CHEWSOFT FILE TRANSFER

HELP GUIDE



// chewonthis software

Version 1.0

1. CONTENTS

1.	Cont	ents
2.	Intro	duction3
3.	Insta	llation4
	3.1	Pre-Requisites
	3.2	Installation Process
4.	Conf	iguring the File Transfer Service5
	4.1	Configuration Process
	4.2	Help With Installation
5.	Setti	ng Up a File Transfer
	5.1	Create File Transfer Profile11
	5.2	Transfer Methods and Settings
	5.3	Setting Up a File Transfer Workflow15
	5.4	Transferring a File
	5.5	Reviewing Execution History21
6.	Requ	lesting Help23
	6.1	Raise a Support Request
	6.2	Contact The Team

2. INTRODUCTION

Welcome to the ChewSoft File Transfer service for Dynamics 365. This document will guide you through the process of installing and configuring File Transfer service for your instance of Dynamics 365.

Before you begin, this guide assumes you have System Administrator experience of Dynamics 365 and an understanding of the process around publishing customizations. If these concepts are new to you, we recommend you familiarize yourself with these concepts first before installing the File Transfer service.

Alternatively, you can purchase a Premium Support Package from Chewonthis Software Ltd and one of our support team will guide you through the process.

3. INSTALLATION

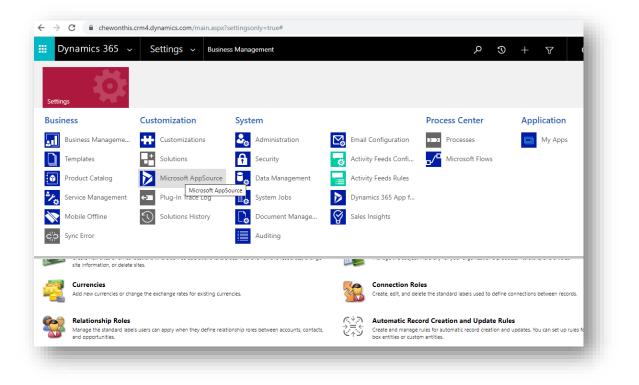
3.1 PRE-REQUISITES

Before beginning the installation process, ensure you have the following:

- An instance of Dynamics 365 CE and a user account with System Administrator permissions
- A user account with permissions to register an application within Azure Active Directory. EG. A tenant administrator

3.2 INSTALLATION PROCESS

- 1. Open Dynamics 365 and navigate to Advanced Settings
- 2. From the menu, select Microsoft AppSource
- 3. In the App Source window that opens, search for File Transfer.
- 4. On the ChewSoft File Transfer Service select "Free Trial" and follow the installation steps.



4. CONFIGURING THE FILE TRANSFER SERVICE

4.1 CONFIGURATION PROCESS

Once the installation process has completed, the File Transfer Service must be configured.

- 1. In Dynamics 365, Navigate to Advanced Settings
- 2. From the menu, select Solutions.
- 3. In the list of solutions, double click the entry for "ChewSoft File Transfer"

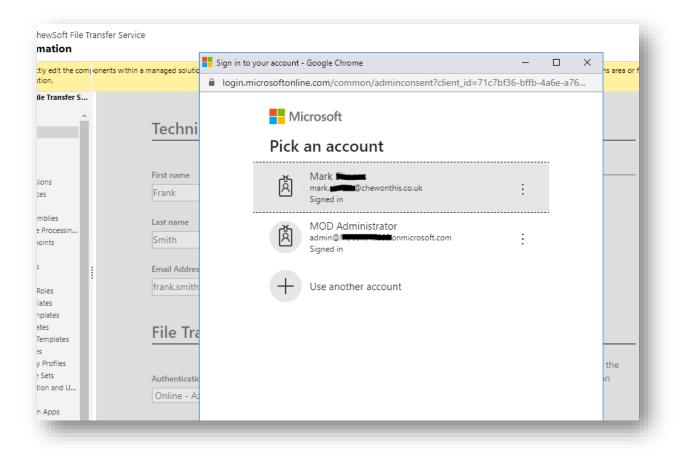
D Y	ou need to assign security rol	es to new users Click to see a list of users	who need Microsoft	Dynamics 365 Security Roles.	Assign Roles
All	Solutions 🖌				
Nev	v 🛛 🗙 Delete 🛛 📲 Show I	Dependencies 🛛 📴 Import 🛛 🗔 Export	Clone a Patch	📊 Clone Solution 🛛 🐺 App	ply Solution Upgra
	Name	Display Name	Version I	nstalled On ↓ Package T	. Publisher
~	CsFileTransfer	ChewSoft File Transfer Service	1.0.0.20	20-3-2020 Managed	<u>ChewSoft (c</u>
	CsLicense	ChewSoft License	1.0.1.9	20-3-2020 Managed	ChewSoft (c

