AttachmentExtractor
for Microsoft CRM 2015/2016 and
Microsoft Dynamics 365
User Guide

v.1.3, March 2018

AttachmentExtractor
(How to work with AttachmentExtractor for Microsoft Dynamics CRM 2015/2016 and Dynamics 365)

Content

Preamble

This documentation is intended to give detailed explanations of all functionalities provided by AttachmentExtractor in Microsoft CRM 2015/2016 and Dynamics 365.

This guide applies to version 2017.8 or higher.

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

Target Audience

This guide is intended for users working with AttachmentExtractor who have the following minimum skills:

- Basic knowledge of Microsoft CRM 2016/2016 and/or Dynamics 365
- Basic knowledge of SharePoint, FileShare and Azure Blob Storage

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/Dynamics 365 must be available:
- Microsoft Dynamics CRM Server 2015/2016/Dynamics 365
- Microsoft Dynamics CRM Online
- Microsoft Dynamics CRM OnPremise

Purpose of AttachmentExtractor?

AttachmentExtractor offers you a service-based tool to move attachments from within Microsoft Dynamics 2015/2016 and/or Dynamics 365 to either a *SharePoint location or a fileshare*, saving precious database space in Dynamics 365 and enabling various indexing and search options via SharePoint and via the Microsoft Search Server functionality.

AttachmentExtractor is able to connect to any Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365 (OnPremise, online and hosted) and offers capabilities like extracting email and note attachments, as well as extracting the email and note itself (for example for indexing purposes). Both email and note descriptions are NOT changed, just replicated and saved as a file to be indexed.

The service is also available in trial mode but will stop for some time after each processed batch of items. The processing batch size is limited to 25 items per cycle and a maximum of 500 Items is supported in total.

1   The functionality of Attachment Extractor

The functionality of AttachmentExtractor can be summarized in one short sentence: AttachmentExtractor extracts attachments on emails, appointments and notes safely from Dynamics 365 to SharePoint, FileShare or Azure Blob Storage.

How does it work?

AttachmentExtractor requires a separate service for each configured organization.

AttachmentExtractor requires the *URL*-extension to be allowed in Dynamics 365. During the setup, AttachmentExtractor modifies the blocked extensions list in Dynamics 365 and allows *URL*. The corresponding setting can be found in the system settings of your CRM Organization.

Each service will be listed in the Windows Service overview separately.

AttachmentExtractor cannot be started directly from the *ServiceManagement*. The product also installs a heartbeat service, which is monitoring the index services and restarting them if required. (For example, on a server reboot). This service starts automatically when the server is booted and can be controlled via the Microsoft Windows *ServiceManagement*. Alternatively, the services can be launched via the *ServiceManagement* Application, which is installed with the product.

AttachmentExtractor creates a new application log called www.mscrm-addons.com, in which status, information, errors and batch process summaries are logged. It is independent of the extended logging features, available in the service configuration panel.

Batches are processed every 100 seconds. With every batch processed, AttachmentExtractor analyses the emails and/or notes, saves the attachment to the configured storage and replaces the existing attachment with an URL-file pointing to the new location. The new attachment is usually less than 500 bytes in size.

In addition, the email or annotation body can be saved to allow indexing and searching in the actual entities description fields. If you choose to index those entities, the file saved to the external location will also contain some meta information, as for example with an email the subject, from, to, cc and bcc are also saved into the content file.

Extracted file handling

Starting with version 2017.8 there is a new plugin, that causes that attachments behave transparently. This means, that if you access attachments from SharePoint, these will be automatically streamed back to Dynamics 365 without the need to be extracted again. You do not need any access authorization anymore to access the files.

2 AttachmentExtractor Service Overview

The AttachmentExtractor Service Overview helps you to create and manage extracted services. To open the AttachmentExtractor Service Overview, please look for
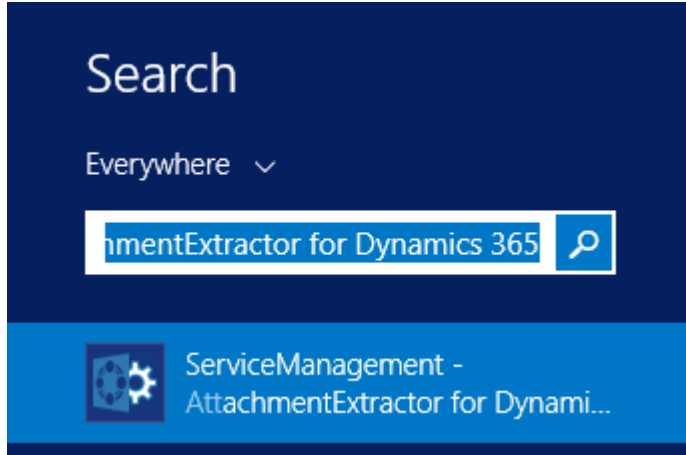*ServiceManagement – AttachmentExtractor for Dynamics 365* in your start panel.

Figure 1: Start panel – Service Management for AttachmentExtractor

The AttachmentExtractor Service Overview opens. Here, you can add and manage extractor services. In the course of the next chapters, we will provide you with information regarding the Service overview.
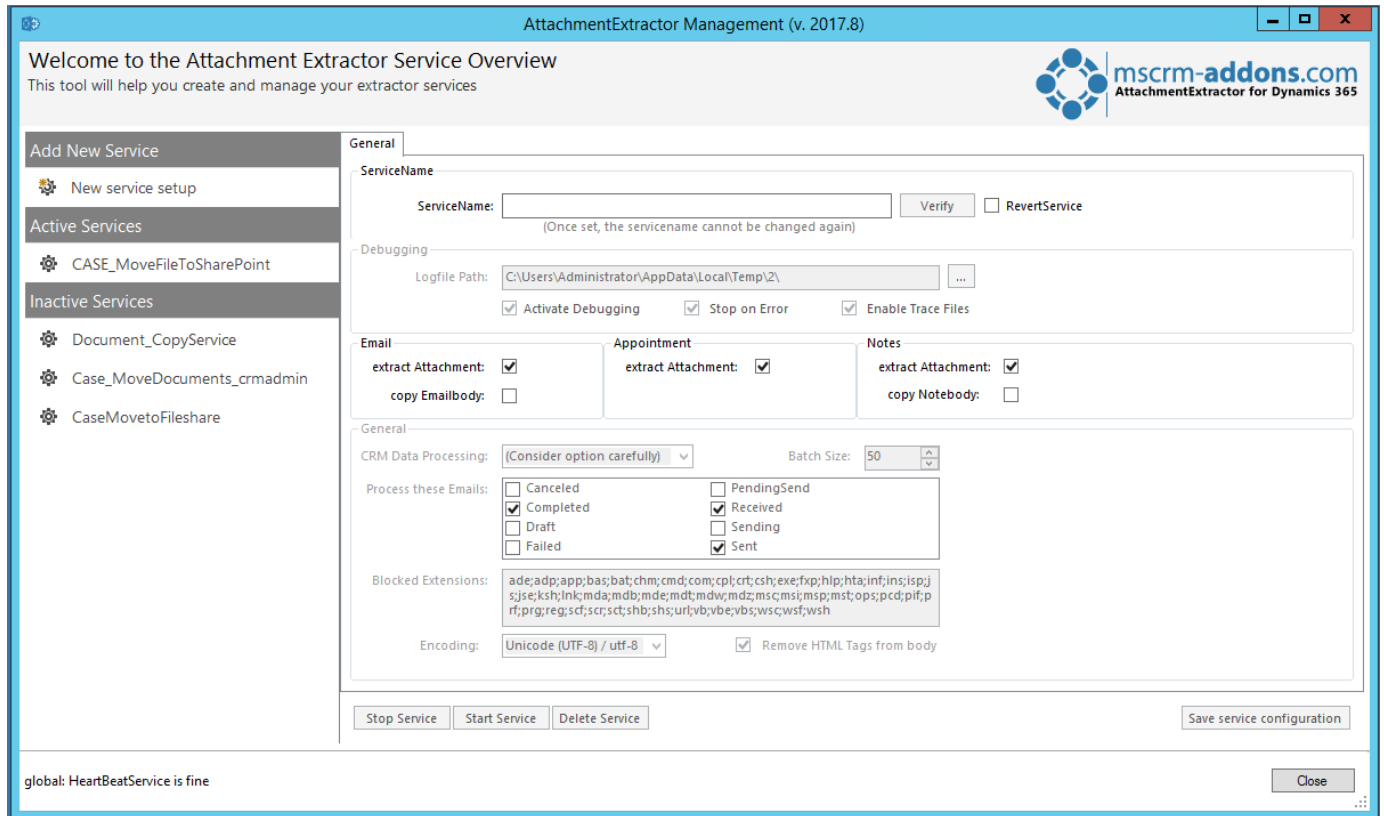

