



mscrm-addons.com
Your company for MS-CRM ADD-ONS!

AttachmentExtractor - Getting started from the www.mscrm-addons.com website

March 2024

Table of Contents

- 1. SET UP AN ATTACHMENTEXTRACTOR SERVICE 2
- 2. LICENSE MANAGER 7
- 3. LIST OF FIGURES..... 7

Thank you for your interest in AttachmentExtractor. This Getting Started Guide will help you to install this Add-On from our website. For detailed information, please refer to our [guides](#) or [blogs](#).

The web-based setup allows users to configure AttachmentExtractor Document Generation for Microsoft Dynamics 365 Online without local installations. The service, as well as licensing, can be configured and maintained on our website.

To get started, it is necessary to register or log in with an existing account to www.mscrm-addons.com.

The registration is quick and free. Once logged in, you will:

- Have access to all our free 14-days trial versions
- Be able to request full support on all trial versions
- Receive our newsletter
- Be able to upgrade free trial versions to licensed products

So, if you aren't registered yet – it's worth a try!

To start the online configuration, select **AttachmentExtractor** from the Solutions page and then select **1 Start Free Trial** and then **2 Start Configuration**.

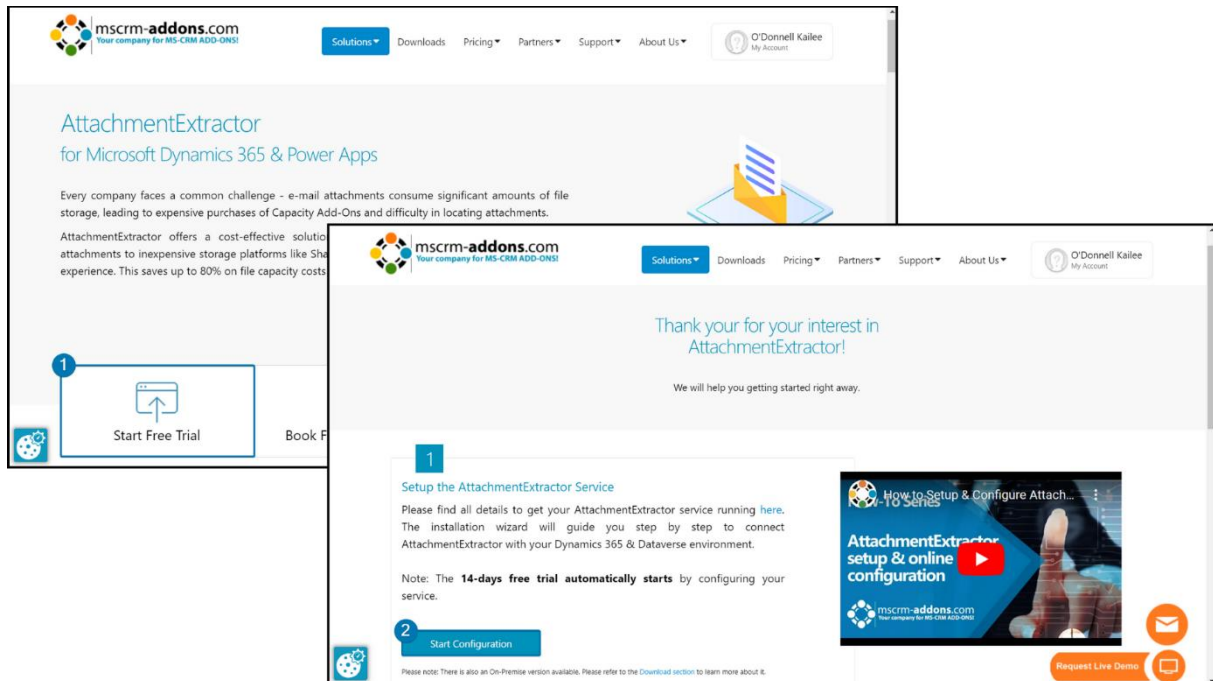


Figure 1: Registered on www.mscrm-addons.com and starting online configuration

1. Set up an AttachmentExtractor service

Once logged in, you will be provided with the Online Configuration window. You can set up a service by clicking the **+ Add Service** button, highlighted in the figure below. Decide here whether you need a DocumentsCorePack or AttachmentExtractor service.

