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AttachmentExtractor Installation Guide for Microsoft Dynamics 365

December 2025

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Preamble

This documentation is intended to guide you through the installation of AttachmentExtractor in Microsoft Dynamics 365.

In this document, the local installation is described, but we recommend the Service Configuration for all Dynamics 365 Online customers. Learn more.

Please read this document carefully and follow the steps as described to achieve the best results.

Target Audience

This guide is intended for users installing AttachmentExtractor for Microsoft Dynmaics 365 with the following basic skills:

- Basic Microsoft Dynamics 365 Knowledge
- Maintaining and configuring a Microsoft CRM Organization

Supported Web Browsers and Versions

Supported Web Browsers:

- Internet Explorer 10 and higher
- Chrome
- Edge
- Firefox

One of the following versions of Microsoft Dynamics CRM must be available:

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

AttachmentExtractor version **2025** requires Microsoft .NET Framework 4.7.2 RTM or higher.

1. How to install AttachmentExtractor

During the installation, you must specify the organization where AttachmentExtractor will be initially installed. Additional organizations can be setup from the installation manager after the original setup has finished.

1.1. Introduction

Before you start the installation, you have to download the AttachmentExtractor Application. Once opened, double click on the AttachmentExtractor for Dynamics 365.exe.

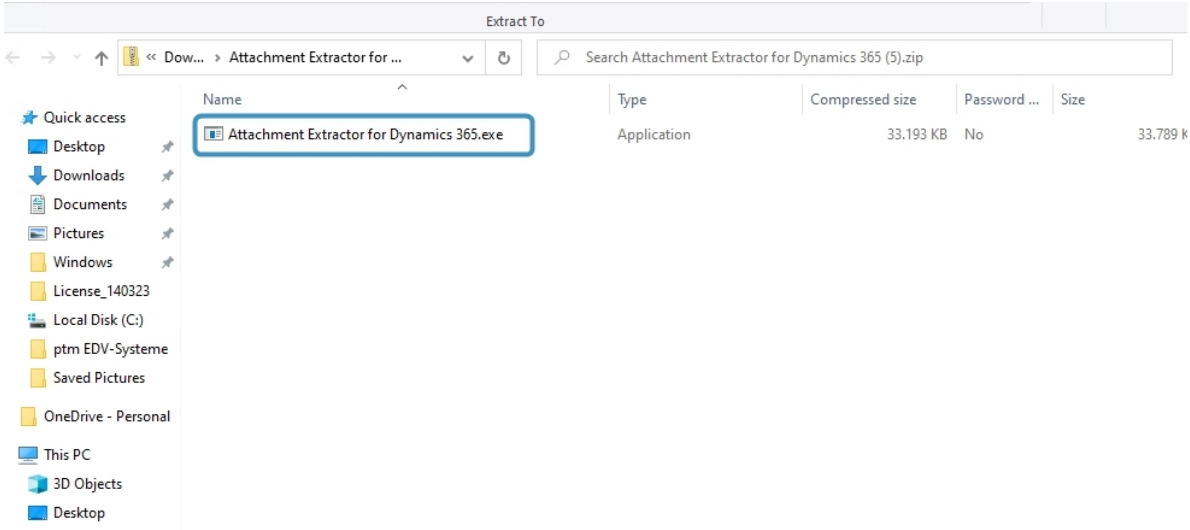

Figure 1: Double-click the AttachmenExtractor.exe file

Confirm this window with **Yes**.