Figure 2: Attachment Extractor Service Overview

2.1   The Service Overview sections

AttachmentExtractor Service Overview provides you with three sections at the left side.
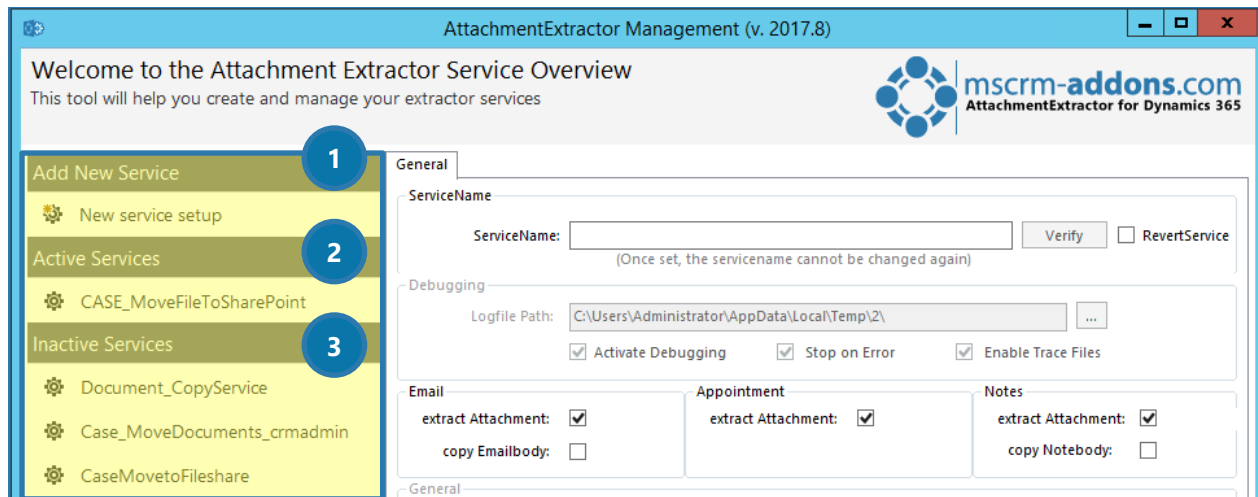

Figure 3: Service Overview sections

❶ ADD NEW SERVICE:

New service setup:

Start here, when you want to create a new service. For more information, have a look at chapter 4.1 HOW TO CREATE A SERVICE IN ATTACHMENTEXTRACTOR ON PAGE 28.

❷ ACTIVE SERVICES:

This tab provides you with a list of all running services.

❸ INACTIVE SERVICES:

This tab provides you with a list of all inactive services. Have a look at CHAPTER 4.2 HOW TO START A SERVICE? ON PAGE 33 to get more information on how to activate a service.

3   The Service Overview tabs

When you have not created a service yet, the AttachmentExtractor Service Overview consists only of the General tab. As soon as you create a service or open an active service, there are more tabs. Within the following chapter, you will be provided with an overview of the different tabs and their functionality. For further information on how to add or customize services, please have a look at chapter 4.1 HOW TO CREATE A SERVICE IN ATTACHMENTEXTRACTOR ON PAGE 28.

Figure 4: Service Overview-tabs

3.1 The General-tab

The General-tab provides you with the opportunity to set the general settings of your future service.

Figure 5: Service Overview - General tab

❶ SERVICE NAME

Enter a service name for your future service here. Click on the *[Verify]*-button to check if the name is still available. You also have the possibility to clone your service as a revert service.

> **PLEASE NOTE**
>
> When creating a new service, it is recommended to name it descriptively. Once set, that name cannot be changed anymore.

❷ DEBUGGING

AttachmentExtractor offers separate debugging options for each configured service. To enable debugging for a specific service, you need to specify a logfile-path. Click on the *[...]*-button to change it. Check the *Activate Debugging* checkbox if you want to activate debugging.

PLEASE NOTE   If the service for which you want to enable debugging is already running, you must stop the service before you can change the configuration.

Checking the *Stop on Error – checkbox* shuts the service down on non-critical errors.

❸ EXTRACT EMAIL

This field determines which parts of the emails should be extracted. You can extract the attachment and/or the email body by checking the corresponding boxes.

❹ EXTRACT APPOINTMENT

This field determines which parts of the appointments should be extracted. You can extract the attachment by checking the corresponding box.

❺ EXTRACT NOTES

This field determines which parts of the notes should be extracted. You can extract the attachment and/or the note body by checking the corresponding boxes.

❻ CRM DATA PROCESSING

By using the drop-down menu of this section, you can decide how to proceed with your extracted data. Select COPY to keep all Dynamics 365 data or select MOVE to replace data in Dynamics 365.

PLEASE NOTE   Once you have moved data, the step cannot be undone anymore!

❼ BATCH SIZE

This field enables you to set the number of items to be processed per step.

❽ *PROCESS THESE EMAILS*

Select the states an email must have to be processed. you can select between the following states: *Canceled, Completed, Draft, Failed, PendingSend, Received, Sending and Sent.* Please note, that depending on your Dynamics 365 setup several states enforce a *read only* state on the email.
Please be aware, that draft status will likely extract the attachment before the email is sent.

❾ BLOCKED EXTENSIONS

Please insert the filetypes that should be blocked from extraction here. Please be aware of the fact, that Dynamics 365 does NOT extract links by default.

⑩ THE SERVICE-BUTTONS

Use the service buttons to configure your service. The *[Stop Service]*-button stops a running service. You can start a service again with a click on the *[Start Service]*-button. When you click on the *[Delete Service]*-button, you delete a service. Please consider the last step carefully, because you cannot undo this action.

⑪ THE EXTRACTION & SAVE BUTTONS

The *[Revert Extraction]*-button reverts previously extracted data, while a click on the *[Reset Extraction]*-button resets the extraction process. Click on *[Save service configuration]* to save your settings.

3.2   The CRM Connection Setup-tab

Figure 6: Service Management - CRM Connection Setup

❶ DYNAMICS 365 TYPE

Select the Dynamics 365 Type you want to use here.

❷ DYNAMICS 365 SERVER-URL

Enter Url of the Dynamics 365-Server you want to use here.

❸ AUTHENTICATED AS

Decide if you want to use default Credentials (Not recommended, because the service is running as *Network-Service*.) or if you want to log on with other credentials (always use administrator).

❹ RETRIEVE ALL

Get all Organizations from the previously selected Dynamics 365-Server.

❺ ORGANIZATION INFORMATION

Friendly name, unique name and ServiceURL of each Organization are displayed in this section.

Have a look at our Connection Dialog documentation for further information on the Connection dialog.

3.3 The Storage Options-tab

Using the drop-down menu, you can select if you want to extract your files to SharePoint, a Fileshare or AzureBlobStorage.

Figure 7: Service Overview - Storage Options

❶ SHAREPOINT

> *SharePoint Server*
> Enter your SharePoint server here. Browse through your sites and libraries to specify the storage location.
>
> *Username & Password*
> Please enter the username and the password of the SharePoint user here.
>
> *ADFS Server*
> Please enter your ADFS Server here.
>
> *HomeRealm Url*
> Enter the governing ADFS address for HomeRealm discovery enabled scenarios. If you don´t know, if you are having one, you very likely don´t.

Use the *[Connect to SharePoint]*-button to establish a connection with SharePoint.

❷ FILESHARE

Internal Path
This is how the service access the files for writing. Be aware, that the service is running under a network/system user per default and might not see the same drive & shares as the logged-on user. Select the local storage path. Click on the *[...]*-button to select one.

External Path
Select the external storage path (the path, the user would take). Click on the *[...]*-button to select one.

> **PLEASE NOTE**   The internal and the external path must point to the physically identical location.

FileShare user
Please enter the username of the FileShare user.

> **PLEASE NOTE**   This is the user the service is impersonating as to write to the FileShare. If no user is supplied, the write access will be performed as the user running the service.

Password
Please enter the password of the FileShare user (click on the eye to see the unencrypted password).

