How to Save CRM Data Storage and manage attachments effectively in Microsoft Dynamics CRM

Attachments in Microsoft Dynamics CRM
CRM-data-storage vs SharePoint

Microsoft Dynamics CRM ⟷ **AttachmentExtractor** ⟷ **SharePoint**

– Attachments stored in CRM database take up to 70% of storage – Hard to find / non-searchable – **9.99 USD** / GB per month	– Move/Copy files to SharePoint – Shrink CRM database by >50% – Archiving data / Replicate data / Local availability – **Establish structured library**	– Advanced document library – Associated to CRM record via CRM SharePoint Integration – Easy to search – **0.20 USD** / GB per month

Example: 50GB additional storage (annual costs)
- CRM storage: $ 5994
- SharePoint: $ 120   Total Savings: **5874 USD per year**!

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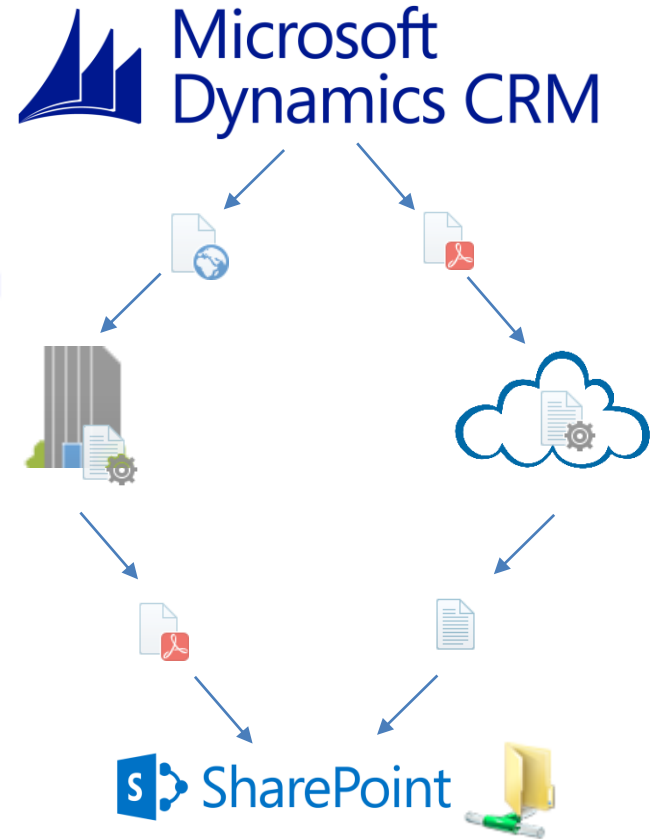MSCRM-ADDONS.COM

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How it works

All work is done by a Service

- Running on a local computer or server
- Running on a VM in the Cloud

Tasks

- Check for new emails/notes every X seconds
- Move/Copy file to alternate storage
- Place link to extraced file inside MS CRM
  - No change in CRM UI!
    Users can access all files as usual from within Microsoft Dynamics CRM
- Revert extraction possible

Microsoft Dynamics CRM

SharePoint

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Demo 1: Basic Extraction Service-Setup

Goal: Reduce CRM Storage & indexation
Topics covered:

- Basic Extraction settings

- CRM & SharePoint connection

Demo 2: Create an Advanced Repository

Goal: Have all attachments related to a opportunity available in a single location on SharePoint. All documents related to a opportunity should be accessible at a glance!
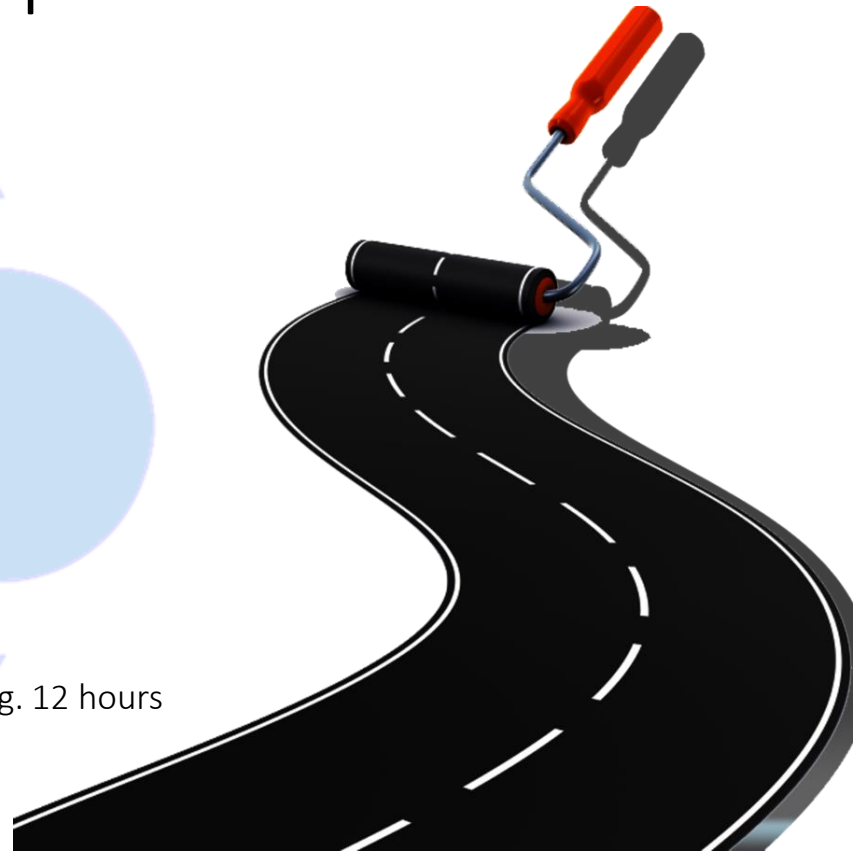
How: Setup service to move both, email attachment and notes depending on the CRM record they are related too.
Topics covered:

- Advanced Extraction settings & options

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Roadmap

- ## Advanced Scheduling
    - Defintion of data-ranges [Archiving]
        - Acting on CreatedOn and ModifiedOn

- ## Summary
    - Report showing extration status
        - Total number of attachments
        - Total size in MB/GB of attachments extraced
        - Number of attachments processed in the last e.g. 12 hours

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Getting Started

1. Download Solution
   Download link: http://www.mscrm-addons.com/Downloads.aspx

2. Execute the downloaded msi-file on the local server or VM on Azure you want to host the AttachmentExtractor service on

3. Setup the service
   Step-by-Step video: https://www.youtube.com/watch?v=WXsrCyhlhn8
   Documentation: http://www.mscrm-addons.com/Support/Documentation.aspx#AE

4. Thats it! Our solution will run in trial mode automatically
   The trial is limitied on Volume. Thus, you can only extract or copy 500 documents.

mscrm-addons.com is fully supporting trials – Dont hesitate to get in touch with our support team by

– Using our Live-Chat (available 17 hours a day)
– Sending an email to support@mscrm-addons.com

Retail - Pricing

- License model: Perpetual
- All active users must be covered
- First year of Support and Maintenance is included

Package	Initial costs	Support & Maintenance*
Small (1-20 Users)	$ 1440	$ 290
Medium (21-100 Users)	$ 3600	$ 720
Large (101-300 Users)	$ 5765	$ 1160
Enterprise (300+ users)	On request	20% of intial costs

- * Support & Maintenance is optional starting year 2

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Thank You

Feel free to join our upcoming Webinars!
http://www.mscrm-addons.com/Support/Webinars.aspx

Resources:

- You can find us on the web at http://www.mscrm-addons.com

- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx

- Don't forget we have an awesome blog at http://blogs.mscrm-addons.com/, you'll find it to be a helpful resource!

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