Dynamics Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD LinkBox

Release: D365 BC V21+

Revision: December 2023

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2 Getting Started

SD LinkBox allows you to drag and drop different files and file types into any page in Microsoft Dynamics 365 Business Central and associate these files with specific table records in Microsoft Dynamics 365 Business Central.

With SD LinkBox you can define multiple locations called Drop Points. These Drop Points are displayed within the Drop Area FactBox that can be added to any page in Microsoft Dynamics 365 Business Central. Using these Drop Point areas users can easily upload different file types and link to a record in a table. Drop Points can also be limited to allow only certain types of files to be uploaded to a specific Drop Area.

Drop Point storage in SD LinkBox can be Microsoft Dynamics 365 Business Central database storage, Azure Blob storage, OneDrive storage, or Dropbox storage, and can be size controlled.

SD LinkBox also allows for the version control of the linked files and allows users to check the files in and out of SD LinkBox and maintains version logs.

You can also choose to apply security filters based on standard Microsoft Dynamics 365 Business Central User Groups to the Drop Points to control a user's upload, view, edit, and delete permissions on the individual Drop Points.

With SD LinkBox you can also attach template files to the Drop Point Card to automatically create, and link template files to records in a specific table.

SD LinkBox allows users to generate documents and deploy to DocuSign from within SD LinkBox.

SD LinkBox also contains functionality that allows users easily keep track of documents that have an expiry date, removing the need for users to manually track expiry dates. Examples of documents that could have an expiry date would be certificates of conformity, indemnity certs, and safety certs.

3 Security Setup

We have provided the following permission sets for SD LinkBox: SDY ULB ADMIN, SDY ULB USER and SDY ULB VIEW *(Figure 3-1)*.

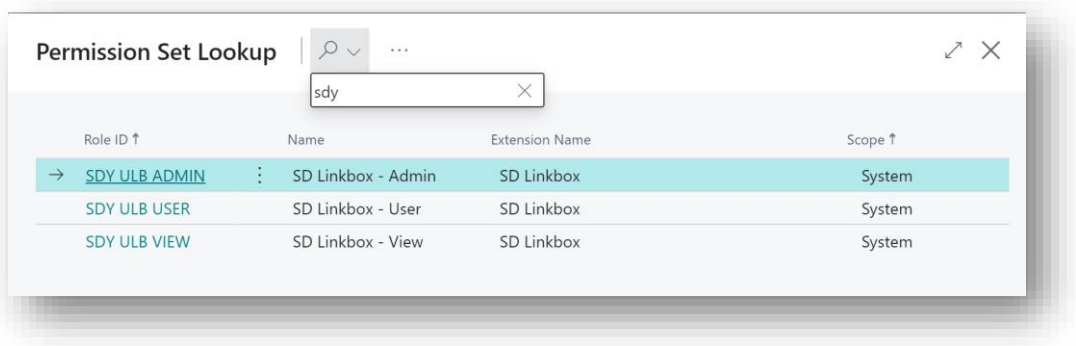

Figure 3-1

4 Installing SD LinkBox Manager

SD LinkBox is available to download from AppSource or you can install the App from within Business Central using Extension Marketplace.

To install **SD LinkBox** from the Business Administration Shell:

1. Run the **Business Central Administration Shell** as **Administrator**.

2. To publish the extension from the package file (.app), use the **Publish-NAVApp cmdlet**.

   Example:
   Publish-NAVApp -ServerInstance BC180 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd_SD LinkBox_5.0.0.0.app"

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

   Example:
   Sync-NavApp -ServerInstance BC180 -Name "SD LinkBox"

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

   Example:
   Install-NAVApp -ServerInstance BC180 -Name " SD LinkBox"

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-1)*.

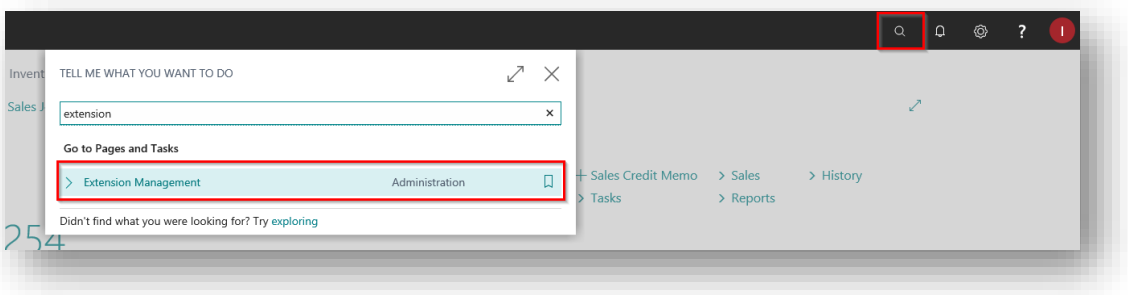

Figure 4-1

6. In the **Extension Management** list, you should see the **SD LinkBox App** installed.

4.1 Allowing HttpClient Requests in SD LinkBox

Switching on the **Allow HttpClient Requests** option allows SD LinkBox to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product. The **Allow HttpClient Requests** option is automatically enabled on install of SD LinkBox.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 4-2)*.

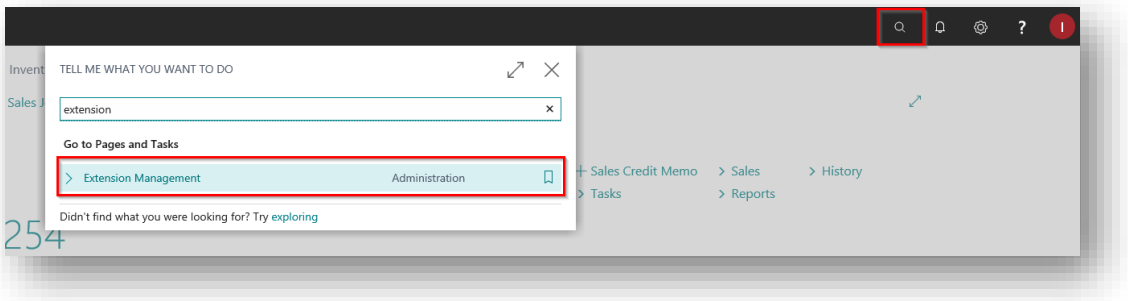

Figure 4-2

2. In the **Extension Management** list, you should see the **SD LinkBox** App installed *(Figure 4-3)*.

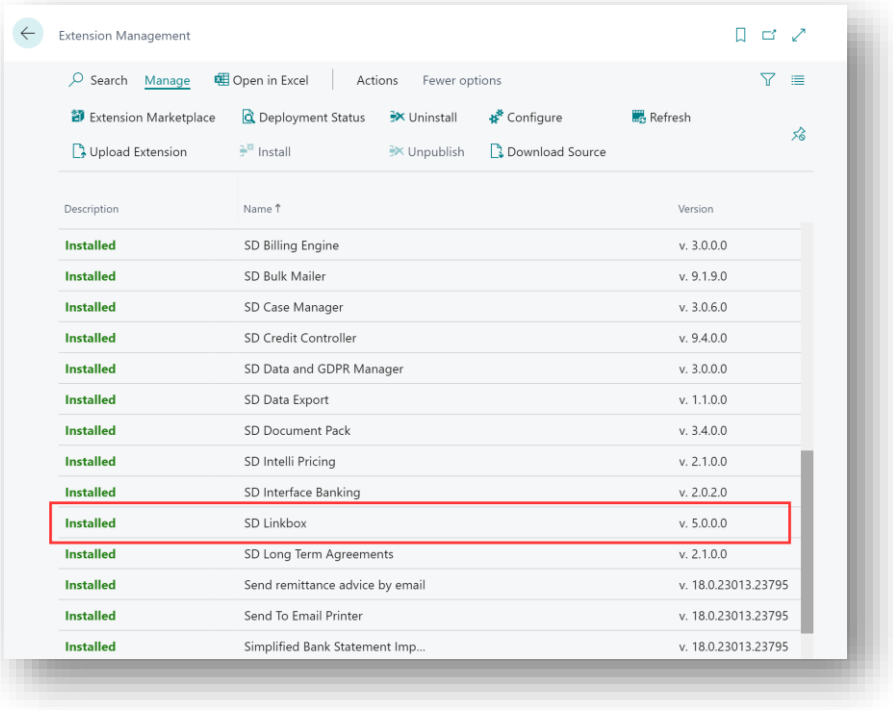

Figure 4-3

3. Select the **SD LinkBox** App record and from the menu, select the **Manage** group, and choose **Configure** *(Figure 4-4)*.

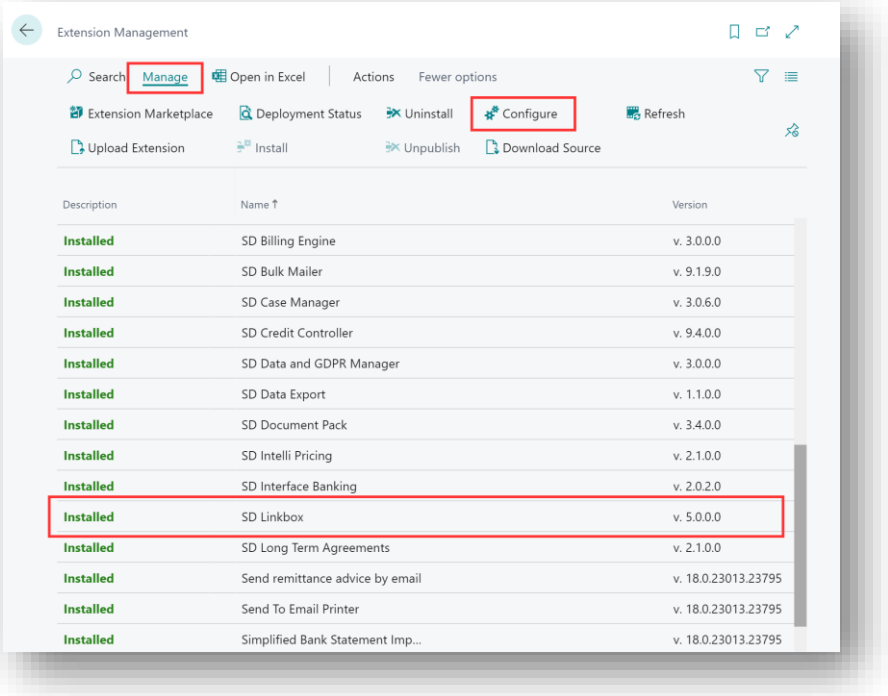

Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option *(Figure 4-5)*.

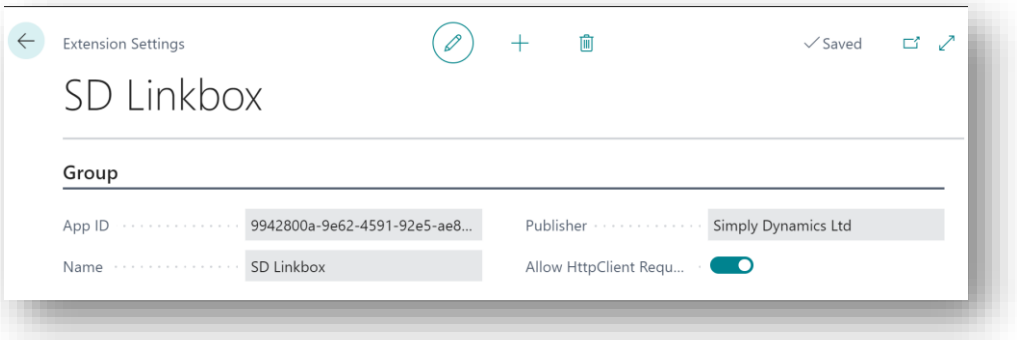

Figure 4-5

4.2 Choosing the SD LinkBox Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 4-6)*.

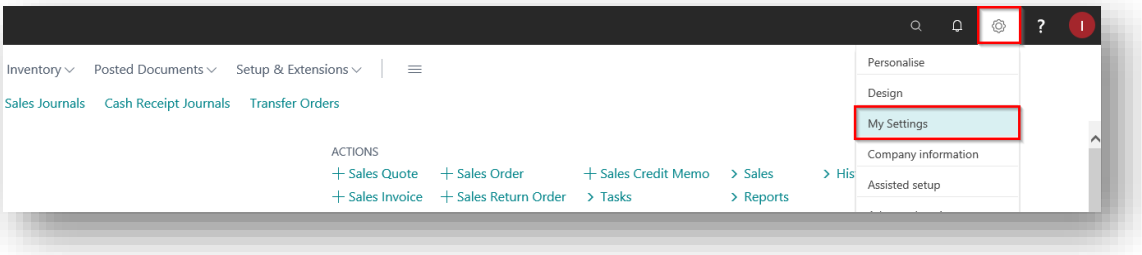

Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 4-7)*.

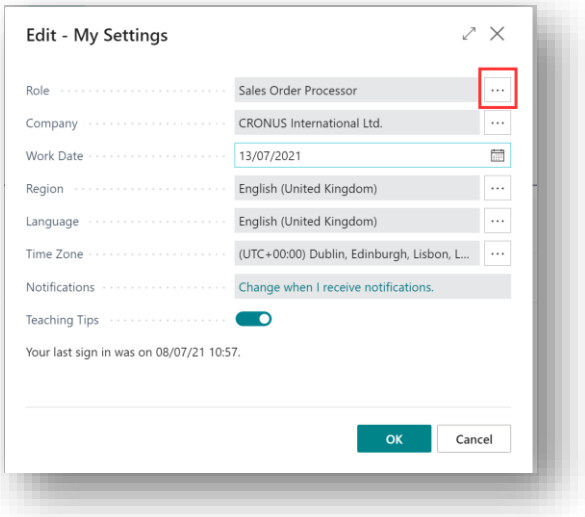

Figure 4-7

3. You should see **SD LinkBox** in the list of Roles *(Figure 4-8)*.

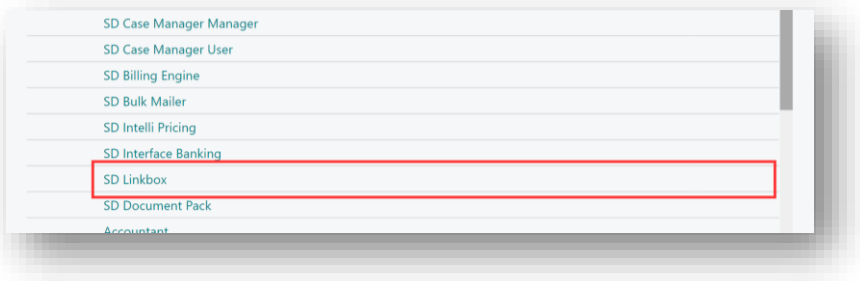

Figure 4-8

4. Choose **SD LinkBox** and click **OK**.

5. The **SD LinkBox** Role should now be displayed in the **Role** field *(Figure 4-9)*.

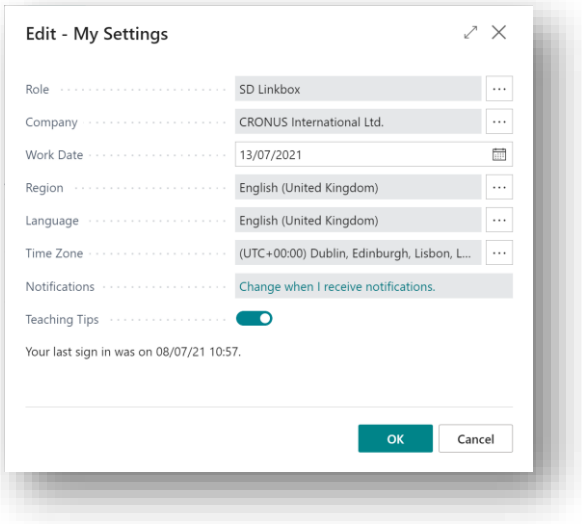

Figure 4-9

4.3 Accessing the SD LinkBox Pages

Use the **Tell Me** to search for SD LinkBox pages. Begin typing **SD** or **LinkBox** to see a list of the SD LinkBox pages *(Figure 4-10)*.

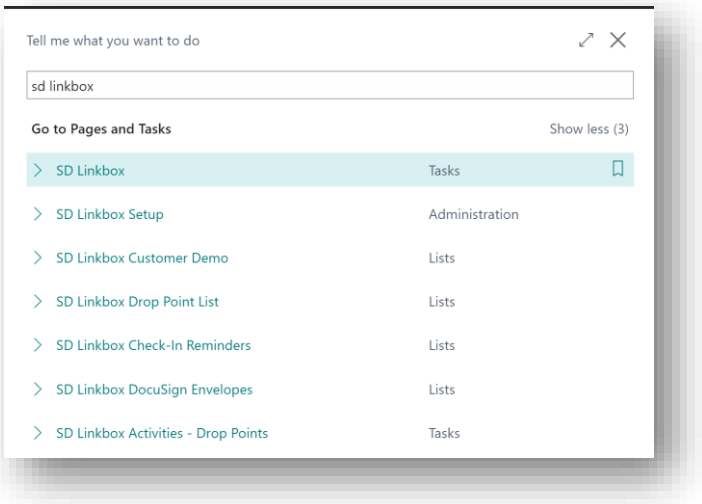

Figure 4-10

4.4 Activating the SD LinkBox Licence

To use SD LinkBox, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD LinkBox Setup** card.

2. You will be prompted that "Your SD LinkBox license needs to be validated." Choose **Yes** *(Figure 4-11)*. You will then see the **Activate your product** page.

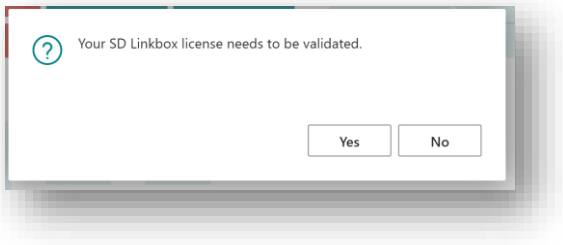

Figure 4-11

4.4.1 Activating the SD LinkBox Licence with a Product Key

1. In the **Activate your product** page, enter your company name in **Company Name** and your company email in **Email.**

2. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to** and **enable the Activate key**. Choose **Activate** *(Figure 4-12)*.

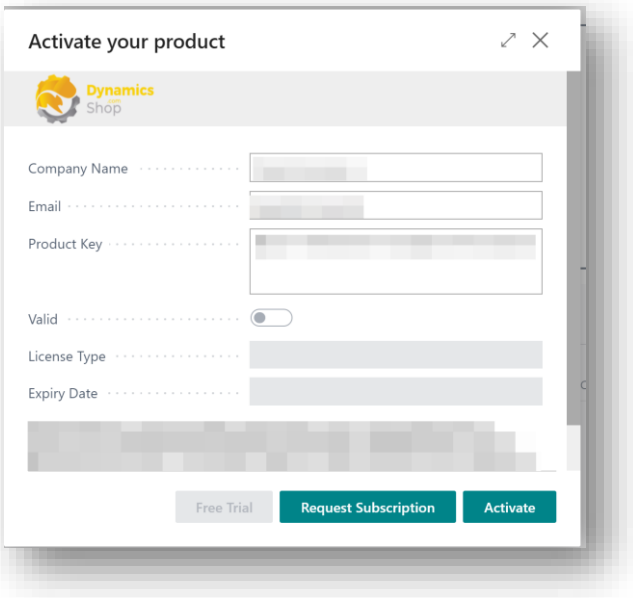

Figure 4-12

3. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.