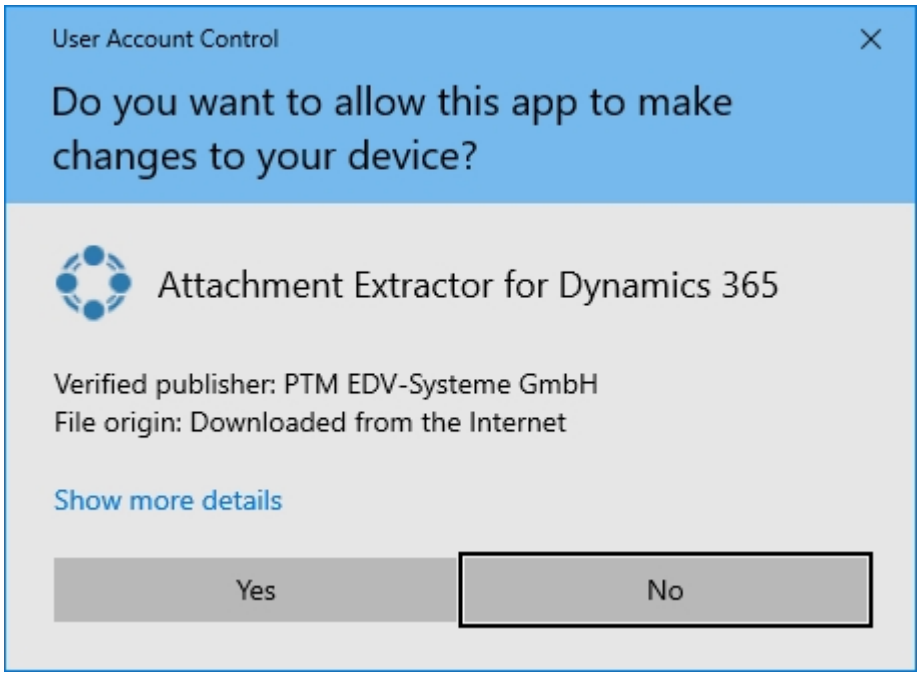

Figure 2: Allow this app to make changes

The AttachmentExtractor Installer opens. Click **Next**.

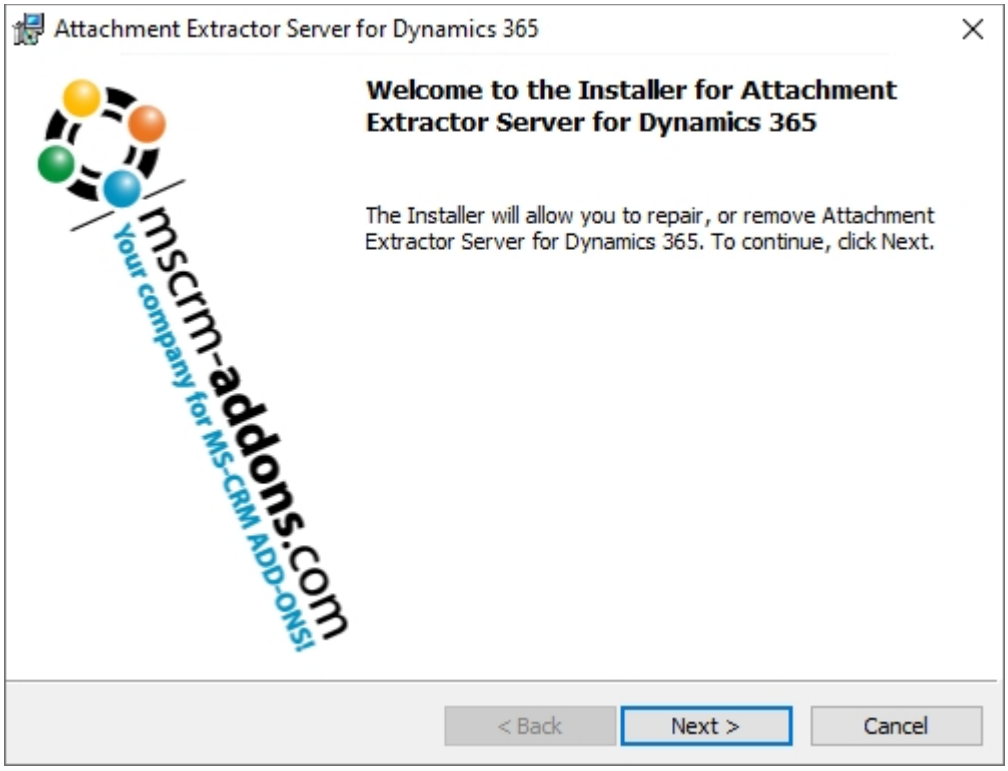

Figure 3: AttachmentExtractor Installer opens

1.2. EULA (End User License Agreement)

Please accept the terms of the license agreement and click the **Next** button.

Please note: If you want to print the License Agreement, hit the **Print** button.

Figure 4: Accept License Agreement; Print License agreement

1.3. Folder Selection

Select the destination folder for AttachmentExtractor. If you are satisfied with the current selection, proceed by clicking the **Next** button. If you prefer a different installation path, click on the **Change** button to specify an alternative folder.

