

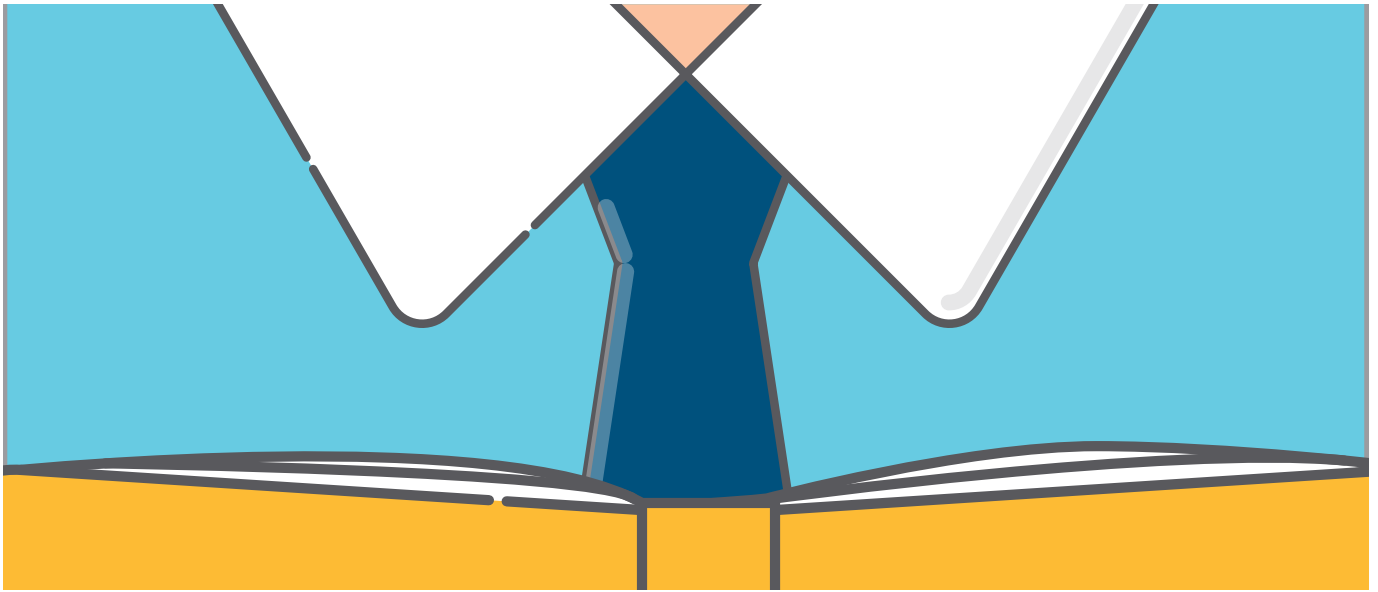
proStorageSaver

User Guide

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Introduction

1.1 What is proStorageSaver?

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

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

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



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

1.2 Installation

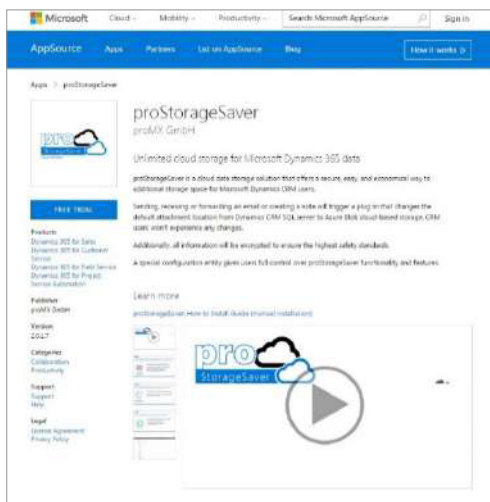
There are two platforms from which you can download a free trial version of proStorageSaver.