4.4.2 Activating the SD LinkBox Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd., and want to avail of a free trial, in the **Activate your Product** page:

1. Enter your company name in **Company Name** and enter your company email in **Email.**

2. Choose **Free Trial** *(Figure 4-13)*.

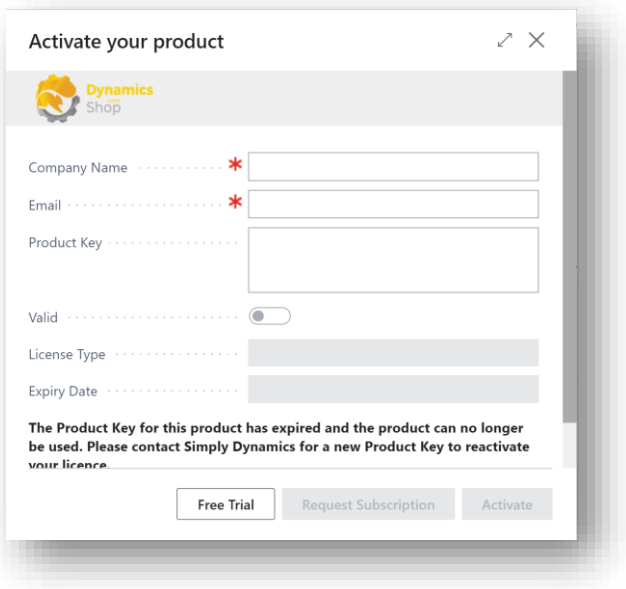

Figure 4-13

3. You are then prompted to choose **Yes** to activate your free trial *(Figure 4-14)*. Choose **Yes**.

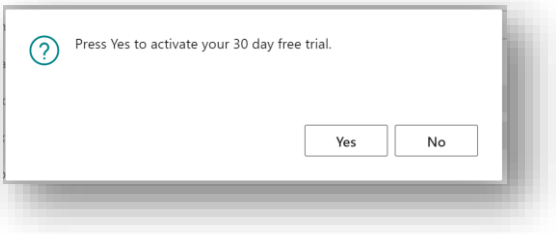

Figure 4-14

4. The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial *(Figure 4-15)*.

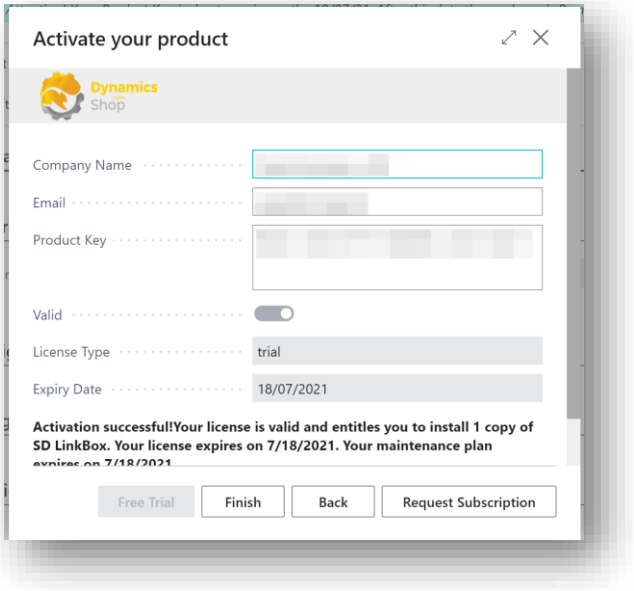

Figure 4-15

5. Choose **Finish** to exit the page.

6. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

5 Uninstalling SD LinkBox

You can uninstall **SD LinkBox** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** *(Figure 5-1)*.

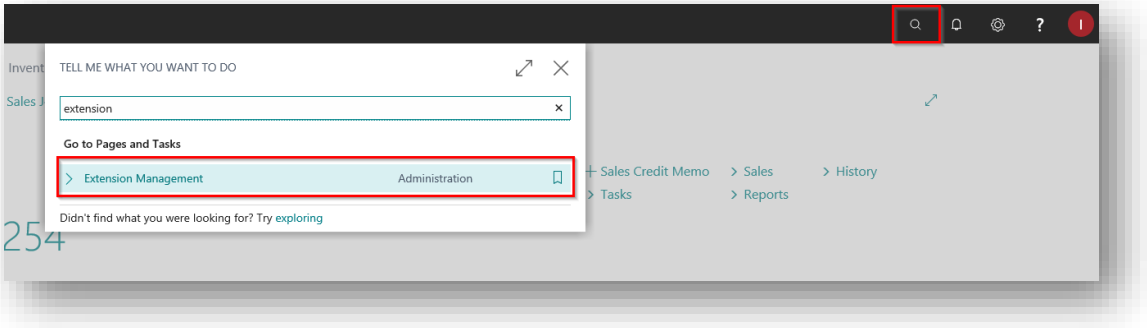

Figure 5-1

2. In **Extension Management**, you should see the **SD LinkBox** App installed.

3. Select the **SD LinkBox** App and choose the **Uninstall** Action *(Figure 5-2)*.

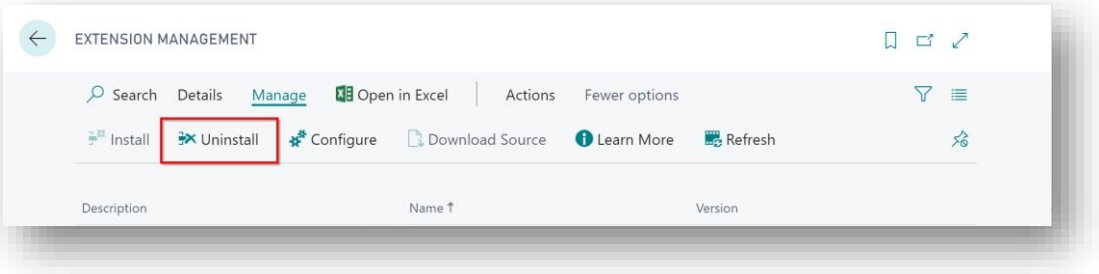

Figure 5-2

6 Setup and Configuration

6.1 SD LinkBox Assisted Setup

You can easily import default setup for SD LinkBox using the **Assisted Setup** Action on the **SD LinkBox Setup** card. This default setup creates sample Drop Points with a database storage type. To use these Drop Points, you will need to enable them in the Drop Point Card.

1. In the **SD LinkBox** page, from the menu choose the **Process** group, and then **Assisted Setup** *(Figure 6-1)*.

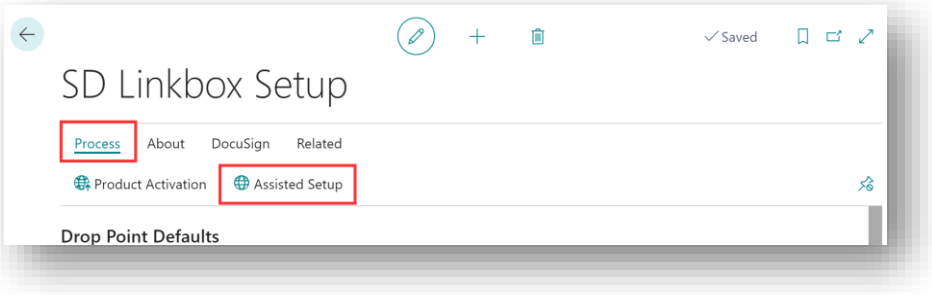

Figure 6-1

2. You are prompted that "Importing setup will modify any existing data in LinkBox. Press Yes to proceed." Choose **Yes** if this is your first time to use SD LinkBox and you have not already created any setup in SD LinkBox *(Figure 6-2)*.

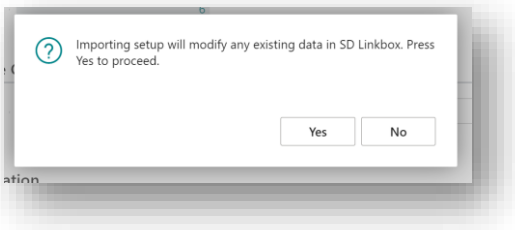

Figure 6-2

3. You are then prompted, "Are you sure?" Choose **Yes** *(Figure 6-3)*.

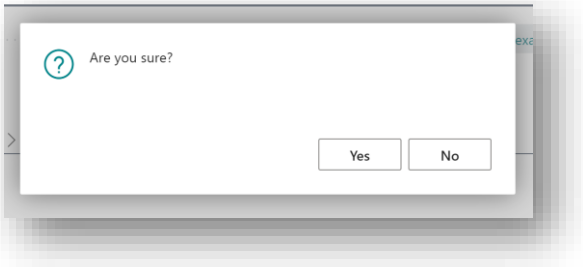

Figure 6-3

4. You will then receive a prompt like the below that the default setup has imported. Choose **OK** *(Figure 6-4)*.

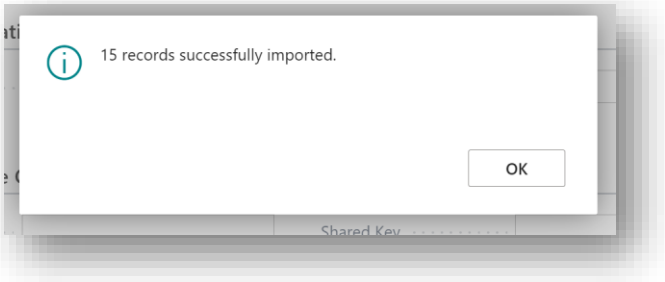

Figure 6-4

7 Understanding SD LinkBox Concepts

SD LinkBox allows you to drag and drop, or browse to upload, different files into Microsoft Dynamics 365 Business Central and link these files to specific table records in your Microsoft Dynamics 365 Business Central database.

With SD LinkBox you can define multiple locations called Drop Points. These Drop Points are displayed within the Drop Area FactBox that can be added to any page in Microsoft Dynamics 365 Business Central. Using these Drop Point areas, users can easily upload different file types into Microsoft Dynamics 365 Business Central.

Drop Points can also be limited to allow only certain types of files to be uploaded to a specific Drop Area.

Drop Point storage in SD LinkBox can be database storage, Azure Blob storage, One Drive storage, or Dropbox storage, and can be size controlled.

With SD LinkBox you can also attach template files to the Drop Point Card to automatically create, and link, template files to records in a specific table.

SD LinkBox also allows for the version control of the files that it links to the specific table records in Microsoft Dynamics 365 Business Central and allows users to check the files in and out of SD LinkBox.

You can also choose to apply security filters, based on standard Dynamics 365 Business Central User Groups, to the Drop Points to control a user's upload, view, edit, and delete permissions on the Drop Points.

SD LinkBox allows users to generate documents and deploy to DocuSign from within SD LinkBox.

SD LinkBox also contains functionality that allows users easily keep track of documents that have an expiry date, removing the need for users to manually track expiry dates. Examples of

documents that could have an expiry date would be certificates of conformity, indemnity certs, and safety certs.

7.1 Drop Points

A **Drop Point** in SD LinkBox is an area, linked to a table, where a user can upload and link files to a specific record. These files can be stored inside the database or in the other storage methods mentioned above *(Figure 7-1)*.

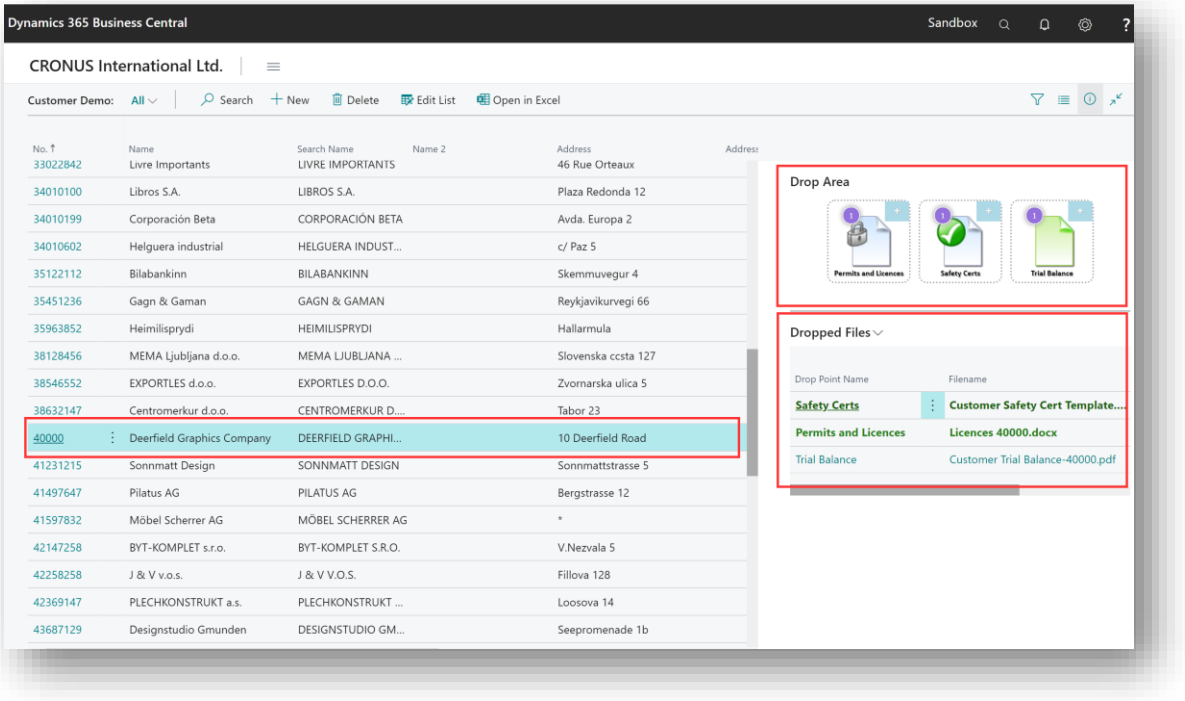

Figure 7-1

8 Using SD LinkBox

8.1 SD LinkBox - Setup Card

The **SD LinkBox Setup** card is accessed from the **SD LinkBox Role Centre**, by selecting the **Setup** action cue, or, by searching for **SD LinkBox Setup** in the **Tell Me**.

In the **SD LinkBox Setup** card, expand the **Drop Point Defaults** FastTab *(Figure 8-1)*.

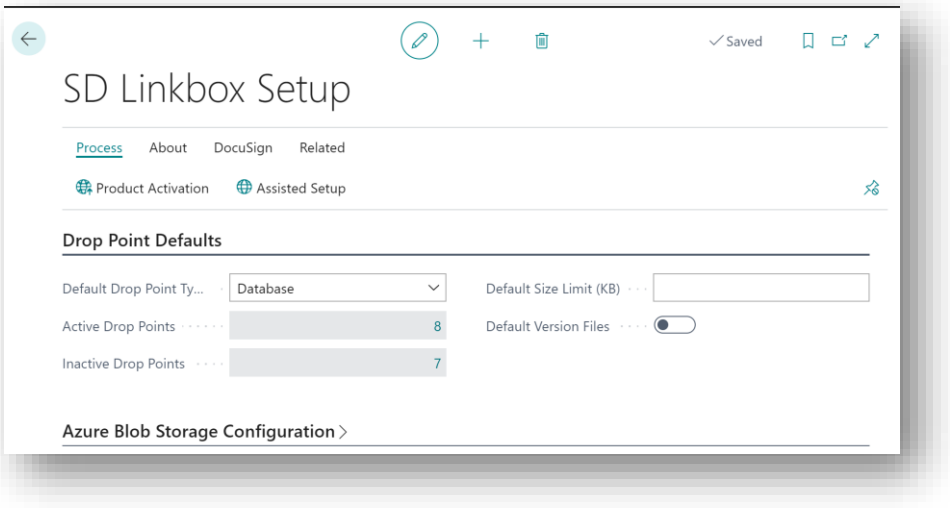

Figure 8-1

- **Default Drop Point Type** - This field specifies the default Drop Point Type to use when a new Drop Point is created in SD LinkBox. The Drop Point Type specifies where SD LinkBox will place the uploaded file. Options are **Database, Azure Blob Storage, OneDrive,** or **Dropbox**.

  Database - The file will be stored in a BLOB field in your Microsoft Dynamics 365 Business Central database.

  Azure Blob Storage - The file will be stored in Azure Blob Storage.

  OneDrive - The file will be saved to your OneDrive account.

  Dropbox- The file will be saved to your Dropbox account.

- **Active Drop Points** - A flowfield count of the active Drop Points that have been setup in SD LinkBox.

- **Inactive Drop Points** - A flowfield count of the inactive Drop Points that have been setup in SD LinkBox.

- **Default Size Limit (KB)** - This field specifies the default size limit (KB) value to use when a Drop Point is initially created in SD LinkBox. The Size Limit (KB) specifies the maximum file size that can be uploaded. Zero signifies an unlimited file size. Files up to a maximum size of 2GB (2,097,152 KB) can be uploaded to a Drop Point (except for Drop Points with a storage type of OneDrive where the maximum file size is 600 MB).

- **Default Version Files** – Enabling Version Files on a Drop Point Card allows for the version control of the files dropped into the Dropped Files FactBox. This Default Version Files field specifies whether to default the Version Files option to on or off when a Drop Point is initially created in SD LinkBox.

Expand the **Azure Blob Storage Configuration** FastTab *(Figure 8-2)*:

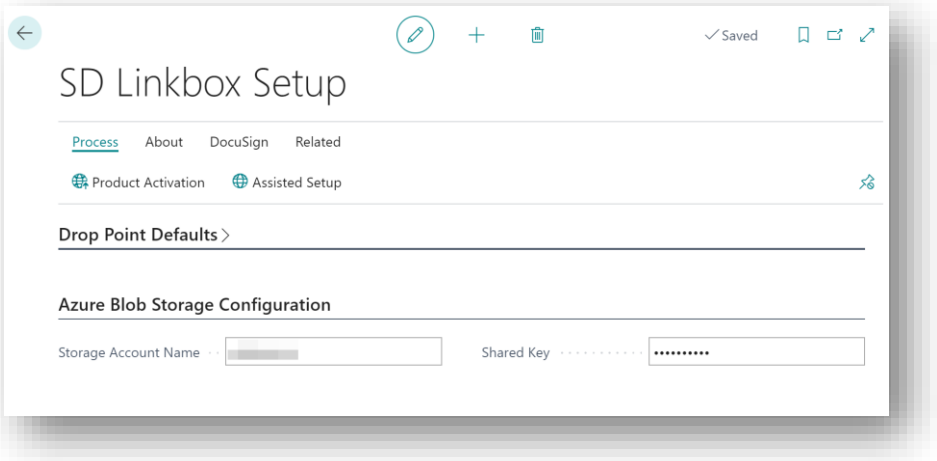

Figure 8-2

Please see the section below on **Using Azure Blob Storage with SD LinkBox**.

- **Storage Account Name** – Enter your Storage Account Name from your Storage Account on Azure Portal.

- **Shared Key** – Enter your Shared Key from your Storage Account on Azure Portal. All keys and passwords in SD LinkBox are encrypted with AES 128.

