



BEYOND CLOUDCONNECTOR

User Guide



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About BEYOND CloudConnector

About this extension

The CloudConnector is a Microsoft Dynamics 365 Business Central extension for connecting Sharepoint, Azure Files and Azure BLOB Storage. This extension allows you to store and link additional files, chaotically or structured, directly from Business Central to your own Microsoft Cloud, so that the corresponding files can be accessed quickly and easily from just one application. Depending on the connection, stored files in the Cloud can be previewed or downloaded directly in the web client. It is developed by:

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Storage Locations

The following storage options are included in this extension:

- **Azure Blob Storage**

"Azure Blob storage is Microsoft's object storage solution for the cloud. Blob storage is optimized for storing massive amounts of unstructured data. Unstructured data is data that doesn't adhere to a particular data model or definition, such as text or binary data."

You can get more information on the official site of Microsoft:

[What is Azure Blob Storage? | Microsoft Docs](#)

- **Azure Files**

"Azure Files offers fully managed file shares in the cloud that are accessible via the industry standard Server Message Block (SMB) protocol, Network File System (NFS) protocol, and Azure Files REST API. Azure file shares can be mounted concurrently by cloud or on-premises deployments. SMB Azure file shares are accessible from Windows, Linux, and macOS clients. NFS Azure file shares are accessible from Linux or macOS clients. Additionally, SMB Azure file shares can be cached on Windows servers with Azure File Sync for fast access near where the data is being used."

You can get more information on the official site of Microsoft:

[What is Azure Files? | Microsoft Docs](#)

- **Sharepoint**

"Organizations use Microsoft SharePoint to create websites. You can use it as a secure place to store, organize, share, and access information from any device. All you need is a web browser, such as Microsoft Edge, Internet Explorer, Chrome, or Firefox."

You can get more information on the official site of Microsoft:

[Was ist SharePoint? - Office-Support \(microsoft.com\)](#)

With these 3 connection options, files can be conveniently stored in a separate cloud storage at your own discretion. On the one hand, this has the advantage that the actual database does not increase unnecessarily in size and, on the other hand, that the files have a central storage location and can be accessed immediately from anywhere with all devices. If multiple cloud services are available, it is up to you to assign the corresponding storage to a specific entity, so that in the end the service you prioritize can be used. All this can be defined and set up in Business Central.

Version	Date	Author	Comments
1.0	01.07.2021	Sascha Fischer	Initial Version of the documentation
1.1	18.10.2021	Sascha Fischer	Rework
1.2	28.02.2022	Jannic Weidel	Digitalization of documentation
1.3	29.03.2022	Jannic Weidel	Added descriptions for screenshots
1.4	20.05.2022	Jannic Weidel	Described copy function for users
2.0	10.10.2022	Jannic Weidel	Documentation of Beyond CloudConnector V2.0
2.1	27.03.2023	Jannic Weidel	Rework of chapters regarding licensing
File Access		public	

Click here to download the latest documentation: [BEYOND CloudConnector Documentation](#).

Important Notes

Moving or deleting data in the cloud storage must be prevented under all circumstances, as there is a link to Business Central and corresponding links become irreparable and thus unusable. Administrators have the option to delete files that are no longer linked from the data sets. This is the case, for example, if a file has been removed from the cloud storage but is still linked in Business Central.

The **Cloud File Search** function becomes slower with each additional search criterion, since each term must again search the data sets including all metadata and temporarily store the partial result in the database.

Set Up Sharepoint as Cloud Storage

This chapter describes how to connect your Business Central (using BeyondCloudConnector) to Sharepoint. Connecting Sharepoint allows you to directly access and edit files stored in the cloud without leaving Business Central.

NOTE

Adminstator Privileges required in Microsoft Azure

The following descriptions require administrator privileges in Microsoft Azure. To set up the connection, you must have permission to create storage accounts, regster apps, add API permissions and create secret keys. If you need help with setup or have any questions in this regard, please feel free to contact us at info@beyondit.gbmh.

