



## **Dynamic 365 - Attachment Mover User Guide**

Version 1.0.0

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## Dynamic 365 - Attachment Mover

Growing size of Attachments will adversely impact on your Dynamics CRM performance due to millions of records stored in annotation table.

You will find multiple attachments in your Organization which will eat up your CRM Storage space. we can notice drastic performance degradation in processing of operations in Dynamics CRM. This attachment needs to be handle or Stored Somewhere to improve Dynamic CRM Performance.

As a CRM administrator, you need to make sure every time Dynamic CRM functioning correctly. It is a not a good idea to regularly check database size or if anything is failing.

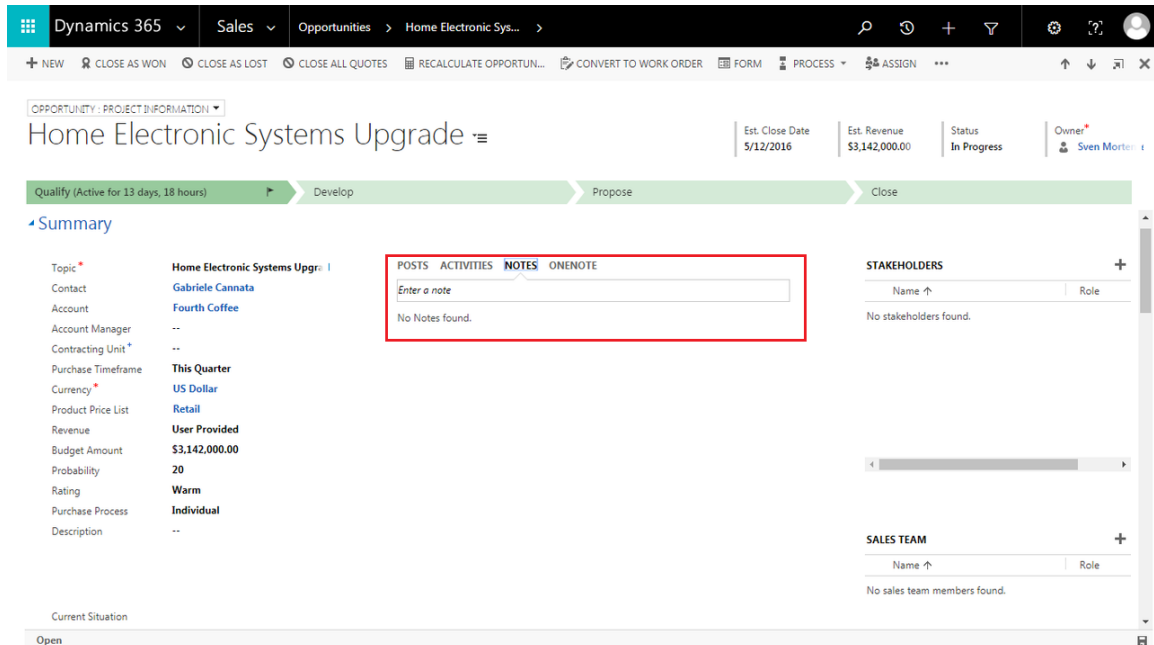
**Dynamic 365 - Attachment Mover** provides functionality to store attachments on Azure Cloud instead in CRM to save the space in Dynamic CRM.

**Some important features: -**

- a. Easy to Configure Azure Connection in Azure Configuration Entity
  - i. Storage key
  - ii. Storage Account
  - iii. Container Name
  - iv. Blob Path
- b. Easy to check attachment in Azure Cloud On Clicking on Button View Attachments on Particular Entity