Please note: System Customizer or System Administrator access is required.

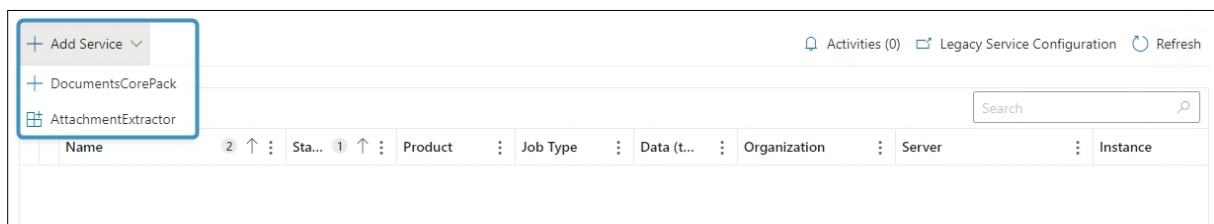


Figure 2: Add an AttachmentExtractor service

The Create AttachmentExtractor Service overview is shown next. Select the **Connection Type** and then click on the **Load Environments** button.

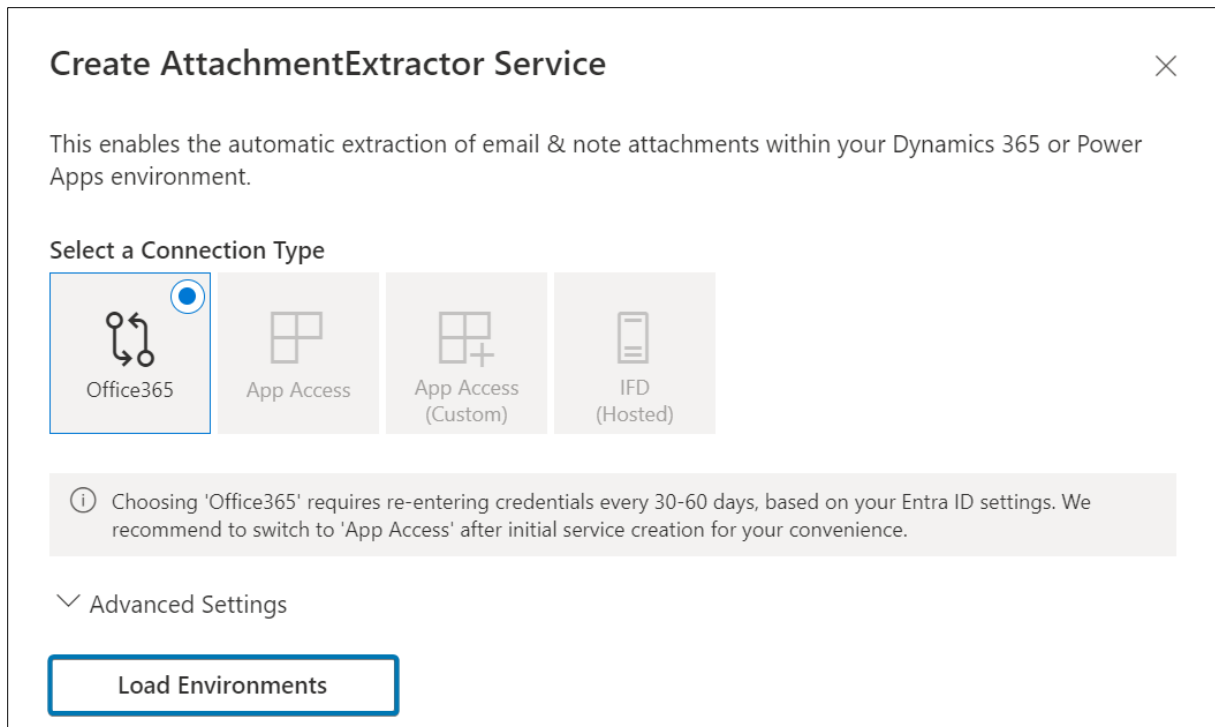


Figure 3: Connection profile

A login is required.