4. In the window that opens, enter your organisation's technical contact details for the File Transfer service.

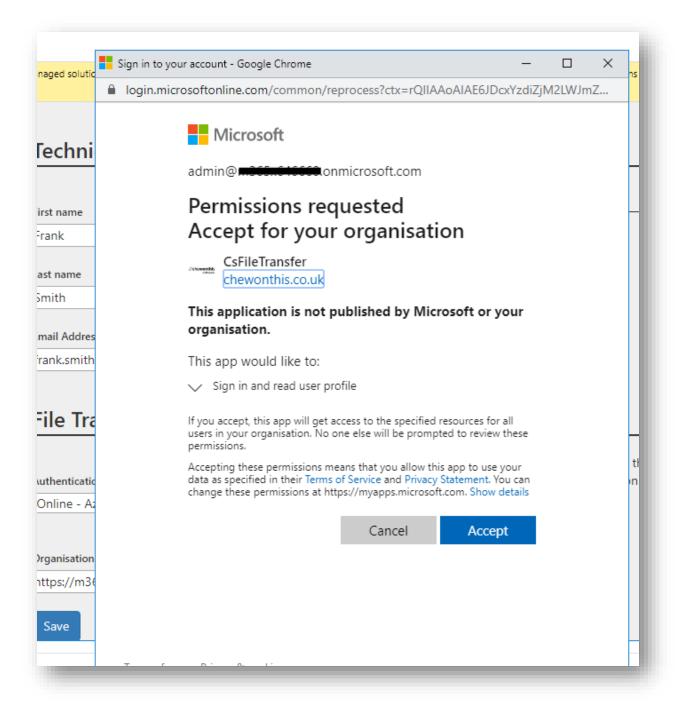
PowerApps		
New Alerts (2) Latest: You've not an a	alert for the mailbox 'MOD Administrator'. Today 22:34 View Alerts	
ile 🔀 Close 🖹 📲 Show Depe	ndencles 🔥 Actions +	
Solution: ChewSoft File Transfer :	Service	
You cannot directly edit the components of unmanaged solution.	within a managed solution. If the managed properties for solution components are set t	to allow customization, you can edit them in the Customizations area or from
ution ChewSoft File Transfer S		
Information	Technical Contact Details	
Configuration	Technical Contact Details	
Components		
Entities Option Sets		Quick Links
Option Sets Client Extensions	First name	
Web Resources	Frank	Help Guide
Processes	T WINK	Suport Request
+ Plug-in Assemblies		Purchase License
Sdk Message Processin	Last name	Upgrade Solution
Service Endpoints	Smith	<u>opgrade solution</u>
Dashboards		
Dialog Boxes :	Email Address	
Reports		
S Connection Roles	frank.smith@yourcompany.com	
Article Templates		
Contract Templates		
Email Templates	File Transfer Service Configuration	
Mail Merge Templates	The mansfel bertiee comigatation	
Security Roles		
Events a security Profiles		If Dynamics 365 is online, choose the
Routing Rule Sets Record Creation and U	Authentication Mode	default "Online - Azure AD" option
SLAs	Online - Azure AD	selected.
Model-driven Apps		
Custom Controls		
Virtual Entity Data Prov	Organisation URL	
Virtual Entity Data Sour	https://m365x646660.crm4.dvpamics.com	
Las Virtual Criticly Data Sour		

- 5. Leave the Authentication Mode as "Online Azure AD"
- 6. Check the Organisation URL is set correctly for the current instance of Dynamics 365.
- 7. Click Save.