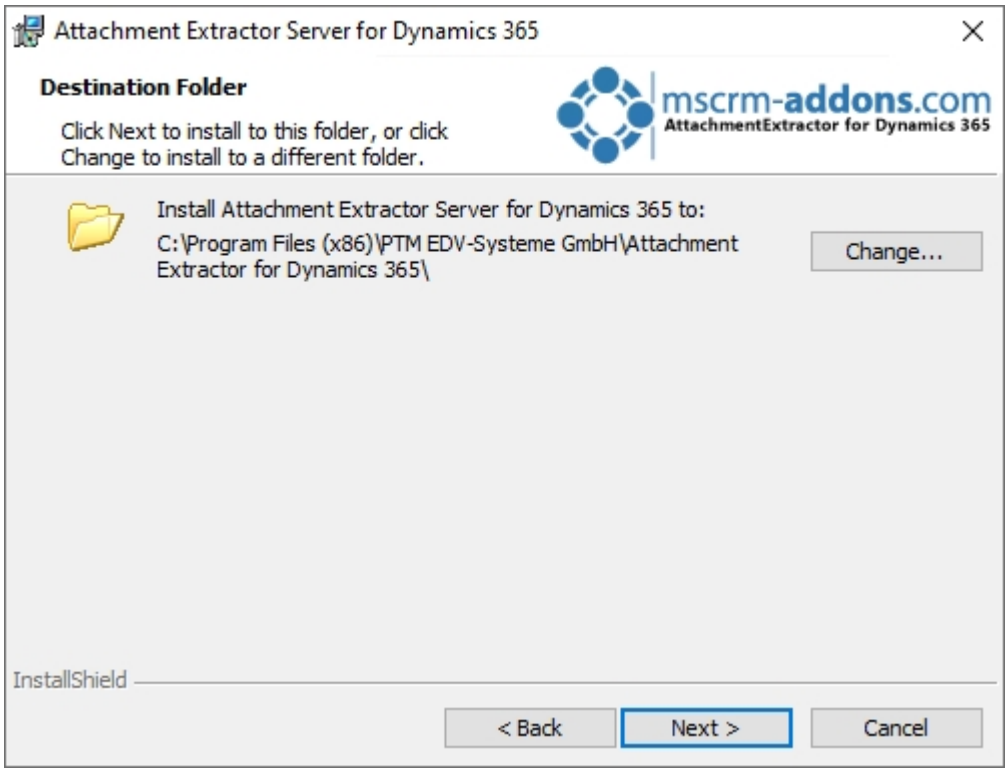

Figure 5: Select a destination folder for the AttachmentExtractor application

1.4. Confirm Installation

Now start the installation of AttachmentExtractor. Click on the **Install** button.

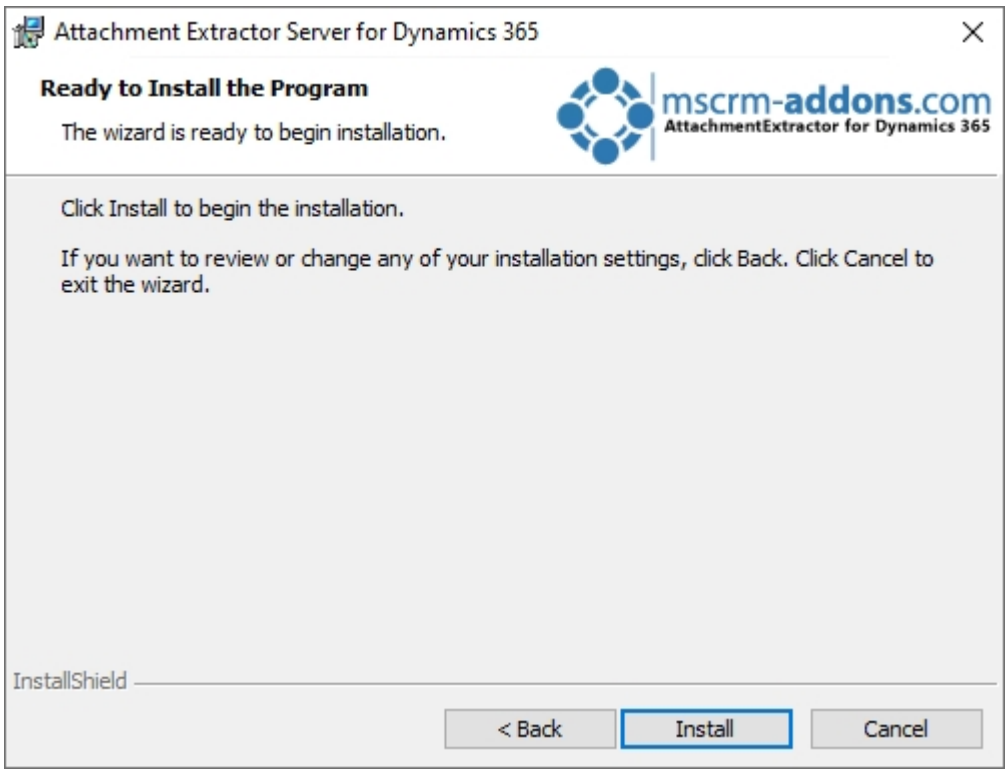

Figure 6: Install the AttachmentExctractor application

The installer will launch the Service Management tool. The installer will stay active until the Service Management is closed again. You are not required to create a service to finalize the installation.

1.5 Configure Connection to Dynamics 365

To use AttachmentExtractor, a connection to Dynamics 365 is necessary, which means you also need to configure your Dynamics 365 Server. Once you open the Dynamics 365 Connection setup window, you can either choose an existing profile or create a new profile.

If you create a new profile, you have to click on **Retrieve all Organizations** and you will be prompted to log in.