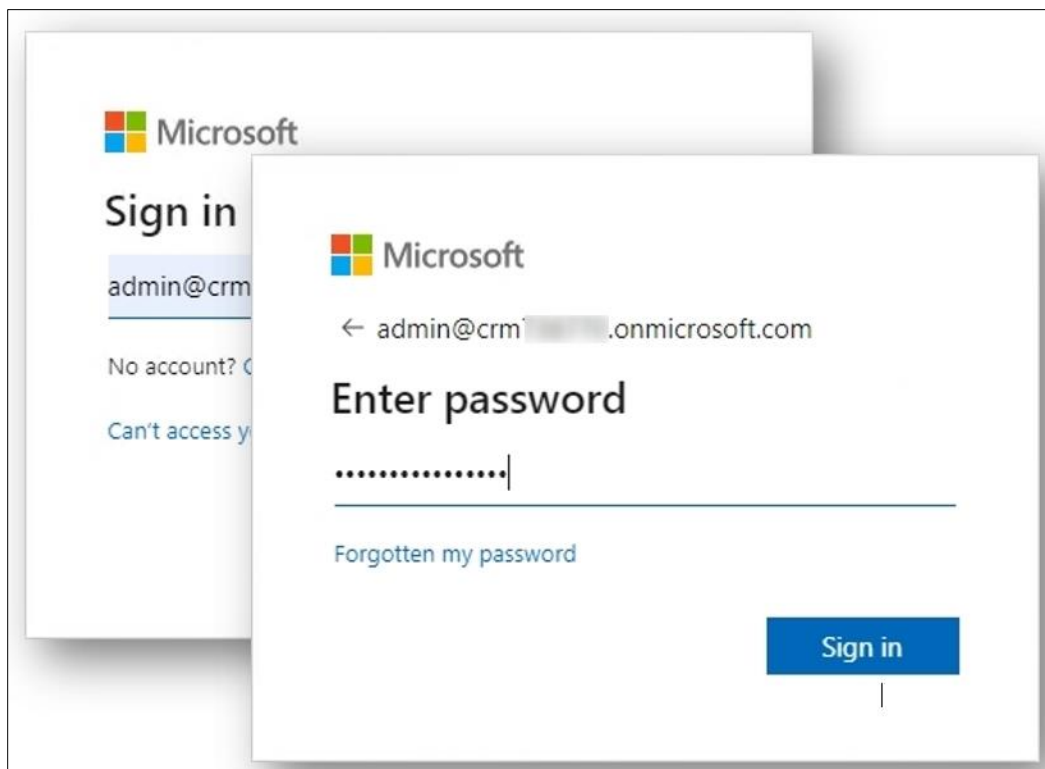


Figure 4: Login with your credentials

After logging in, accept the requested permissions.