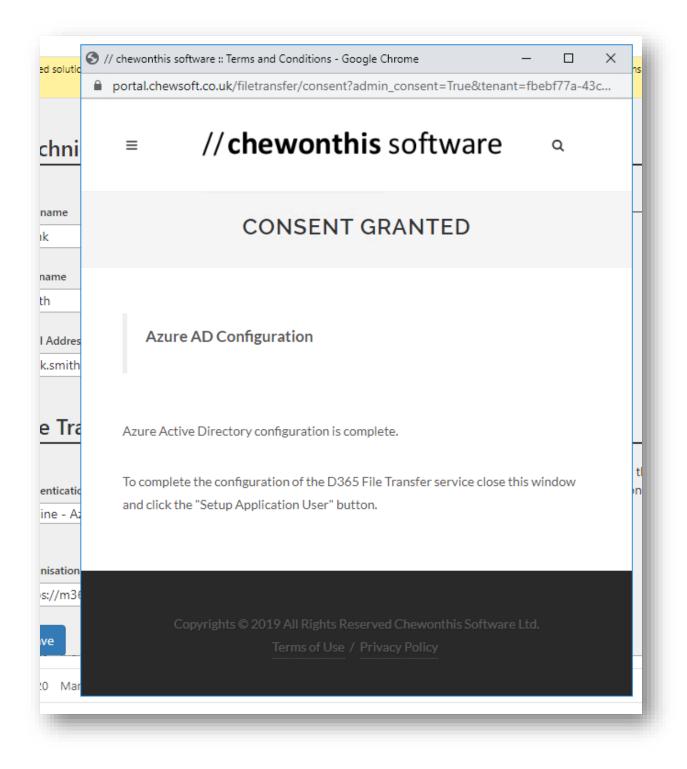
8. A new window will open prompting you to login. Login with a user account that has administrator permissions on the Azure Active Directory Dynamics 365 is linked to.



9. You will be prompted to Accept granting permission to the File Transfer Service to be registered within your Azure Active Directory. Click Accept.



NB. AT THIS POINT YOU ARE REGISTERING THE FILE TRANSFER SERVICE ACCOUNT WITHIN YOUR AZURE ACTIVE DIRECTORY. HOWEVER, IT DOES NOT HAVE ANY PERMISSIONS WITHIN DYNAMICS 365 UNTIL YOU GRANT IT THE NECESSARY PERMISSIONS. THIS IS DONE IN THE FOLLOWING STEPS.



10. Once you have successfully granted permissions a "Consent Granted" message is displayed.

11. Close this window by clicking the x in the top right corner.

12. On the File Transfer configuration page, now click the "Setup Application User" button.

	If Dynamics
Authentication Mode	- Azure AD
Online - Azure AD	
Organisation URL	
Organisation URL https://m365x646660.crm4.dynamics.com	

CLICKING THIS BUTTON ASSIGNS THE FILE TRANSFER SERVICE ACCOUNT PERMISSIONS TO EXECUTE.

13. Next Click the "Connectivity Test" button. Check the test is successful. If the test is not successful, review the error message and then repeat the associated steps in this process related to the failure.

14. Configuration of the File Transfer service is now complete. Close the File Transfer solution window.

4.2 HELP WITH INSTALLATION

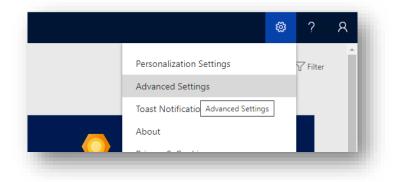
If you are unable to successfully complete the installation process, please click the "Support Request" link to raise a ticket. One of our technical support team will contact you directly.

Contact Details		-
	Quick Links	
	Help Guide Suport Request Purchase License Upgrade Solution	
ewonthis.co.uk		

5. SETTING UP A FILE TRANSFER

5.1 CREATE FILE TRANSFER PROFILE

1. As a System Administrator or a File Transfer Administrator, navigate to Advanced Settings



2. Click "File Transfer Profiles" from the settings menu

ettings							
usiness	Customization	System		Process Center	Application	ChewSoft	Upgrade Logs
Business Manageme	Customizations	administration	Email Configuration	Processes	Interactive Service H	Settings	Upgrade Runs
Templates	Solutions	Security	Activity Feeds Confi	Flow Templates	My Apps	Cicenses	_
Product Catalog	Microsoft AppSource	ටි. Data Management	Activity Feeds Rules			File Transfer Profiles	
Service Management	←■ Plug-In Trace Log	System Jobs	Dynamics 365 App f			File Transfer Pr	ofiles
Mobile Offline	Solutions History	Document Manage	Sales Insights				