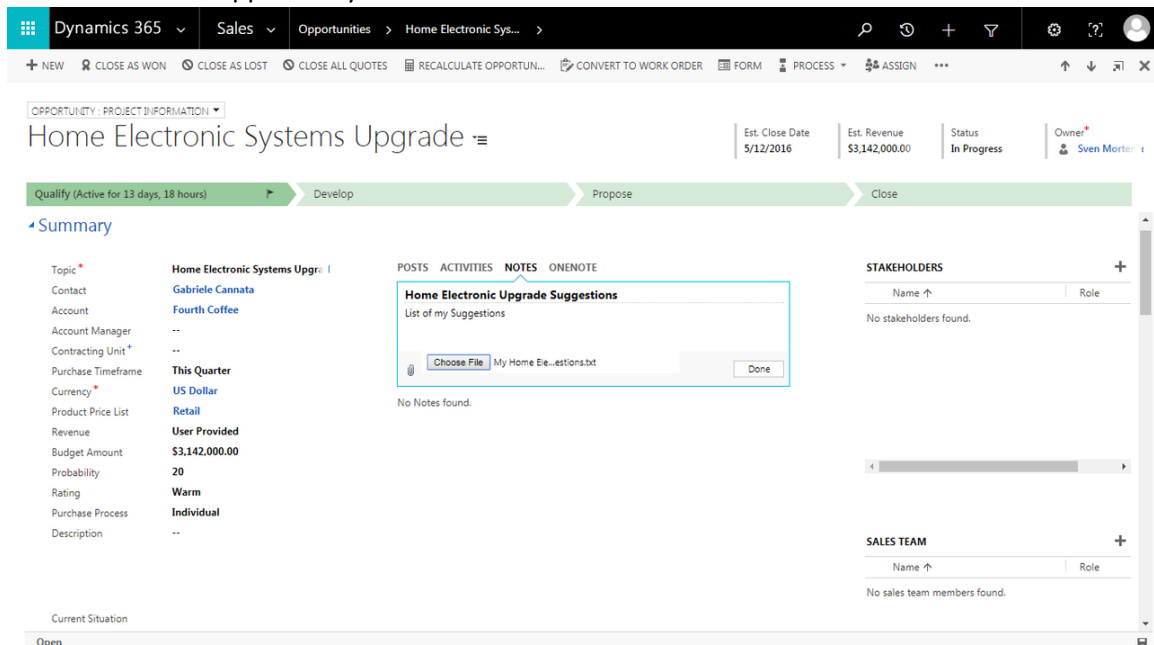
## Steps:

1. Navigate to entity which is enabled for Dynamics 365 Attachment mover.  
For instance, consider Opportunity entity is enabled.  
Navigate to Sales >> Opportunity