The following fields are contained in the **OneDrive Configuration** FastTab *(Figure 8-3)*:

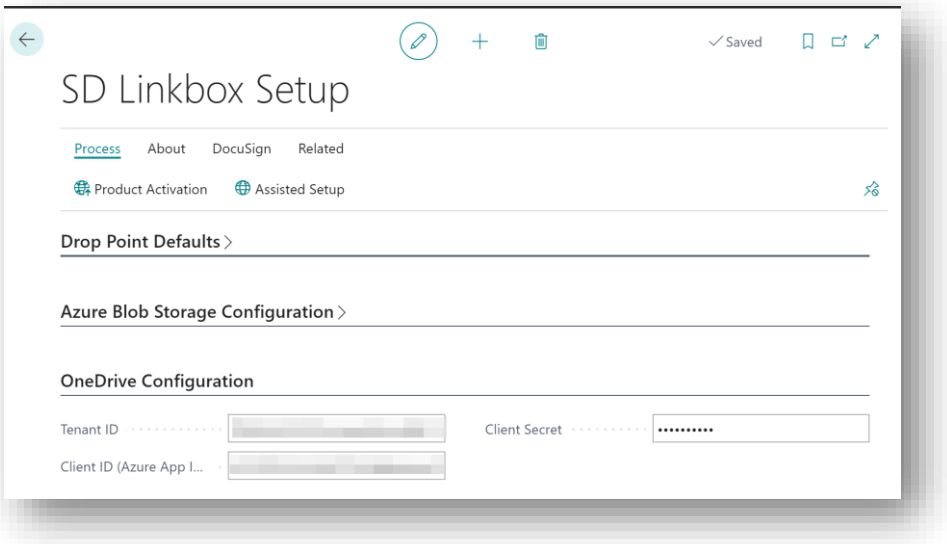

Figure 8-3

Please see the section below on **Using OneDrive with SD LinkBox**.

- **Tenant ID** – Enter your Directory (Tenant) ID.
- **Client ID (Azure App ID)** – Enter your Application (Client) ID.
- **Client Secret** – Enter your Client Secret. All keys and passwords in SD LinkBox are encrypted with AES 128.

Expand the **Dropbox Configuration** FastTab *(Figure 8-4)*:

Figure 8-4

Please see the section below on **Using Dropbox with SD LinkBox**.

- **Dropbox Access Token** – Enter your Dropbox access token used by SD LinkBox to communicate your Dropbox account. All keys and passwords in SD LinkBox are encrypted with AES 128.

The following fields are contained in the **DocuSign Configuration** FastTab *(Figure 8-5)*:

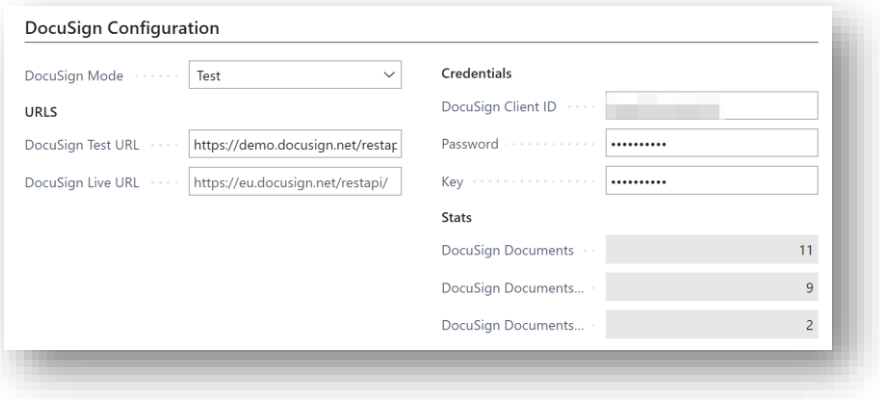

Figure 8-5

Please see the section below on **Using DocuSign with SD LinkBox**.

- **DocuSign Mode** - Select the DocuSign Mode from a list of modes. Options are **Off**, **Test**, **Live**.

  Off - The DocuSign functionality is turned off in SD LinkBox.

  Test - The DocuSign functionality is in Test Mode and all requests will use the Test URL.

  Live - The DocuSign functionality is in Live Mode and all requests will use the Live URL.

- **DocuSign Test URL** - This field is visible only when the DocuSign Mode is set to Test or Live. Specify the DocuSign Test URL to be used when the **DocuSign Mode** is set to **Test**. This is https://demo.DocuSign.net/restapi.

- **DocuSign Live URL** - This field is visible only when the DocuSign Mode is set to Test or Live. Specify the DocuSign Live URL to be used when the **DocuSign Mode** is set to **Live**. This is https://eu.DocuSign.net/restapi/.

- **DocuSign Client ID** - This field is visible only when the DocuSign Mode is set to Test or Live. Enter your DocuSign Client ID. This is the email address that you used when creating your DocuSign developer account.

- **Password** - This field is visible only when the DocuSign Mode is set to Test or Live. Enter your DocuSign developer account password.

- **Key** - This field is visible only when the DocuSign Mode is set to Test or Live. Enter your DocuSign Key. This is your DocuSign Integrator Key. All keys and passwords in SD LinkBox are encrypted with AES 128.

- **DocuSign Documents** - A flowfield count of the DocuSign Envelopes that have been sent using the SD LinkBox DocuSign functionality.

- **DocuSign Documents This Month** - A flowfield count of the DocuSign Envelopes that have been sent This Month using the SD LinkBox DocuSign functionality.

- **DocuSign Documents Last Month** - A flowfield count of the DocuSign Envelopes that have been sent Last Month using the SD LinkBox DocuSign functionality.

The following actions can be chosen from the **DocuSign** menu group in the **SD LinkBox Setup Card** *(Figure 8-6)*.

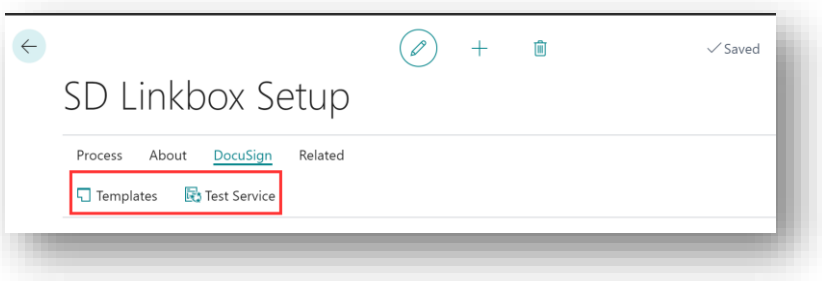

Figure 8-6

- **Templates** - Choose this Action to open the **DocuSign Templates List** *(Figure 8-7)*.

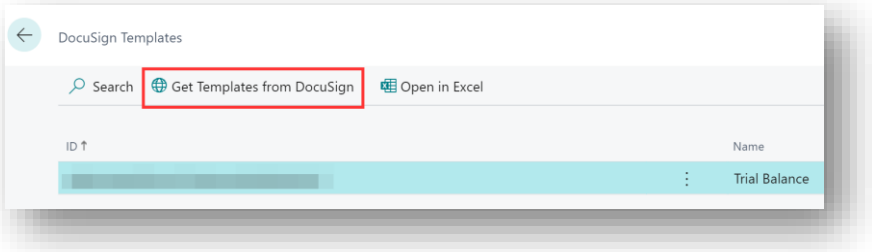

Figure 8-7

From here you get the Templates that you have set up in DocuSign under your Credentials specified in the **DocuSign Configuration** FastTab. Please see the section below on **Using DocuSign with SD LinkBox**.

- **Test Service** - Choose this Action to test the validity of your DocuSign Credentials.

The following actions are available in the **Related** menu group *(Figure 8-8)*.

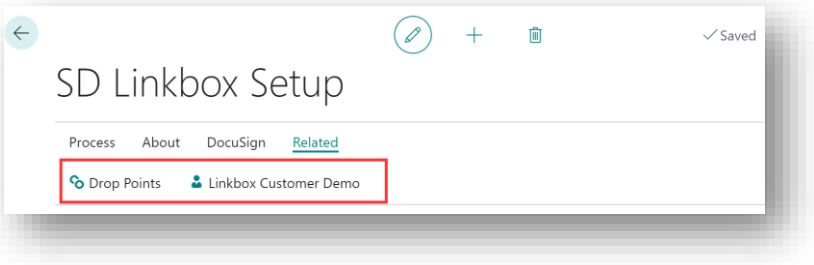

Figure 8-8

- **Drop Points** - Choose this action to open the **SD LinkBox Drop Point List**.
- **LinkBox Customer Demo** - Choose this action to view the **SD LinkBox Customer Demo** list.

The following action is available in the **Azure Blob Storage** menu group *(Figure 8-8)*.

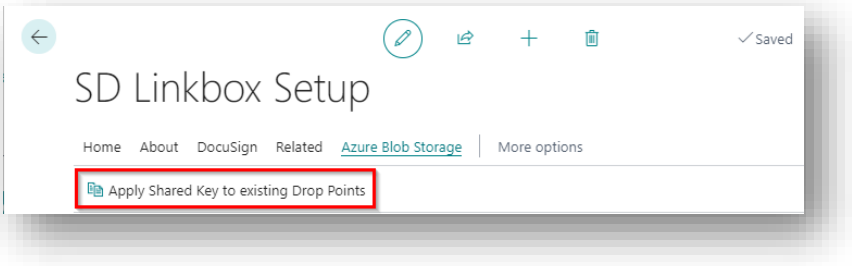

Figure 8-9

- **Apply Shared Key to existing Drop Points** - On creation of a new drop point the values entered in the Setup Card in the Azure Blob Storage FastTab are inserted into the Drop Point. If the Drop Point is already created and details on the Setup Card for Azure Blob Storage are changed, it is not good practice to automatically update values on existing Drop Points that are being used. Choose this action to update the Shared Key to Drop Points with the same storage account name.

8.2 SD LinkBox – Drop Points

The **SD LinkBox Drop Points** list, is accessed from the SD LinkBox Role Centre by drilling through on the **Active Drop Points** cue or by searching the **Tell Me**.

A Drop Point is an area linked to a table where a user can drag and drop files which can be stored using Microsoft Dynamics 365 Business Central database storage, Azure Blob storage, OneDrive storage, or Dropbox storage.

These Drop Points are displayed within the Drop Area FactBox that can be added to any page in Microsoft Dynamics 365 Business Central. Using these Drop Point areas users can easily upload different file types and link to a record in a table. Drop Points can also be limited to allow only certain types of files to be uploaded to a specific Drop Area.

If you selected the **Assisted Setup** action in the **SD LinkBox Setup** card, sample Drop Points were created in SD LinkBox. The **SD LinkBox Drop Point Card** is accessed from the **SD LinkBox Drop Points** list by choosing **New**, **View** or **Edit** from the menu *(Figure 8-9)*.

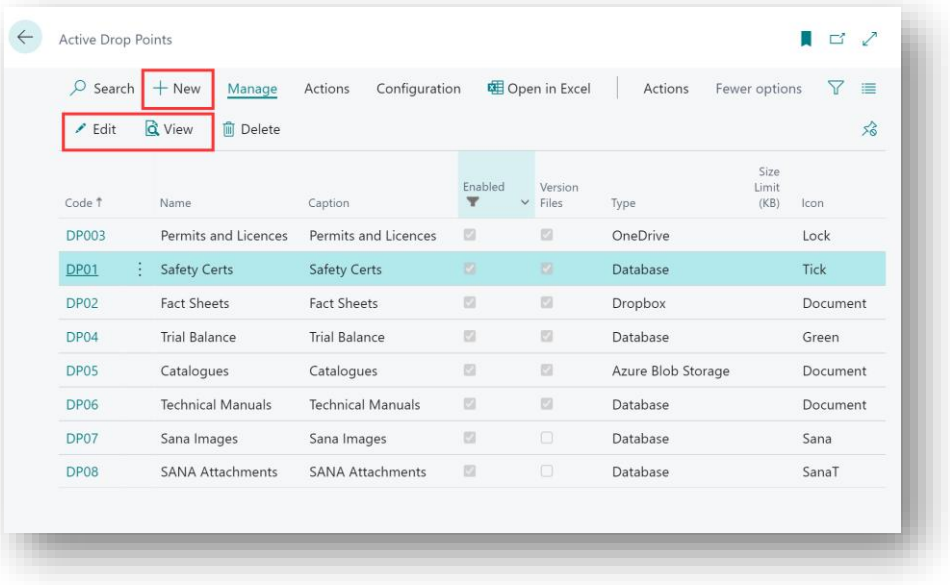

Figure 8-10

8.3 SD LinkBox – Drop Point Card

The **SD LinkBox Drop Point Card** contains the following fields in the **General** FastTab *(Figure 8-10)*.

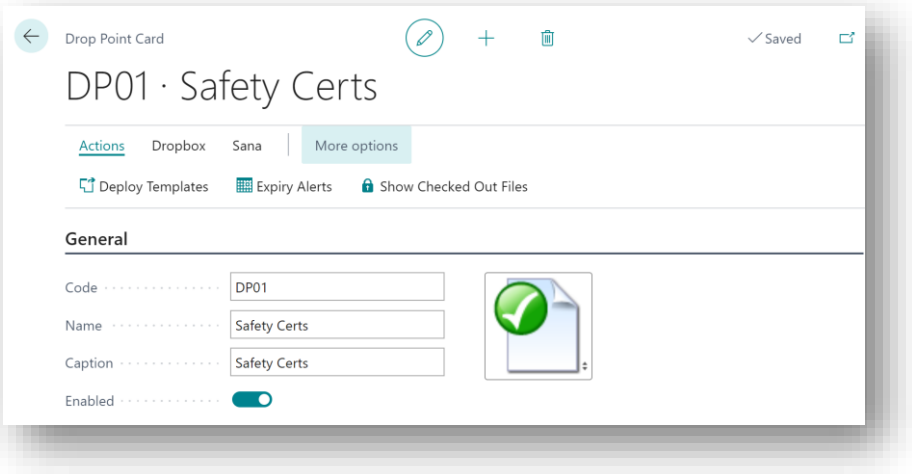

Figure 8-11

- **Code** – Specify a unique code to identify the Drop Point. Users are not permitted to modify a Drop Point Code once files have been dropped to the Drop Point. The exception being Drop Points with a database Storage Type.

- **Name** – Enter a meaningful name for the Drop Point.

- **Caption** – Specifies the caption to be displayed as a tool tip underneath the Drop Point in the Drop Area FactBox.

- **Enabled** – Select this flag to enable the Drop Point.

- **Icon** – Select the icon to be displayed for the Drop Point in the Drop Area FactBox.

Expand the **Options** FastTab *(Figure 8-11)*.

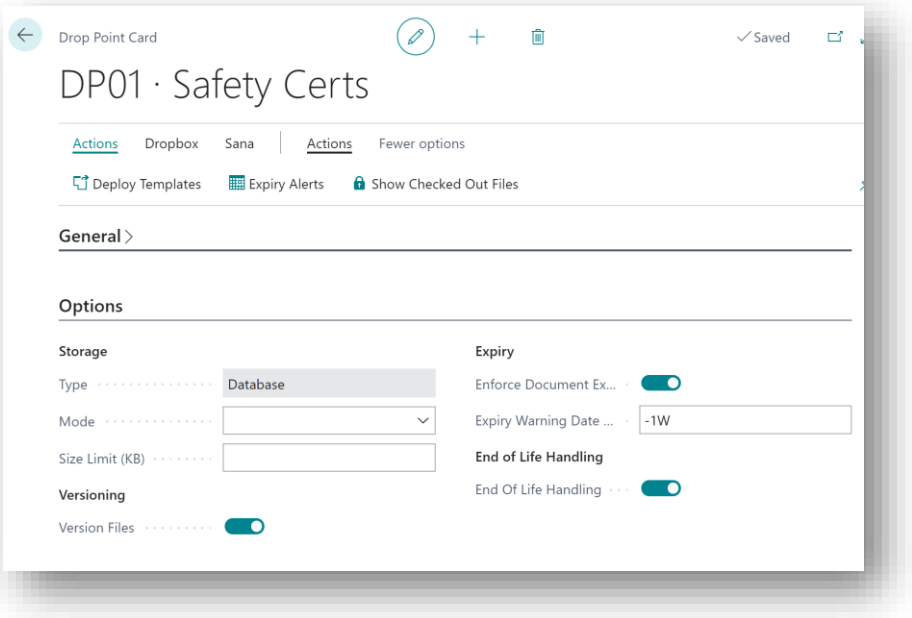

Figure 8-12

- **Type** - Specifies where SD LinkBox will save the uploaded file. Options are **Database**, **Azure Blob Storage**, **OneDrive**, or **Dropbox.** Defaults from the **SD LinkBox Setup** card.

  Database - The file will be stored in a BLOB field in your Microsoft Dynamics 365 Business Central database.

  Azure Blob Storage - The file will be stored in Azure Blob Storage.

  OneDrive - The file will be saved to your OneDrive account.

  Dropbox- The file will be saved to your Dropbox account.

- **Mode** - This field allows you to choose how the Drop Point will be used. Options are **<blank>**, **Sana Product Images**, **Sana Product Attachments**.

  <blank> - This is the default **Mode** to use for SD LinkBox. Use this mode for regular files that you want to drag and drop to the Drop Points.

  Sana Product Images – Use this **Mode** specifically for Sana product image files. Using functionality in SD LinkBox, you can easily rename and structure your Sana image files when these files are added to a Drop Point of **Mode Sana Product Images**. If using a Mode of Sana Product Images, you would enter **Table No. = 27** in the **Table Links** FastTab.

SANA Product Attachments – Use this **Mode** specifically for SANA product attachment files. Using functionality in SD LinkBox, you can easily rename and structure your SANA attachment files when these files are added to a Drop Point of **Mode SANA Product Attachments**. If using a Mode of Sana Product Images, you would enter **Table No. = 27** in the **Table Links** FastTab.

The **Mode** of **Sana Product Images** and **Sana Product Attachments** allow users using Sana to easily structure and name their product images and product attachments and place in their Sana ProductImage folder or the Sana Attachments folder for upload to the Sana website. Created to help Sana users, you drop attachments or images to the relevant Drop Point. Choosing the **Download Zip** action in the **Dropped Files** FactBox downloads a zip file with the correct folder structure and with the product images renamed to that of the linked Item No. You can then copy the contents of the downloaded zip file to the relevant Sana folder providing an easy way to structure and name your images (with sequential numbering) and product attachments.

- **Size Limit (KB)** - Defaults from the **SD LinkBox Setup** card. The maximum file size that can be uploaded. Zero signifies an unlimited file size. Files up to a maximum size of 2GB (2,097,152 KB) can be uploaded to a Drop Point (except for Drop Points with a storage type of OneDrive where the maximum file size is 600 MB).

- **Version Files** – Defaults from the **SD LinkBox Setup** card. Select this checkbox to enable the version control of files in the Dropped Files FactBox.

- **Enforce Document Expiry** – Select this checkbox to enforce document expiry on Documents dropped to the Drop Point.

  If you have files on a Drop Point where the **Enforce Document Expiry** has been switched on, then the Expiry Date field will show as an unfavourable style when the document has expired and as ambiguous style when nearing expiry date.

- **Expiry Warning Date Formula** – Enter a date formula that is used to calculate expiry alerts to notify users that a document's expiry date is approaching. If you want to be notified of a document's expiry date one week before expiry you would enter -1W in this field.

- **End of Life Handling** – Choose this option to allow SD LinkBox handle documents linked to end of life transactions and move links from records such as Sales Quotes to

Posted Sales Invoice records. Quotes, Credit Memos, Orders, Invoices will pass the record link to the newly created document upon end of life of the original transaction.

Applicable for Sales Header to Posted Sales Invoice/Posted Sales Credit Memo transactions, and for Purchase Header to Posted Purchase Invoice/Posted Purchase Credit Memo transactions.

Expand the **DocuSign Options** FastTab *(Figure 8-12)*.