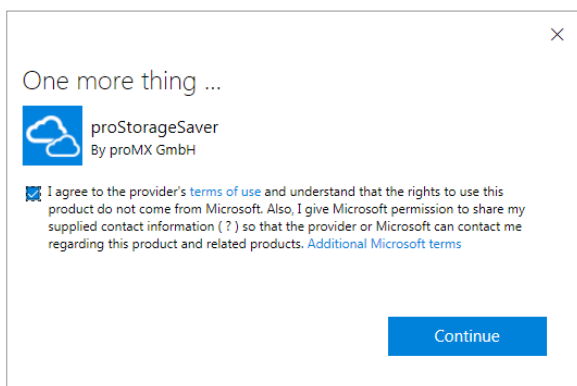
Please note: You require the administrator security role in Dynamics 365 to perform these installations.

1.2.1 Download from Microsoft AppSource

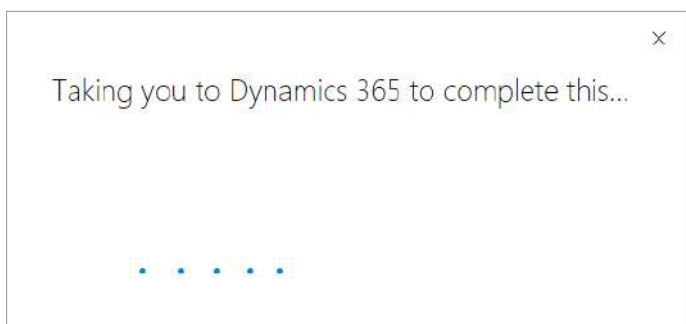
To download a free trial version of proStorageSaver from Microsoft AppSource, please click [here](#)



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



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




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

1.2.2 Download from proMX AppStore

To download a free trial of proStorageSaver from the proMX AppStore, please click [here](#). Insert your Dynamics 365 URL and click **Install Now!**

TRY proStorageSaver NOW!



proStorageSaver needs to be installed into Microsoft Dynamics 365.
If you don't have Microsoft Dynamics 365 please [click here](#)

CRM URL:

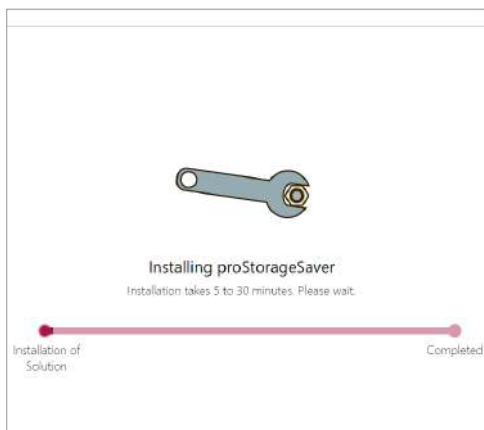
OR:

- <https://promx.com/dynamics>
- <https://promx.com/subpromx.com>

Install Now!

Our inexpensive and secure solution for additional storage space for Microsoft Dynamics CRM Online

The installation process will start automatically.

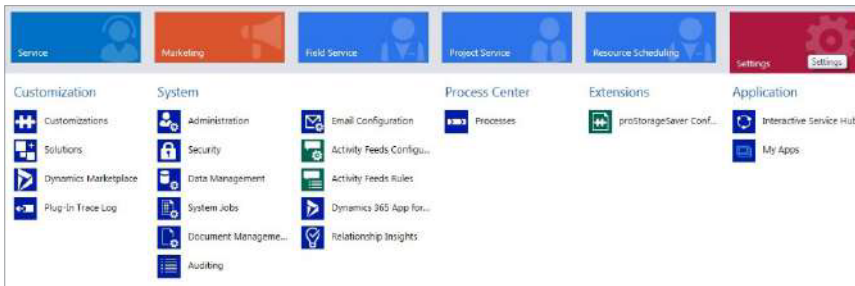


Company News Timeline	1.0.0.0	12/31/2050	Not installed
FantasySalesTeam	1.4.6	1/1/2050	Not installed
Field Service	6.1.1.39	1/1/2050	Not installed
Gamification	2016.12.2	1/1/2050	Not installed
Office 365 Groups	2.6.0.0	1/1/2050	Not installed
proStorageSaver (AzureBI...	2.0.1.7	9/5/2099	Installing