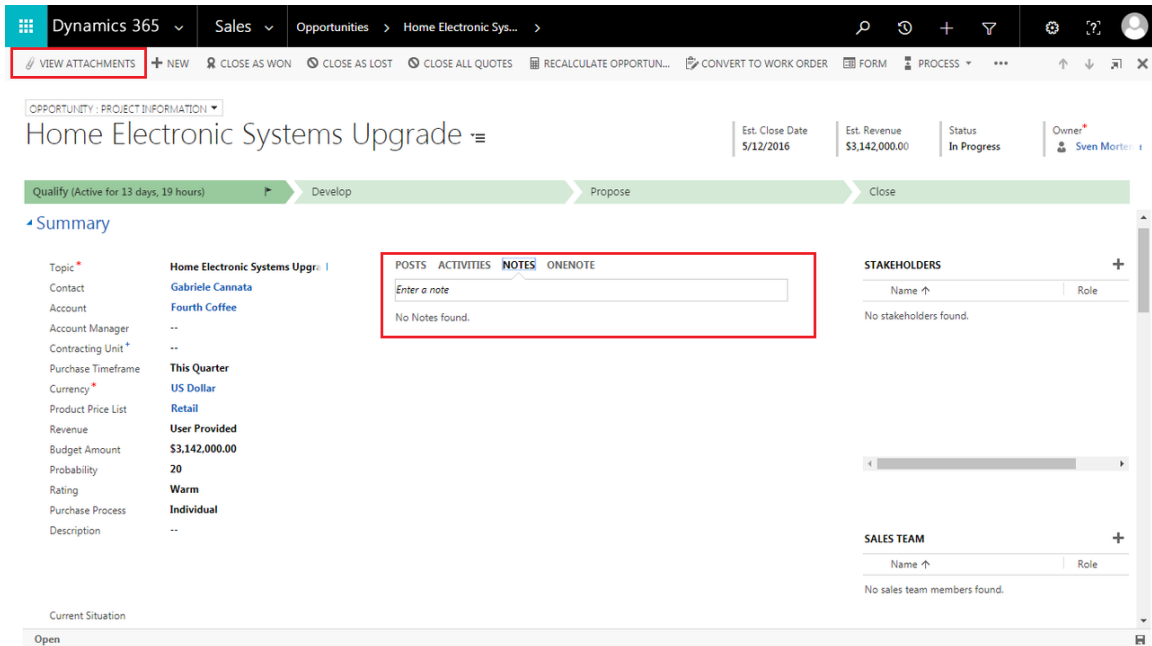
The screenshot shows the Dynamics 365 interface for an Opportunity record titled "Home Electronic Systems Upgrade". The navigation bar includes "Dynamics 365", "Sales", "Opportunities", and the specific record name. Below the navigation bar, there are buttons for "NEW", "CLOSE AS WON", "CLOSE AS LOST", "CLOSE ALL QUOTES", "RECALCULATE OPPORTUNITY", "CONVERT TO WORK ORDER", "FORM", "PROCESS", "ASSIGN", and a search icon. The record details show "Est. Close Date: 5/12/2016", "Est. Revenue: \$3,142,000.00", "Status: In Progress", and "Owner: Sven Morten". The process flow bar indicates the current stage is "Quality (Active for 13 days, 18 hours)", with "Develop", "Propose", and "Close" as subsequent stages. The "Summary" section on the left lists various attributes: Topic (Home Electronic Systems Upgrade), Contact (Gabriele Cannata), Account (Fourth Coffee), Account Manager (Contracting Unit), Purchase Timeframe (This Quarter), Currency (US Dollar), Product Price List (Retail), Revenue (User Provided), Budget Amount (\$3,142,000.00), Probability (20), Rating (Warm), Purchase Process (Individual), and Description. The "NOTES" tab is selected, showing a text input field with the placeholder "Enter a note" and a "No Notes found." message. The "STAKEHOLDERS" and "SALES TEAM" sections on the right both show "No stakeholders found." and "No sales team members found." respectively.

2. Add Note on Opportunity and Save the record.



This screenshot shows the same Dynamics 365 Opportunity record, but now a new note has been added. The "NOTES" tab is still selected, and the text input field now contains the text "Home Electronic Upgrade Suggestions" followed by "List of my Suggestions". Below the input field, there is a "Choose File" button and a file name "My Home Ele...estions.txt". A "Done" button is also visible. The "No Notes found." message is no longer present. The rest of the interface, including the navigation bar, record details, process flow, and summary section, remains the same as in the previous screenshot.

3. Refresh the page
4. After adding Note **View Attachments** Button Will get Visible on Top Left Corner and Attached Note will get removed from CRM.



**Dynamics 365** | Sales | Opportunities | Home Electronic Sys...

**VIEW ATTACHMENTS** + NEW CLOSE AS WON CLOSE AS LOST CLOSE ALL QUOTES RECALCULATE OPPORTUN... CONVERT TO WORK ORDER FORM PROCESS ...

OPPORTUNITY: PROJECT INFORMATION

## Home Electronic Systems Upgrade

Est. Close Date: 5/12/2016 | Est. Revenue: \$3,142,000.00 | Status: In Progress | Owner: Sven Morten

Qualify (Active for 13 days, 19 hours) | Develop | Propose | Close

**Summary**

Topic	Home Electronic Systems Upgrade
Contact	Gabriele Cannata
Account	Fourth Coffee
Account Manager	--
Contracting Unit	--
Purchase Timeframe	This Quarter
Currency	US Dollar
Product Price List	Retail
Revenue	User Provided
Budget Amount	\$3,142,000.00
Probability	20
Rating	Warm
Purchase Process	Individual
Description	--

Current Situation: Open

**POSTS ACTIVITIES NOTES ONENOTE**

Enter a note

No Notes found.

