

USER GUIDE

PowerAttachment







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Overview

PowerAttachment is a managed solution that sits in CRM that will push your attachments to your SharePoint site removing the document from CRM and replacing it with a link to the document that is now stored in SharePoint, saving you storage in your CRM system! This guide will walk you through how PowerAttachment works in your CRM system.

If you have not imported the solution into your CRM system yet, please refer to the PowerAttachment Quick Guide for instructions on how to get started.

Using PowerAttachment

Once you have setup the PowerAttachment configuration, the solution will move all new attachments in the CRM system to your SharePoint site. The PowerAttachment solution will not touch any pre-existing attachments in your system or document types that are not defined in the "Attachment Types" field in the setup.

Note: PowerAttachment will sync documents to your SharePoint every 5 minutes.

Attachments for Email Activities

If you navigate to an Email Activity in your CRM system, you will notice not much has changed with the form. We have simply added a section towards the bottom for PowerAttachments, this is where your links to the SharePoint documents will appear.

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Sending an Email with Attachments

The process of sending an email with an attachment has not changed; simply write out your email content > save > attach your files > send!

Microsoft Dynam	ics CRM 🗸 🏦 POWERPACK 🗸 PowerEmail Opens 🗸 PowerAttachment E 🗸	(Create	Enter Search Item 👂	÷ 🔹
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BCC Link to Survey	••		PowerAttachment_1_0_3_2013_managed.z	ip 415,806
Subject	PowerAttachment Example		Quick Guide - PowerAttachment.docx	2,106,498
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Regarding				
Duration	30 minutes			

Once the email has sent, PowerAttachment will sync the attachments to SharePoint and place links to the documents in the PowerAttachments section of the form.

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Receiving an Email with Attachments

PowerAttachment will also work with emails that are tracked back to CRM using the Outlook CRM client. Again, the solution will take the attachments and push them to SharePoint; placing links to the documents in the PowerAttachments section.

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e-mail : email • RE: PowerA	ttachment Example CRM:0005033		Priority Normal	Due 		Status Reason Received	Owner*
From (▲ To Juli Cc	JIII CRM RM PowerAttachment Example CRM:0005033 ts script or content that is potentially harmful and has been blocked. Open Menage to see how the whole process works. redyects.com Office: 612.339.335 x Emal: incago Cincinnati Dallas New York Omaha Philadelphia Seattle Toronto If an email is tracked back to CRM via the Outlook client; any attachments will be automatically pushed to SharePoint and listed in the "PowerAttachments' section File Stee Byten cpdf 205,025	0	*	F= Attachment File Name ↑ No Attachment records found.	Attachm replaced 'PowerA	ent is removed a with a link under tachments' sect	(Bytes)
1 - 1 (0 selected)	1	H ∉Page11⊧					

Attachments in Notes sections

Additional to the Email Activity, PowerAttachment will move any attachment on any entity in your CRM system to your SharePoint site. This can be an out of box entity or even custom; if there is a specific entity you do not want PowerAttachment to work with, you can define this is in the "Exclude Entities" section of the setup.

Find Customer * Find Contact Find Case	A. Datum Corporation click to enter	on (:				
UMMARY ASE DETAILS ase Title * ubject ustomer * rigin ontact titlement oduct	PowerAttachment TEST 1.0 CAS-00100-Z3B0J9 A. Datum Corporation (sample 	This attachment is still waiting to be pushed to SharePoint but will shortly turn to a link	POSTS ACTIVITIES NOTES PowerAttachment works with notes! User Guide - PowerAttachment.docx You - Just now PowerAttachment Example! https://	der		
SCRIPTION		Attachment has been pushed to SharePoint and replaced with a link	You - Just now	JUCK	 	

In the second screen shot we can see the second attachment on the case record has been moved and replaced with a link to the document in SharePoint.

CASE PowerAttachment TEST 1.0	Research Reso
✓ Find Customer	
Summary CASE DETAILS Case Title PowerAttachment TEST 1.0 ID CAS-00100-Z380J9 Subject Customer Attachment A. Datum Corporation (sample) Origin Contact Entitlement Product DESCRIPTION Within 5 minutes of adding the attachment PowerAttachment has moved the document to SharePoint	POSTS ACTIVITIES NOTES Enter a note PowerAttachment works with notes! https:/docx Today 2:55:52 PM PowerAttachment Example! https://docx

Thanks for your interest in PowerAttachment. Should you have any questions, contact us at 612.339.3355 or email the PowerPack Team at <u>powerpackpro@powerobjects.com</u>. Your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "Try" to "Subscribe" and enter your credit card information – you will be charged \$1/enabled CRM user/month.

Interested in more CRM tips and tricks? Check out our blog or subscribe to our newsletter.