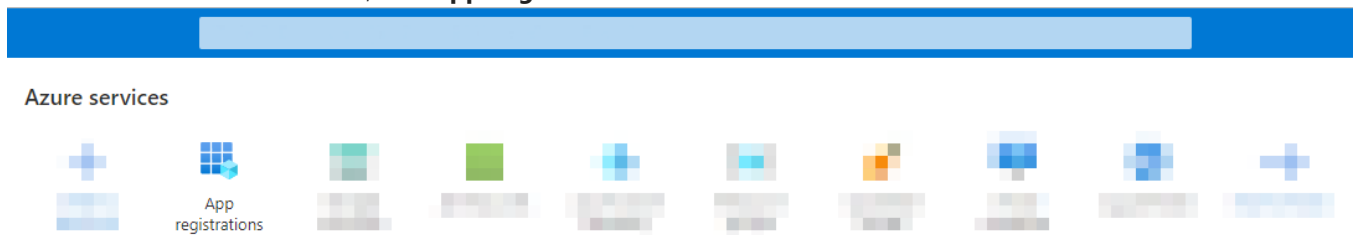
Follow the steps below to connect Sharepoint in Business Central:

- [Register application in Microsoft Azure](#)
- [Add API permissions](#)
- [Prepare access data](#)
 - [Copy Application \(Client\) ID](#)
 - [Generate and copy secret](#)
 - [Copy Authorization URL](#)
 - [Create and copy Redirect URL](#)
 - [Copy Access Token URL](#)
- [Connect BeyondCloudConnector with Sharepoint in Business Central](#)

Register application in Microsoft Azure

This section describes how to register the application (BeyondCloudConnector) in Microsoft Azure. To do this, proceed as follows:

1. Open the website <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click **App Registrations**.



3. The **App Registrations** page is displayed. Click **New Registration** in the menu bar.

Microsoft Azure

Home > App registrations >

Register an application

* Name

BEYOND CloudConnector

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only

☐

☐

☐

Register

4. Enter a suitable name for the new application under **Name**. We recommend using the name **BEYOND CloudConnector**.
5. Under **Supported Account Types**, select the **Accounts in this organizational directory only** option.
6. To complete the application registration, click **Register**.

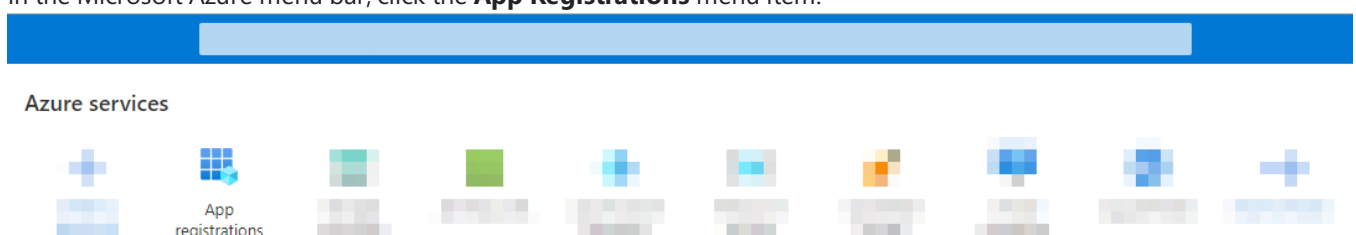
You have registered a new application in Microsoft Azure. You need to give this registered application (**BEYOND CloudConnector**) the appropriate API permissions to connect to Business Central, Microsoft Graph and Sharepoint.

Add API permissions

This section describes how to configure the API permissions required for data exchange (Read, Write and Manage). You need to configure permissions for three program interfaces (APIs). The interfaces used are Sharepoint, Dynamics 365 Business Central, and Microsoft Graph.

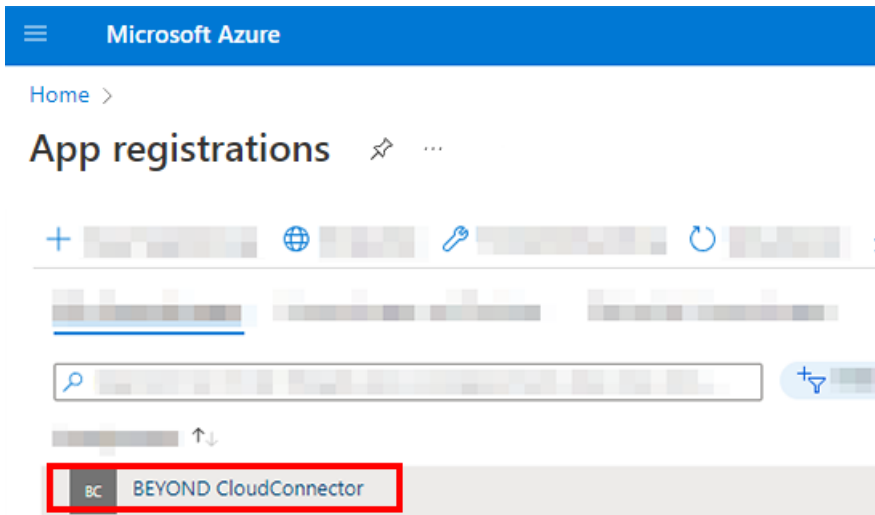
To add the API permissions, do the following:

1. If you have not yet opened the Microsoft Azure web page, click on the link below and log in:
<http://www.portal.azure.com/>.
2. In the Microsoft Azure menu bar, click the **App Registrations** menu item.