❸ AZUREBLOBSTORAGE

Starting with version 2017.8 AttachmentExtractar supports Azure Blob Storage (ABS). ABS is a service for storing large amounts of unstructured object data, such as text or binary data. It only offers flat storage without saving attributes. This means there is no hierarchy, everything will be stored in one folder.

Storage Account Name
All access to Azure Storage is done through the storage account name of the blob storage instance to use for AttachmentExtractor. It provides a unique namespace to store and access the Azure Storage. An account can contain an unlimited number of containers.

Container
A container provides a grouping of a set of blobs. It can store an unlimited number of blobs. Please note, that the name of the container must be identical to the actual name, as this is case sensitive. All attachments will be stored in this container.

Sas Token
The Shared Access Signature can be created with the Microsoft Azure Storage Explorer. AE requires read/write/delete access on the container. Please take a note of the set token expiration time for a timely refresh, when required.
More information about how to get the SAS for a blob container can be found in the corresponding Microsoft Azure documentation.

3.4   The Integration-tab

Figure 8: Service Overview - Integration

❶ SHAREPOINT INTEGRATION OPTIONS

Enable CRM SharePoint Integration

Enable this option and AttachmentExtractor will save the files to the regarding entities location for emails or to the owning entities location for annotations.

Create locations on SharePoint

Enable this option to allow AttachmentExtractor to create document locations for the related entities.

Create locations with GUID suffix

Enable this option to create folders synchronously with CRM 2015 folder creation logic.

❷ DEFINE SUBFOLDER NAMES

Here you can define the names of your subfolder for emails or for notes. You are allowed to use maximum 14 chars – only letters and numbers.

❸ HANDLING OF ENTITIES WITH NO REGARDING OR REGARDING WITHOUT DOCUMENT MANAGEMENT

Entities with no regarding or without document management, but with regarding can be managed here. Simply check the box that displays best how you want to proceed with these entities.

AttachmentExtractor supports CRM integrated DocumentManagement, saving documents in the same location as CRM would do (The document location is determined by the regarding field for emails and by the owning entity for notes).

The AttachmentExtractor creates a weekly or daily subfolder, based on the created date of an item for items without regarding or regarding items without document management enabled in Dynamics 365.
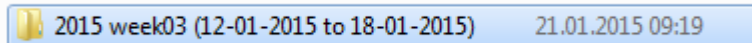This feature is optional!

Weekly Subfolder

| 2015 week03 (12-01-2015 to 18-01-2015) | 21.01.2015 09:19 |

Figure 9: Example of a weekly subfolder

Daily subfolder

| 2014 week42 (13-07-2014 to 19-07-2014)_13Mo | 13.10.2014 09:13 |
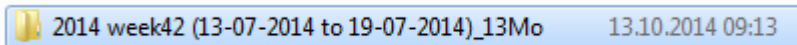
Figure 10: Example of a daily subfolder

④ SHAREPOINT ATTRIBUTES

If you want to create SharePoint attributes, you can do so here. Attributes are optional and add additional information to each Dynamics 365 item on SharePoint. However, enabling this option will slow down the extraction process.

- **CRMBACKLINK**
  Containing a link to the actual Dynamics 365 item

- **ENTITYGUID**
  The unique ID of the item

- **ENTITYTYPENAME**
  The name of the Entity in Dynamics 365

- **ISCRMRECORD**
  Indicating if this item is an actual Dynamics 365 record or an attachment

- **LINKGUID**
  Containing the GUID and TypeName as a CSV list for the attributes specified below

- **LINKDATA**
  Containing the display values for the attributes specified below

- **ENTITYDATE**
  The created on date of the item in Dynamics 365

A comma-separated list of the following items is saved into the SharePoint attributes. The attributes are separated by a semicolon:

For Email:
"FROM", "TO", "CC", "BCC", "SUBJECT", "REGARDINGOBJECTID"

For Annotation (Note):
"SUBJECT", "FILENAME", "FILESIZE", "NOTETEXT", "OBJECTID"

Please note that the attributes are set for both, the attachments and the actual entity.

❺ MANUAL SHAREPOINT INTEGRATION FOLDERS

This option defines if the SharePoint integration folders should be created once a week or once a day.

3.5   Filter

Figure 11: Service Overview - Filter

1 ATTACHMENT SIZE FILTER

Set the attachment size filter to define what size an attached file must have to be extracted by this service. If you want to extract as many files as possible, it is recommended to use a very small size.

2 ENTITYTYPE FILTER

Excluded Entities (BlackList)
Check this checkbox to extract the email/Note attachment and save it as a file.

Included Entities (Whitelist)
Contains a list of entities, which notes will ALWAYS be processed by the Extraction. Leave this field empty to process any entity. You also have the possibility to select filtered views, which you can create in Dynamics 365. Please note, that the additional processing required for filtered views will have an impact on overall performance

3 RESTRICTIONS

Use this area to set time restrictions on the extraction of your notes and emails.

4 OWNERSHIP – INCLUDE ITEMS OWNED BY

You can filter by user, teams and business units. Only items owned by this user will be extracted and is queried with an *OR* condition.

3.6　The Deletion-tab

Figure 12: Service Overview – Deletion

DELETION SETTINGS

Max. Attachment Size Backup folder
Define the maximum attachment size here.

Backup folder:
Select a folder location into which you would like to back up your data.

Patterns:
Only files that contain the expressions inserted into this box will be flagged for deletion.

PLEASE NOTE　　Once set, this section will PERMANENTLY delete files from your database.
This action is NOT reversible!

Trace CRM Deletion

It is possible to:

- *Delete files on SharePoint, when the CRM entity is deleted* or to

  If you are checking this checkbox, AttachmentExtractor is capable of cascading delete requests in Dynamics 365 to extracted files, which means that it enables the plugin to delete items on SharePoint/AzureBlobStorage.

  Settings required:
  EnableCascadeDelete
  Value: true

- *Cancel the CRM delete request if the SharePoint file cannot be deleted.*

3.7   The Runtime-tab

Figure 13: Service Overview – Runtime

Supported by the functionalities of this tab, you can specify the runtime of your service.

Specify, on which weekday(s) and when exactly the service should run by checking the checkboxes next to the weekday and by setting a certain time/period. AttachmentExtractor is smart enough to figure out that, running your service on Monday from 11pm to 7am, is actually running from midnight to 7am and from 11pm till midnight.

Unthrottled
By checking this checkbox, you have the possibility to run your service non-braked.

Idle time
Define an idle time so that other services also get time on the server.

Retry count for failed items
Define the number of attempts to retry your failed items.

Retry failed item delay in hours
You have the possibility to set in how many hours the retry should start for the first time and retry the failed five times.

3.8   License

	Licensevalue	Systemvalue	Status
Licensemodel	perSite		ℹ
Licensekey	XH5K8UCCi2pDmRIEQD/Fg7...	Licensekey installed	ℹ
BusinessUnit	Standard	Standard	✔
Number of site licenses	85	7	✔
Licenses for Readonly Users	0	0	✔
Expiration	29.09.2019 00:00:00	556 days left	✔
Support	29.09.2019 00:00:00	556 days left	✔
Issued product	AttachmentExtractor	AttachmentExtractor	✔
Version upgrade covered ...	29.09.2019 00:00:00	20.03.2018 16:46:56	✔

License Status

LicenseState		valid	✔

Figure 14: Service Overview – License

This overview enables you to quickly check your license state. If the license is invalid, the service will not start. For more information on the license manager, please have a brief look at our Licensing Guide.

PLEASE NOTE

When in trial mode, the service will stop after each processed batch of items. The processing batch size is limited to 25 items per cycle and a maximum of 500 items is supported in total.