- 3. Click "New" to create a new File Transfer Profile.
- 4. Enter the name of the profile. EG. My Azure Storage Account

Dynamics 365	 Settings ~ File Trans 	fer Profiles > New File Transf	fer Pr	<u>ې</u> ک	+ 7	(?)
lew Alerts (2) Latest: You've go	ot an alert for the mailbox 'MOD Administrator	Yesterday 22:34 View Alerts				
SAVE	+ NEW ⊿/ [®] FLOW ▼ 🖽 FORM ED	ITOR				$\uparrow \downarrow$
FILE TRANSFER PROFILE New File Transfe				Status Reason Active	Transfer M	ethod*
⊿ General						
General		Encryption				
Name *	My Azure Storage Account	Encrypt File * No	D			
Transfer Method *		Execution History				
Status Reason	Active					
Owner *	MOD Administrator	Name ↑	Execution S	tatus Data Transfer V	olume (File Count	Creat
Task Summary			1			1
Last Execution	A					
Last Execution Status						

- 5. Enter the Transfer Method required you have the following options:
- Secure FTP
- HTTPS Post
- Azure Storage
- File Share
- FTP (Insecure)
- HTTP Post (Insecure)

The option you select determines the additional profile settings you will be required to provide. See section 5.2 for further information on the options available.

6. Enter the settings required for the Transfer Method selected. For example, if Azure Storage is selected you must enter Azure Storage Connection String and the Azure Storage Container name.

File Transfe		Active Azure Storage
eral		
ral		Encryption
÷*	My Azure Storage Account	Encrypt File * No
fer Method *	Azure Storage	Azure Storage Account
s Reason	Active	Azure Storage Connection String
er *	MOD Administrator	Azure Storage Container *
Summary		Execution History
xecution •		
xecution Status		

7. Click Save

5.2 TRANSFER METHODS AND SETTINGS

5.2.1 SECURE FTP

Secure FTP or sFTP is a secure way of transferring files to an FTP server. A secure FTP profile requires you to enter the following settings:

Field	Description
FTP Server Address	The address of the FTP server. This should be entered as the server name with no preceding or trailing slashes. EG. myserver.com
FTP Server Folder	The folder on target FTP server the file should be transferred to. No proceeding or trailing slashes. EG. data
FTP Server Port	If a custom port is required enter it here.
FTP Username	The username required to connect to the FTP server.
FTP Password	The password required to connect to the FTP server.

The file is transferred using a secure HTTP Post.

Field	Description
URL	The URL of the server the file should be transferred to using a HTTP Post. EG. https://data.myserver.com/post
Username	The username required to connect to the HTTP server.
Password	The password required to connect to the HTTP server.

5.2.3 AZURE STORAGE

The file is transferred securely to an Azure Storage Account.

Field	Description
Azure Storage Connection String	The connection string for the Azure Storage account.
Azure Storage Container	Name of the storage container to use.

5.2.4 FILE SHARE

The file is transferred to windows file.

Field	Description
UNC Path	The path to the windows file share.
Username	The username required to connect to the file share.
Password	The password required to connect to the file share.

5.2.5 FTP (INSECURE)

This transfer method is insecure and is therefore NOT recommended.

See <u>Secure FTP</u> settings for further information.

5.2.6 HTTP POST (INSECURE)

This transfer method is insecure and is therefore NOT recommended.

5.3 SETTING UP A FILE TRANSFER WORKFLOW

Once a File Transfer profile has been created, the simplest way of enabling users to transfer files is by using an on-demand workflow.

The File Transfer service includes custom workflow activities to help you create your own workflows.

However, if creating your own workflow "sounds a bit much" - don't worry, we've created one for you. To configure it with your profile you will need to:

- 1. Create a File Transfer Profile as per section 5.1
- 2. Navigate to Settings > Advanced Settings

@	?	R
Personalization Settings	rn More	×
 Advanced Settings		
Toast Notification Dis Advanced Settings	7 Filter	Ê
About	THE T	
Privacy & Cookies		
Software license terms		
۲ ۵ 4		

3. From the menu click Settings > Processes

III Dynamics 365 🗸	Settings ~ Busine	ss Management			
Settings					
Business	Customization	System		Process Center	Application
Business Manageme	Customizations	Administration	Email Configuration	>>>> Processes	Interactive Ser
Templates	Solutions	Security	Activity Feeds Confi	Flow Templates	My Apps
Product Catalog	Microsoft AppSource	Data Management	Activity Feeds Rules		
🍾 Service Management	← Plug-In Trace Log	System Jobs	Dynamics 365 App f		
Mobile Offline	Solutions History	Document Manage	Sales Insights		
ငှံ၃ Sync Error		Auditing			

- 4. In the grid of results, click the "Transfer File" process.
- 5. The Transfer File process should be deactivated. If it is not click Deactivate.
- 6. Click the "Set Properties" button on the Transfer File process form.