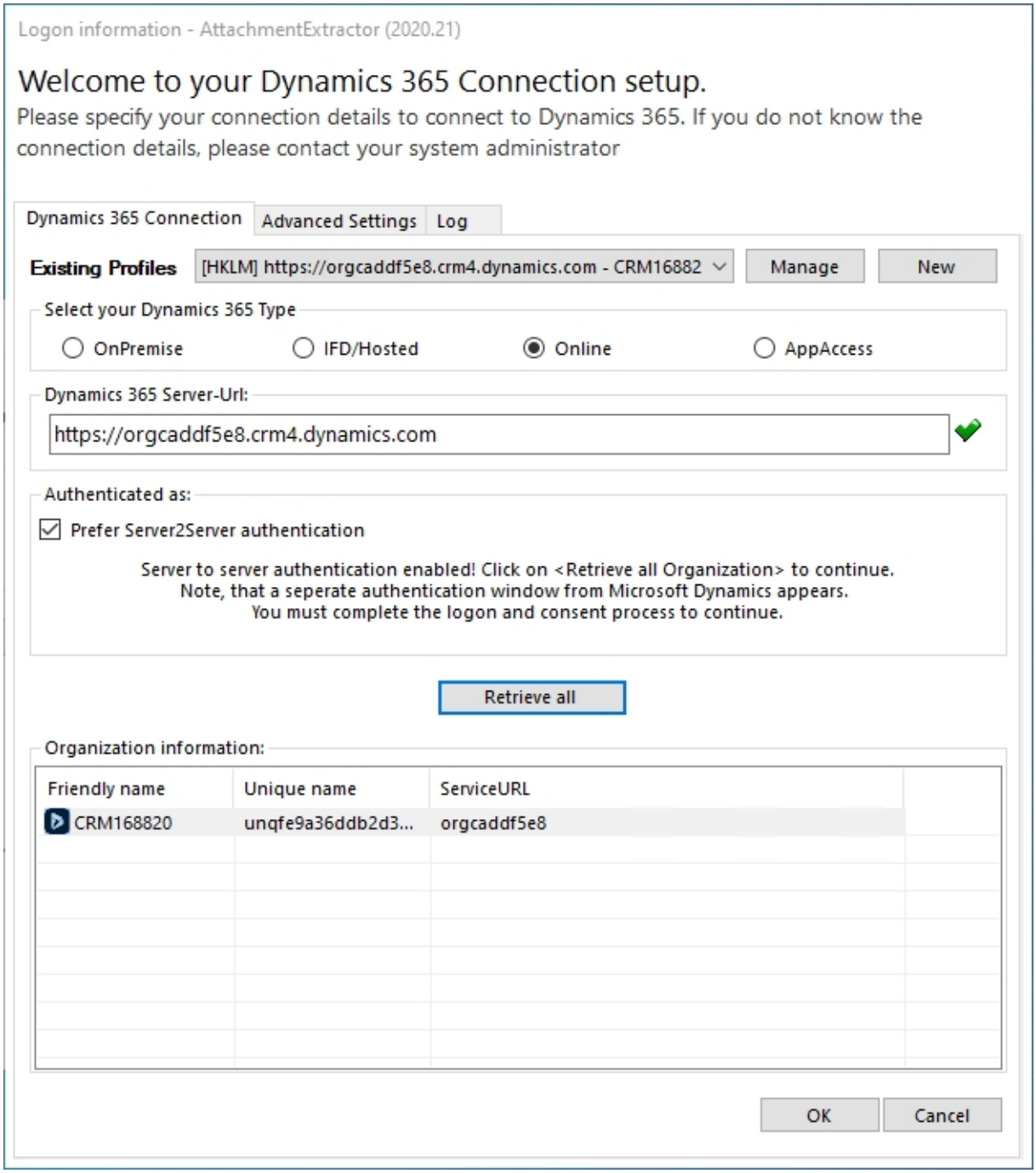

Figure 7: For a new organization click the Retrieve all button

1.5. Finish Installation

Click **Finish** to complete the installation.

