Dynamic 365 - Attachment Mover Installation Guide

Document Version History

#	Date	Author	Reason	Version
1	04/10/17	Pragmasys	Initial Version	0.1

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1. Dynamic 365 - Attachment Mover

1.1 Introduction

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

b. Easy to check attachment in Azure Cloud on a single of click of Button named “View Attachments” on an entity

2. Supported MS Dynamics CRM versions

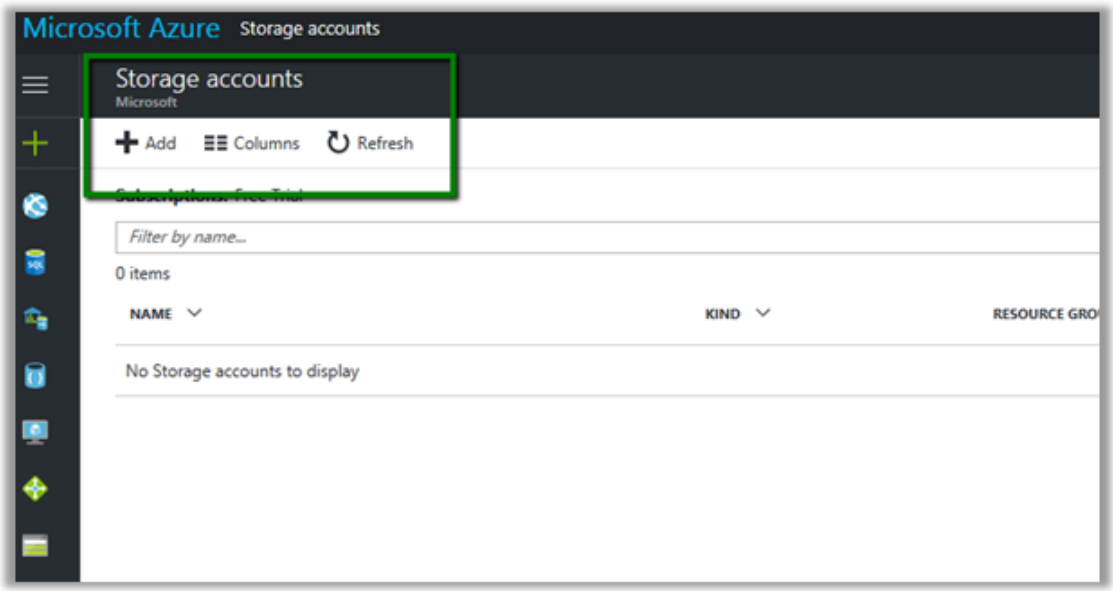
1. Microsoft Dynamics 365 online and on-premise version.

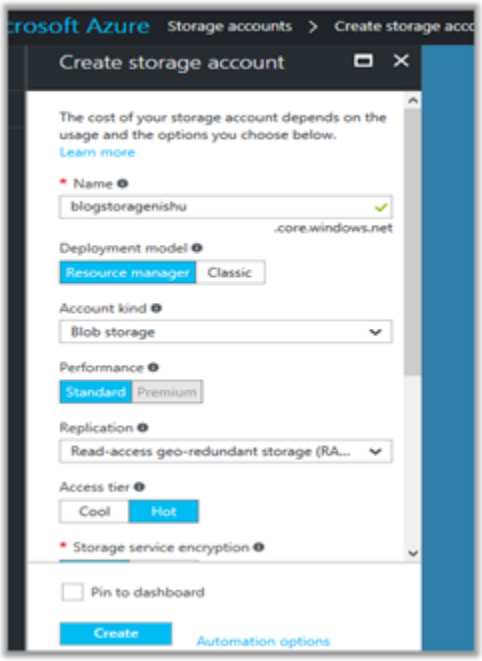
3. Azure Storage Creation process

Microsoft Azure Storage is a Microsoft-managed cloud service that provides storage that is highly available, secure, durable, scalable, and redundant. Azure Storage consists of Blob storage, File Storage, and Queue storage.