Process Name * Transfer File	Entity	Note
Activate As Process	Category	Workflow
Run this workflow in the background (recommended)	Options for A	utomatic Processes
As an on-demand process	Scope	Organization
As a child process	Start when:	Record is created
Workflow Job Retention		Record status changes
Automatically delete completed workflow jobs (to save disk space)		Record is assigned
		Record fields change Select
		Record is deleted
Add Step ▼ [¬] → [¬] □nsert ▼ X Delete this step. ▼ Stage 1		
Transfer file		
Cs.D365.FileTransfer.Plugin (1.0.0.0):Cs.D365.FileTransfer.Workflow.Tra	ansferFile Set Properties	

7. In the settings window, click on the File Transfer Task search box and select the profile created in Step 1.

Set Custom St	ep Input Properties	5		Working on solution: Default Soluti
roperty Name	Data Type	Required	Value	Form Assistant
				Dynamic Values
notation	Lookup	Optional	{Note(Note)}	Dynamic Values
e Transfer Task	Lookup	Optional	Azure Storage Profile	Operator:
				Look for:
				Note
				Add
				★ 🔒 🐺

8. Click Save and Close

9. Click "Activate"

PowerApps			
File	🖳 🖉 🗘 Activate 🔤 Convert to a real-time workflow 🛱 Show Dependencies	<u>∕%A</u> ctions →	
Process: Transfer File			
 ✓ Common 중. Information ⊘ Audit History 	General Administration Notes Hide Process Properties		
▲ Process Sessions	Process Name * Transfer File	Entity	Note
Process Sessions	Activate As Process 🔻	Category	Workflow
	Run this workflow in the background (recommended)	Options for A	utomatic Processes
	As an on-demand process	Scope	Organization
	As a child process	Start when:	Record is created
	Workflow Job Retention		Record status char
	Automatically delete completed workflow jobs (to save disk space)		Record is assigned
			Record fields chan
			Record is deleted

10. Click "Close"

Here PowerApps		
File Close Image: Close Process: Transfer File The second	│ 🗿 Deactivate 🛛 🚭 🗄	Show Dependencies 🔥 <u>A</u> ctions 👻
 ✓ Common ♥ Information ♥ Audit History 	General Administrat	
Process Sessions Process Sessions	Process Name * Activate As @ Run this workflo @ As an on-demai	Transfer File Process w in the background (recommended) nd process

5.4 TRANSFERRING A FILE

To test the file transfer profile you configured in the previous step do the following:

1. Open an existing account or create a new one.

2. Create a new note and attach a file to it.

MS Test 0000 Account · Account	t v	line Dalatard	
COUNT INFORMAT	e Lists Details Field Service Scheduling	Timeline	+ 7 …
Account Name	* MS Test 000001	Title	
Phone		Note	
ax			
Website	https://MS Test 000001 3/24/2020 3:11 PM		Cancel Add note
Parent Account		Note modified by Note	3/17/2020 👼
icker Symbol		ChewSoft File Transfer Help Guide.docx	
Relationship Type		Auto-post on MS Test 000001	11/9/2019 🖵

3. Next Click Advanced Find from the menu

	م	Q	Q	+	Y	ŝ	?	8
						Le	arn Mo	re X
) Code	🖻 Share	☆ F	ollow	₀⁄ª Fic	w V			

4. In the Advanced Find search change the entity to search to "Notes"

NB. If you have already created notes in your environment you may want to add search criteria here to find the note you created in the previous steps.

FILE ADVANCED FIN	D	Microsoft Dynamics 365
Query Saved Results Show	New Save As View	Image: Clear Image: Clear
Look fo <mark>r:</mark> Notes		▼ Use Saved View: [new]

- 5. Click Results
- 6. Check the tickbox to select the Note the file is attached to and click "Run Workflow".