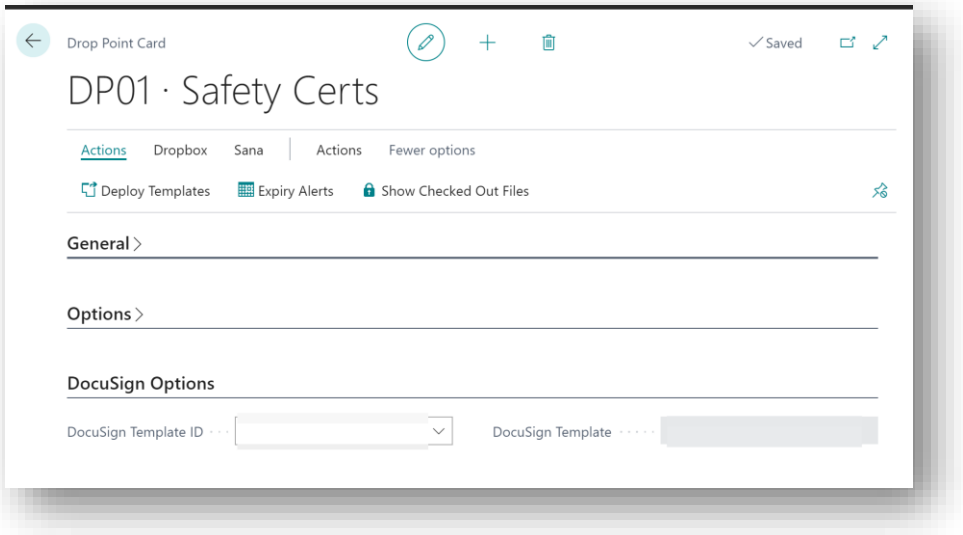

Figure 8-13

- **DocuSign Template ID** - Enter the ID of the DocuSign Template to be associated with this Drop Point. Select from a list of templates. This template list is populated in the **DocuSign Templates** list accessed from the **DocuSign Templates** action in the **SD LinkBox Setup** card.

- **DocuSign Template** - Displays the Template Name of the DocuSign Template in DocuSign Template ID.

Expand the **File Types** FastTab *(Figure 8-13)*.

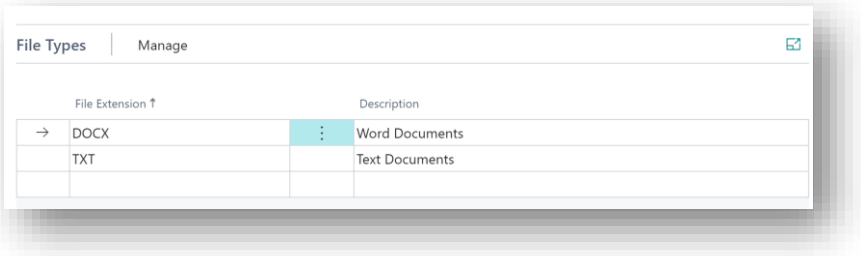

Figure 8-14

- **File Extension** – Specifies the file extension of the files that can be uploaded, or dragged and dropped, to the Drop Point. In this example, entering a file extension of DOCX and TXT specifies that only files with a DOCX or TXT extension can be uploaded to this Drop Point. If you do not specify a file extension, then all file types can be uploaded to the Drop Point.

- **Description** – Enter a user defined description of the File Extension.

The **Table Links** FastTab allows you to define the table(s) for which this Drop Point will display. Expand the **Table Links** FastTab *(Figure 8-14)*.

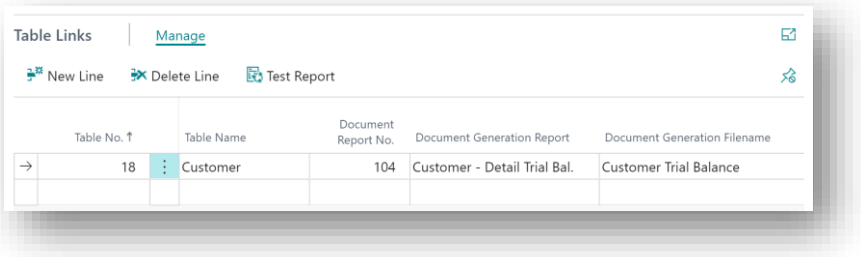

Figure 8-15

- **Table No.** - The number of the Microsoft Dynamics 365 Business Central table for which this Drop Point will display. For example, if you want this Drop Point Area to also display on a Drop Area FactBox on the Item Card, or the Item List Page, and allow files to be linked to the Item Table, you will add a record for Table No. 27, Item, to the Table Link List.

- **Table Name –** Displays the Microsoft Dynamics 365 Business Central Table Name of the table selected in **Table No.**

- **Document Report No.** - Enter the Microsoft Dynamics 365 Business Central Report ID to generate for the table record when the **Attach Report** Action is selected on the

Drop Point. The report will be generated and attached to the record. You could then send the document to DocuSign from within SD LinkBox.

The reports shown in the Document Report No. field are those that have the root data item in the report based on the table chosen in Table No.

- **Document Generation Report** - Displays the name of the report selected in **Document Report No.**

- **Document Generation Filename** - Enter the filename that the report in **Document Report No.** will be generated to when the **Attach Report** Action is selected on the Drop Point. This report will be generated and attached to the record and can then be sent to DocuSign.

The **Test Report** Action can be chosen from the **Table Links** FastTab *(Figure 8-15)*.

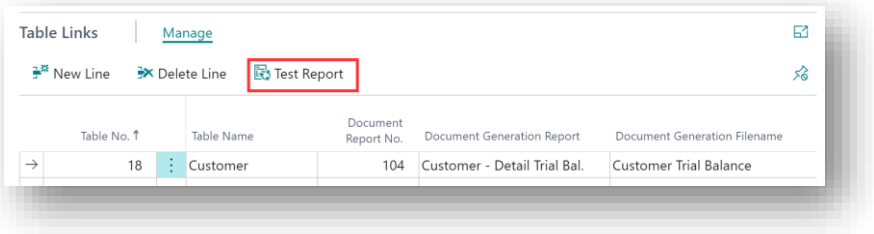

Figure 8-16

- **Test Report** – Choose this Action to verify that the report chosen in **Document Report No.** can be run with the data from the table chosen in **Table No.**

Expand the **Template Files** FastTab *(Figure 8-16)*. The Template Files List Page allows you to define the table(s) for which the template file can be created and linked to.

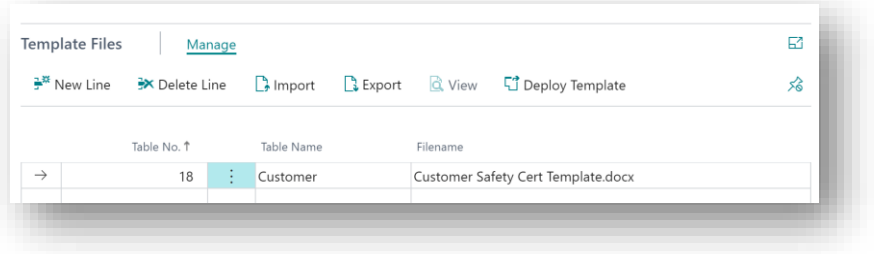

Figure 8-17

- **Table No.** - The number of the Microsoft Dynamics NAV table for which the template file can be created and linked to. For example, if you want this template file to be

created and linked to records in the Item Table, you will add a record for Table No. 27, Item, to the Template Files.

- **Table Name –** Displays the Microsoft Dynamics Table Name of the table selected in Table No.

- **Filename** – Displays the filename of the template file that was imported to the template record.

There are several Actions that can be chosen from the **Template Files** FastTab *(Figure 8-17)*.

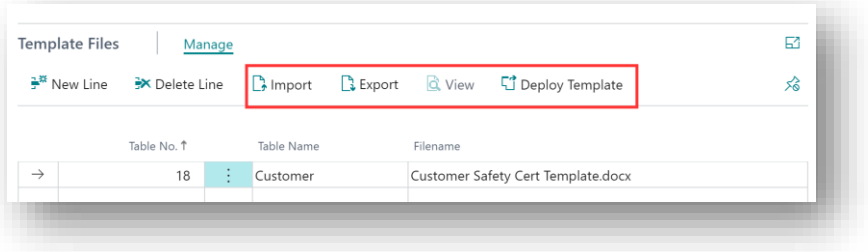

Figure 8-18

- **Import -** To import a template file, choose the **Import** action from the Template Files FastTab.

- **Export** - To export a template file, choose the **Export** action from the Template Files FastTab.

- **View -** To view an existing template file, choose the **View** action from the Template Files FastTab. Viewing is limited to pdf or text files only for a database storage type and pdf files for all other storage types. The file is opened in the relevant application in read only mode.

  Note: SD LinkBox uses google doc iframe to view the pdf or text files.

- **Deploy Template -** To deploy a template file, choose the **Deploy Template** action from the Template Files FastTab. This will link the template file to all records in the specified Table No.

  If you are dropping files to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date when dropping the file onto the Drop Point.
  Note: If you deploy a template, make a change to a linked document, and redeploy the template again, changes on the linked document are overwritten by the template document.

The **Permissions** FastTab allows you to define upload, view, edit, and delete permissions for the files dropped to the Drop Points. The permissions are based on Microsoft Dynamics 365 Business Central User Group Codes. If a user belongs to different User Groups that have varying permissions, SD LinkBox will always take a user's highest permission when evaluating the assigned permissions. Expand the **Permissions** FastTab *(Figure 8-18)*.

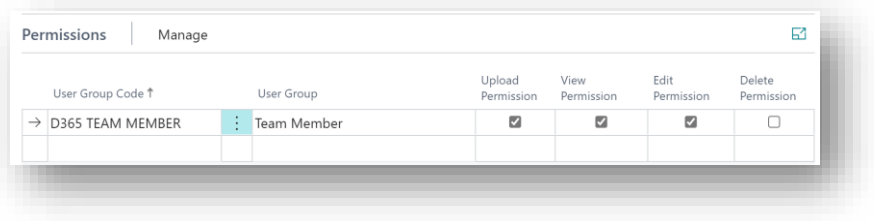

Figure 8-19

- **User Group Code** - The User Group Code of the User Group. Choose from a list of existing User Groups in your Microsoft Dynamics 365 Business Central database.

- **User Group –** Displays the Microsoft Dynamics 365 Business Central User Group Name of the User Group selected in User Group Code.

- **Upload Permission** – Select this checkbox if you want to grant upload permission to this User Group to allow members of this User Group upload files to the Drop Point.

- **View Permission** – Select this checkbox if you want to grant view permission to this User Group to allow members of this User Group view the Linked Files for the Drop Point.

- **Edit Permission** - Select this checkbox if you want to grant edit permission to this User Group to allow members of this User Group edit the Linked Files for the Drop Point.

- **Delete Permission** – Select this checkbox if you want to grant delete permission to this User Group to allow members of this User Group delete the Linked Files for the Drop Point.

If a **Storage Type** of **Azure Blob Storage** has been chosen in the **Options** FastTab, the **Azure Blob Storage Options** FastTab is displayed *(Figure 8-19)*:

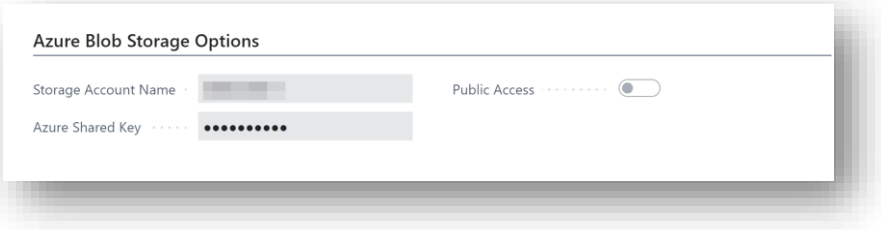

Figure 8-20

Please see the section below on **Using Azure Blob Storage with SD LinkBox**.

- **Storage Account Name** – Enter the Storage Account Name for your Azure Blob Storage. Defaults from the **SD LinkBox Setup** card.

- **Azure Shared Key**– Enter the Azure Shared Key for your Azure Blob Storage. Defaults from the **SD LinkBox Setup** card. All keys and passwords in SD LinkBox are encrypted with AES 128.

- **Public Access** – Select this option to allow public read of the files uploaded onto the Drop Point.

If a **Storage Type** of **Dropbox** has been chosen in the **Options** FastTab, the **Dropbox** FastTab is displayed *(Figure 8-20)*:

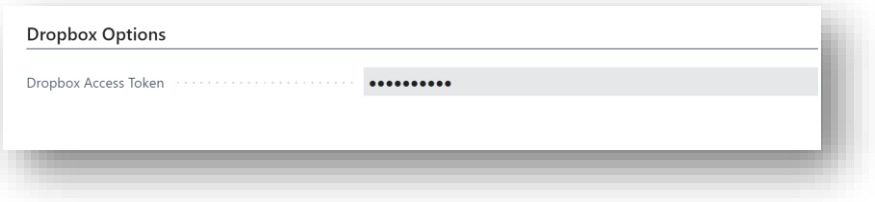

Figure 8-21

Please see the section below on **Using Dropbox Storage with SD LinkBox**.

Dropbox Access Token – Enter your Dropbox access token used by SD LinkBox to communicate with your Dropbox account. All keys and passwords in SD LinkBox are encrypted with AES 128.

There are several actions that can be chosen from the Actions menu group in **Drop Point Card** *(Figure 8-21)*.

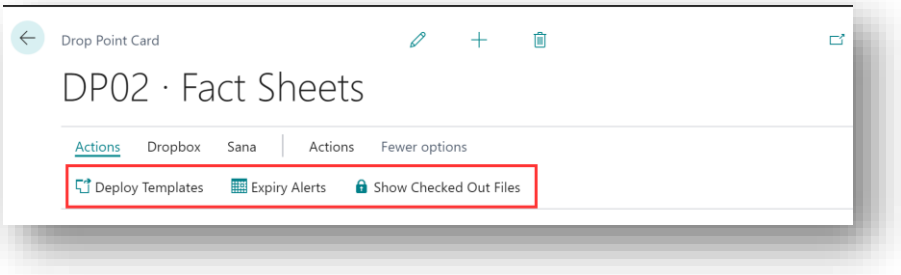

Figure 8-22

- **Deploy Templates** - Select this action to link the Template File(s) to all records in the specified Table No.

  If you are dropping files to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date when dropping the file onto the Drop Point.

  Note: If you deploy a template, make a change to a linked document, and redeploy the template again, any changes on the linked document are overwritten by the template document.

- **Expiry Alerts** - Select this action to view the documents for this Drop Point whose expiry dates are nearing expiration.

- **Show Checked Out Files** - Select this action to view the checked-out files for this Drop Point.

The following actions are available in the **Dropbox** menu group in **Drop Point Card** *(Figure 8-22)*.

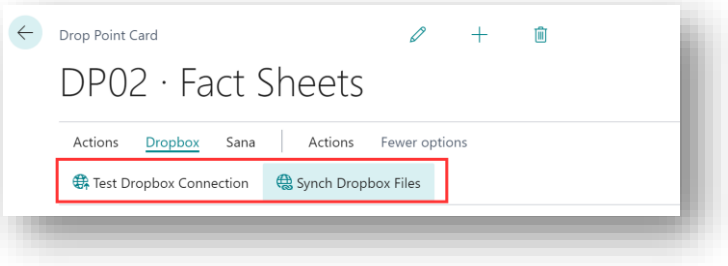

Figure 8-23

- **Test Dropbox Connection** - Select this action to test the Dropbox connection. Applicable if the Drop Point is of **Storage Type Dropbox**. On enable of the Drop Point the Dropbox Connection is automatically tested.

- **Synch Dropbox Files** - Select this action to synchronise Dropbox files that have been added to your Drop Point folder in Dropbox back to the Drop Points in SD LinkBox. Applicable if the Drop Point is of **Storage Type Dropbox**.

The following actions are available in the **Sana** menu group in **Drop Point Card** *(Figure 8-23)*.

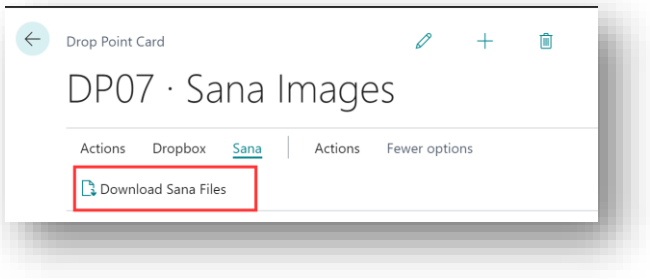

Figure 8-24

- **Download Sana Files** - Select this action to download the Sana files dropped to the Drop Point to a Zip file. Applicable if the Drop Point **Storage Mode** is of **Sana Product Images** or **Sana Attachments**.

9 Working with SD LinkBox

Please refer to the section below in this document on **Viewing the SD LinkBox Customer Demo** and **Adding the Drop Area and Dropped Files FactBoxes to a Page** in Microsoft Dynamics 365 Business Central.

9.1 Viewing the SD LinkBox Customer Demo

Navigate to the **SD LinkBox Customer Demo**, using the **Tell Me.**

In the **SD LinkBox Customer Demo** list, you can see that the SD LinkBox **Drop Area** and **Dropped Files** FactBoxes have been added to the page. When you enable a Drop Point linked to the Customer table, the Drop Point will appear in the **Drop Area** FactBox, and you can drag and drop files to the Drop Point (*Figure 9-1*).

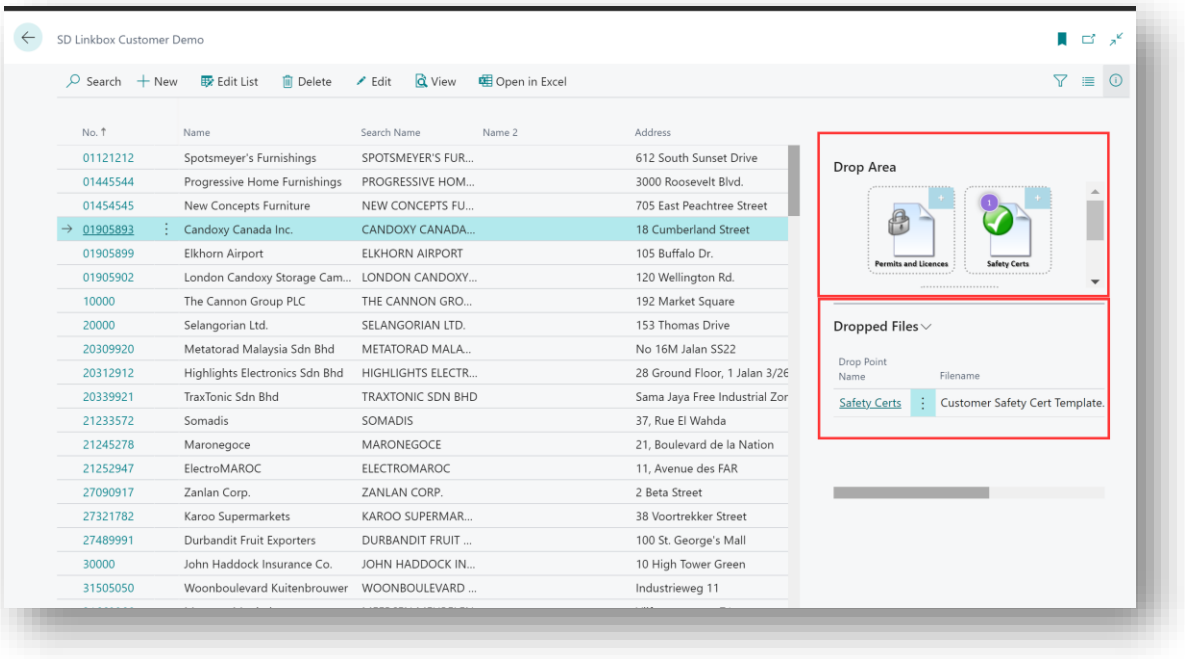

Figure 9-1

Note: When uploading files to Drop Points, the Page, where the Drop Point and Drop Area FactBoxes are located, must be in Edit Mode.