**STAKEHOLDERS**

Name ↑ Role

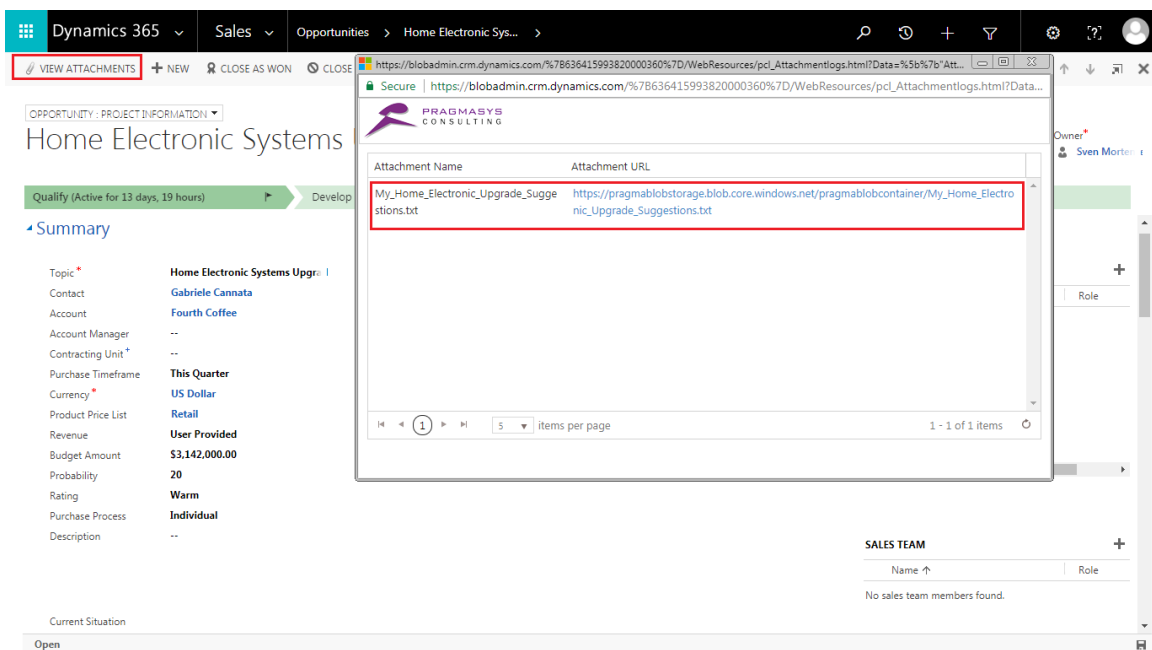
No stakeholders found.

**SALES TEAM**

Name ↑ Role

No sales team members found.

5. On Click of **View Attachment** window will get pop up and shows the attached file from Azure Storage for that same record.



**Dynamics 365** | Sales | Opportunities | Home Electronic Sys...

**VIEW ATTACHMENTS** + NEW CLOSE AS WON CLOSE AS LOST CLOSE ALL QUOTES RECALCULATE OPPORTUN... CONVERT TO WORK ORDER FORM PROCESS ...

OPPORTUNITY: PROJECT INFORMATION

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Product Price List	Retail
Revenue	User Provided
Budget Amount	\$3,142,000.00
Probability	20
Rating	Warm
Purchase Process	Individual
Description	--