3.9 Log

The log provides an excerpt of the AttachmentExtractor event log, filtered for this specific service. This helps you to identify any issues with the service.
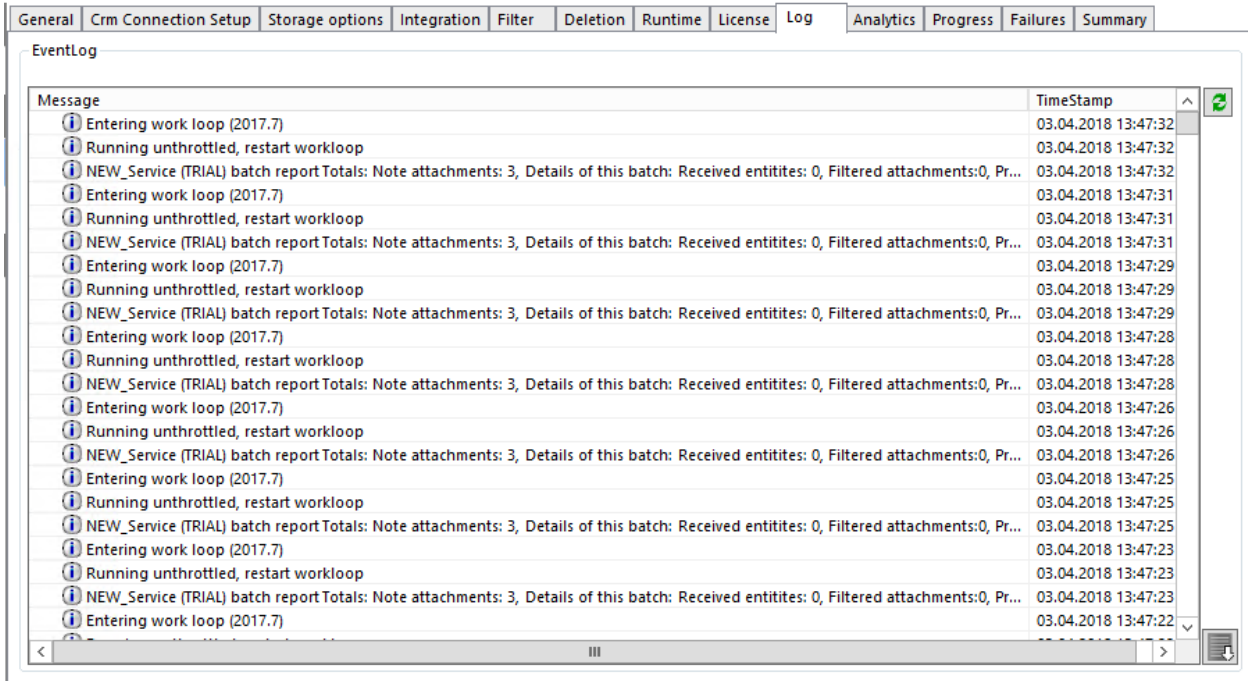

Figure 15: Service Overview – Log

Double-clicking on an entry in the list brings up the full description in a message box, like you can see in the figure below.
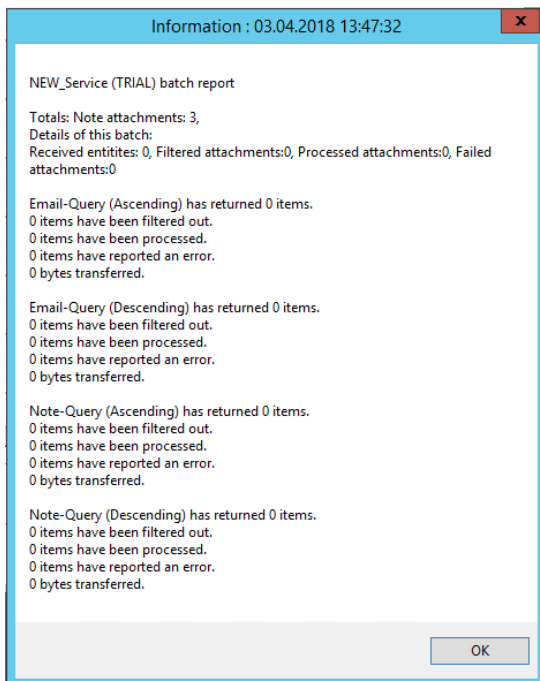

Figure 16: Example log – message box

3.10 Analytics

Figure 17: Service Overview - Analytics

CRM DATA ANALYSIS

Get an overview of your CRM data analysis here. Hit the **[Run analytics]**-button to get the progress of your service at a glimpse. The total size, the extractable size, the counted items and the types of your items will be displayed.

It is possible to disable debugging while analysis is active by checking the checkbox.

3.11 Progress

	ItemGuid	TimeStamp	LogicalName	CreatedOn	ModifiedOn	Subject	State	Reason	File
▶	{0bc8ff82-3a62-...	2017-09-29 14:3...	annotation	2017-07-06 11:0...	2017-07-06 11:0...	1st Farm Credit ...	whitelistfailed	whitelist failed ...	1st
	{0ac8ff82-3a62-...	2017-09-29 14:3...	annotation	2017-07-06 11:0...	2017-07-06 11:0...		blacklisted	blacklisted by o...	1st
	{12c56b1a-3a62-...	2017-09-29 14:3...	annotation	2017-07-06 10:5...	2017-07-06 10:5...		blacklisted	blacklisted by o...	AM
	{ba84e1c8-c4ee-...	2017-09-29 14:3...	annotation	2017-02-09 12:3...	2017-02-09 12:3...		blacklisted	blacklisted by o...	am
	{f47582b6-c4ee-...	2017-09-29 14:3...	annotation	2017-02-09 12:3...	2017-02-09 12:3...		blacklisted	blacklisted by o...	am
	{dd0aa989-c4ee-...	2017-09-29 14:3...	annotation	2017-02-09 12:3...	2017-02-09 12:3...		blacklisted	blacklisted by o...	am
	{f1b2b777-c3ee-...	2017-09-29 14:3...	annotation	2017-02-09 12:3...	2017-02-09 12:3...		blacklisted	blacklisted by o...	am
	{2b234ac4-97ee-...	2017-09-29 14:3...	annotation	2017-02-09 07:1...	2017-02-09 07:1...		blacklisted	blacklisted by o...	am
	{79e7ccce-96ee-...	2017-09-29 14:3...	annotation	2017-02-09 07:1...	2017-02-09 07:1...		blacklisted	blacklisted by o...	am
	{78630a35-92ee-...	2017-09-29 14:3...	annotation	2017-02-09 06:3...	2017-02-09 06:3...		blacklisted	blacklisted by o...	am
	{8b4734c1-19ee-...	2017-09-29 14:3...	annotation	2017-02-08 16:1...	2017-02-08 16:1...		blacklisted	blacklisted by o...	am

Figure 18: Service Overview - Progress

SERVICEPROGRESS

Check the progress of your service here to get an overview of your file extraction history.
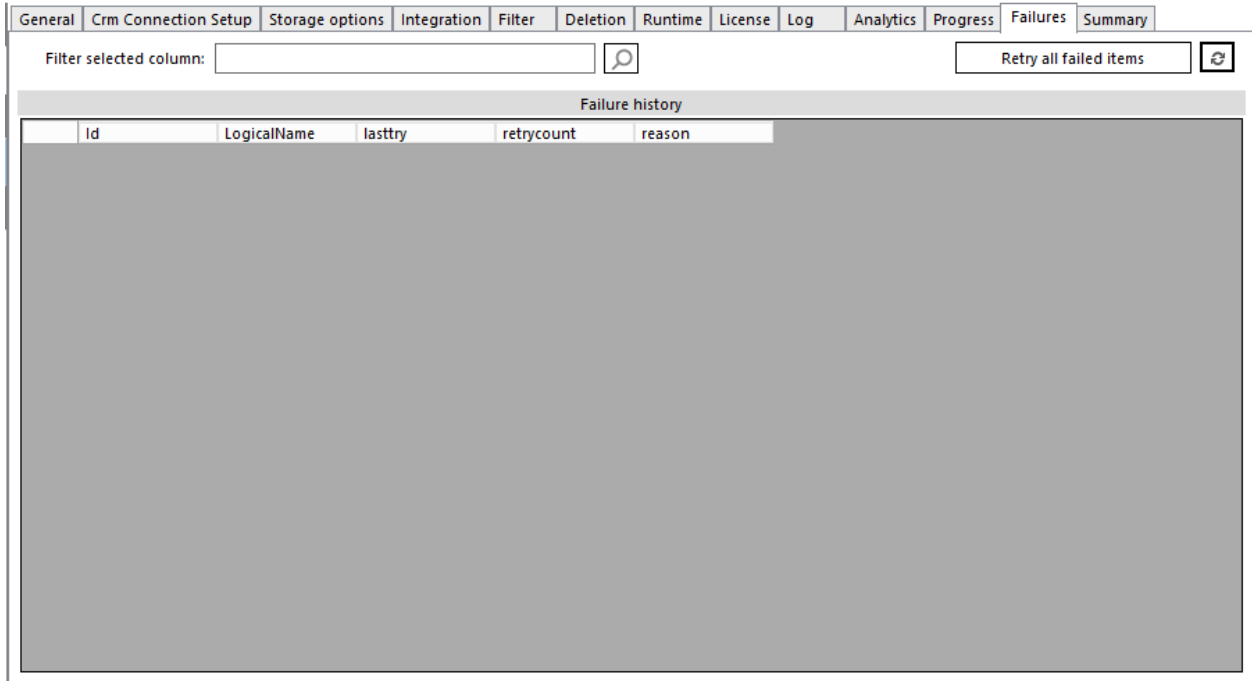
3.12 Failures

Figure 19: Service Overview - Failures

The *Failures-tab* provides you with the Failure history of your failed items. You have the possibility to retry failed items by hitting the ***[Retry all failed items]***-button. Retry enabled the service to retry all items that have already failed more than the set times on the *Runtime-tab* .