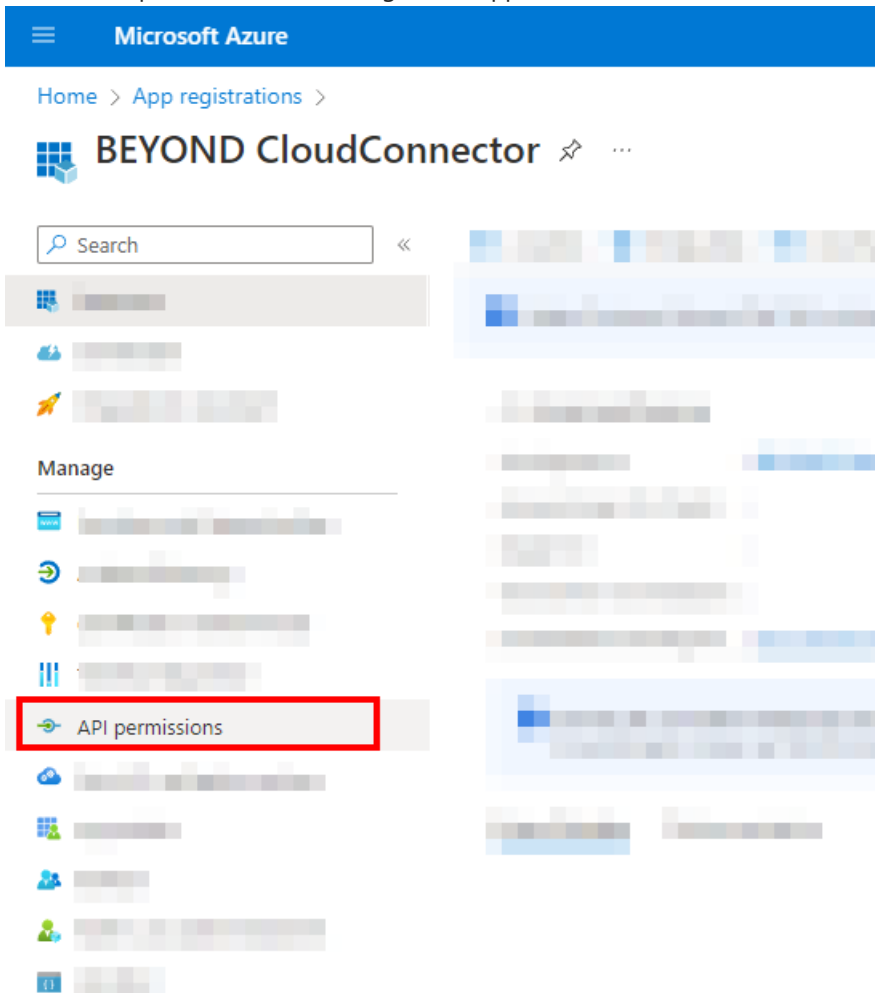


3. The **App Registrations** page is displayed.

4. In the **App Registrations** table that is displayed, click the application that you created in the [Register application in Microsoft Azure](#) section.



5. The corresponding app registration page is displayed.
6. To view the permissions for the registered app, click **API Permissions** in the menu.



7. To add the permission for **Dynamics 365 Business Central**, click the **Add a Permission** option under the **Configured Permissions** section.

Microsoft Azure

Home > App registrations > BEYOND CloudConnector

BEYOND CloudConnector | API permissions

Search

Manage

API permissions

Configured permissions

+ Add a permission

API / Permissions name	Type	Description	Admin consent requ...
Microsoft Graph (1)			
User.Read	Delegated	Sign in and read user profile	No

8. The **Request API Permissions** window is displayed.

Request API permissions

Select an API

Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs

Grid of API permission options:

- Microsoft Dynamics 365 Business Central
- Microsoft Dynamics 365 Finance
- Microsoft Dynamics 365 Human Resources
- Microsoft Dynamics 365 Marketing
- Microsoft Dynamics 365 Project Services
- Microsoft Dynamics 365 Sales
- Microsoft Dynamics 365 Supply Chain Management
- Microsoft Dynamics 365 Customer Service
- Microsoft Dynamics 365 Commerce
- Microsoft Dynamics 365 Field Service
- Microsoft Dynamics 365 Integration
- Microsoft Dynamics 365 Operations
- Microsoft Dynamics 365 Retail
- Microsoft Dynamics 365 Service
- Microsoft Dynamics 365 Talent
- Microsoft Dynamics 365 Unpackaged
- Microsoft Dynamics 365 Virtual Agent
- Microsoft Dynamics 365 Webhooks
- Microsoft Dynamics 365 Workflow
- Microsoft Dynamics 365 XRM
- Microsoft Dynamics 365 YAM
- Microsoft Dynamics 365 ZAM
- Microsoft Dynamics 365 ZRM
- Microsoft Dynamics 365 ZSM
- Microsoft Dynamics 365 ZTM
- Microsoft Dynamics 365 ZUM
- Microsoft Dynamics 365 ZVM
- Microsoft Dynamics 365 ZWM
- Microsoft Dynamics 365 ZYM
- Microsoft Dynamics 365 ZYU
- Microsoft Dynamics 365 ZYV
- Microsoft Dynamics 365 ZYW
- Microsoft Dynamics 365 ZYX
- Microsoft Dynamics 365 ZYU
- Microsoft Dynamics 365 ZYV
- Microsoft Dynamics 365 ZYW
- Microsoft Dynamics 365 ZYX

Dynamics 365 Business Central
Programmatic access to data and functionality in Dynamics 365 Business Central

9. Select **Dynamics 365 Business Central** from the available API permission options.

10. Choose the permission type **Delegated permissions**.
11. Select the **Financials.ReadWrite.All** checkbox.

Request API permissions



[← All APIs](#)



Dynamics 365 Business Central

<https://dynamics.microsoft.com/business-central/overview/> [Docs](#) [↗](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Select permissions

[expand all](#)

Permission

Admin consent required

Other permissions



user_impersonation ⓘ

Access as the signed-in user

No

Financials (1)



Financials.ReadWrite.All ⓘ

Access Dynamics 365 Business Central as the signed-in user

No

Add permissions

Discard

12. Click **Add Permissions**.
13. You have granted permission for Dynamics 365 Business Central. This is displayed under the **Configured Permissions** section in your app registry.
14. To add other required permissions (**Sharepoint**), click **Add a Permission** in the **Configured Permissions** area.

Microsoft Azure

Home > App registrations > BEYOND CloudConnector

BEYOND CloudConnector | API permissions

Search

Manage

API permissions

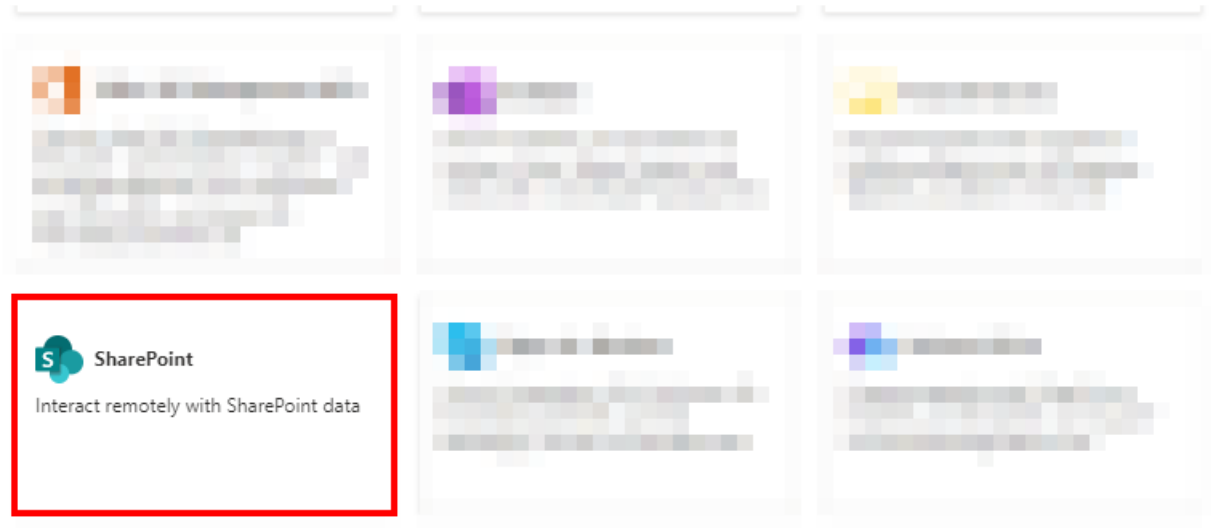
Configured permissions

[+ Add a permission](#)