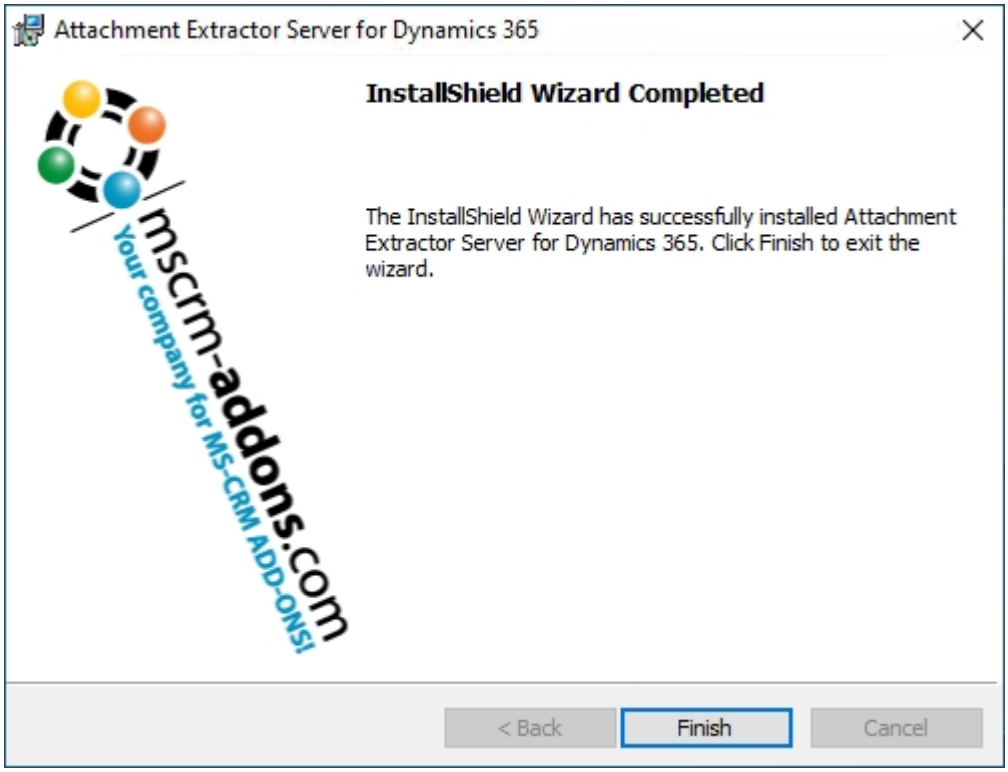

Figure 8: The installation is completed

Learn more about configuring a Service in the AttachmentExtractor User Guide.

2. Licensing

This window provides you with information regarding your current license status. Learn more about licensing here.