Current Situation: Open

**Attachment Name** | **Attachment URL**

My_Home_Electronic_Upgrade_Suggestions.txt	https://pragmablobstorage.blob.core.windows.net/pragmablobcontainer/My_Home_Electronic_Upgrade_Suggestions.txt
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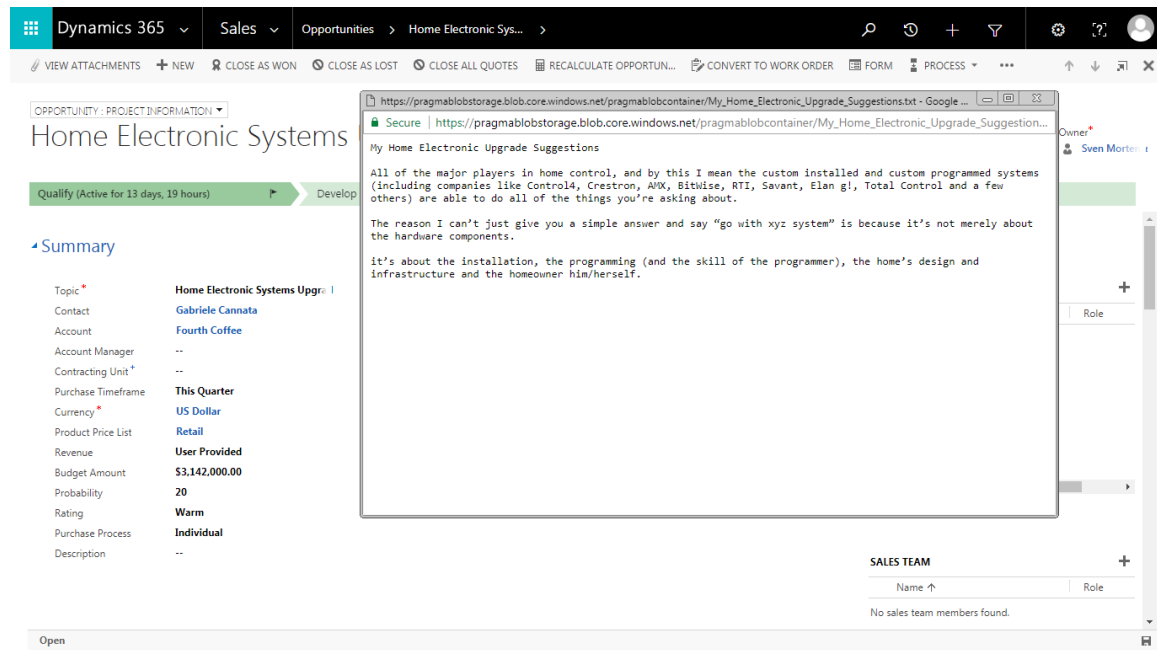
1 - 1 of 1 items

**SALES TEAM**

Name ↑ Role

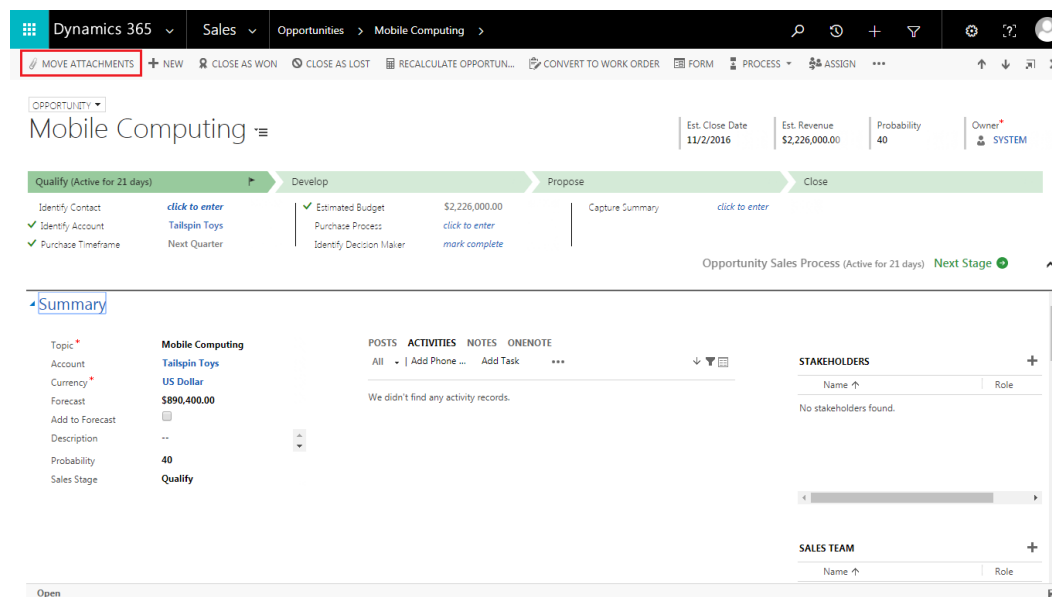
No sales team members found.