API / Permissions name	Type	Description	Admin consent requ...
Dynamics 365 Business Central (1)			
Financials.ReadWrite.All	Delegated	Access Dynamics 365 Business Central as the signed-in user	No
Microsoft Graph (1)			
User.Read	Delegated	Sign in and read user profile	No

15. Click on the **SharePoint**.

Request API permissions



16. Choose the permission type **Delegated permissions**.

17. Select the **AllSites.Manage** checkbox.

Request API permissions



[← All APIs](#)



SharePoint

<https://microsoft.sharepoint-df.com/> [Docs](#) [↗](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Select permissions

[expand all](#)

Permission		Admin consent required
▼ AllSites (1)		
<input type="checkbox"/>		
<input checked="" type="checkbox"/>	AllSites.Manage ⓘ Read and write items and lists in all site collections	No
<input type="checkbox"/>		
<input type="checkbox"/>		
>		

Add permissions

Discard

18. Click **Add Permissions**.

19. You have granted permission for Sharepoint. Dynamics 365 Business Central and Sharepoint permissions are displayed under the **Configured Permissions** section in your app registration.

20. To add the other required permissions (**Microsoft Graph**), click **Add a Permission** in the **Configured Permissions** area.

Microsoft Azure

Home > App registrations > BEYOND CloudConnector

BEYOND CloudConnector | API permissions

Search

Manage

API permissions

Configured permissions

+ Add a permission

API / Permissions name	Type	Description	Admin consent requ...
▼ Dynamics 365 Business Central (1)			
Financials.ReadWrite.All	Delegated	Access Dynamics 365 Business Central as the signed-in user	No
▼ Microsoft Graph (1)			
User.Read	Delegated	Sign in and read user profile	No
▼ SharePoint (1)			
AllSites.Manage	Delegated	Read and write items and lists in all site collections	No


21. Click on the API **Microsoft Graph**.

Request API permissions

Select an API

Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs



Microsoft Graph

Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

22. Choose the permission type **Delegated permissions**.

23. Select the **Files.ReadWrite.All** checkbox under the **Files** API Permissions.

Request API permissions



> ExternalItem

> Family

✓ Files (1)

<input type="checkbox"/>	Files.Read ⓘ Read user files	No
<input type="checkbox"/>	Files.Read.All ⓘ Read all files that user can access	No
<input type="checkbox"/>	Files.Read.Selected ⓘ Read files that the user selects (preview)	No
<input type="checkbox"/>	Files.ReadWrite ⓘ Have full access to user files	No
<input checked="" type="checkbox"/>	Files.ReadWrite.All ⓘ Have full access to all files user can access	No
<input type="checkbox"/>	Files.ReadWrite.AppFolder ⓘ Have full access to the application's folder (preview)	No
<input type="checkbox"/>	Files.ReadWrite.Selected ⓘ Read and write files that the user selects (preview)	No

> Financials

24. In addition to the **Files.ReadWrite.All** permission, scroll down to the **Sites** permission and select the checkbox for **Sites.Read.All**.

Request API permissions



✓ Sites (1)

<input type="checkbox"/>	Sites.FullControl.All ⓘ Have full control of all site collections	Yes
<input type="checkbox"/>	Sites.Manage.All ⓘ Create, edit, and delete items and lists in all site collections	No
<input checked="" type="checkbox"/>	Sites.Read.All ⓘ Read items in all site collections	No
<input type="checkbox"/>	Sites.ReadWrite.All ⓘ Edit or delete items in all site collections	No

25. Click **Add Permissions**.
26. You have granted API permissions for Microsoft Graph.
Dynamics 365 Business Central, Sharepoint, and Microsoft Graph permissions are displayed under the **Configured Permissions** section in your app registry.



Prepare access data

Please download the file from the link below:

After downloading, open the PDF file and proceed to the following sections:

- Copy Application (Client) ID

1. Open the website for Microsoft Azure <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click the **App Registrations** menu item.

Azure services



3. The **App Registrations** page is displayed.
4. In the **App registrations** table that is displayed, click the application that you created in the [Register application in Microsoft Azure](#) section.
5. Click **Overview** in the menu bar.
6. Move the cursor to the **Application (Client) ID** value. An icon will appear that allows you to copy the value to the clipboard.