FILE ADVANCED FIND Image: Constraint of the state of t								Micros	oft Dynamics 36	5
Query Saved Views Results New Save Edit Columns Clear Eli Group OR Download Fetch XML Show Views View Query Debug Image: Clear Image: Clear Image: Clear Debug Image: Clear Image: Clear	FILE	ADVAN	ICED FINE	0						
Image: Start Dialog More Actions → Image: Start Dialog More Actions → Image: Start Dialog Description Image: Start Dialog File Name	Query	Saved Views	Results			Edit Columns	Clear	[t≣ Group OR		
☑ Title ↑ Description File Name		Show			1	/iew		Query	Debug	
	Ē.		(🍑	Run Worl	cflow	▶ Start Dialog	More A	ctions 👻		
File Transfer help guide ChewSoft	~	Title	\uparrow			Description	ı		File Name	
		File Ti	ransfer	help gui	de				ChewSoft	

7. In the pop window, select the Transfer File workflow

Look for	Process	🔻 🔲 SI	now Only My Records
Look in	On Demand Workflows	•	
Search	Search for records	Q	
Pro	ocess Name	Category	Created On

8. Click Add and then OK.

	plication of e applied to 1 Note.				×
You can monitor workflo	ow jobs by opening each l	Note and clicking V	Vorkflows.		
Are you sure that you	want to continue?				
			ОК	Cancel	
			0.11	Contect	· · · · · · · · · · · · · · · · · · ·

5.5 REVIEWING EXECUTION HISTORY

	sfer Profiles > Azure Storage Profile > SAND	ۍ م BOX	+ 7 (?)
You need to assign security roles to new users Click to see a list of users with the set of users withe set of users withe set of users withe set of users wit		"FLOW ▼ •••	↑ ↓
FILE TRANSFER PROFILE : INFORMATION Azure Storage Profile ™		Status Reason Active	Transfer Method* Azure Storage
Last Execution 🔒 3/20/2020 1:06 PM	Execution History		
Last Execution Status 🔒 Succeeded			+ 🖩
NOTES	Name ↑ 2020-03-20 13:03 - Azure Storage Profile Execution	Execution Status	Data Transfer Volume (File Cc 1,397.00
Enter a note			

The execution history of a file transfer profile can be viewed on the File Transfer Profile form under "Execution History".

To review the status of the File Transfer triggered in the previous step:

1. Navigate to Settings > File Transfer Profiles

	Service	Marketing	Settings	Training		
	Customization	System		Process Center	Application	ChewSoft
eme	Customizations	Administration	Email Configuration	Processes	Interactive Service H	Settings
	Solutions	Security	Activity Feeds Confi		My Apps	Licenses
	Carl Plug-In Trace Log	Data Management	Activity Feeds Rules			File Transfer Profiles
nent		System Jobs	Dynamics 365 App f			
		Document Manage	Intelligence Configu			

2. In the grid of results, click on your File Transfer Profile to open it.

3. On the File Transfer Profile form, scroll to the section called "Execution History". Double click the most recent entry to view the status.

FILE TRANSFER EXECUT 26/02/2020 06:	тіон : інғогматіон :57:17 - Azure Storage Profile E	Execution 📹	
⊿ General			
Name *	26/02/2020 06:57:17 - Azure Storage Profile Execution	Notes	Triggered by Agent at 26/02/2020 06:57:17.Transferring file conversionTrend.csv W01 completed processing.
File Transfer Profile	Azure Storage Profile		Transferring file conversionTrend.csv Transferring file conversionTrend.csv
File Count			Transferred file conversionTrend.csv
Data Transfer Volume (KB)		Error Message	
Trigger Date			
Execution Status	In Progress		
Owner *	Mark Sissens (admin)		
Created On	■ 2/26/2020 6:57 AM	Name ↑	Created On

6. REQUESTING HELP

The Chewonthis Support team are available to support you should you encounter difficulties with the File Transfer Service.

You can contact us in the following ways:

6.1 RAISE A SUPPORT REQUEST

Please click the "Support Request" link to raise a ticket on the configuration page of the File Transfer service. One of our technical support team will contact you directly.

	Quick Links	_
	Help Guide Suport Request Purchase License Upgrade Solution	
wonthis.co.uk		

6.2 CONTACT THE TEAM

You can contact our support team directly via email: support@chewsoft.co.uk