9.2 Adding the Drop Area and the Dropped Files FactBoxes to a Page

Extensions to SD LinkBox were made for the following standard Dynamics 365 Business Central pages to show the Drop Area and Dropped File FactBoxes on the page (*Figure 9-2*): Customer Card, Customer List, Vendor List, Item List, Sales Quote List, Sales Order List, Sales Invoice List, Posted Sales Invoice List, Sales Return Orders, Sales Credit Memo List, Posted Sales Credit Memo List, Purchase Quotes, Purchase Order List, Purchase Invoice List, Posted Purchase Invoice List, Purchase Return Order, Purchase Credit Memo, Posted Purchase Credit Memo.

Object Type	Object ID	Object Name
PageExtension	43006200	SDY ULB Customer Card
PageExtension	43006201	SDY ULB Customer List
PageExtension	43006202	SDY ULB Sales Order List Ext.
PageExtension	43006203	SDYULBPostedSalesInvListExt.
PageExtension	43006204	SDY ULB Purch. Order List Ext.
PageExtension	43006205	SDYULBPostedPurchInvListExt
PageExtension	43006206	SDY ULB Sales Quote List Ext.
PageExtension	43006207	SDY ULB Sales Cr.M. List Ext.
PageExtension	43006208	SDY ULB Posted Sales CrM. Ext.
PageExtension	43006209	SDY ULB Purch. CrM Ext
PageExtension	43006210	SDY ULB Post Purch. CrM Ext
PageExtension	43006211	SDY ULB Item List Ext.
PageExtension	43006212	SDYULBSalesInvListExt
PageExtension	43006213	SDYULBPurchInvListExt
PageExtension	43006214	SDYULBVendorListExt
PageExtension	43006215	SDYULBPurchQuoteExt
PageExtension	43006216	SDYULBPurchReturnOrderExt
PageExtension	43006217	SDYULBSalesReturnOrderExt

Figure 9-2

To add the Drop Area and Dropped Files FactBoxes to pages in Microsoft Dynamics 365 Business Central, you can add the following code as a page extension *(Figure 9-3),* or you can choose the **SD LinkBox Extension** page to select the pages that you want to add the Drop Area and Dropped Files FactBoxes to and easily create extensions for these pages and publish the extensions to your environment in two clicks *(Figure 9-4)*.

```
layout
{
    addfirst(FactBoxes)
    {
        part(SDYDropArea; "SDY ULB Drop Area FactBox")
        {
            ApplicationArea = All;

        }
        part(SDYDroppedFile; "SDY ULB Dropped File FactBox")
        {
            ApplicationArea = All;

        }
    }
}
trigger OnOpenPage()
begin
    CurrPage.SDYDroppedFile.Page.SetParentPageId(CurrPage.ObjectId(false));
end;

trigger OnAfterGetCurrRecord()
begin
    CurrPage.SDYDropArea.Page.SetLink(Rec, true);
    CurrPage.SDYDroppedFile.Page.SetLink(Rec);
end;
}
```

Figure 9-3

It is recommended that only those users with a good knowledge of installing and publishing apps and extensions use this **SD LinkBox Extension** page to add the Drop Area and Dropped Files FactBoxes to pages in Microsoft Dynamics 365 Business Central. The following fields are displayed in the **General** FastTab *(Figure 9-4)*:

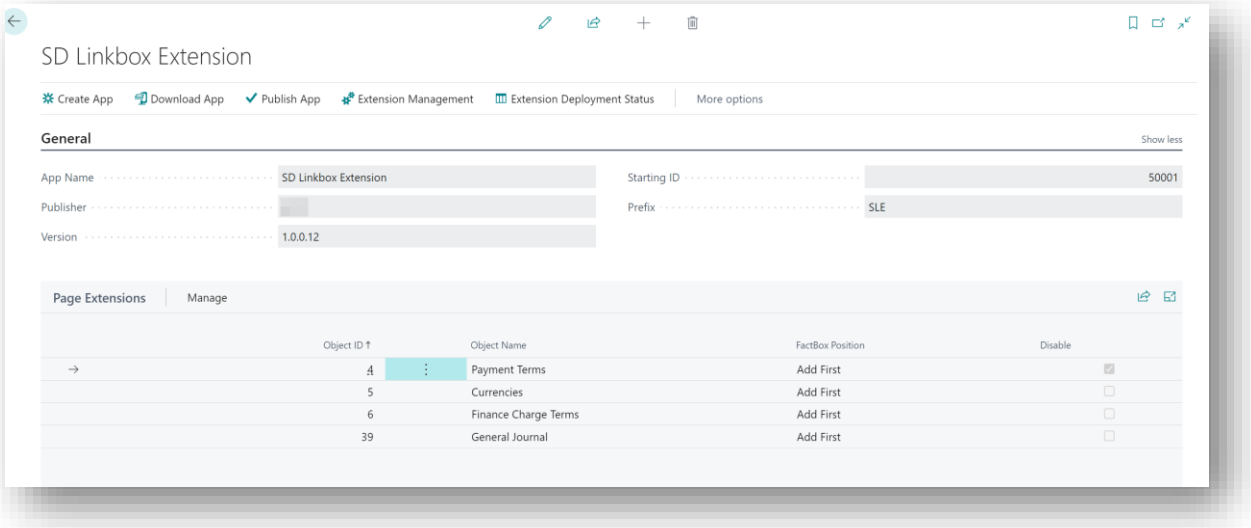

Figure 9-4

- **App Name** – Defaults to SD LinkBox Extension. This field cannot be updated.
- **Publisher** – Enter a publisher name. This field cannot be updated after the **Create App** action is chosen for the first time.
- **Version** – Defaults to 1.0.0.0. Each time the **Create App** action is chosen, the version automatically increments.
- **Starting ID** – Defaults to 50001. When the **Create App** action is selected, the code searches for the first available page ID after the ID in **Starting ID** to use as the object IDs for the page extensions that will be created.
- **Prefix** – Enter the Prefix for the App. This value is used when creating the object names for the extensions and is also used to ensure that the page extension names are unique.

In the **Page Extensions** FastTab, you add the pages that you want to add the Drop Area and Dropped Files FactBoxes to (*Figure 9-5*).

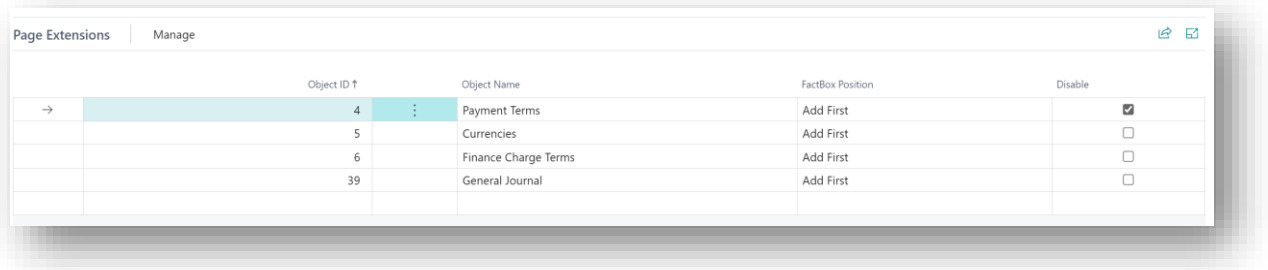

Figure 9-5

- **Object ID** – Select the page ID for the page that you want to create an extension for from a list of pages.
- **Object Name** – Displays the name of the page chosen in Object Name.
- **FactBox Position** – Choose whether to place the Drop Area and Dropped Files FactBoxes first or last in the page's FactBox area.
- **Disable** – Choose this checkbox to remove the page extension that was created for the page from the **SD LinkBox Extension App**.

When you have added the pages to the Page Extensions list, you are ready to create the extensions to the pages and publish the page extensions (*Figure 9-6*):

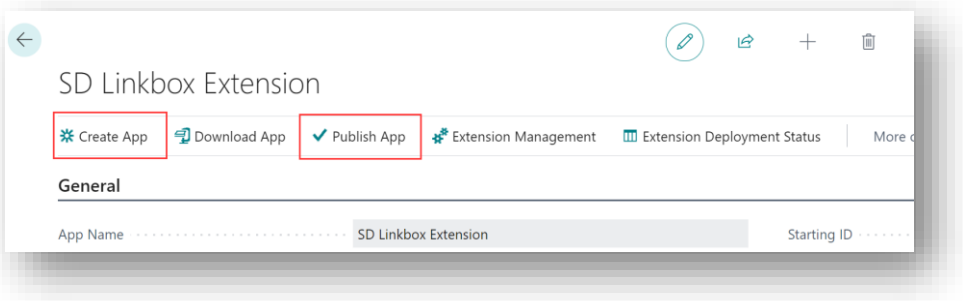

Figure 9-6

Choose this **Create App** action to create the extensions to the pages that you have added in the Page Extensions list. An App will be created containing these page extensions. You can then choose the Publish App action to publish the App to your environment. You can choose the **Extension Deployment Status** to see the status of the installation.

Once the SD LinkBox Extension App has published you can view the Drop Area and Dropped Files FactBoxes on the pages (*Figure 9-7*):

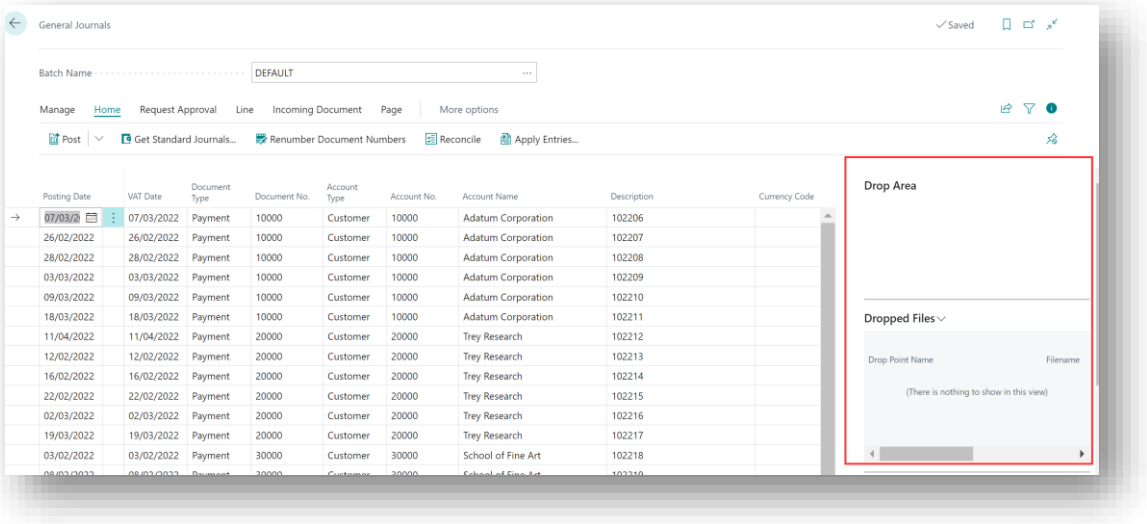

Figure 9-7

9.3 Dragging and Dropping Files to Link to a Record

1. The Page, where the Drop Point and Drop Area FactBoxes are located, must be in Edit Mode when uploading files to Drop Points.

2. Where permissions have been specified for a particular Drop Point, you must be granted Upload Permission in the relevant Drop Point Card to link files to a table record.

3. Using the pre-configured **SD LinkBox Customer Demo** page as an example, highlight the Customer record that you want to link the file(s) to.

4. Select the file(s), in File Explorer, that you wish to upload and link to the record, and simply drag and drop the file(s) onto the chosen Drop Point in the **Drop Area** FactBox on the **SD LinkBox Customer Demo** list *(Figure 9-8)*.

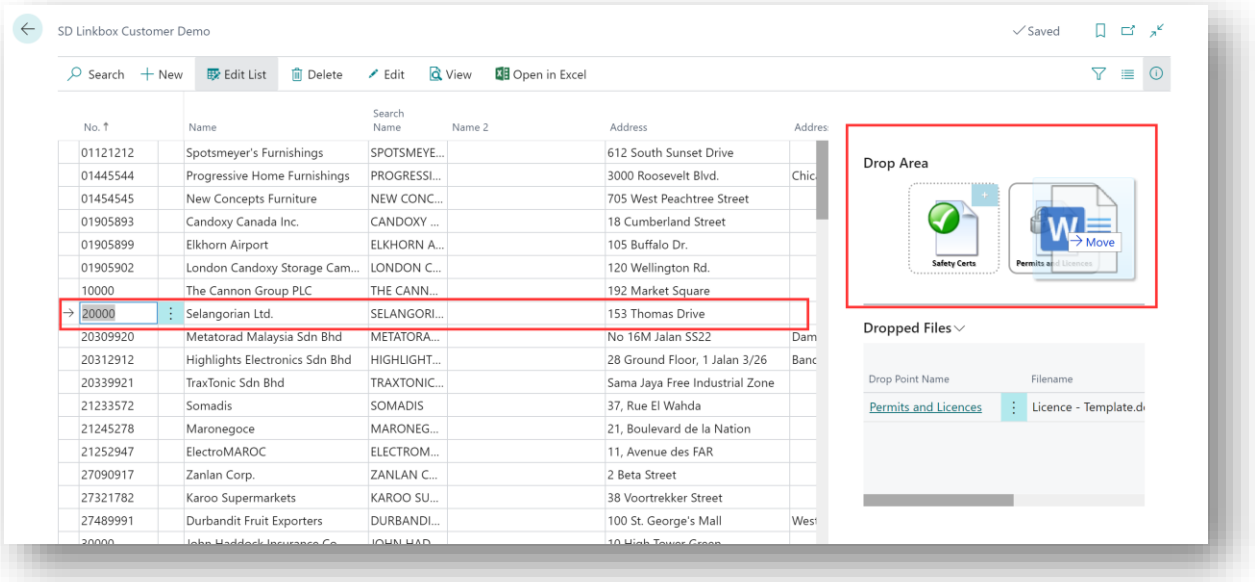

Figure 9-8

5. If you are dropping files to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date when dropping the file onto the Drop Point *(Figure 9-9)*.

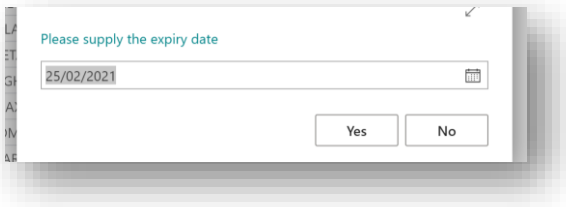

Figure 9-9

6. The dropped files are now linked to the Customer Record, and you can see the linked file(s) in the **Dropped Files** FactBox *(Figure 9-10)*.

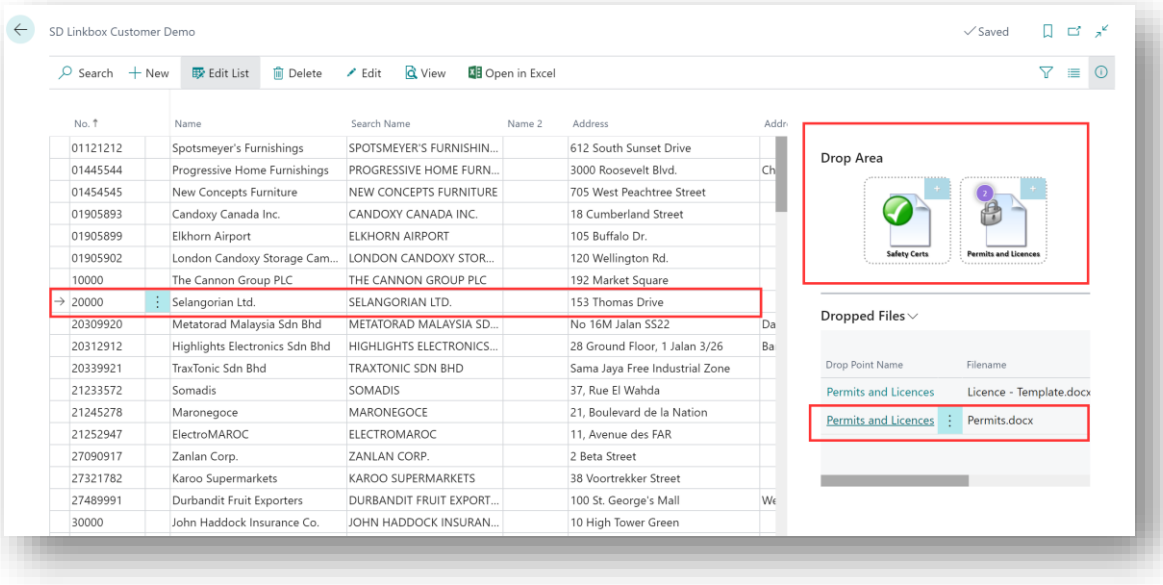

Figure 9-10

9.4 Browsing to Upload a File to Link to a Record

1. The Page, where the Drop Point and Drop Area FactBoxes are located, must be in Edit Mode when uploading files to Drop Points.

2. Where permissions have been specified for a particular Drop Point, you must be granted Upload Permission in the relevant Drop Point Card to link files to a table record.

3. Using the pre-configured **SD LinkBox Customer Demo** page as an example, highlight the Customer record that you want to link the file to.

4. From the **Drop Area** FactBox, select the + in the top right-hand corner of the Drop Point Icon *(Figure 9-11)*.

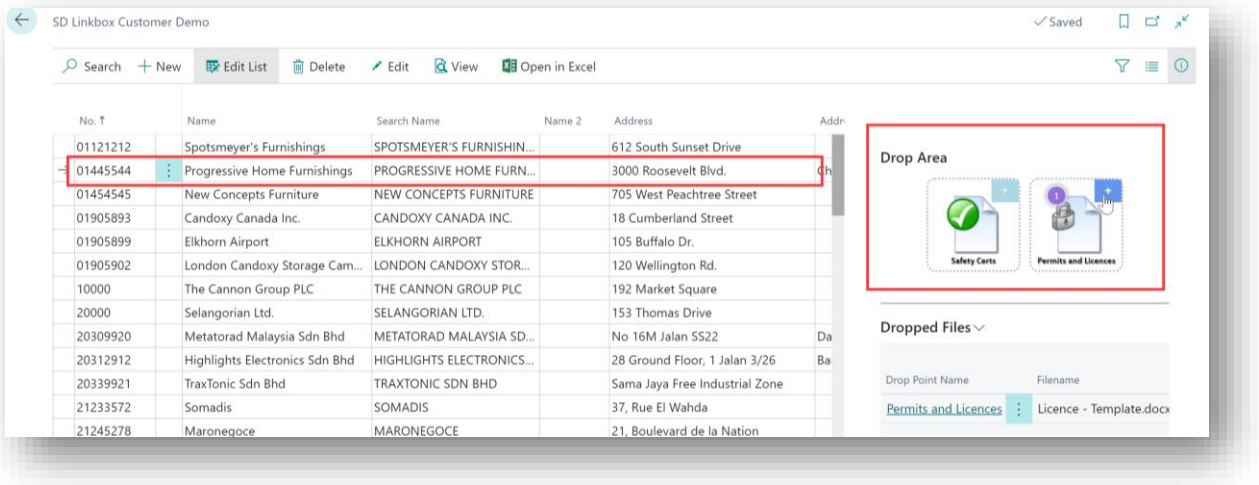

Figure 9-11

5. From the **Add File** window, browse to, and select, the file, that you wish to upload and link to the record.

6. If you are adding a file to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date *(Figure 9-12)*.

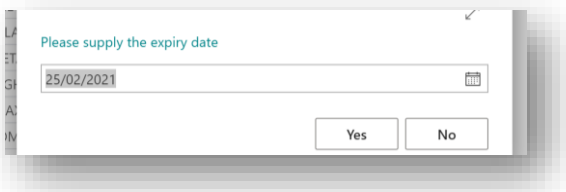

Figure 9-12

7. The file is now linked to the Customer Record, and you can see the linked file in the **Dropped Files** FactBox *(Figure 9-13)*.

