Email Subfolder" and "Note Subfolder" text inputs, both with "(max. 14 chars, letters and numbers only)" as a hint.
- Section 7:** "Data Processing" section with buttons for "Copy - Keep data in CRM" and "Extract - Replace data in CRM".
- Section 8:** "Minimum Attachment Size Filter" with a numeric input "64" and a unit dropdown "kb".
- Section 9:** "Only extract attachments older than" with a numeric input "min. 0" and a unit dropdown "hours".
- Section 10:** A "Show Advanced Options" button.
- Bottom:** A "Save Service" button.

Figure 18: Create new AE online service

1 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.

2 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.

3 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:

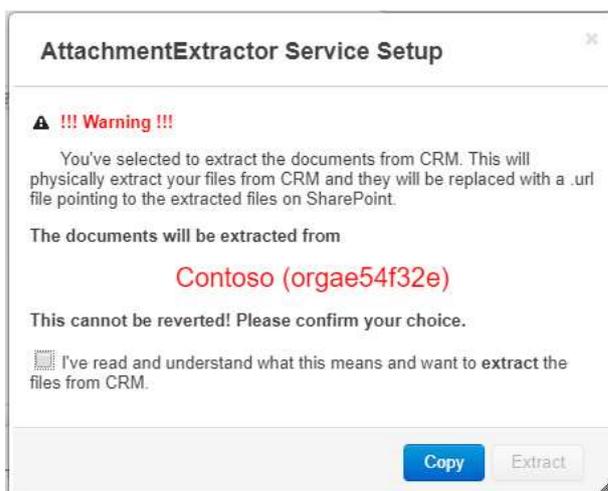
- [EMAIL ATTACHMENTS](#)
- [NOTE ATTACHMENTS](#)
- [APPOINTMENT ATTACHMENTS](#)

4 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.



5 *Figure 19: AttachmentExtractor online service warning*

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

6 ONLY EXTRACT ATTACHMENTS OLDER THAN

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

7 SHOW ADVANCED OPTIONS

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



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.



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.

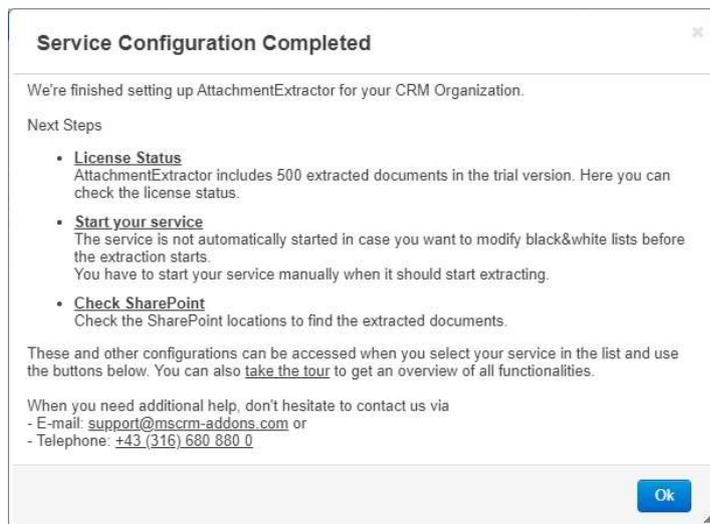


Figure 22: Service configuration completed

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

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Contact

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

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH
Bahnhofgürtel 59
A-8020 Graz
Austria

Tel Austria +43 316 680-880-0
Fax +43 316 680-880-25

Support:

7AM - 8PM GMT+1 (Monday-Friday)

Sales:

+43 316 680 880 14

sales@mscrm-addons.com

www.ptm-edv.at

www.mscrm-addons.com



Headquarter – US

mscrm-addons.com Corp
1860 North Rock Springs Rd
Atlanta, GA 30324
United States

Tel US +1 404 720 6066

Support:

9AM - 6PM EST (Monday-Friday)

Sales:

+1 404 720 6046

ussales@mscrm-addons.com

www.mscrm-addons.com