## 6. On Click of Attachment URL user can see the attachment



The screenshot shows the Dynamics 365 interface for an opportunity named 'Home Electronic Systems'. The 'Summary' tab is active, displaying various fields such as Topic, Contact, Account, and Budget Amount. A browser window is open, showing a secure link to a file named 'My Home Electronic Upgrade Suggestions.txt'. The file content is displayed, detailing home electronic upgrade suggestions and the role of a programmer in the installation process.

## 7. On Click On **Move Attachment** button user can send already created Notes to Azure Storage



The screenshot shows the Dynamics 365 interface for an opportunity named 'Mobile Computing'. The 'Summary' tab is active, displaying various fields such as Topic, Account, Currency, and Forecast. The 'Estimate Budget' field is highlighted, showing a value of \$2,226,000.00. The 'Estimate Revenue' field is also highlighted, showing a value of \$2,226,000.00. The 'Probability' field is highlighted, showing a value of 40. The 'Owner' field is highlighted, showing a value of SYSTEM. The 'Estimate Close Date' field is highlighted, showing a value of 11/2/2016. The 'Estimate Close Date' field is highlighted, showing a value of 11/2/2016. The 'Estimate Close Date' field is highlighted, showing a value of 11/2/2016.

User can move multiple attachments from selecting records using **Move Attachments** button on Home grid

**Dynamics 365** Sales Opportunities

**MOVE ATTACHMENTS** + NEW EDIT DELETE REOPEN OPPORTUNITY SEND DIRECT EMAIL ASSIGN SHARE EMAIL A LINK

Open Opportunities

Topic	Account	Owner	Est. Close Date	Probability	Est. Revenue	Add to Forecast	Forecast
Expressed interest in A. Datum X line of printers	Northwind Trad...	SYSTEM	6/5/2016	70	\$10,568,900.00	No	\$255,000.00
Audio Equipment	Wide World Imp...	SYSTEM	4/20/2016	60	\$8,710,785.00	No	\$4,200,000.00
Interested in our newer offerings	A. Datum	SYSTEM	7/9/2016	60	\$7,500,000.00	No	\$2,143,500.00
Printers	Adventure Works	Christa Geller	7/15/2016	80	\$4,931,300.00	No	\$4,108,800.00
Video Hardware Upgrade	Adventure Works	SYSTEM	11/30/2016	60	\$4,790,000.00	No	\$630,540.00
Refrigeration Smart Sensors	Tailspin Toys	SYSTEM	7/6/2016	40	\$3,550,000.00	No	\$1,420,000.00
4G Enabled Tablets	Southridge Video	Azure Admin	5/6/2016	60	\$3,257,500.00	No	\$3,186,000.00
Home Electronic Systems Upgrade	Fourth Coffee	Sven Mortensen...	5/12/2016	20	\$3,142,000.00	No	\$628,400.00
Home PC	Adventure Works	Amy Alberts (Sa...	8/31/2016	20	\$2,470,860.00	No	
Notebooks		SYSTEM	8/31/2016	60	\$2,441,475.00	No	\$2,217,000.00
Mobile Computing	Tailspin Toys	SYSTEM	11/2/2016	40	\$2,226,000.00	No	\$890,400.00
Mobile Computing Purchase	Blue Yonder Airli...	Sven Mortensen...	5/12/2016	40	\$2,187,500.00	No	\$1,448,550.00
Mobile Computing Expansion	Northwind Trad...	David So (Sampl...	7/17/2016	40	\$2,160,000.00	No	\$864,000.00
Product SKU JJ202	Adventure Works	Dan Jump (Sam...	12/9/2016	80	\$2,134,000.00	No	\$1,707,200.00
PC Selection	Humongous Ins...	Sven Mortensen...	7/13/2016	60	\$2,095,680.00	No	\$1,410,049.90
Video Hardware Update	Fourth Coffee	Dan Jump (Sam...	8/10/2016	50	\$2,086,850.00	No	\$241,250.00
PC	Fabrikam, Inc.	SYSTEM	12/10/2016	60	\$2,078,125.00	No	\$1,242,150.00
Computers	Tailspin Toys	SYSTEM	5/31/2016	60	\$2,000,000.00	No	\$648,000.00

1 - 66 of 66 (3 selected)

AB # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z