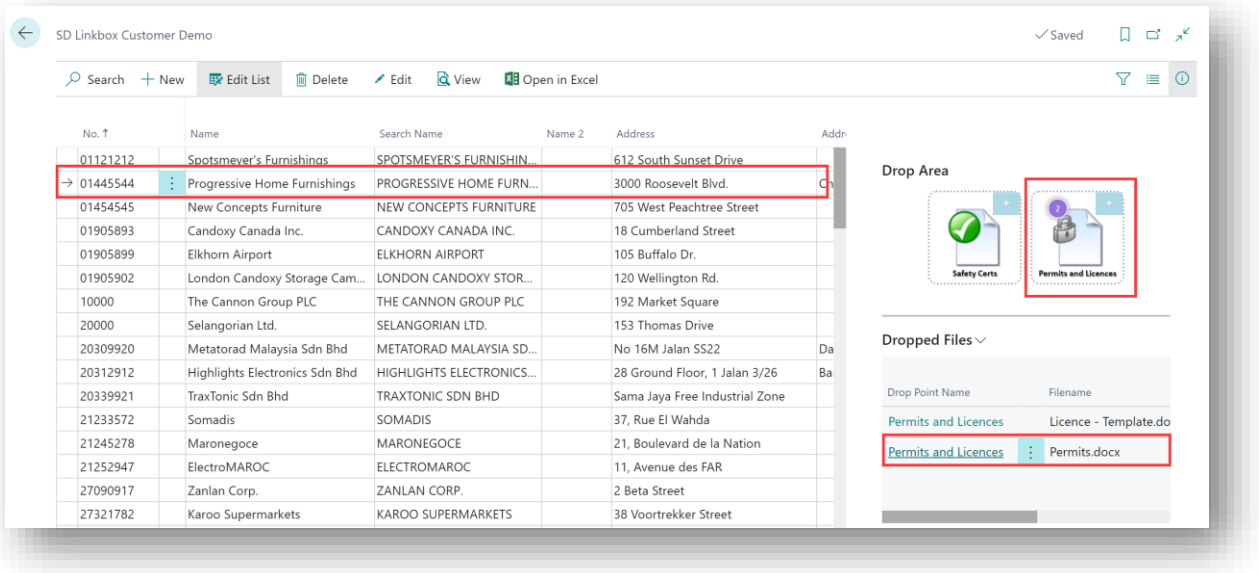

Figure 9-13

9.5 Deploying and Linking Template Files to Records

1. The Page, where the Drop Point and Drop Area FactBoxes are located, must be in Edit Mode when uploading files to Drop Points.

2. Where permissions have been specified for a particular Drop Point, you must be granted Upload Permission in the relevant Drop Point Card to link files to a table record.

3. You must have completed the necessary setup in the Template Files FastTab of the **Drop Point Card** as detailed in the Section above, **SD LinkBox –Drop Point Card**.

4. From the Template Files FastTab in the **Drop Point Card**, highlight the Template File that you want to link to all records in the specified Table No and select **Deploy Template** *(Figure 9-14)*.

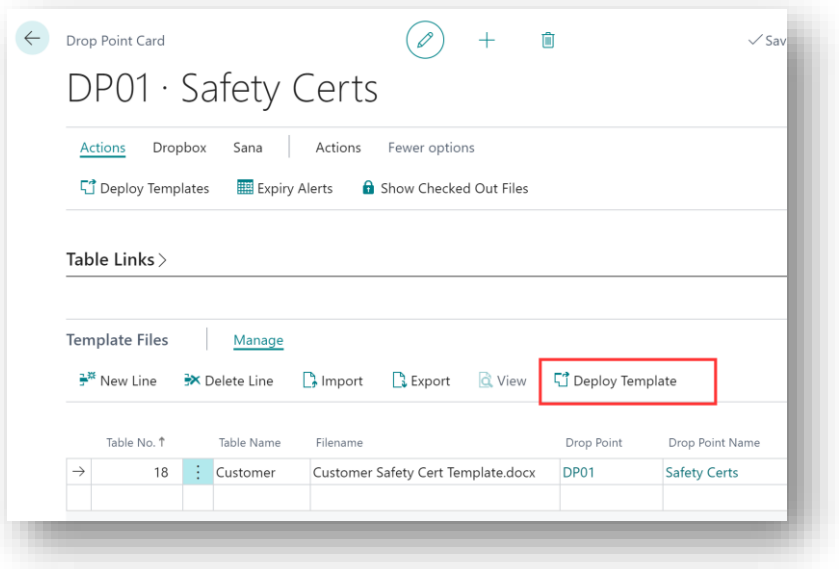

Figure 9-14

5. If you are deploying a template file to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date *(Figure 9-15)*.

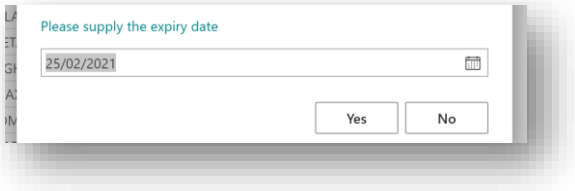

Figure 9-15

6. Using the pre-configured **SD LinkBox Customer Demo** page as an example, the Template File is linked to all records in the specified **Table No** and you can see the linked file in the **Dropped Files** FactBox for each record in the linked table *(Figure 9-16)*.

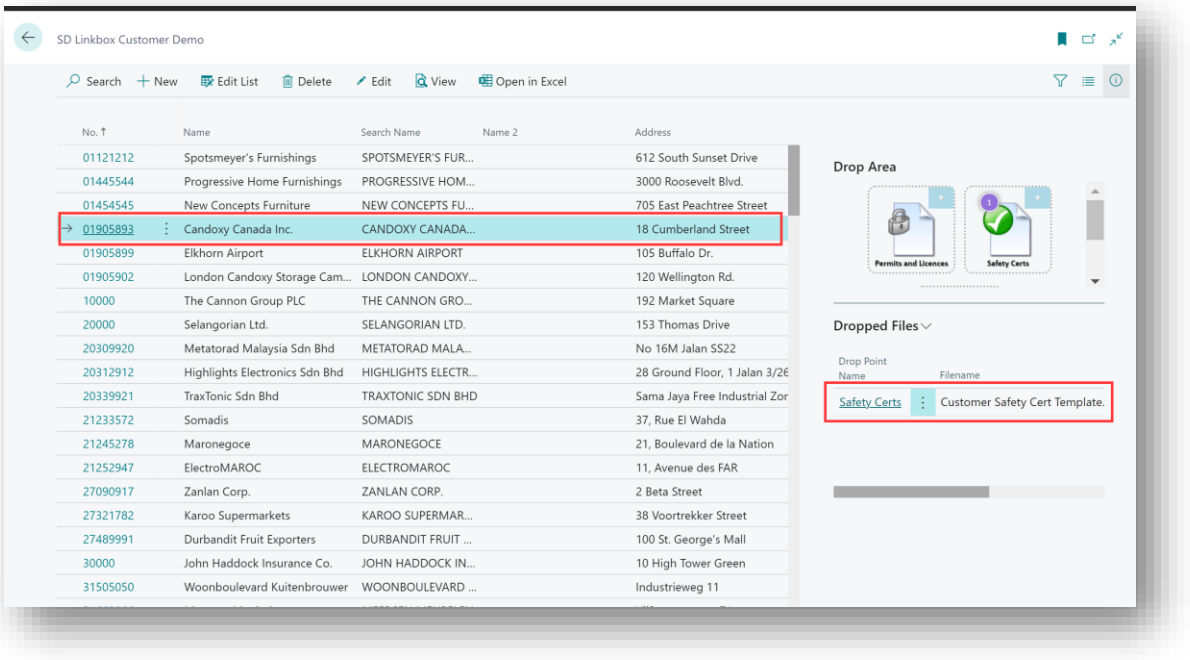

Figure 9-16

9.6 Working with the Dropped Files - Actions

Again, using the pre-configured **SD LinkBox Customer Demo** page as an example, there are several actions that can be chosen from the actions in the **Dropped Files** FactBox *(Figure 9-17)*.

Where permissions have been specified for a particular Drop Point Card, you must be granted the necessary **Permissions** in the relevant **Drop Point Card** to upload, view, edit, or delete files.

If you have files on a Drop Point where the **Enforce Document Expiry** has been switched on, then the Expiry Date field will show with an unfavourable style when the document has expired and with an ambiguous style when nearing expiry date.

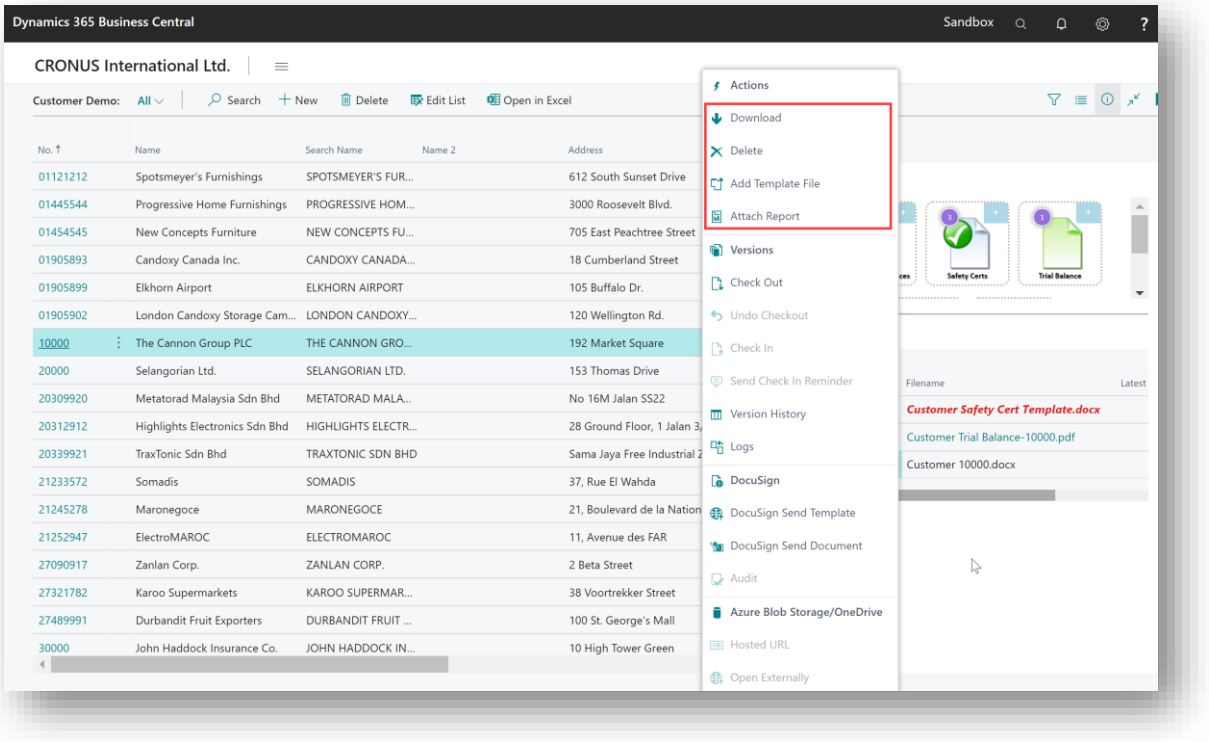

Figure 9-17

9.6.1 Download

Highlight the relevant file in the **Dropped Files** FactBox and select **Dropped Files> Actions> Download** *(Figure 9-17)*. Depending on your browser settings you are prompted to **Open** the file or **Save As**. The file downloading is handled by your browser.

Make your changes, keeping the original filename if you wish to overwrite the changes in the linked file with a new version (if versioning has been enabled for the Drop Point).

When you have completed your changes to the file, upload the amended file to the record (as described in the Sections above, **Dragging and Dropping Files to Link to a Record** and **Browsing to Upload Files to Link to a Record**).

If versioning is enabled for the Drop Point, when you drag and drop the modified file or browse to upload the modified file back to the Drop Area for the relevant record, the Latest Version of the file is incremented.

9.6.2 View

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> Actions> View** *(Figure 9-17)*.

The option to view a file is applicable only for pdf or text files for a Drop Point with a database storage type and pdf files for all other Drop Point storage types. The file is opened in the relevant application in read only mode.

Note: SD LinkBox uses google doc iframe to view the pdf or text files.

9.6.3 Delete

Highlight the required file in the **Dropped Files** FactBox and select **Dropped Files> Actions> Delete** *(Figure 9-17)*. All versions of the file linked to the record are deleted.

9.6.4 Add Template File

Highlight the required file in the **Dropped Files** FactBox and select **Dropped Files> Actions> Add Template File** *(Figure 9-17)*. The template file is added to the **Dropped Files** FactBox and linked to the record.

If you are adding a template file to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date.

Note: If you deploy a template, make a change to a linked document, and redeploy the template again, changes on the linked document are overwritten by the template document.

9.6.5 Attach Report

In the **Dropped Files** FactBox, select **Dropped Files> Actions> Attach Report** *(Figure 9-17)*. This will generate and attach the report that is defined in the **Document Report No**. field in the **Table Links** FastTab on the **Drop Point Card** to the record in the Drop Point.

If you are attaching a report to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date for the report.

9.7 Working with the Dropped Files - Versions

Again, using the pre-configured **SD LinkBox Customer Demo** page as an example, there are several actions that can be chosen from the **Dropped Files** FactBox *(Figure 9-18)*.

Where Permissions have been specified for a particular Drop Point Card, you must be granted the necessary **Permissions** in the relevant **Drop Point Card** to upload, view, edit, or delete files.

To enable versioning of files for a Drop Point, the **Version Files** checkbox must be selected for the relevant Drop Point in the **Drop Point Card**.

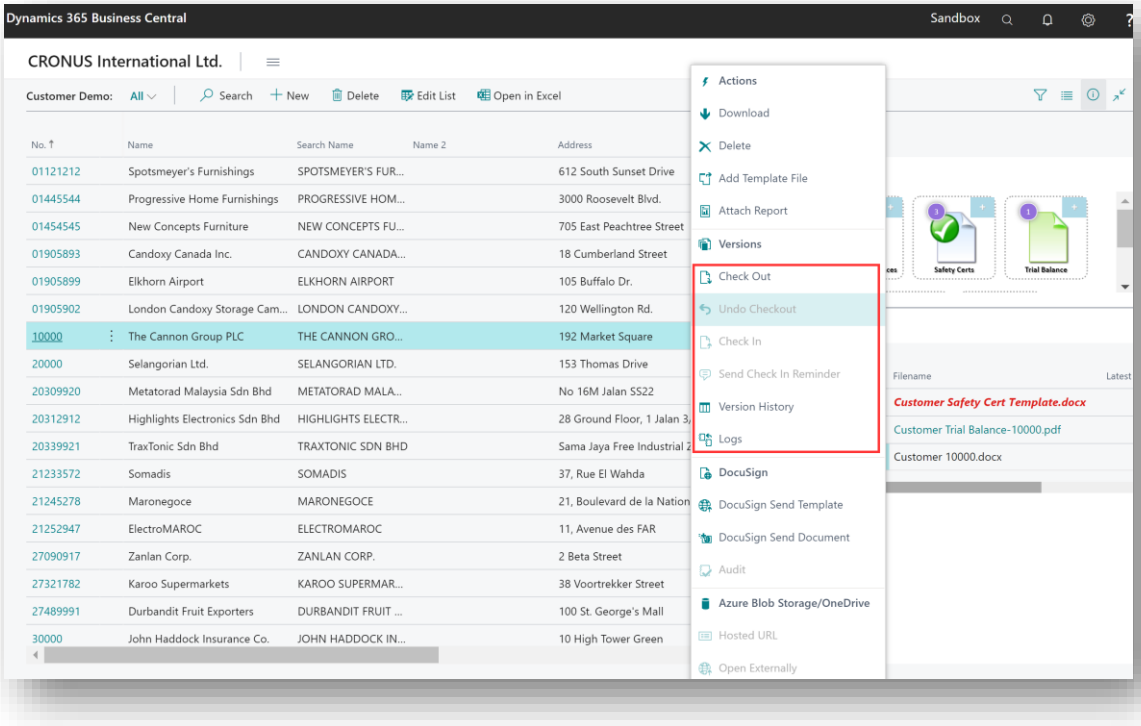

Figure 9-18

9.7.1 Check Out

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> Versions> Check Out** *(Figure 9-18)*. The file is checked out.

When the file is checked out, the style of the record for the checked-out file changes in the **Dropped Files** FactBox *(Figure 9-19)*. If you have checked out the file, the record in the **Dropped Files** FactBox is marked in green. If another user has checked out the file, the record is marked in red.

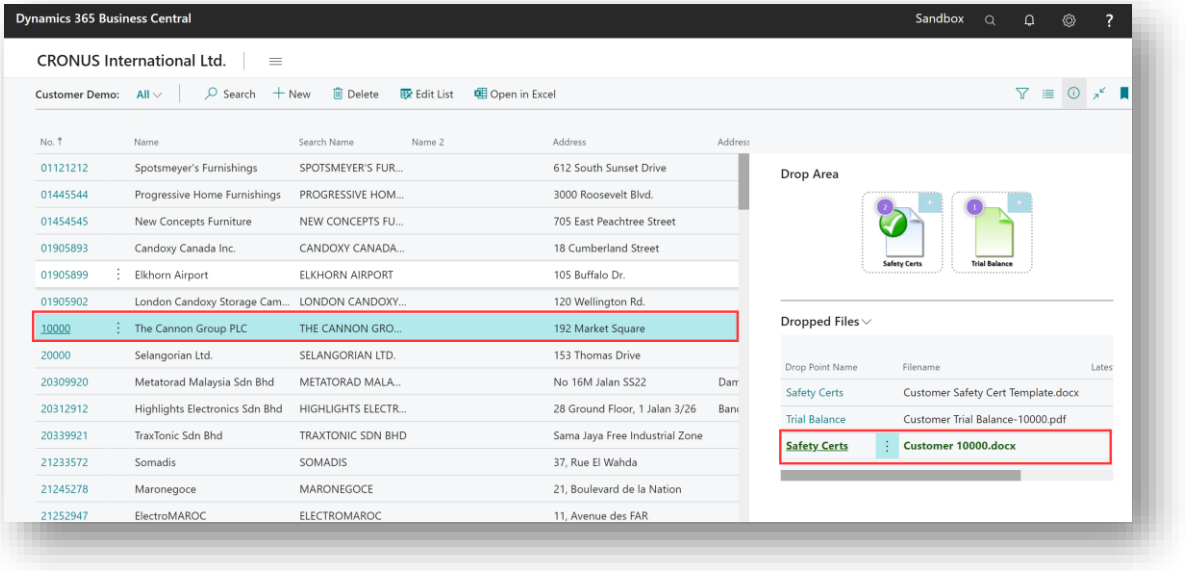

Figure 9-19

9.7.2 Undo Check Out

When a file is checked out, you can choose to undo the checkout by selecting the relevant file in the **Dropped Files** FactBox and select **Dropped Files> Versions> Undo Check Out** *(Figure 9-18)*.

You will be prompted that by undoing the check out any local file changes will be lost *(Figure 9-20)*.