3.13 Summary

The *Summary-tab* displays you the configuration structured in a tree diagram like you can see in the figure below. You can export your Log-files as a ZIP document, which contains the service overview and the latest logs and the eventlog. Therefore, please hit the *[Export]*-button, highlighted in yellow.
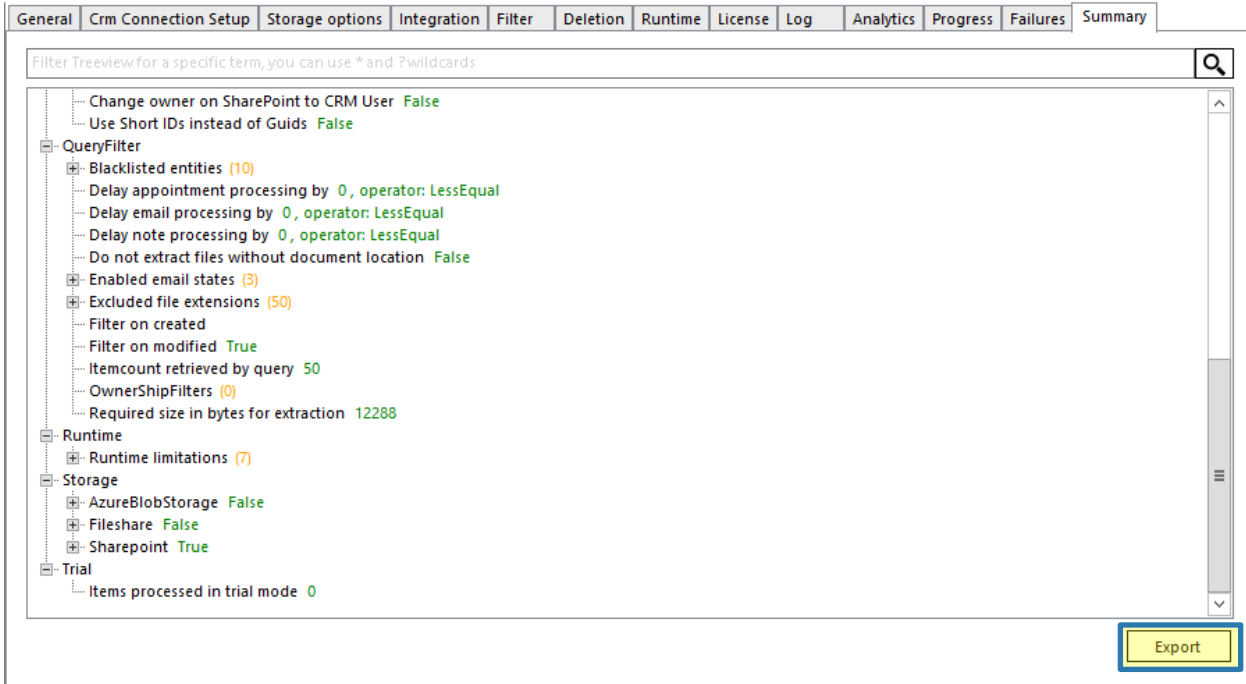
Figure 20: Service Overview - Summary
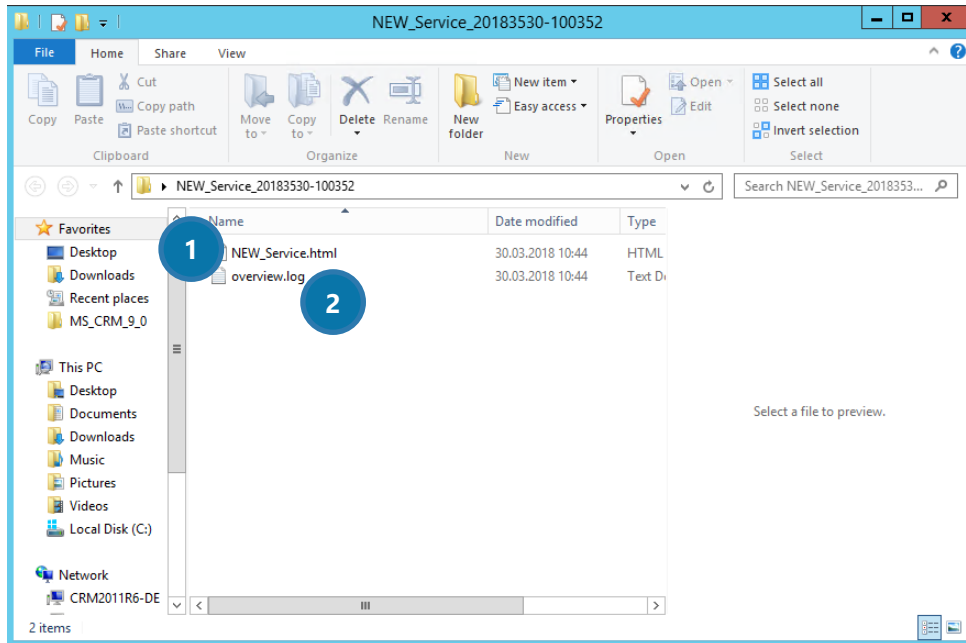
Figure 21: Service Overview – Zip-file

The ZIP-file contains usually more than two files, like shown in our simple example. Depending on the debug status, this could have around 15-20 files. The intention is to help our support team to find issues and have all information in place.

❶ NEW_SERVICE.HTML

If you open this file, you will be provided with a structured service overview where you can find all information to your newly created service, like you can see below.
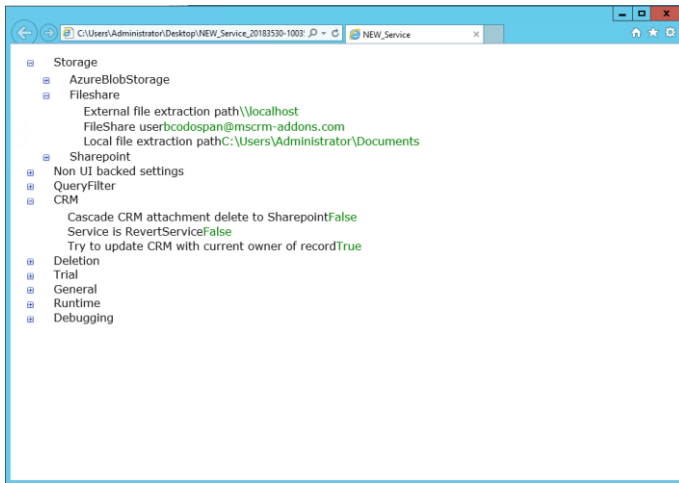

Figure 22: The New_Service.html

❷ OVERVIEW.LOG

The log overview of the service configuration helps you to identify any issue with this service.
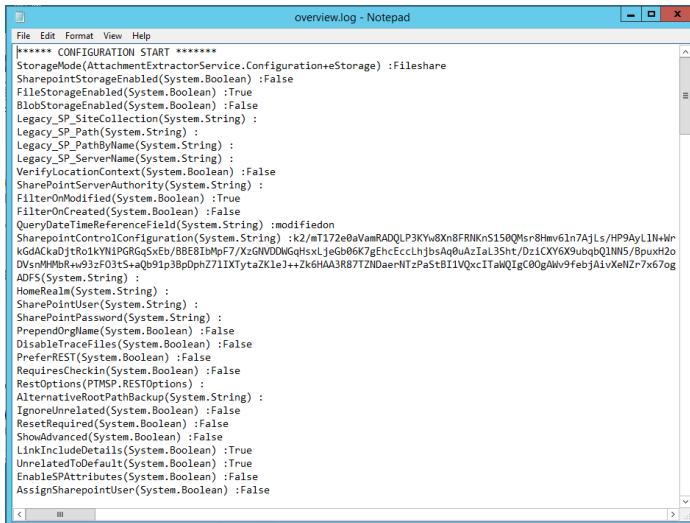
Figure 23: The Overview.log

This ZIP-file is very important for support requests.