1.3 Configuration

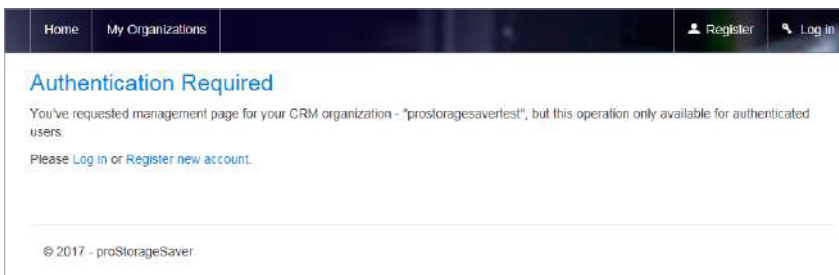
Once you have downloaded proStorageSaver from either Microsoft AppSource or proMX AppStore, configure the solution:

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



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

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
✓ proStorageSaver	proStorageSaver (Account...	2.0.1.7	1/11/2017	Managed	proMX Online	The proStorageSaver application will automatically move...
FieldServiceDemoAutoMove	Field Service Demo Auto...	6.1.0.1	12/21/2016	Managed	Microsoft Dynamics	Demo plug-in that automatically moves work orders to th...
ResourceSchedulingDemo...	Resource Scheduling Dem...	1.0.0.4	12/21/2016	Managed	Microsoft Dynamics	
ProjectServiceDemoData	Project Service Demo Data	1.0.1.4	12/21/2016	Managed	Microsoft Dynamics	Demo Data for Project Service
SiteMapCustomization	Trial Site Map Customizat...	1.8	12/21/2016	Managed	Microsoft Dynamics 365	
FreeTrialBaseSolution2	Trial Base Solution	2.1.0.0	12/21/2016	Managed	Microsoft Dynamics	Solution to enhance out of the box Microsoft Dynamics C...



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

Email Confirmation

The confirmation email has been sent and should be delivered shortly.

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

You are about to register your CRM Organization with proStorageSaver.

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

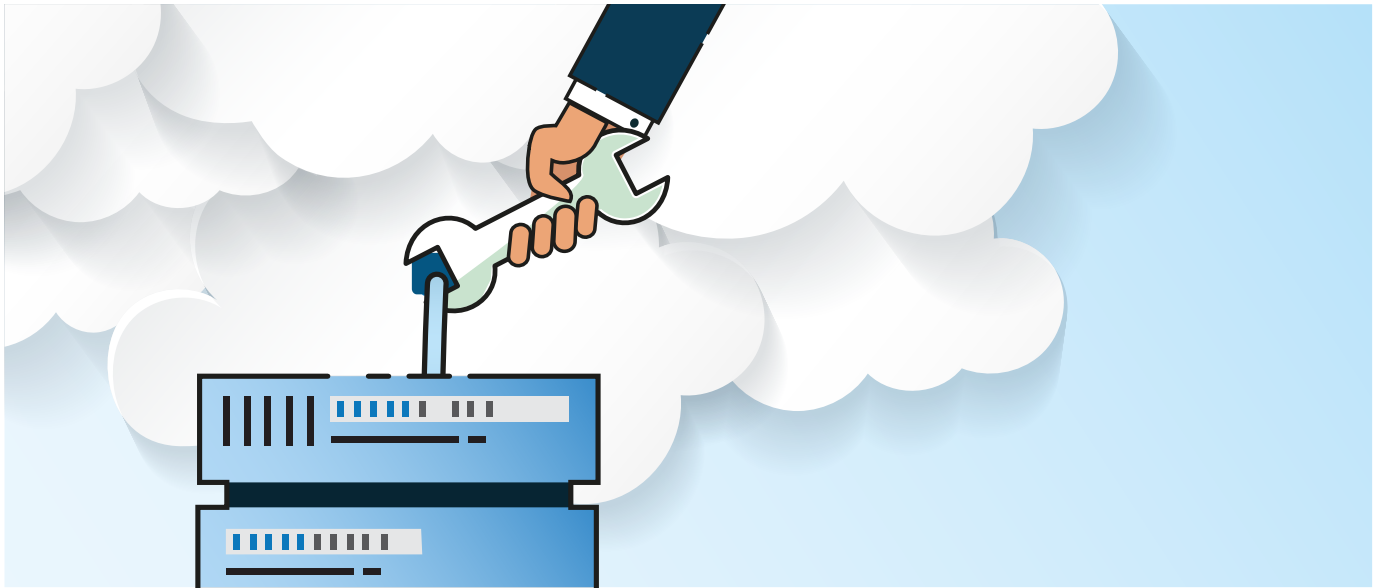
OrganizationId
8320fc8c-4632-4ba3-b9c4-c7b496ac2166

Name
prostorgesavertest

Owner
[REDACTED]

Confirm Ownership

© 2017 - proStorageSaver



2. Usage

proStorageSaver is now configured and ready to process attachments.