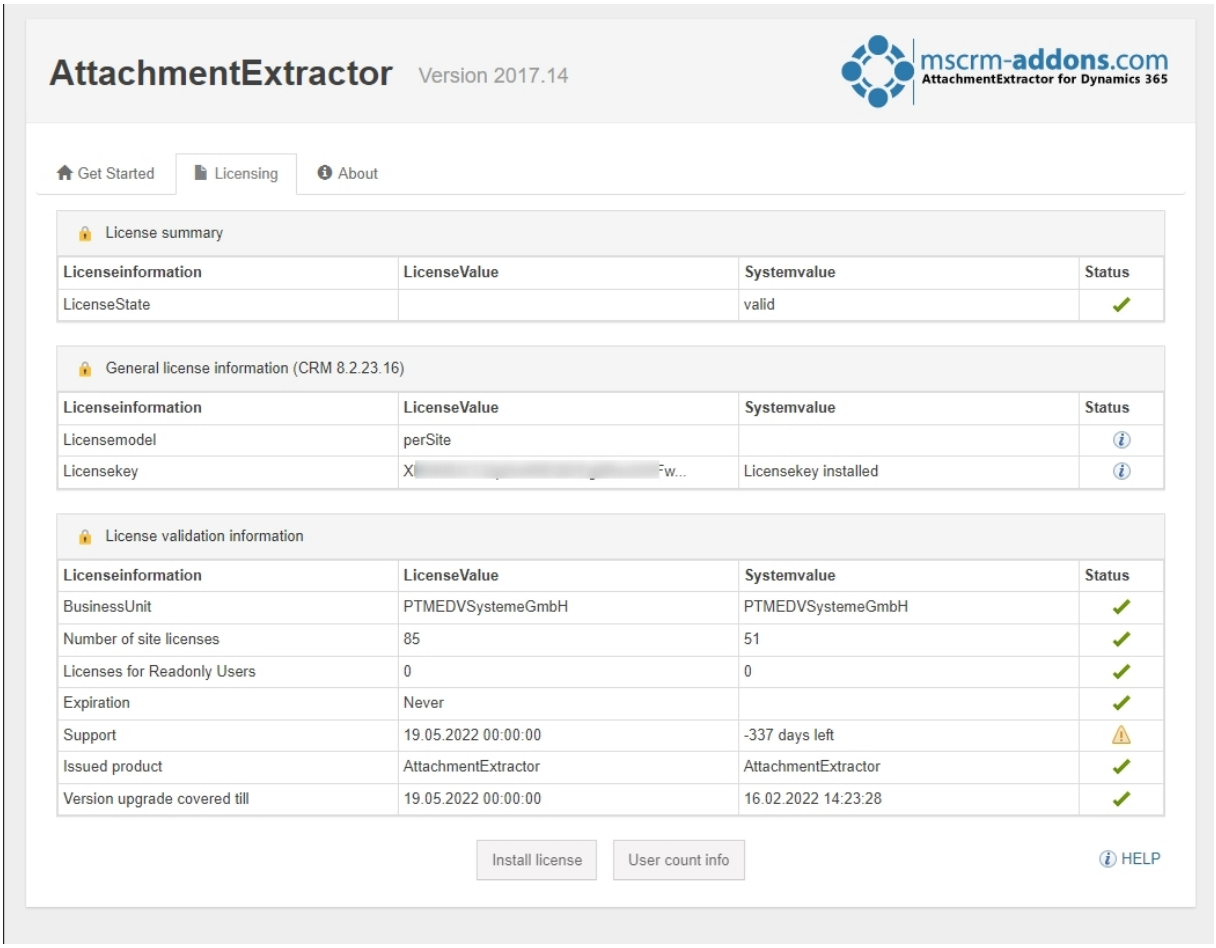

Figure 9: Check license status

2. Security Roles

During installation you will be asked to install Security Roles.

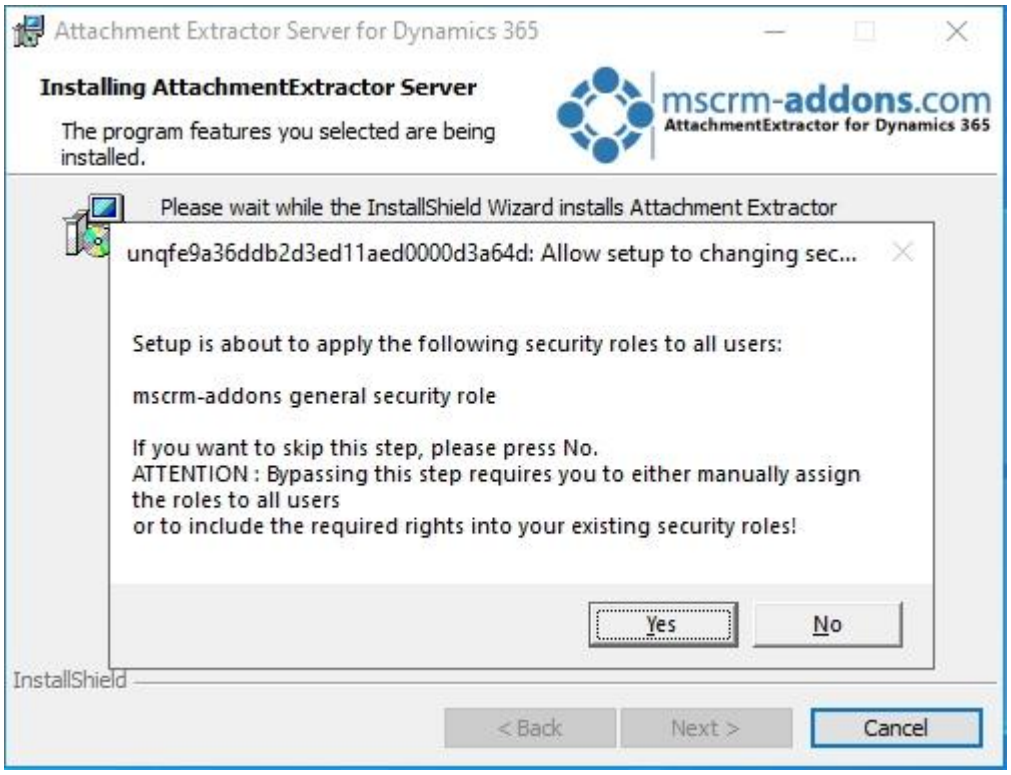

Figure 10: Decide about the Security Roles

Click on **Yes** to proceed while applying the security roles to all users.
Press **No** if you don´t want to apply the security roles to any user.

Please note: If you decide not to apply the security roles automatically, you will have to assign the rules manually.

This security role is required by all our products:

MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and to be able to perform the license check.