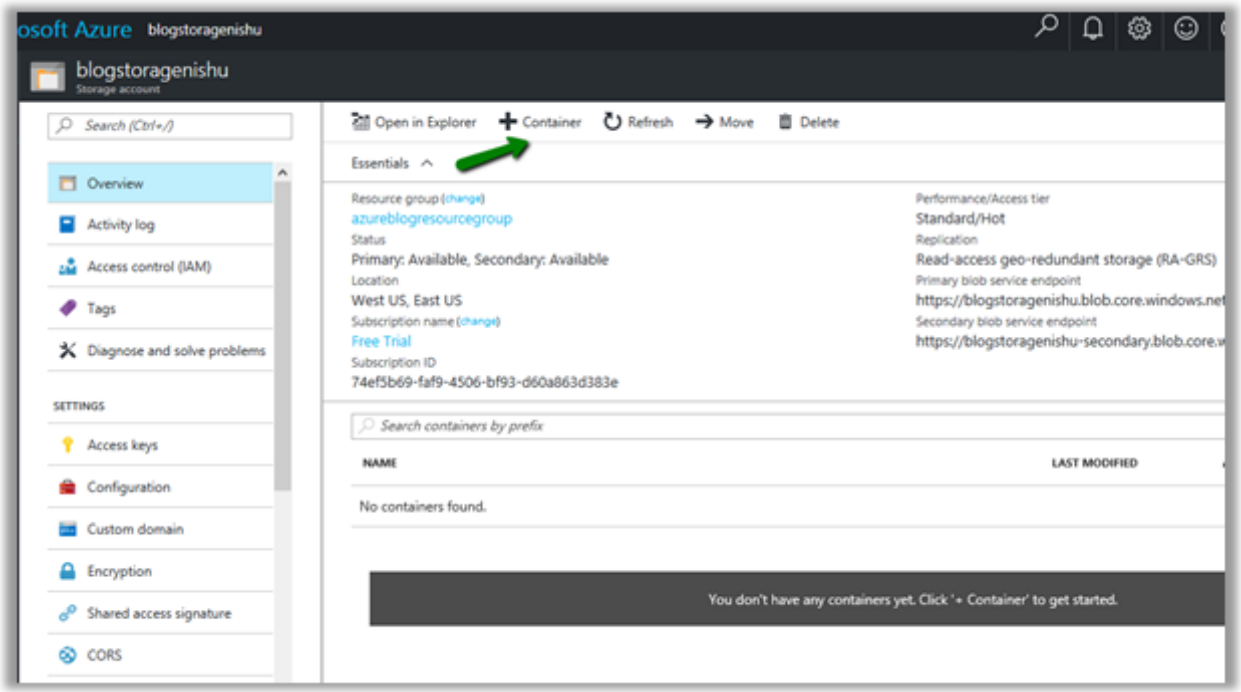
https://docs.microsoft.com/en-us/azure/storage/common/storage-introduction

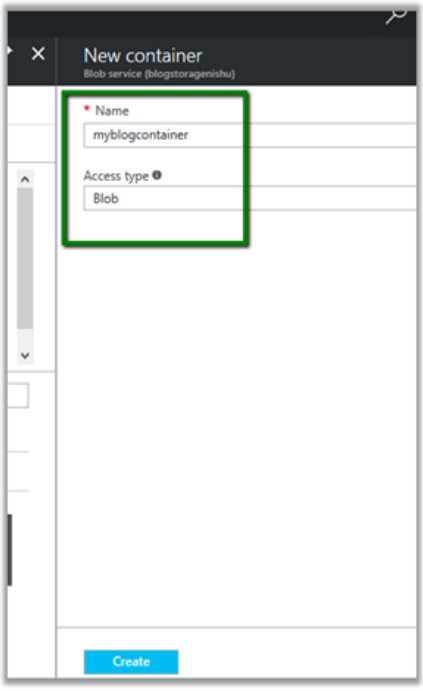
1. **Steps to Configure Azure Storage Account**
   a. Log in to Azure Portal
      https://portal.azure.com
   b. Click on Add to add a new storage account