4 How-To's

This section provides you with some useful Tutorials on how to work with AttachmentExtractor.

4.1 How to create a service in AttachmentExtractor

It does not need much to start a service in AttachmentExtractor. To do so, simply open the AttachmentExtractor ServiceManagement in the start pane.
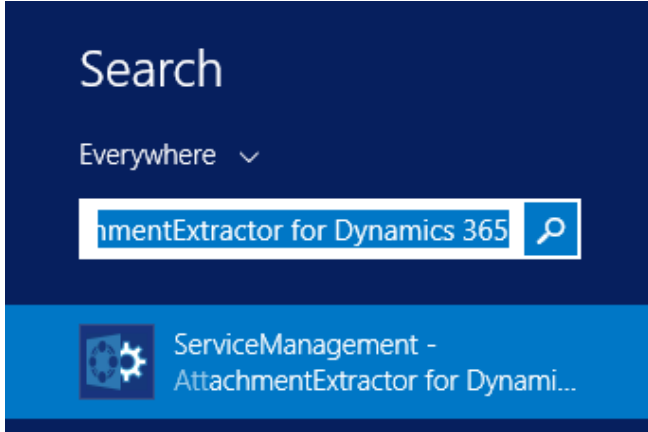

Figure 24: Start Pane – AttachmentExtractor ServiceManagement

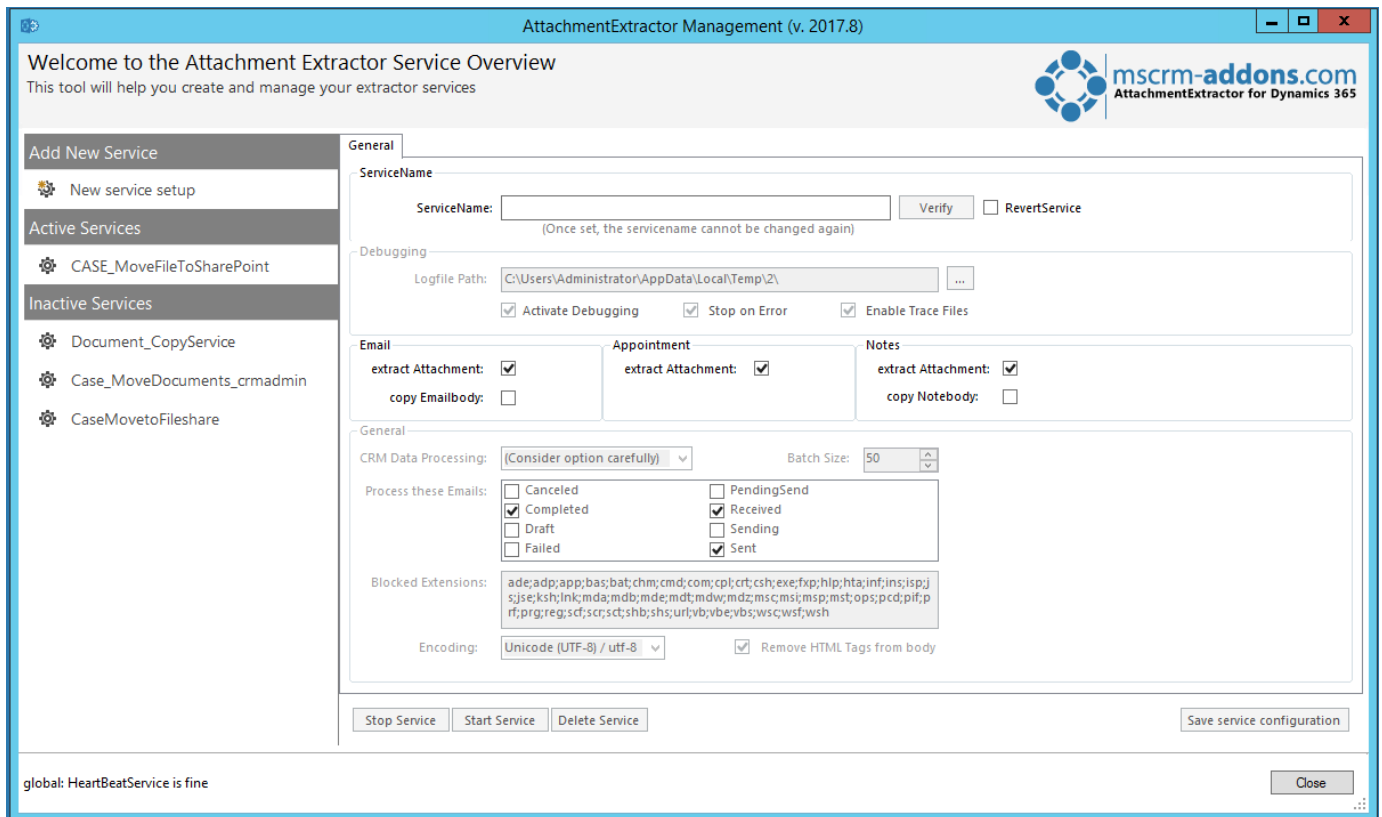This opens the AttachmentExtractor Service Overview. Click on *New service setup* on the left side.

Figure 25: AttachmentExtractor Service Overview

Now insert a *ServiceName* of your choice (here: NEW_Service) ❶ and click on the *[Verify]*-button ❷.

Now click on the *[Safe service configuration]*-button ❸ to proceed. Next, to the General-tab, two further tabs appear.
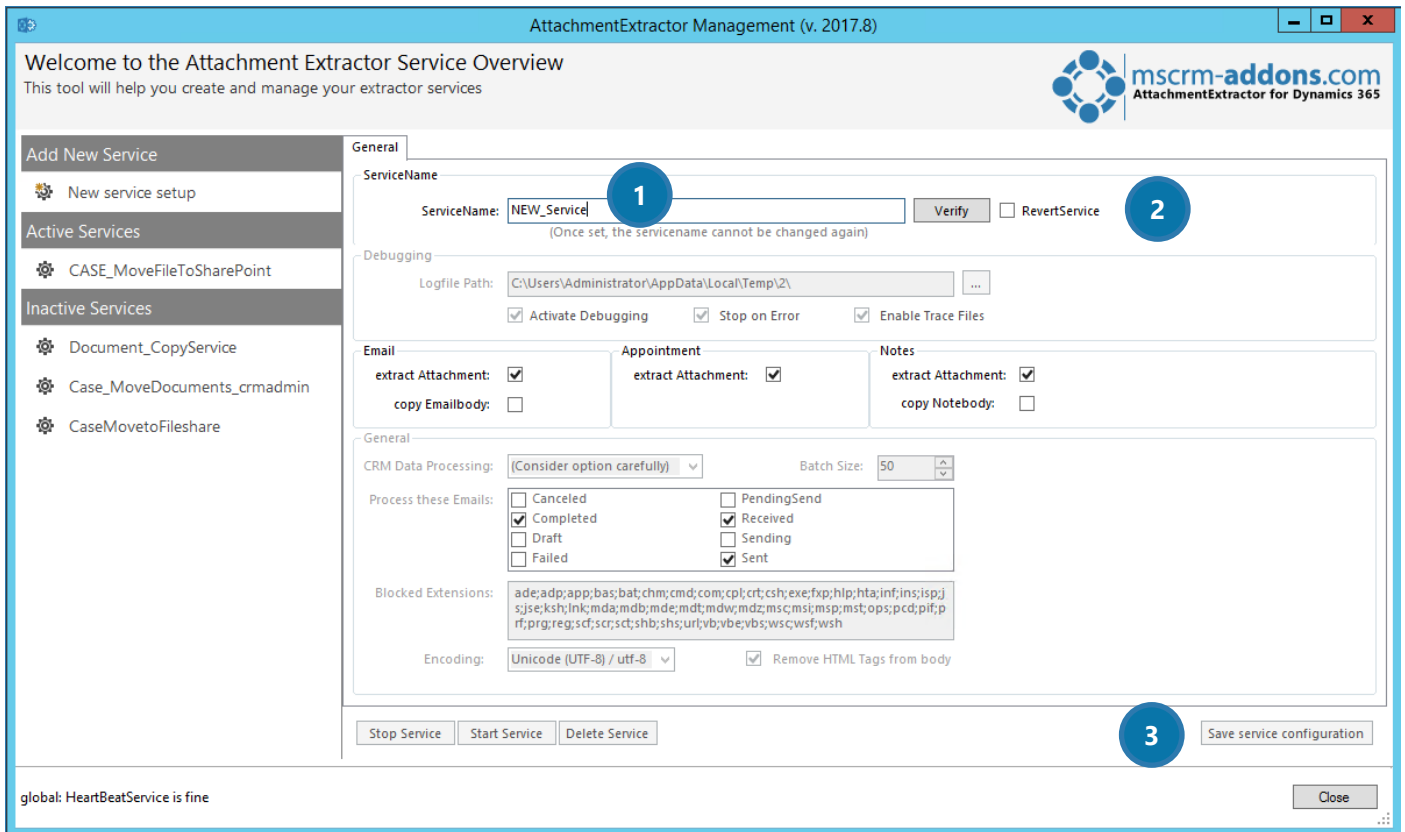