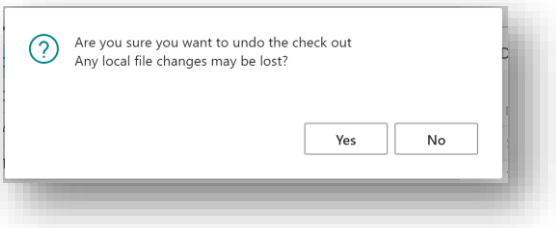

Figure 9-20

9.7.3 Check In

Having checked out your file, made and saved your changes, you can check the file back in by selecting **Dropped Files> Version**> **Check In** *(Figure 9-18)*.

If you are adding a file to a Drop Point that is enforcing expiry dates, you will be prompted to enter an expiry date.

The latest version of the checked-in document is incremented.

Note: if the Drop Point is a Storage Type of OneDrive or Azure Blob storage, the file names always start with _(version)- when viewed in OneDrive or Azure Blob Storage as these storage types do not inherently support versioning.

9.7.4 Send Check In Reminder

For a file that has been checked out by another user, select the required file in the **Dropped Files** FactBox, and select **Dropped Files> Version**> **Send Check In Reminder** *(Figure 9-18)*.

A reminder is sent to the user to check the file in *(Figure 9-21)*.

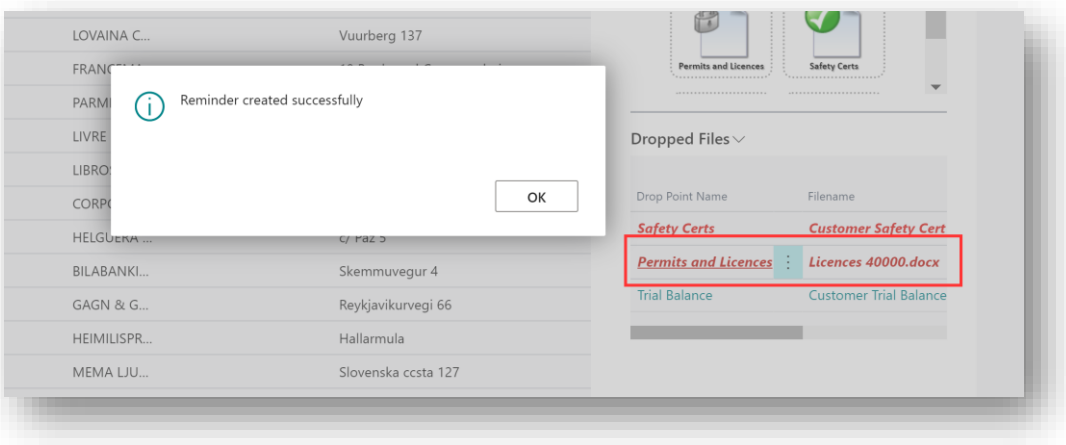

Figure 9-21

Users can see their check in reminders in the **SD LinkBox Check-In Reminders** list *(Figure 9-22)*.

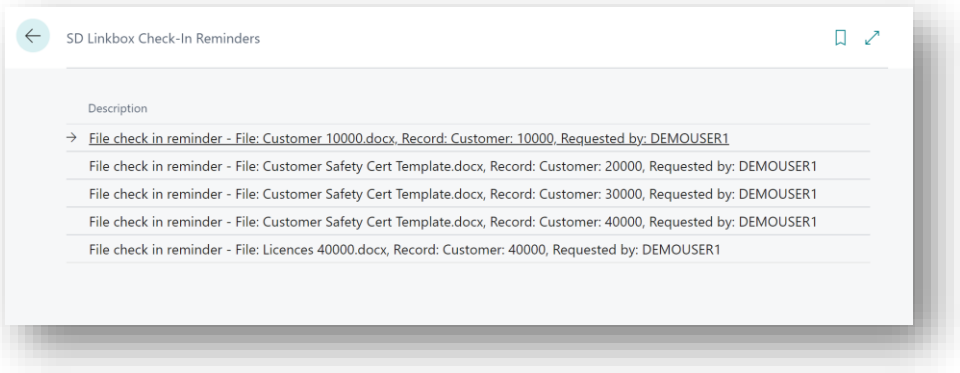

Figure 9-22

When the file is checked in, the associated reminder is deleted *(Figure 9-23)*.

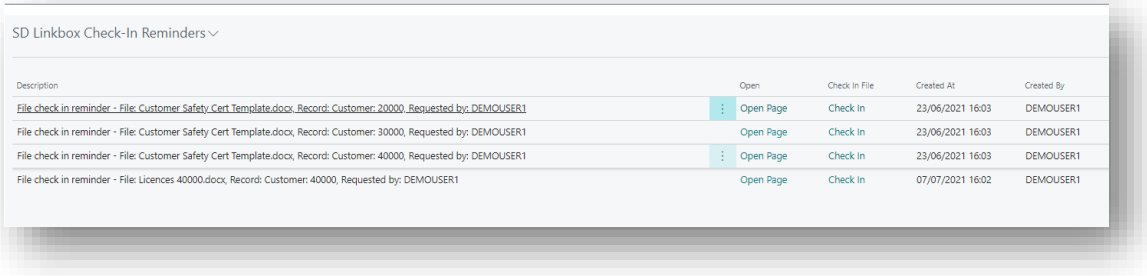

Figure 9-23

Note: To use this functionality, open the standard Dynamics 365 Business Central **My Notifications** page and ensure that the **Notification SD LinkBox File Check-In Reminders** is enabled *(Figure 9-24)*.

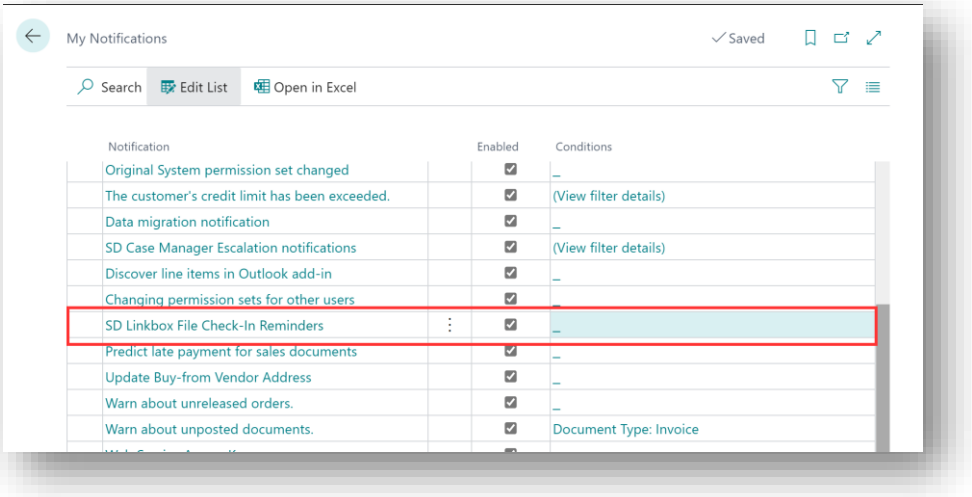

Figure 9-24

9.7.5 Version History

In the **Dropped Files** FactBox, select **Dropped Files> Version> Version History** *(Figure 9-18)* to view the version history of the file. The **File Versions** list opens, and the versions of the file are displayed in the list *(Figure 9-25)*.

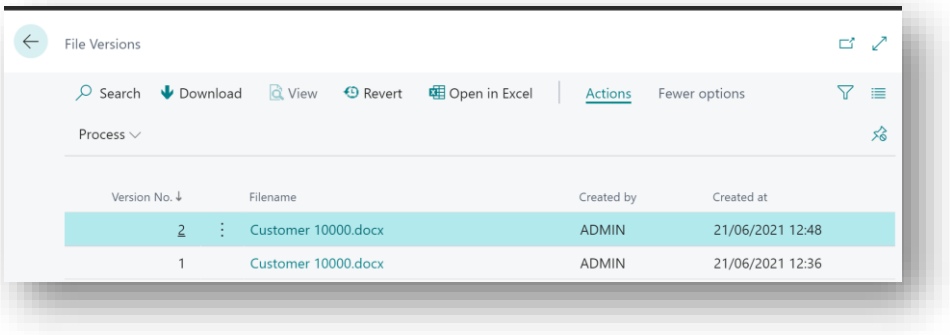

Figure 9-25

In the **File Versions** list to revert to an earlier version of the file, select the relevant file and choose **Revert** *(Figure 9-26)*.

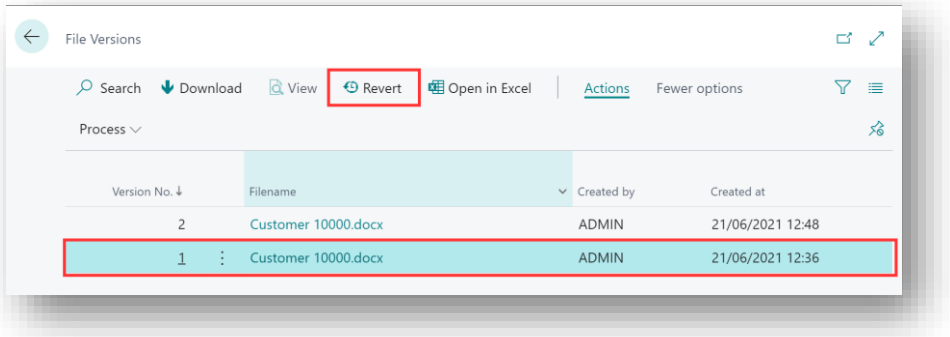

Figure 9-26

All previous versions of the file are retained *(Figure 9-27)*.

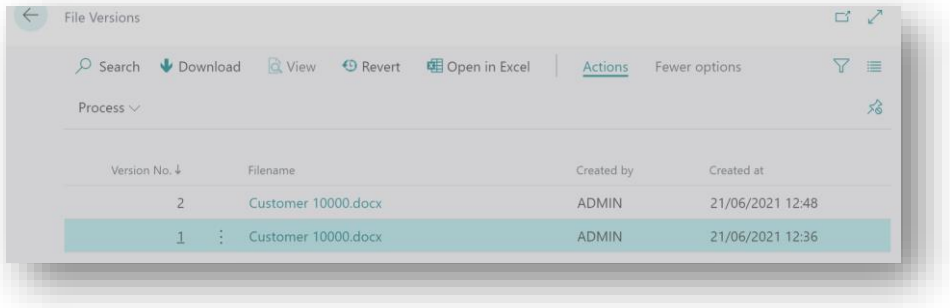

Figure 9-27

Note: In OneDrive, the reverted file will be marked as the most recent file and will not appear in OneDrive storage as a separate file. However, when you checkout or download the reverted file the most recent file is downloaded.

Note: In Dropbox, the contents of the reverted file can be viewed by choosing the Version history option on the file.

To view a version of the file, select the relevant file version and choose **View** *(Figure 9-28)*. The file is opened in Read Only mode in the relevant application. The option to view a file is applicable only for pdf or text files for a Drop Point with a database storage type and pdf files for all other Drop Point storage types.

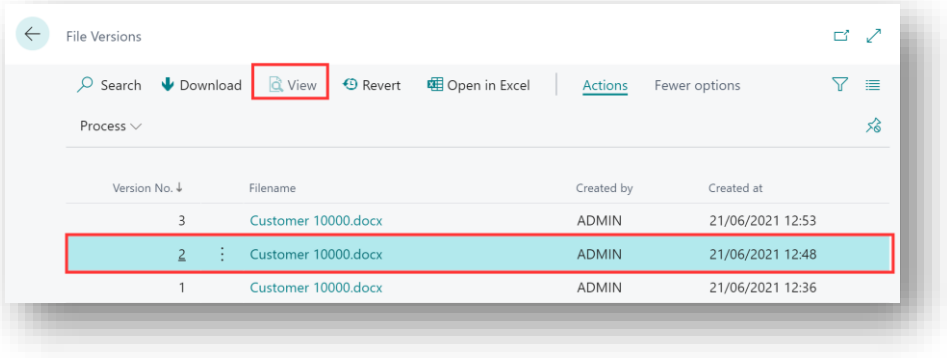

Figure 9-28

To **Edit** a version of the file, select the relevant file version, and choose **Download** *(Figure 9-29)*.

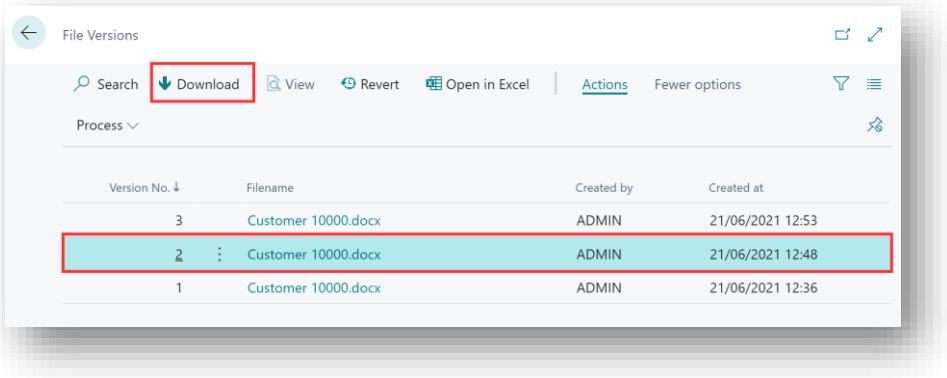

Figure 9-29

Make your changes, keeping the original filename if you wish to overwrite the changes in the linked file with a new version. When you have completed your changes to the file, drag and

drop the amended file to the record (as described in the Section above, **Dragging and Dropping Files to Link to a Record**).

When you drag and drop the file back to the Drop Area, for the relevant record, the latest version of the file is incremented *(Figure 9-30)*.

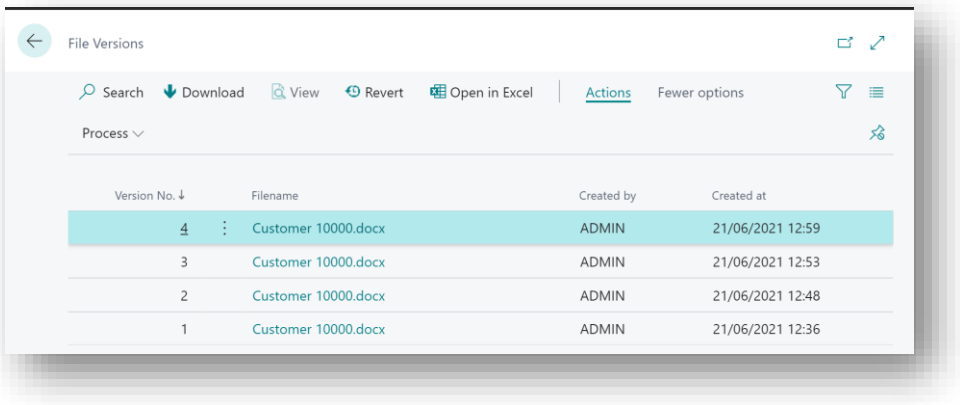

Figure 9-30

9.7.6 Logs

All Check In/Check Out/Send Notification Reminder information is logged. You can view the version control log information by selecting **Dropped Files> Version> Logs** *(Figure 9-31)*.

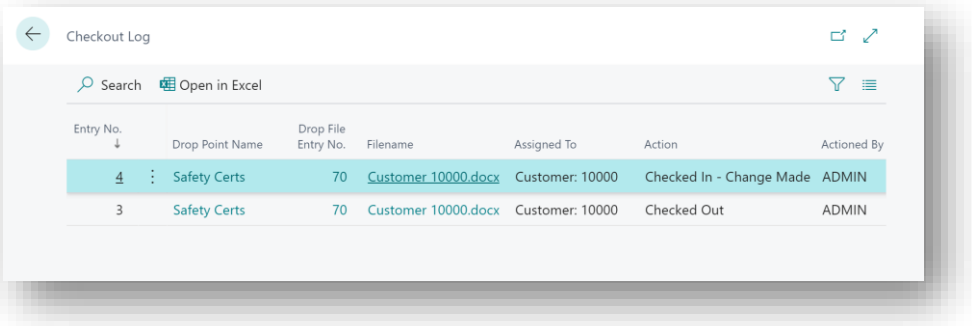

Figure 9-31

9.8 Working with the Dropped Files - DocuSign

Again, using the pre-configured **SD LinkBox Customer Demo** page as an example, there are several actions that can be chosen from the **Dropped Files** FactBox *(Figure 9-32)*.

Where Permissions have been specified for a particular Drop Point Card, you must be granted the necessary **Permissions** in the relevant **Drop Point Card** to upload, view, edit, or delete files.

Please see the section below on **Using DocuSign with SD LinkBox**.

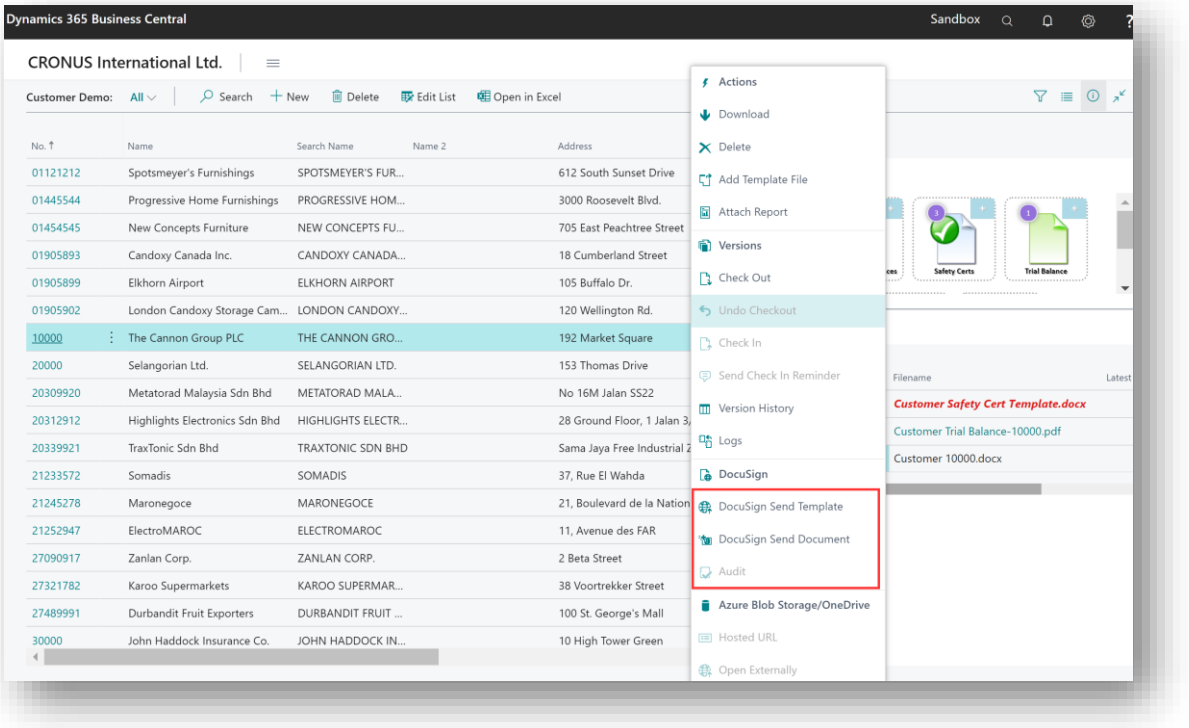

Figure 9-32

9.8.1 DocuSign Send Template

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> DocuSign > DocuSign Send Template** *(Figure 9-32)*. This sends the Template file that you have created in DocuSign to a recipient via DocuSign.

When the file has a DocuSign Envelope, the stye of the record changes in the **Dropped Files** FactBox.

9.8.2 DocuSign Send Document

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> DocuSign> DocuSign Send Document** *(Figure 9-32)*. This sends the file via DocuSign to a recipient.