2.1 Extracting attachments

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

Organization ID	6320fc8c-4632-4ba3-b8c4-c7b496ac2166
Organization Name	prostorgesavertest
Owner	[REDACTED]
Subscription Active	<input checked="" type="checkbox"/>
Active Users	0
Storage Size	0 B
Number of Files	0
Number of "Store" Requests	0
Number of "Retrieve" Requests	0
Incoming Traffic	0 B
Outgoing Traffic	0 B

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

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

POSTS
ACTIVITIES
NOTES

A Simple Note to test proStorageSaver

proStorageSaver1.jpg
You - Just now

Simply refresh the page to see the result.

POSTS
ACTIVITIES
NOTES

Enter a note

A Simple Note to test proStorageSaver

proStorageSaver1.jpg.url
ProStorage Saver - Today 13:40:20

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

Manage

Organization ID	1b0f5b79-8f8f-4a01-b127-f6694e397aa6
Organization Name	prostoragesavertest
Owner	
Subscription Active	<input checked="" type="checkbox"/>
Active Users	3
Storage Size	165.67 KB
Number of Files	1
Number of "Store" Requests	1
Number of "Retrieve" Requests	1
Incoming Traffic	165.67 KB
Outgoing Traffic	165.67 KB

[Back to Organizations](#)

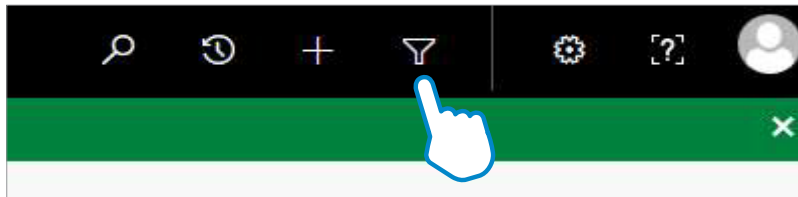
2.2 Recalling extractions

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

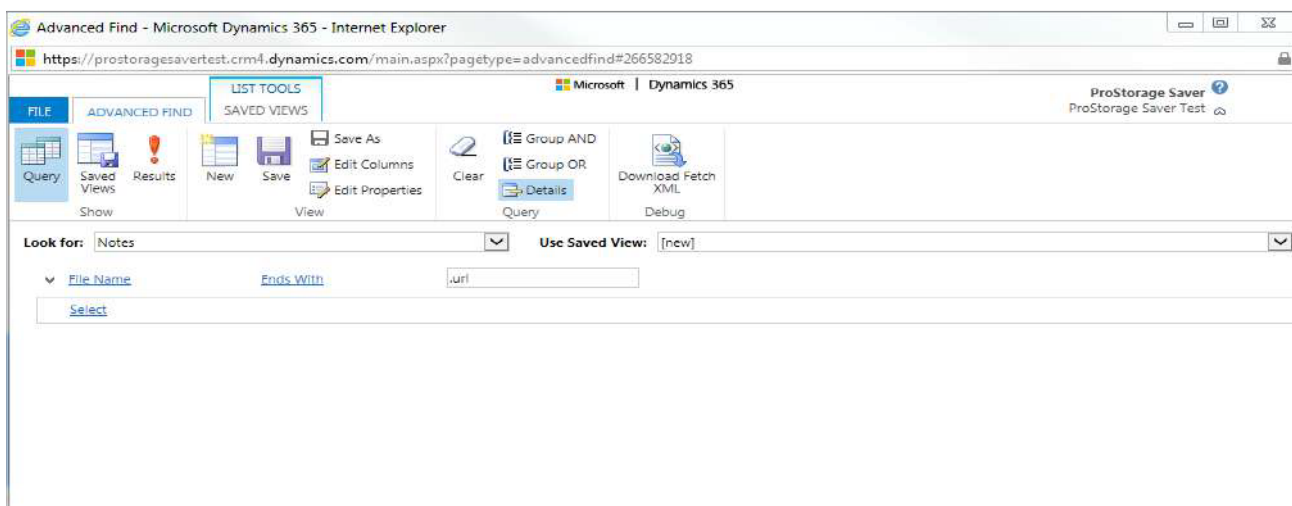
To restore attachments navigate to **Advanced Find** icon in the top right side of the screen.



