



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.

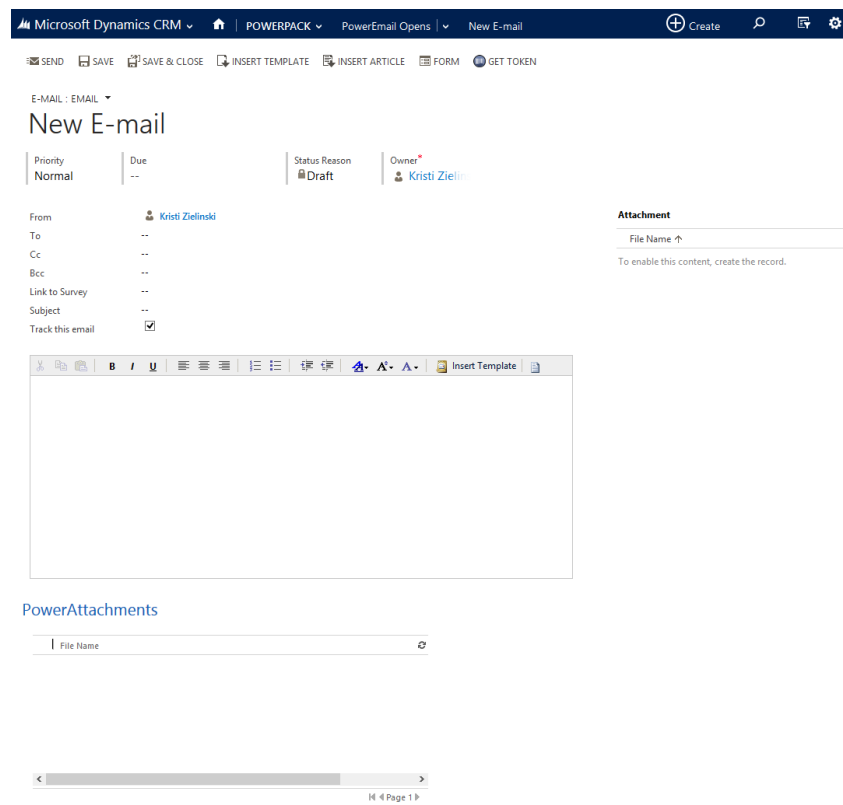
Using PowerAttachment

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.



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!

The screenshot shows the Microsoft Dynamics CRM interface for composing an email. The subject is "PowerAttachment Example". The recipient is "Jill CRM". The email body contains the following text:

Hi Jill,
Check out PowerObjects' latest PowerPack, PowerAttachment!
Send a document back and we will show you how you can save on storage space in your CRM system.
Kind regards,
PO Team

Below the text is the PowerObjects logo. The email is currently in "Draft" status. The attachment list on the right includes:

File Name	File Size (Bytes)
addon logo.png	2,352
PowerAttachment_1_0_3_2013_managed.zip	415,806
Quick Guide - PowerAttachment.docx	2,106,498

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.

The screenshot shows the email "PowerAttachment Example CRM:0005033" after it has been sent. The status is now "Sent". The email body is identical to the previous screenshot. The "PowerAttachments" section at the bottom lists the following files:

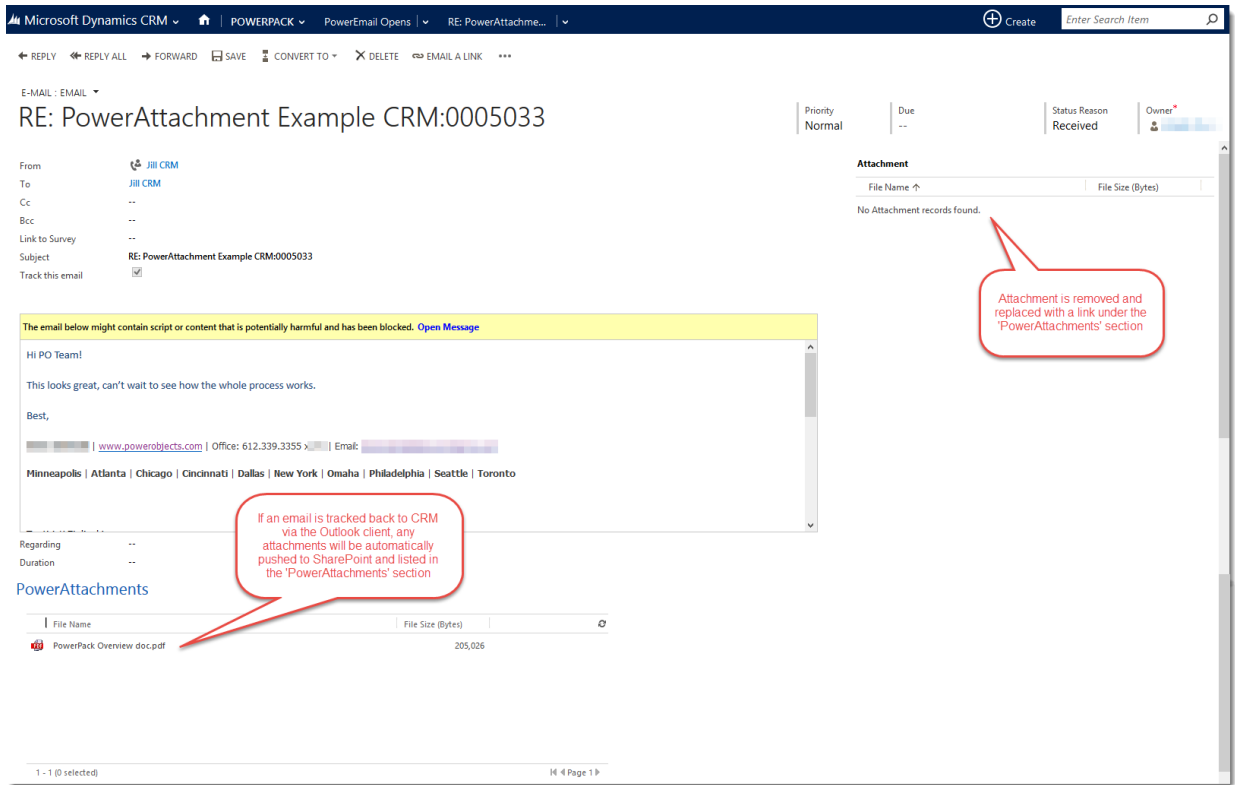
File Name	File Size (Bytes)
PowerAttachment_1_0_3_2013_managed.zip	415,806
Quick Guide - PowerAttachment.docx	2,106,498