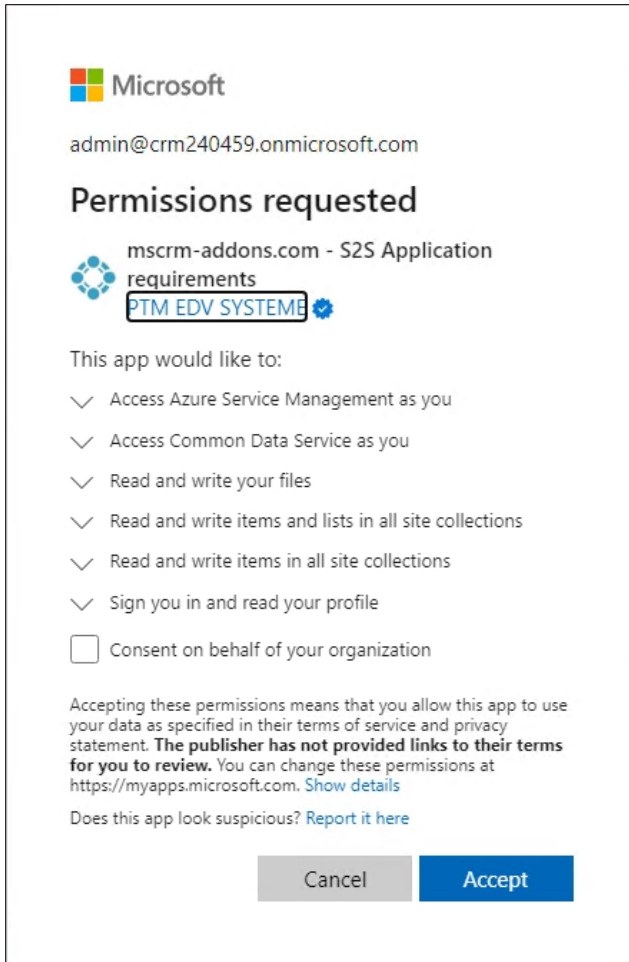


Figure 5: Accept requested permissions

Your permissions will then be verified, which may take a few seconds. Then your organization will be shown. Continue with **Connect**.

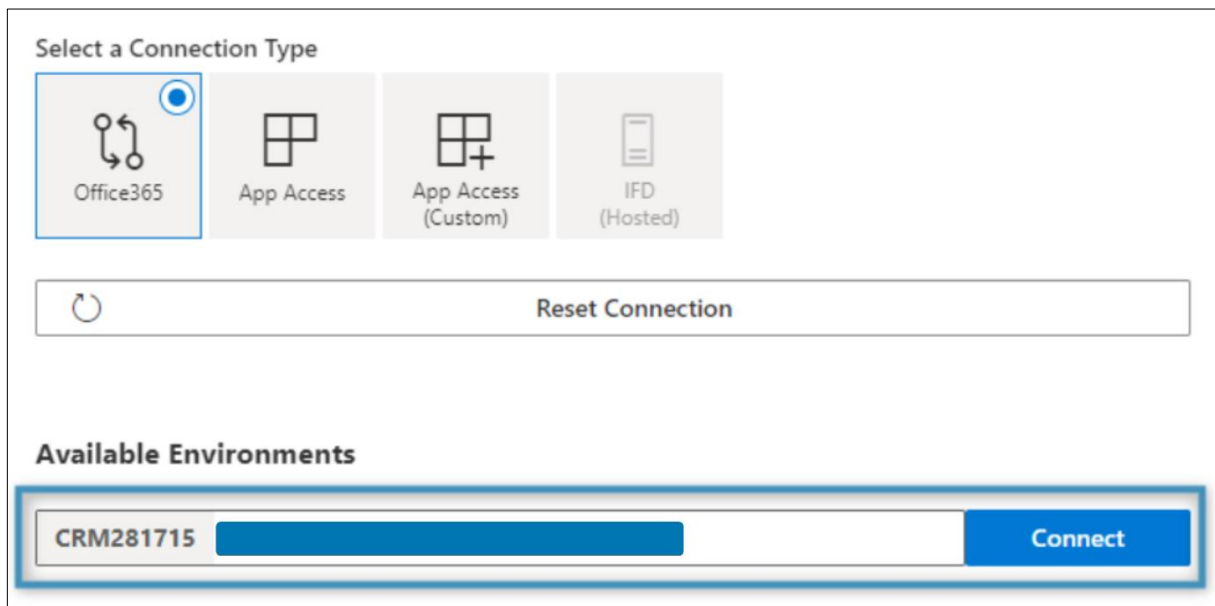


Figure 6: Connect to an environment

Now the **Service Configuration** will be displayed, and you can view/configure the Service details.