Microsoft Azure

Home > App registrations >

BEYOND CloudConnector

Search

Overview

Essentials

Display name : BEYOND CloudConnector

Application (client) ID : **12345678-1234-1234-1234-1234567891011**

Object ID :

Directory (tenant) ID :

Supported account types : My organization only

7. Insert the value in the PDF file under the **Client ID** field.
- ### Generate and copy secret

This subsection describes how to create a new secret key in your Microsoft Azure. The secret key (also called **Client Secret**) is required to secure the connection to Sharepoint and to authenticate yourself.

To generate a secret key, proceed as follows:

1. If you have not yet opened the Microsoft Azure web page, click on the link below and log in:
<http://www.portal.azure.com/>
2. In the Microsoft Azure menu bar, click the **Certificates & Secrets** menu item.

Microsoft Azure

Home > App registrations > BEYOND CloudConnector

BEYOND CloudConnector | Certificates & secrets

Search

Verwalten

Certificates (0) Client secrets (0) Federated credentials (0)

+ New client secret

Description	Expires	Value ⓘ
-------------	---------	---------

3. Select **New client Secret** from the menu bar.
4. Under the **Description** field, enter a name for the key (for example, **BEYOND CloudConnector**).
5. Under the **Expires** field, define the validity period of the key. We recommend that you specify the validity period as 12 months. Please note that a new key must be regenerated after this period/date expires.

Add a client secret ✕

Description

BEYOND CloudConnector

Expires

Recommended: 6 months

Recommended: 6 months

3 months

12 months

18 months

24 months

Custom

Add

Cancel

6. To create the key, click **Add**.
7. The new secret key (client secret) will be added to the **Certificates & Secrets** page.

Microsoft Azure

Home > App registrations > BEYOND Cl

BEYOND CloudConnector | Certificates & secrets

Client secrets (1)

+ New client secret

Description	Expires	Value	Secret ID
BEYOND CloudConnector	4/17/2023	Value of the secret	

8. Move the mouse cursor to the displayed value under the **Value** column. An icon will appear that allows you to copy the value to the clipboard.
9. Copy the value.
10. Insert the value in the PDF file under the **Client Secret** field.

NOTE

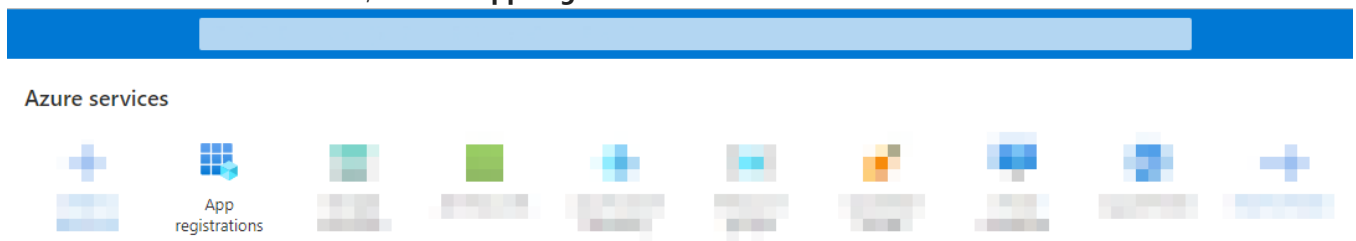
Values of secret keys are displayed only immediately after creation

The displayed value for the secret key is shown only in this session. When the browser window is closed or you log out, the value is made unrecognizable and can no longer be copied. You need the value of the key to connect Sharepoint/Beyond CloudConnector to Microsoft Dynamics 365 Business Central (see section [Connect BeyondCloudConnector with Sharepoint in Business Central](#)).

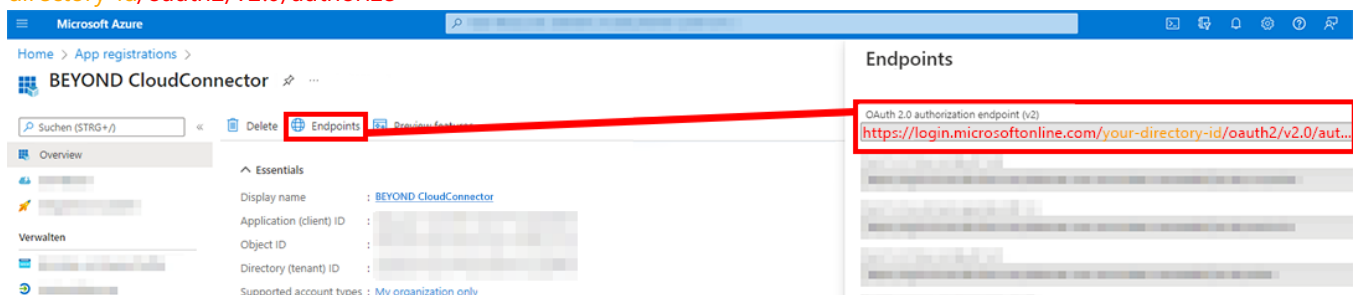
Copy Authorization URL

This subsection describes where to get the **Authorization URL** information for setting up BEYOND CloudConnector in Business Central.