Two callout boxes provide additional information:

- A callout box pointing to the "addon logo.png" attachment in the top right attachment list states: "If an attachment type is not denoted in the PowerAttachment configuration screen it will stay intact as an attachment in CRM".
- A callout box pointing to the "PowerAttachments" section at the bottom states: "The attachments that have been moved to SharePoint will be listed in the 'PowerAttachments' sections".

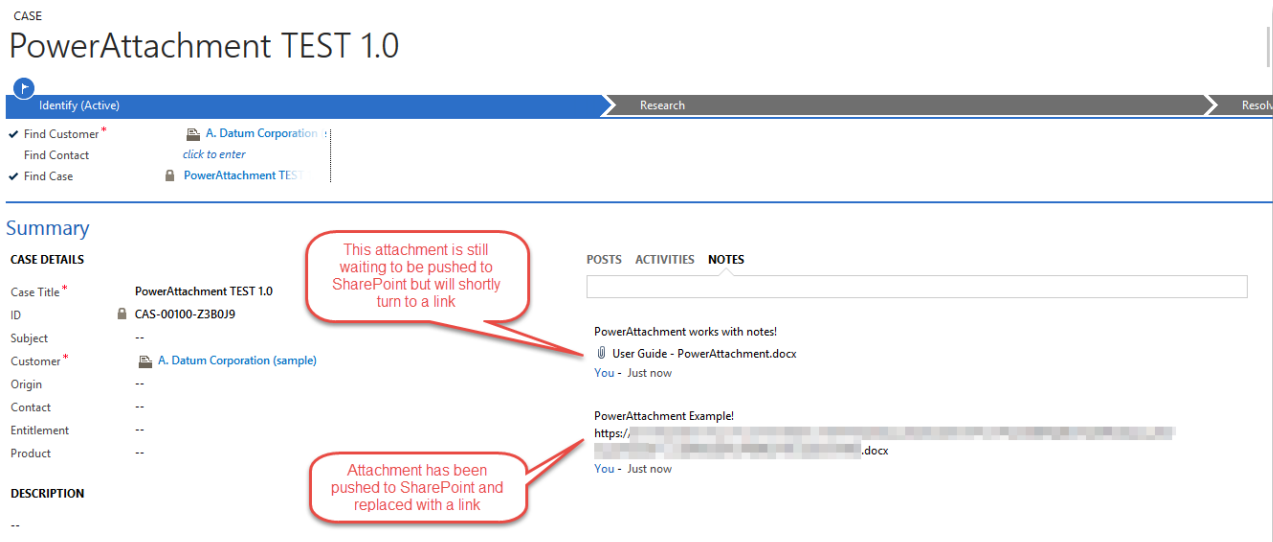
Receiving an Email with Attachments

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.



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 in the "Exclude Entities" section of the setup.



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.

The screenshot shows a CRM interface for a case titled "PowerAttachment TEST 1.0". The case ID is CAS-00100-Z380J9. The customer is "A. Datum Corporation (sample)". The case details are listed on the left, and the right side shows a list of attachments. A red callout box points to the second attachment, stating: "Within 5 minutes of adding the attachment PowerAttachment has moved the document to SharePoint".

Case Title	PowerAttachment TEST 1.0
ID	CAS-00100-Z380J9
Subject	--
Customer	A. Datum Corporation (sample)
Origin	--
Contact	--
Entitlement	--
Product	--

Attachments
PowerAttachment works with notes! https://...docx Today 2:55:52 PM
PowerAttachment Example! https://...docx Today 2:51:04 PM

Thanks for your interest in PowerAttachment. Should you have any questions, contact us at 612.339.3355 or email the PowerPack Team at powerpackpro@powerobjects.com. 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.

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