- **Service Name:** After your connection is set up, a Service Name is required. Select a unique service name and know that it cannot be changed once set.
- **AttachmentExtractor Instance:** Select which instance the AttachmentExtractor Service should run. The instance with the highest bandwidth is automatically selected for you, but you can change this as desired.
- **Extraction Mode:** You can also choose the Extraction Mode, which can be attachments or email content.
- **Storage System:** Select between SharePoint or AzureBlobStorage for your storage system, and then set up the integration and additional parameters for the selected system.
- **SharePoint Integration:** If using SharePoint, select between using a Dynamics 365 Integrated SharePoint or a specific SharePoint location.

Create AttachmentExtractor Service

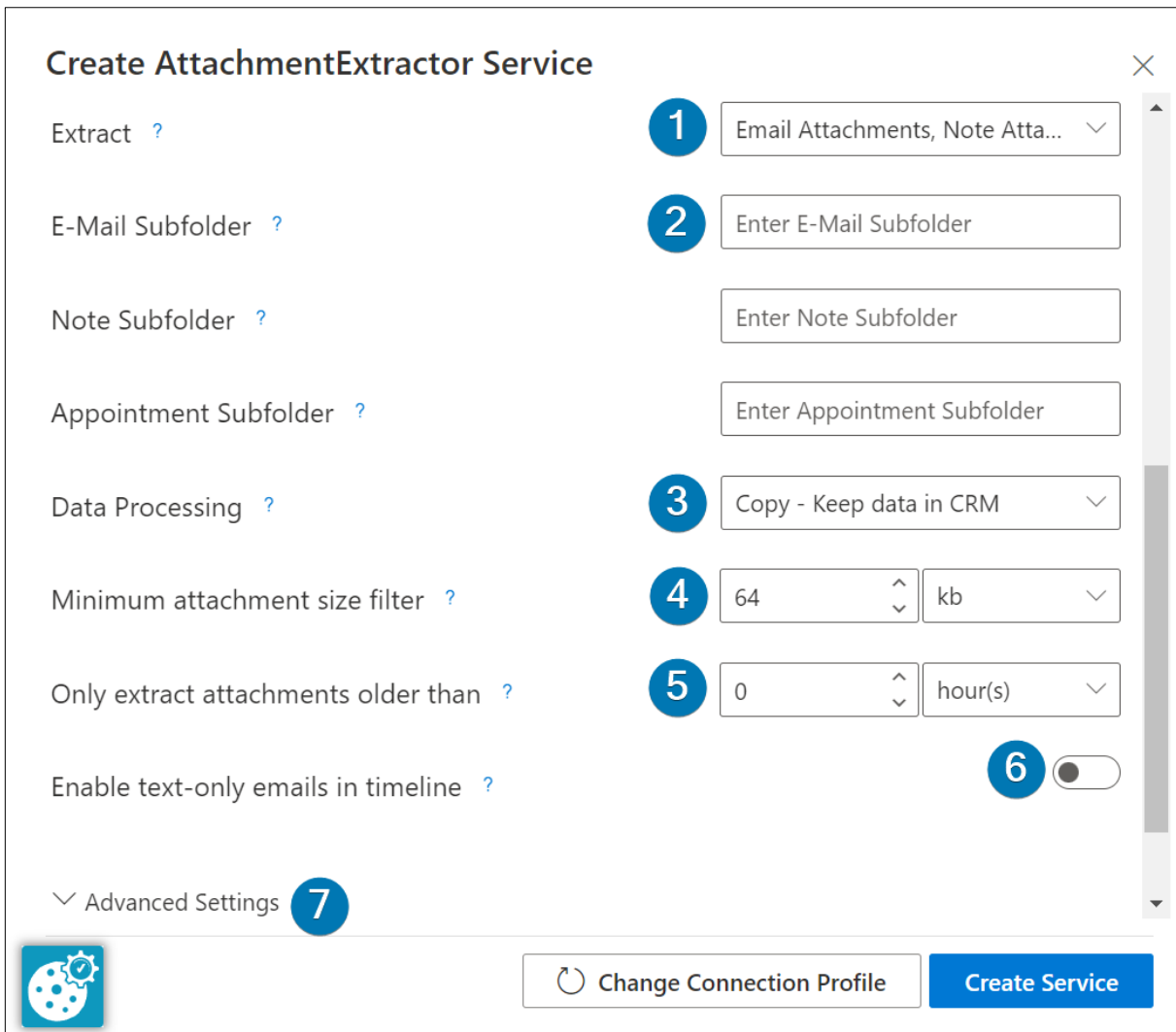
Service Name	<input type="text" value="unq0b31883536d6ee119048000d..."/>
AttachmentExtractor Instance ?	<input type="text" value="EU Germany Public - 12.04 M..."/>
Extraction mode ?	<input type="text" value="Attachments"/>
Storage system ?	<input type="text" value="SharePoint"/>
SharePoint Integration ?	<input type="text" value="Integrated SharePoint"/>