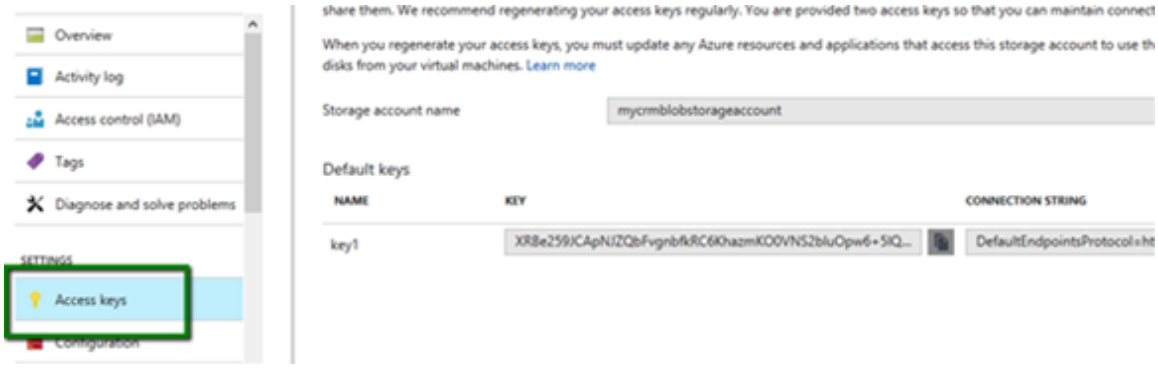


2. Create a new container in it to store the blob files





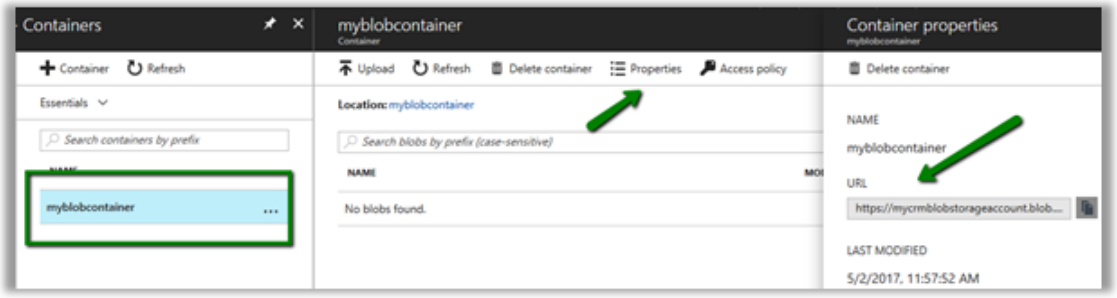
3. In Azure Portal – Storage Account, note down the below items:
    a. Storage Account Name
    b. Storage Key a.k.a. Access Key
    c. Container name



And note down the storage account name and container name which will be used to construct the URL.

```
string requestUri = "https://[storageAccount].blob.core.windows.net/[containerName]/ ";
```

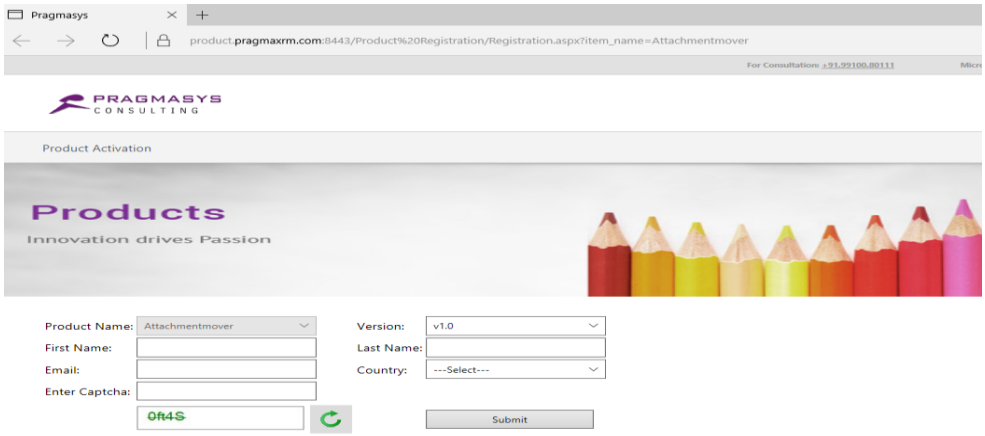
We can also go to container, select its properties and copy the url.