Figure 26: AttachmentExtractor Service Overview

Now switch to the *CRM Connection Setup*-tab, select your Dynamics 365 type, type in the Dynamics 365 Server-URL and click on the *[Retrieve all Organizations]*-tab. Select the appropriate organization and click on the *[OK]*-button.
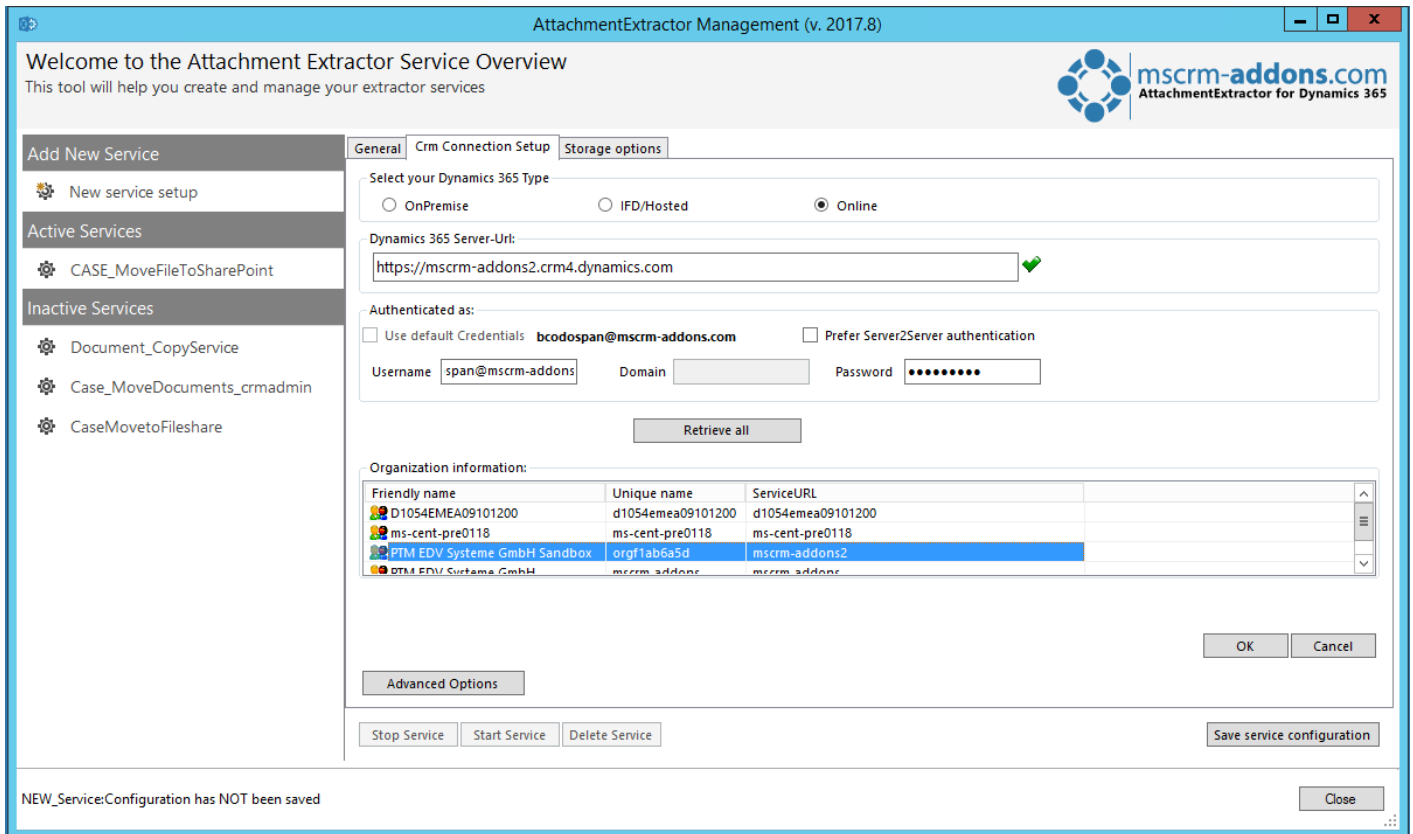

Figure 27: CRM Connection setup

If the connection has been established successfully, the following dialog appears. Please click on the *[OK]*-button in order to proceed.
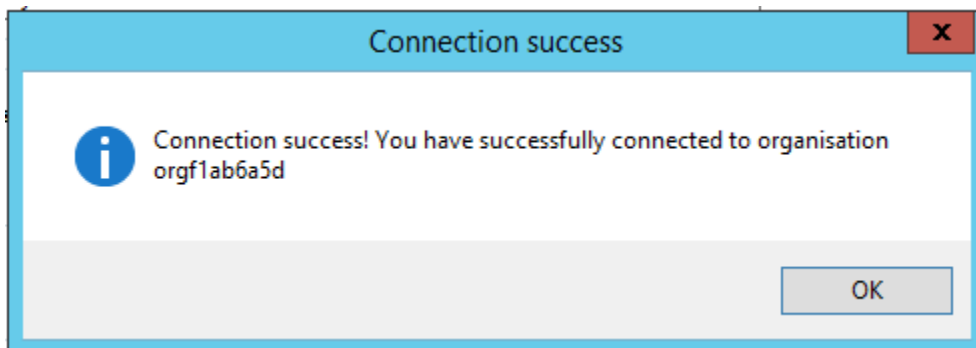

Figure 28: Connection success-window

Now switch to the *Storage options-tab* and select if you want to use SharePoint, FileShare or AzureBlobStorage as an active storage option ❶. Depending on which option you select, the selected option is highlighted, while the other option remains grey. As shown in figure 23, a file share is used as storage location ❷. We have already entered our file storage ❷ and saved our settings.