1. Open the website for Microsoft Azure <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click the **App Registrations** menu item.



3. The **App Registrations** page is displayed.
4. In the **App registrations** table that is displayed, click the application that you created in the [Register application in Microsoft Azure](#) section.
5. Click **Overview** in the menu bar.
6. In Microsoft Azure, under the overview for the registered application **BEYOND CloudConnector**, click **Endpoints** in the menu bar. The authorization URL is composed of the following components: <https://login.microsoftonline.com/your-directory-id/oauth2/v2.0/authorize>

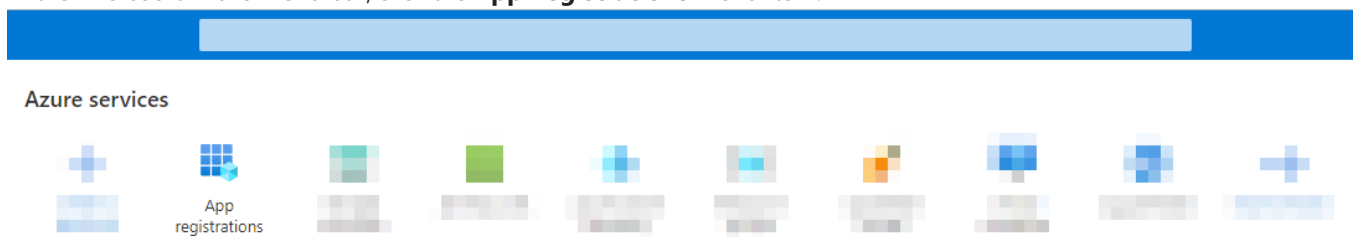


7. From Microsoft Azure, copy the field value for **OAuth 2.0 authorization endpoint (v2)** and paste it into the **Authorization URL** field in the PDF file.

Create and copy Redirect URL

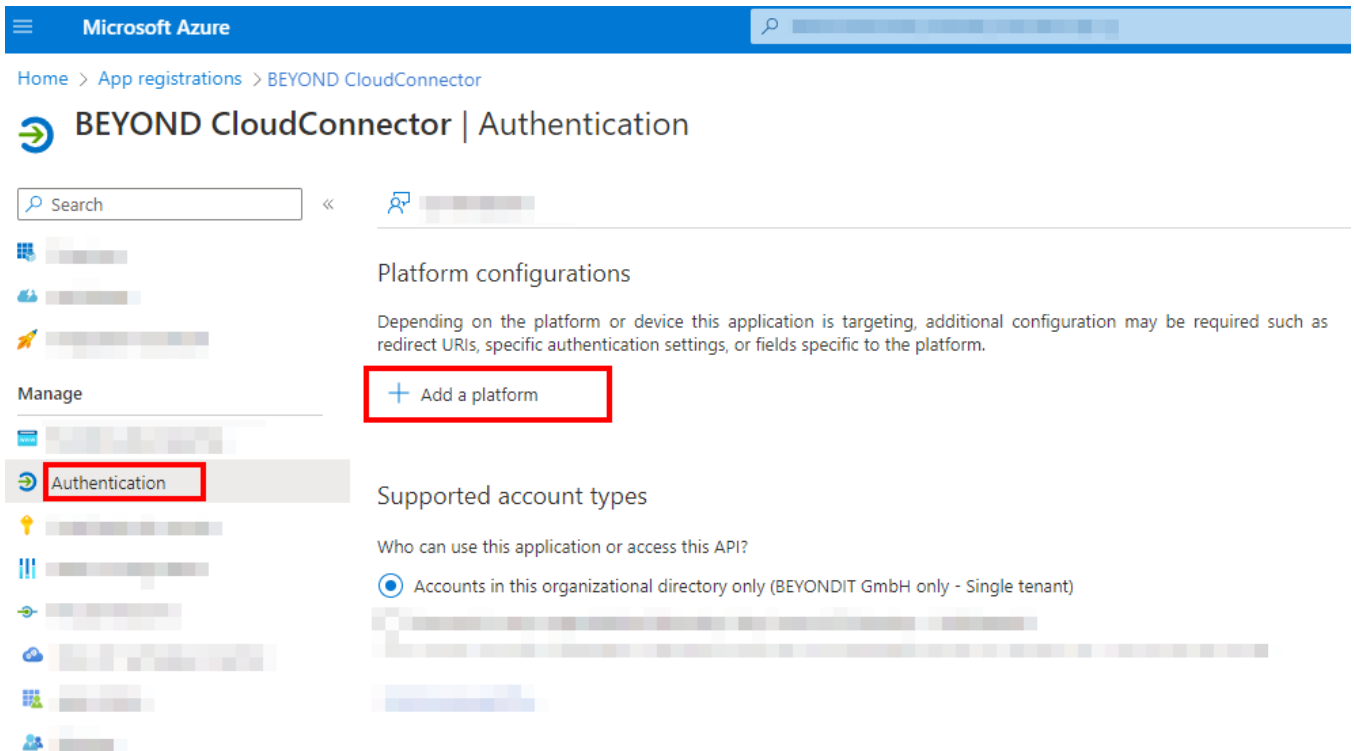
This subsection describes where to get the **Redirect URL** information for BEYOND CloudConnector setup in Business Central.