4. Getting product key

Access the below URL for getting the product key:

https://product.pragmaxrm.com:8443/Product%20Registration/Registration.aspx?item_name=Attachmentmover

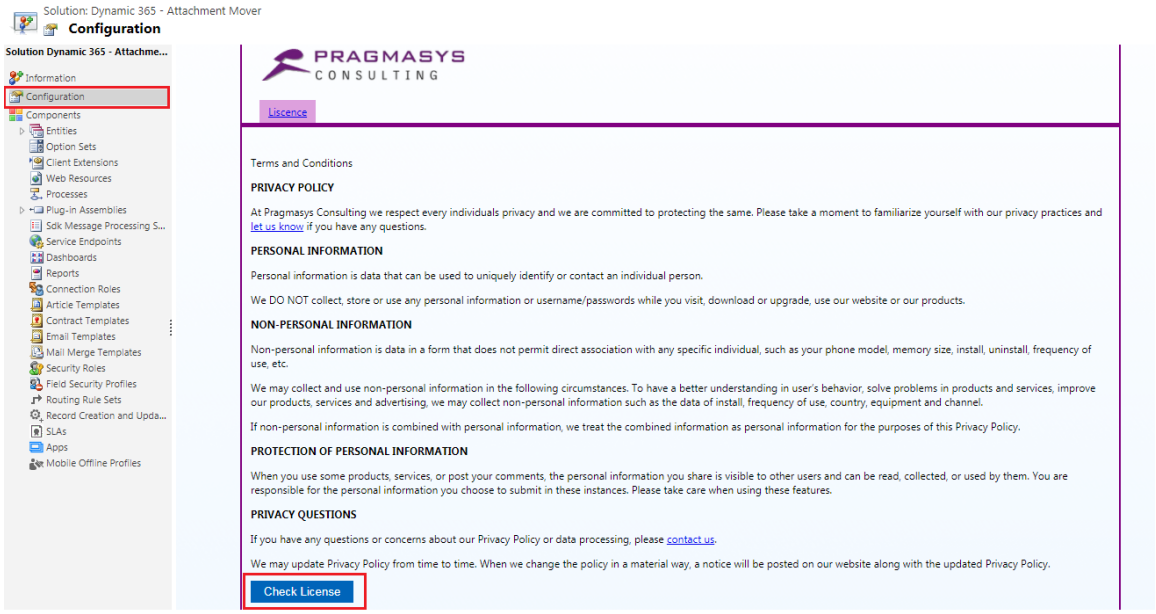


Fill in the mandatory information in the product page. On submit of the information email will be triggered to the email address provided in the above web page.

Note down the Customer Id and the user License which will be used to configure the product on the CRM environment.

5. Dynamic 365-Attachment Mover Solution Configuration

1. Open Solution “Dynamic365AttachmentMover_1_0_0_0_managed “
2. Click on Configuration and then Check License
3. Provide the Client ID and Product Key
4. Click on the submit button


Solution: Dynamic 365 - Attachment Mover
Configuration
Solution Dynamic 365 - Attachme...
Information
Configuration
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing S...
Service Endpoints
Dashboards
Reports
Connection Roles
Article Templates
Contract Templates
Email Templates
Mail Merge Templates
Security Roles
Field Security Profiles
Routing Rule Sets
Record Creation and Upda...
SLAs
Apps
Mobile Offline Profiles
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We may collect and use non-personal information in the following circumstances. To have a better understanding in user's behavior, solve problems in products and services, improve our products, services and advertising, we may collect non-personal information such as the data of install, frequency of use, country, equipment and channel.
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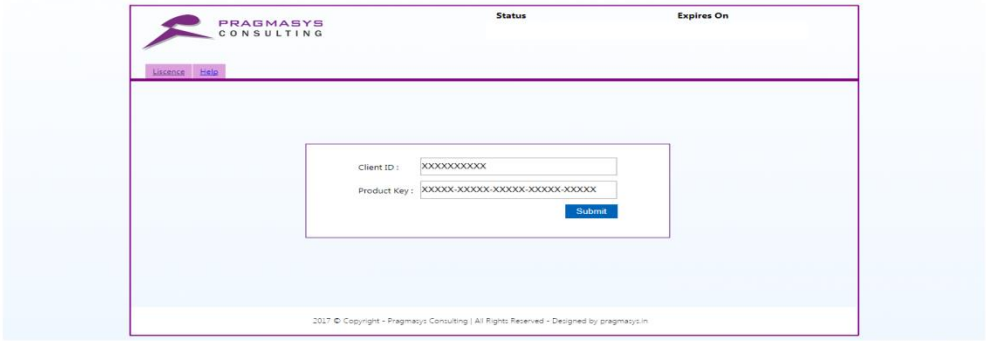
Check License