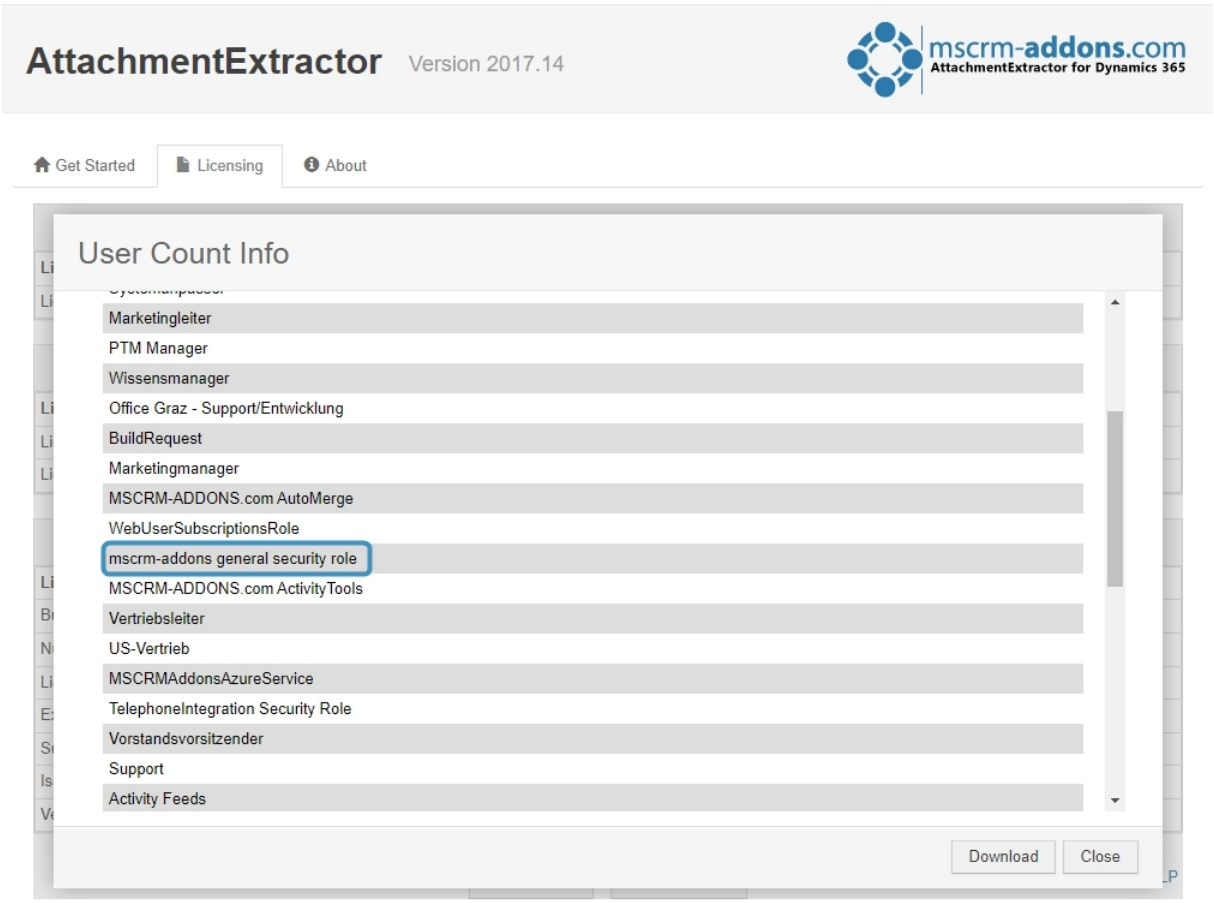

Figure 11: Find in the User count info the mscrm-addons general security role

3. How to uninstall AttachmentExtractor

To uninstall AttachmentExtractor, open **Programs and Features > Uninstall a program** in the Control Panel.

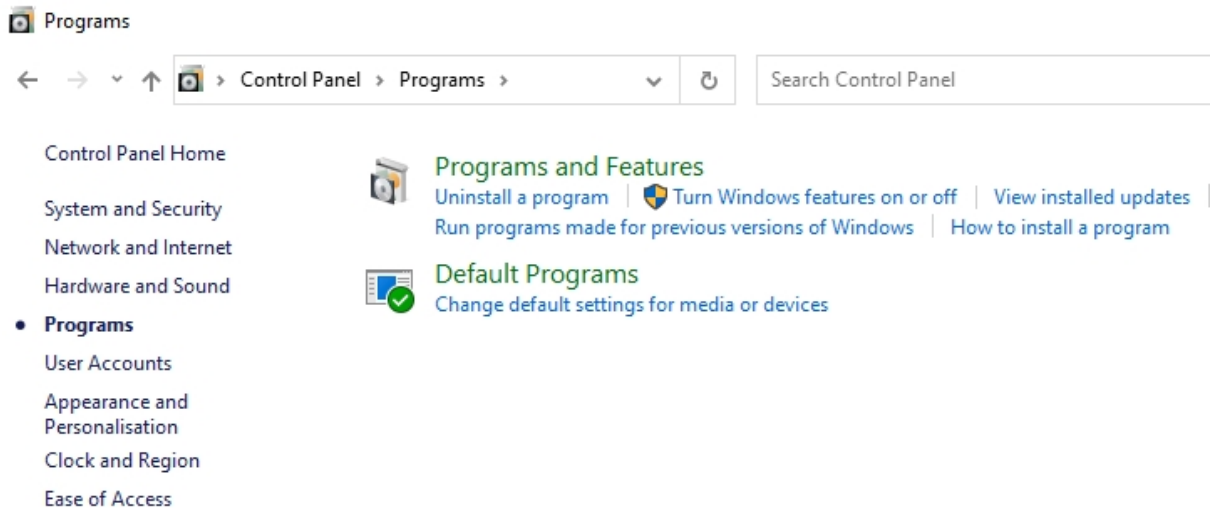

Figure 12: Open Programs and Features in the Control Panel

Now look for AttachmentExtractor for Dynamics 365, select it and click on **Uninstall**.