Figure 7: Service Configuration overview

You can also configure additional settings before creating the service:

- 1 **Extract:** Choose whether to extract email attachments, note attachments and/or appointment attachments.

- 2 **E-mail, Note, and Appointment Subfolder (only for SharePoint):** Enter an email, note, or appointment subfolder.
- 3 **Data Processing:** Select if data should be kept or replaced in Dynamics.
- 4 **Minimum attachment size filter:** Set the minimum size for attachments to be extracted.
- 5 **Only extract attachments older than:** Set a certain number of hours, days, weeks, or months for a file to be extracted.
- 6 **Enable text-only emails in timeline:** Decide if only email text or all email content should be displayed in the record timeline.
- 7 **Advanced settings:** There are also advanced options available.



Create AttachmentExtractor Service ×

Extract ? **1** Email Attachments, Note Atta... ▾

E-Mail Subfolder ? **2** Enter E-Mail Subfolder

Note Subfolder ? Enter Note Subfolder

Appointment Subfolder ? Enter Appointment Subfolder

Data Processing ? **3** Copy - Keep data in CRM ▾

Minimum attachment size filter ? **4** 64 ^ ▾ kb ▾

Only extract attachments older than ? **5** 0 ^ ▾ hour(s) ▾

Enable text-only emails in timeline ? **6**

Advanced Settings **7**




Figure 8: Service Configuration – Additional Settings overview

The service can take up to half an hour to create, but once completed, you can view it in the service list.

Name	Status	Product	Job Type	Data (t...	Environme...	Dataverse URL	Instance
unq50da87e8ab24ee118475000d3a	Stopped	DocumentsCor...	Document Genera	0 Docs	CRM738936		JS EAST Public
unqef434b4479094a9d8092cda1782	Stopped	AttachmentExtr...	Move	0 B	Marketing-Testversion		UK West
unq0b31883536d6ee119048000d3a	Stopped	DocumentsCor...	Document Genera	0 Docs	Sales Trial		JS EAST Public
unqb71cf8a72bf2ee119048000d3a3	Running	AttachmentExtr...	Copy	0 B	Sales Trial		U Germany Public

Figure 9: AttachmentExtractor service in the service list

2. License Manager

AttachmentExtractor comes with a **14-days trial license**. Once you receive the license from our support-team, just open the License Manager to install it. For more information, have a look at the Licensing [Guide](#).

We hope our product is to your full satisfaction and a useful supplement to your business activities.

3. List of Figures

Figure 1: Registered on www.msrm-addons.com and starting online configuration	4
Figure 2: Add an AttachmentExtractor service	5
Figure 3: Connection profile	5
Figure 4: Login with credentials	6
Figure 5: Accept required permissions	7
Figure 6: Connect to an environment	7
Figure 7: Service Configuration overview	8
Figure 8: Service Configuration – Additional Settings overview	9
Figure 9: Final configured service	10