When the file has a DocuSign Envelope, the stye of the record changes in the **Dropped Files** FactBox.

9.8.3 Audit

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> DocuSign> Audit** *(Figure 9-32)*. This displays the **DocuSign Envelope Audit** page where you can view the status of the document in DocuSign *(Figure 9-33)*.

Choose the **Update** action to synchronise the status details from DocuSign back to SD LinkBox.

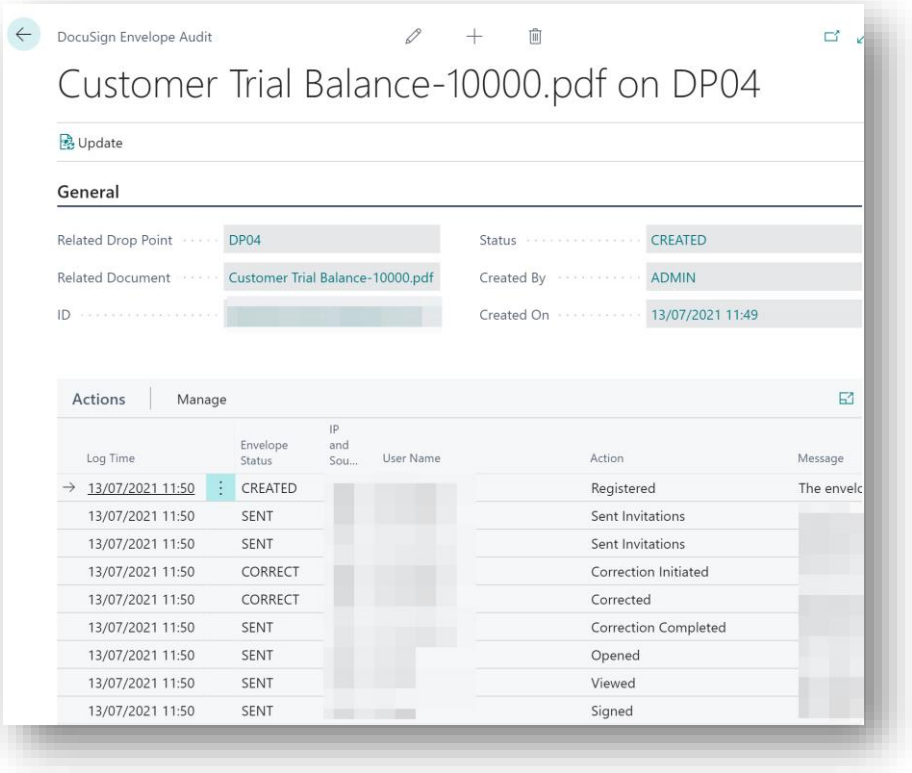

Figure 9-33

9.9 Working with the Dropped Files – Azure Blob Storage and OneDrive

Again, using the pre-configured **SD LinkBox Customer Demo** page as an example, there are several actions that can be chosen from the **Dropped Files** FactBox *(Figure 9-34)*.

Where Permissions have been specified for a particular Drop Point Card, you must be granted the necessary **Permissions** in the relevant **Drop Point Card** to upload, view, edit, or delete files.

Please see the section below on **Using Azure Blob Storage with SD LinkBox**.

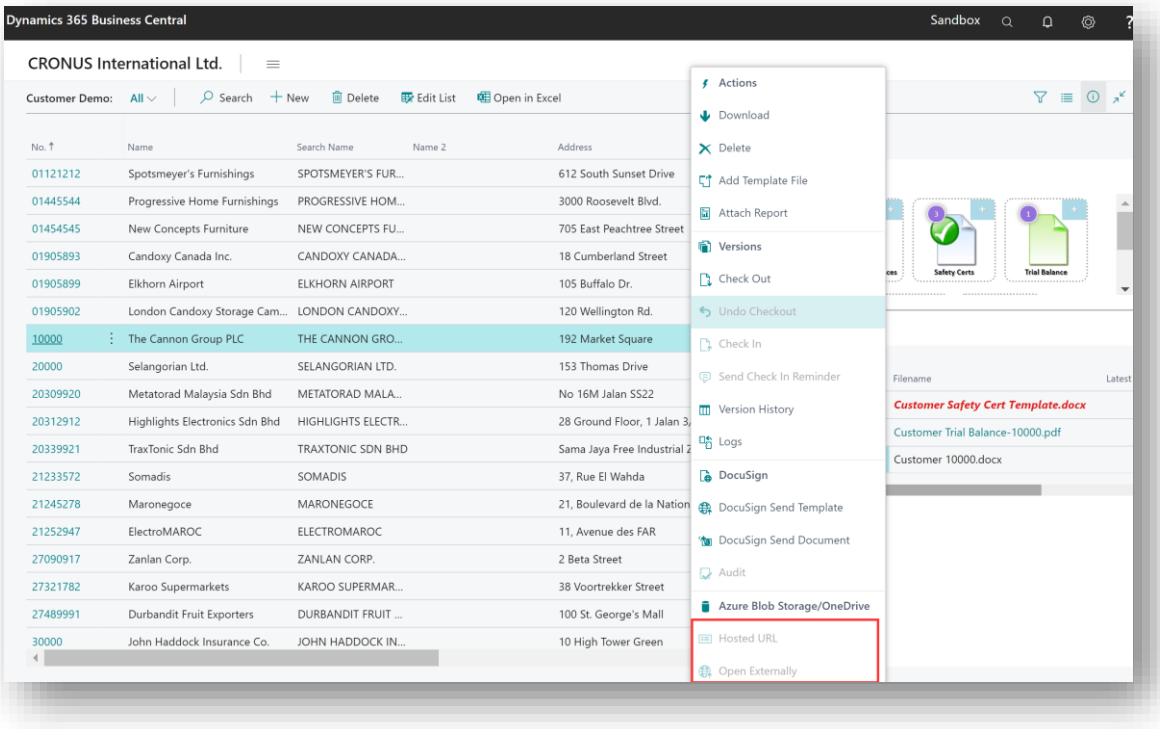

Figure 9-34

9.9.1 Hosted URL

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> Azure Blob Storage/OneDrive> Hosted URL** *(Figure 9-34)*. Choosing this action will show you the URL for the file.

9.9.2 Open Externally

Highlight the chosen file in the **Dropped Files** FactBox and select **Dropped Files> Azure Blob Storage/OneDrive> Open Externally** *(Figure 9-34)*. Choosing this action will open the file in the browser.

10 Using Azure Blob Storage with SD LinkBox

The purpose of this section is not to describe in detail how to create storage accounts on your Azure Portal. Knowledge of creating storage accounts on Azure Portal is assumed.

1. To use Azure Blob Storage with SD LinkBox, you need to create a storage account on your Azure Portal.

2. Create a storage account on your Azure Portal. Set the Default access tier to Hot. **Blob public access should only be enabled if you want to provide a URL to allow users outside the company to access the file**.

3. You will need the **Storage Account Name** and the **Shared Key** from your Storage Account.

4. Insert the **Storage Account Name** and the **Shared Key** to the Drop Point Card.

5. When enabling the Drop Point with Azure Storage, a new container is created in your Azure Storage Account.

6. When testing, you can view the files you drop to the Azure Blob Storage Drop Points using Microsoft Azure Storage Explorer.

Note: Azure Blob Storage does not support multiple Dynamics 365 Business Central companies on the same storage account. Issues can be raised when multiple companies have the same Drop Point names. Each company should have their own storage account to avoid conflict.

11 Using OneDrive with SD LinkBox

The purpose of this section is not to describe in detail how to create an App on your Azure Portal for use with OneDrive. Knowledge of creating Apps on Azure Portal is assumed.

1. To use OneDrive with SD LinkBox, you must register an App on you Azure Portal - http://www.portal.azure.com. Select **Azure Portal> App Registrations> New Registration**.

2. You are registering this App to generate a token that will allow SD LinkBox to communicate with your OneDrive account via the OneDrive API.

3. Your App requires the API permissions below *(Figure 11-1)*. An administrator in your organisation with sufficient privileges will need to set these up.

API / Permissions name	Type	Description	Admin consent req...	Statu
Microsoft Graph (5)				
Directory.Read.All	Application	Read directory data	Yes	
Files.ReadWrite.All	Application	Read and write files in all site collections	Yes	
Notes.ReadWrite.All	Application	Read and write all OneNote notebooks	Yes	
User.Read	Delegated	Sign in and read user profile	No	
User.Read.All	Application	Read all users' full profiles	Yes	

Figure 11-1

4. Select **Certificates & Secrets** and create a **Client Secret** for the App in Certificates & Secrets.

5. The **Directory (Tenant) ID**, **Application (Client) ID** and the **Client Secret** need to be added to the **OneDrive Configuration** FastTab in the **SD LinkBox Setup** card.

6. When dragging and dropping files, SD LinkBox creates a folder on your SharePoint shared folder called LinkBox. Each company in your Microsoft Dynamics 365 Business Central database will have a separate folder. Under the company folder there will be another folder with the Drop Point Code.

12 Using Dropbox with SD LinkBox

The purpose of this section is not to describe in detail how to create an App on Dropbox. Knowledge of creating Apps on Dropbox is assumed.

1. To use Dropbox with SD LinkBox, you need to have an existing Dropbox account. If you do not have a Dropbox account create one on https://www.dropbox.com

2. Log in to you Dropbox account and go to the developer's section on the Dropbox website https://www.dropbox.com/developers

3. Choose **App Console** *(Figure 12-1)*.

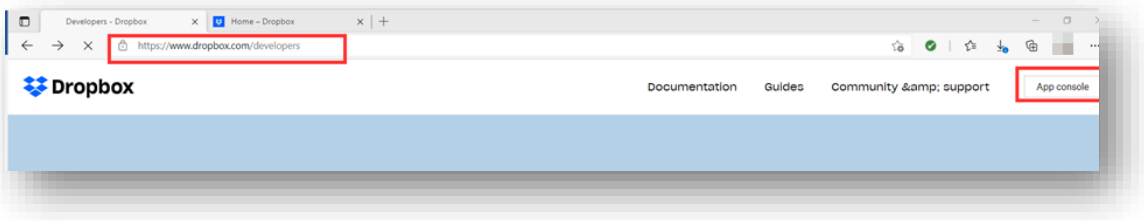

Figure 12-1

4. Then choose **Create App** *(Figure 12-2)*.

Figure 12-2

5. Choose **Full Dropbox** *(Figure 12-3)*.

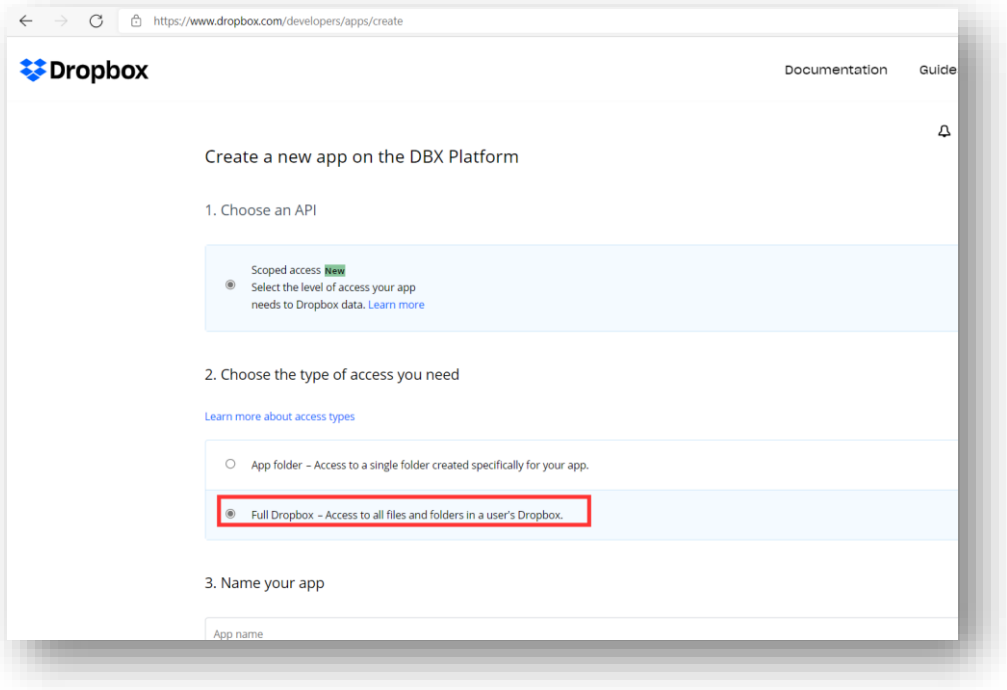

Figure 12-3

6. You can call this App anything you like. You are creating this App to generate a token that will allow SD LinkBox to communicate with your Dropbox account via the Dropbox API.

7. Give permissions on your App for account_info.read, files.metadata.write, files.metadata.read, files.content.write, files.content.read *(Figure 12-4)*. Remember to choose to **Submit** your permission changes.

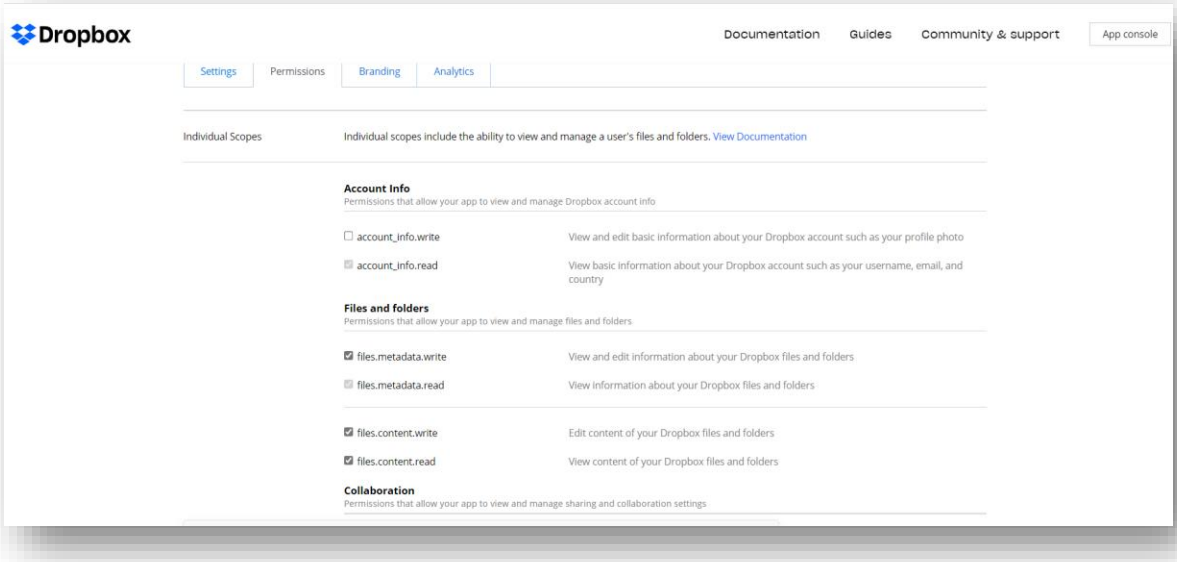

Figure 12-4

8. In the Settings tab, set the **Access token expiration** to **No expiration**. Then choose to **Generate** the access token *(Figure 12-5)*.

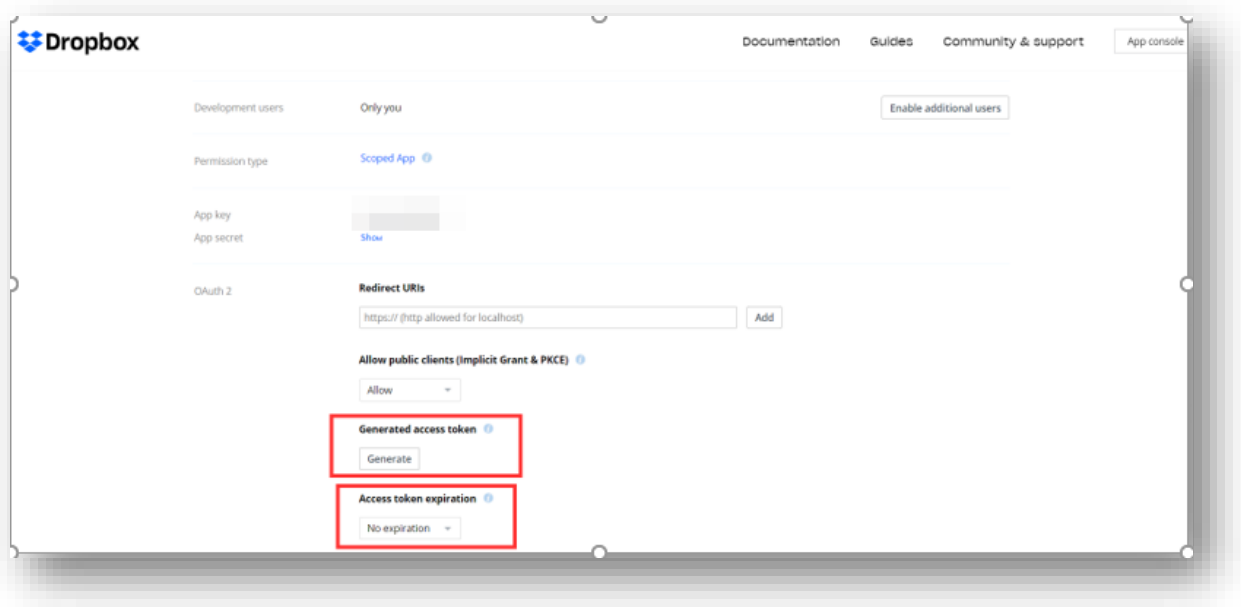

Figure 12-5

9. Copy this token and insert the token into the **Dropbox Access Token** on the **SD LinkBox Setup** card. **Keep this token somewhere safe because it will not be visible on the Dropbox website after creation**.

10. Navigate to www.dropbox.com/home to see the files as you drop them into the Dropped Files FactBox in SD LinkBox.

13 Using DocuSign with SD LinkBox

The purpose of this section is not to describe in detail how to setup a DocuSign account and crate an Integrator Key. Knowledge of setting up DocuSign Accounts on DocuSign is assumed.

1. To use DocuSign with SD LinkBox, you will need to create a DocuSign sandbox in the DocuSign Developer website on https://developers.docusign.com.

2. From there chose **Go To Sandbox.** Create a Login/Username and Password.

3. You need to follow the instructions in the developer portal to create an **Integrator Key**.

4. **Copy the Integrator Key and keep it somewhere safe.**

5. In the **SD LinkBox Setup** card enter the following values

   DocuSign Test URL = https://demo.docusign.net/restapi

   DocuSign Live URL = https://eu.docusign.net/restapi/

   DocuSign Client ID = this is the Username/email address that you signed up with in the Developer portal

   DocuSign Password = this is the password you signed up with in the Developer portal

   Key = this is the integrator key that you created in the Developer portal

6. Use the **Test Service** action on the **SD LinkBox Setup** card to test the connection details.

7. In the **SD LinkBox Setup** card, select the **DocuSign** menu group and choose **Templates.**

8. From the **DocuSign Templates** page, choose the **Get Templates from DocuSign** action to download the templates that you have set up on DocuSign.

9. Navigate to the **Drop Point Card** that you want to use with DocuSign.

10. In the **DocuSign Options** FastTab, enter the **DocuSign Template ID** from the list.

14 API Pages in SD LinkBox

Functionality exists in SD LinkBox to drop files to a Drop Point via JSON API. The API can be called from an external source with a record type and record ID to allow a write of data into the specified SD LinkBox Drop Point.

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