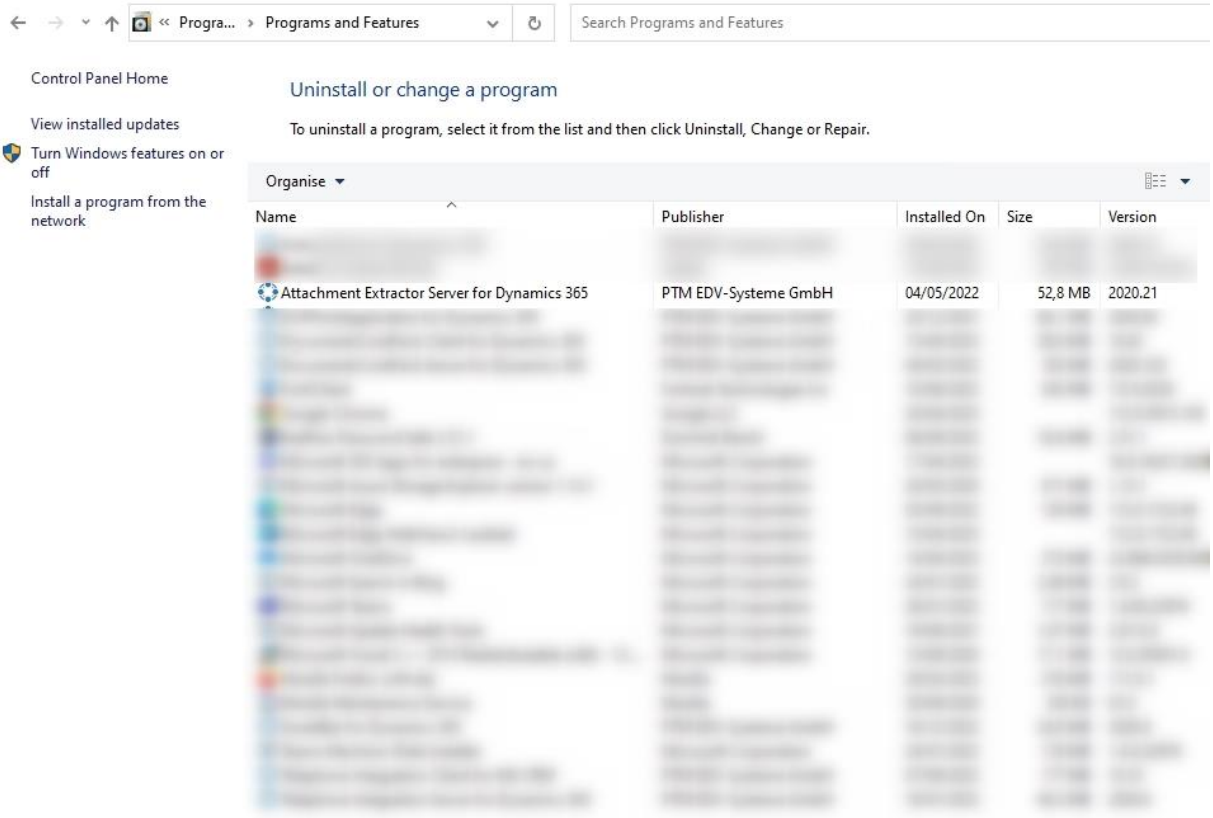

Figure 13: Select AttachmentExtractor

Confirm in this window with **Yes** if you want to uninstall AttachmentExtractor.

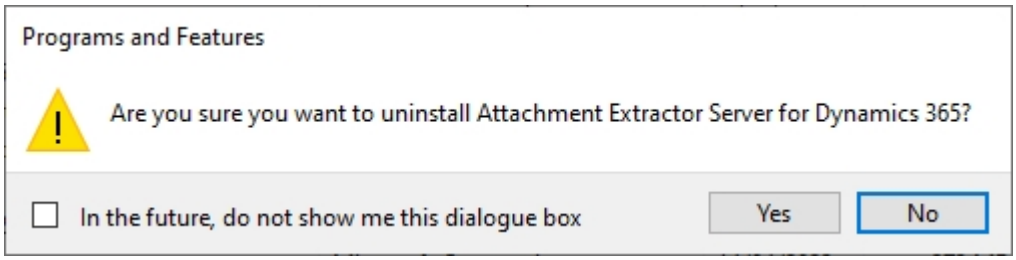

Figure 14: Confirm the Deinstallation

That's it! We appreciate your feedback! Please share your thoughts by sending an email to support@mscrm-addons.com.

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5. 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.

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