PRAGMASYS
CONSULTING
Status
Expires On
Liscence
Help
Client ID :
XXXXXXXXXX
Product Key :
XXXXX-XXXXX-XXXXX-XXXXX-XXXXX
Submit
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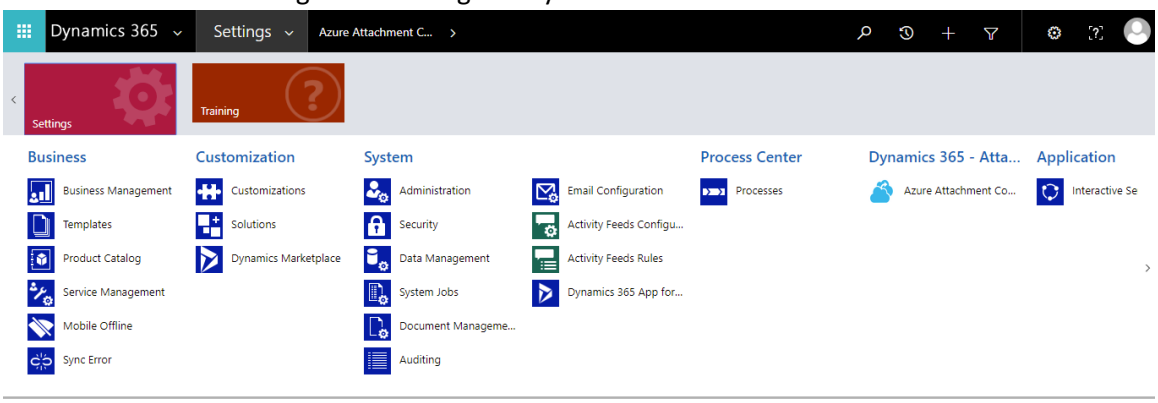
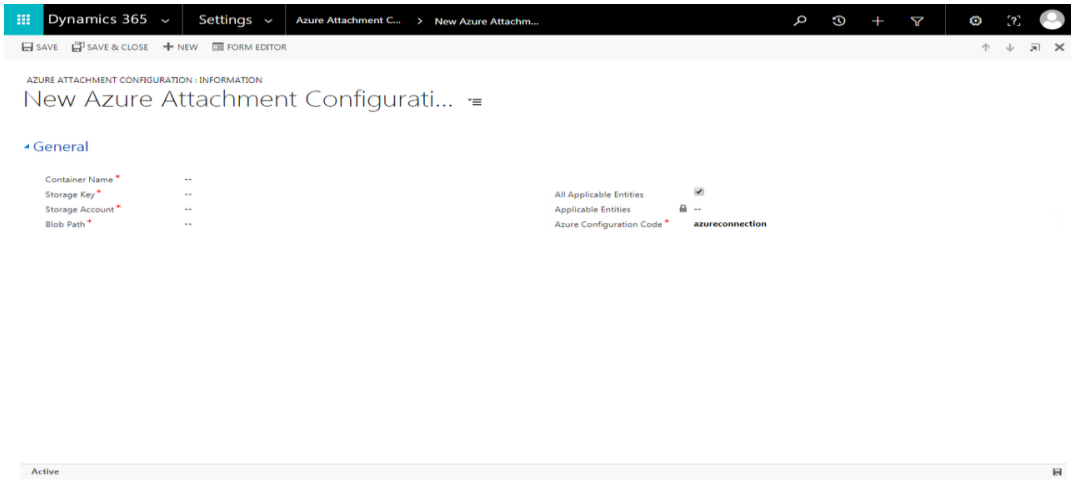
6. Enabling the Attachment Mover for CRM entities:

i. Login to MSCRM

ii. Navigate to Settings >> Dynamics 365 – Attachment Mover



iii. Set Azure Connection Details

Create a configuration record with values copied in above steps.

If All Applicable Entities field is ticked then its applicable to all entities, otherwise comma separated schema names of the applicable entities should be provided in the applicable entities field.