Figure 29: Set storage options

As soon the storage options are clear and saved, the new service appears in the *Inactive Services* overview. Furthermore, a few more tabs to work with have appeared. For further information on the tabs, have a look at CHAPTER 3 THE SERVICE OVERVIEW TABS ON PAGE 7.
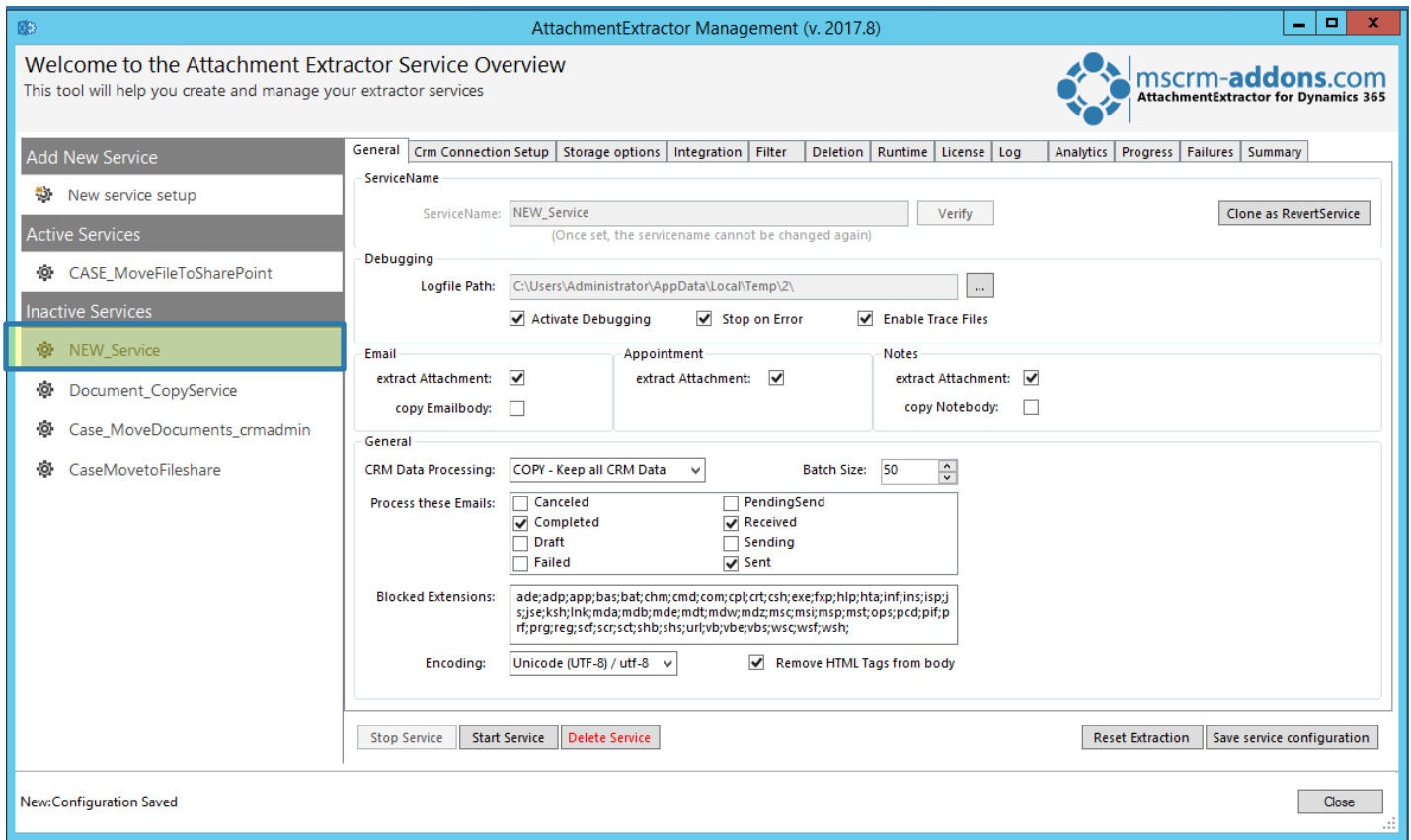

Figure 30: New service created

Congratulations! You have created your first service!

PLEASE NOTE As long as you have not started the service, the service remains in the Inactive Service section. For further information on how to start a service, have a look at CHAPTER 4.2 HOW TO START A SERVICE? ON PAGE 33.

4.2   How to start a service?

Starting a service is very easy. To do so, simply click on the Service you would like to start in the *Inactive Services* section (here: *NEW_Service*) ❶. Next, click on the *[Start Service]*-button. ❷ That's it!
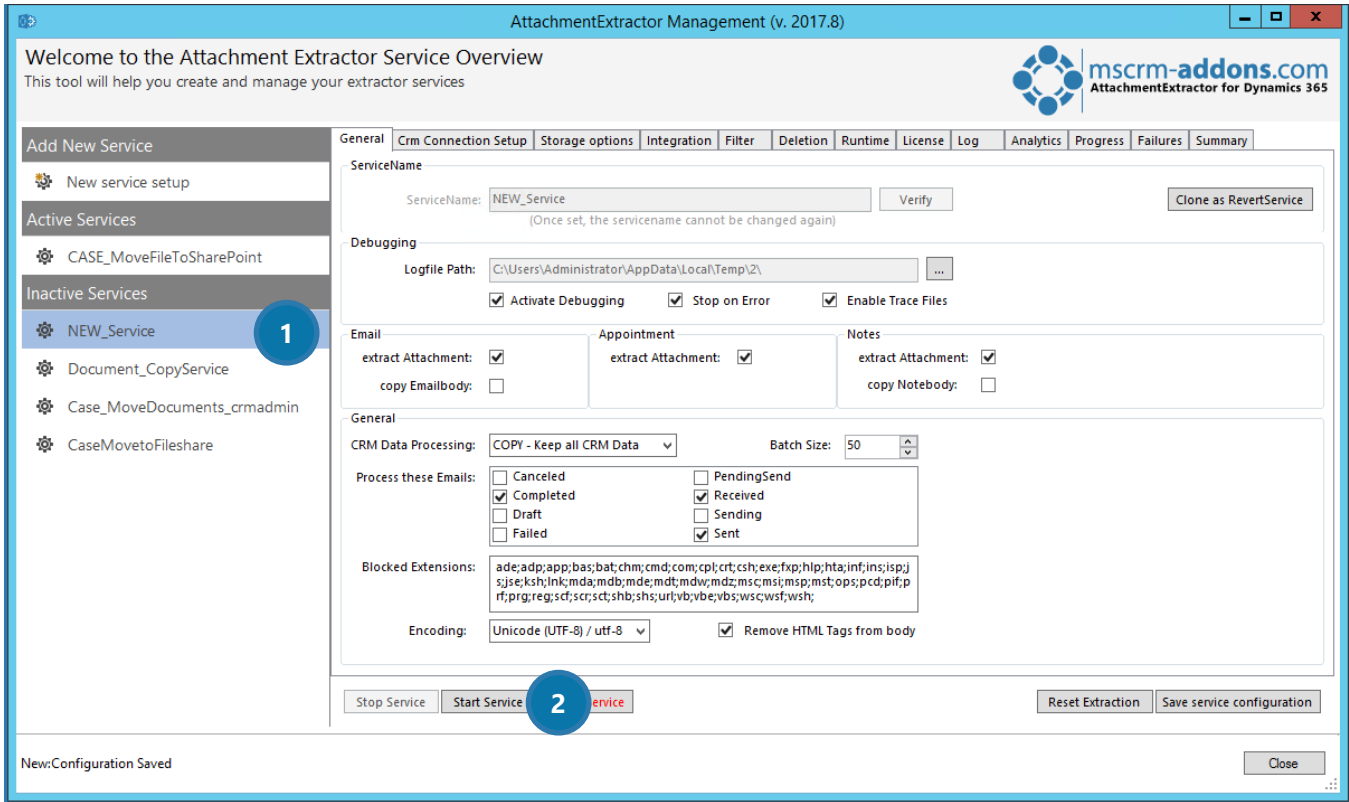

Figure 31: Start new service

4.3 How to react if AttachmentExtractor fails to upload large files?

Please note, that this chapter only applies to SharePoint version 14 and lower.

AttachmentExtractor sometimes fails to upload files exceeding two megabytes of size (The actual size being blocked depends on various parameters and may actually be lower than the set value).

To overcome this problem, please first check, if you see a message like the following in the event log or the log overview of the service configuration:

The request message is too big. The server does not allow messages larger than 2097152 bytes.

This indicates, that the default upload method is not working due to server-side message size restrictions.

Please follow the below step-by-step tutorial to get rid of this issue.

1) Note your service name
   (the one you have entered when creating the service, for example *MyService*)

2) Open the registry editor on the machine, where the AttachmentExtractor service is installed.

3) Open the following key:
   HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\AttachmentExtractorserver\Configurations

4) Find the key that equals your previously entered service name, for example:
   HKEY_LOCAL_MACHINE\SOFTWARE\PTM EDV-Systeme\AttachmentExtractorserver\Configurations\MyService

5) Find the following StringValue
   UseSP15Upload

6) Change the value to *true*

7) Stop and Restart the service

5 FAQs

This article provides you with a collection of frequently asked questions.

Should you deal with a certain issue regarding AttachmentExtractor, you might find the answer here.

If not, do not hesitate to contact our support via support@mscrm-addons.com.

5.1 What is AttachmentExtractor used for?

AttachmentExtractor was generated to extract attachments, notes or emails/email content safely from Dynamics 365 to locations like SharePoint, FileShare or Azure Blob Storage.

This action saves a lot of time and money, because

1) you do not have to manually extract the files to a more economical location like SharePoint, a file share or Azure Blob Storage.
2) The cost reduction can be easily checked: While one GB/month of CRM Online storage costs 9,99 USD, one GB/month of SharePoint storage costs 0,2 USD.

5.2 Why aren't my attachments being extracted?

This is one of the most common questions our support deals with. Besides, it is also the most difficult question to answer, because there is more than one possible reason for this issue.

Now before you feel upset, simply go through the below checklist. The solution for your issue might be only a click away.

Are your User Credentials correct? Did you double check them?
Do you use the right filetype? Did you select the correct one?
What about the file size? Did you select the smallest possible file size?

6   List of figures

7 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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