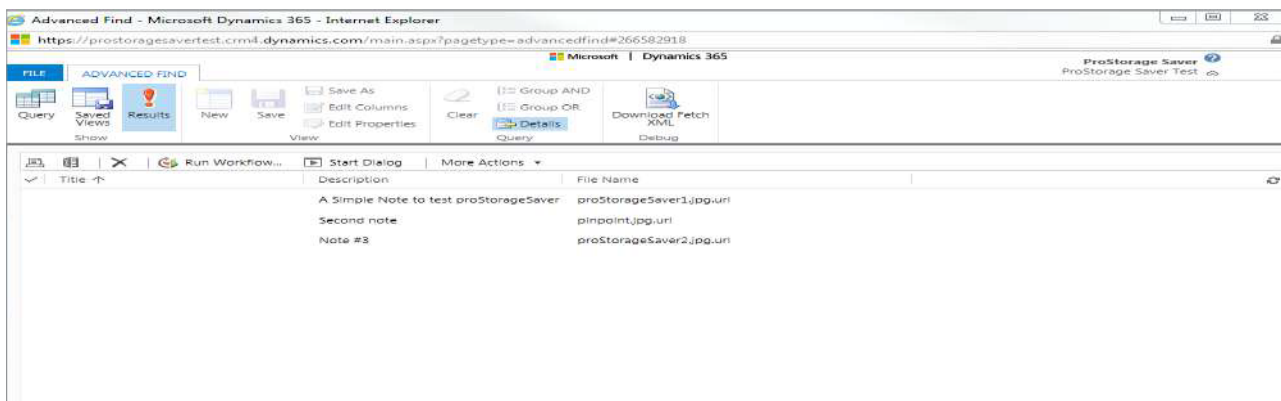
Please note: Recalling attachments will require sufficient Dynamics 365 storage space, otherwise the workflow cannot be completed.



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



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



As you can see, proStorageSaver comes with two built-in workflows: **Process Note** and **Restore Note**. The former is a way to

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

Look Up Record

Enter your search criteria.

Look for Process

Look in On Demand Workflows

Search Search for records

Show Only My Records

	Process Name	Category	Created On	Mod	
	proStorageSaver: Process Note	Workflow	1/11/2017 12:47...	1/11/2017	
✓	proStorageSaver: Restore Note	Workflow	1/11/2017 12:47...	1/11/2017	

1 - 2 of 2 (1 selected)

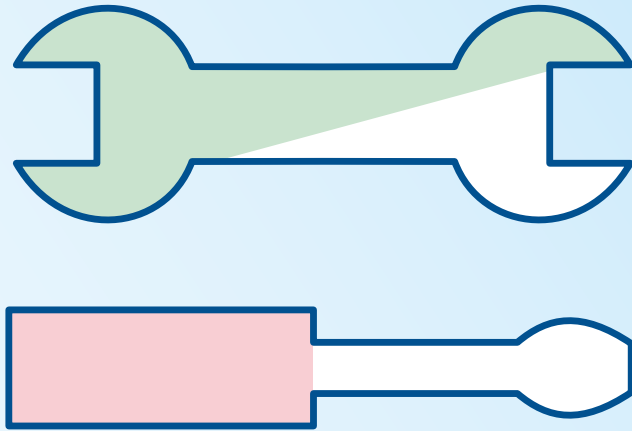
Page 1

Add

Cancel

Remove Value

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



3. Trouble shooting

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

If you encounter any problems while **using** proStorageSaver, please contact us via our [support form](#).



4. Contact

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