1. Open the website for Microsoft Azure <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click the **App Registrations** menu item.

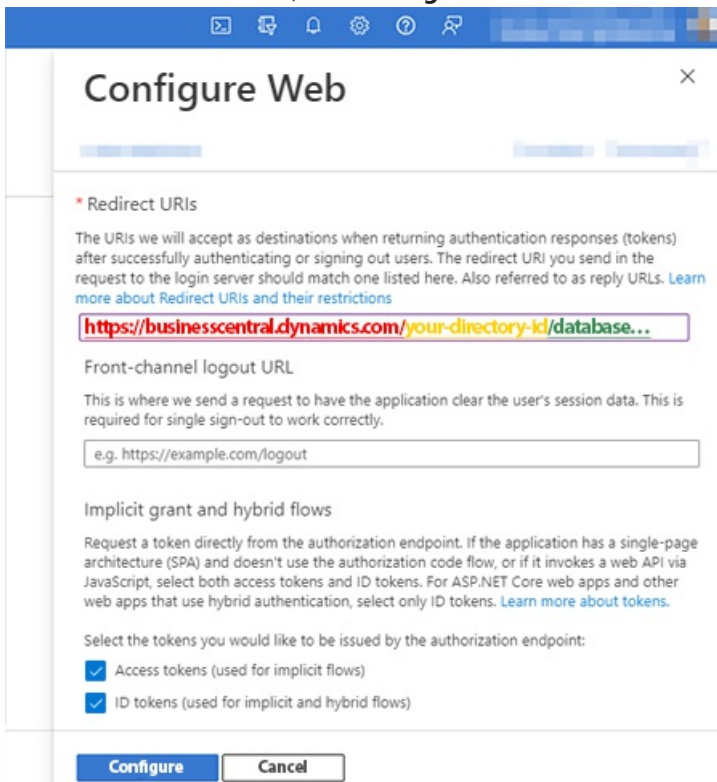


3. The **App Registrations** page is displayed.
4. Klicken Sie in der angezeigten Tabelle **App-Registrierungen** auf die Anwendung, die Sie im Abschnitt [Register application in Microsoft Azure](#) erstellt haben.

- Click **Authentication** in the menu bar.
- Click **Add Platform**.



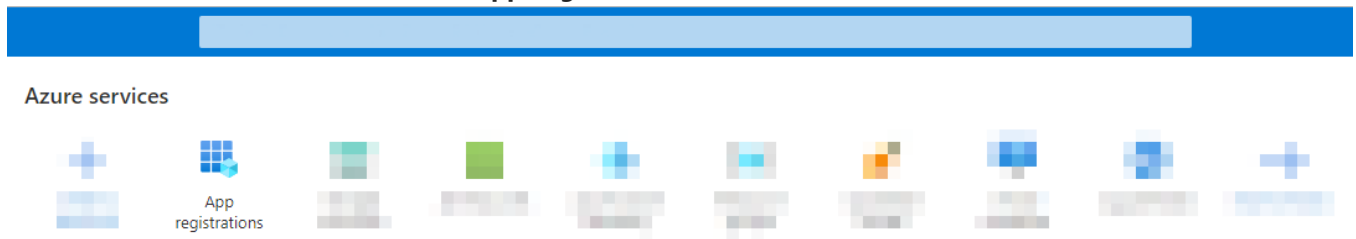
- A window will be displayed. Select **Web** from the options for the platform.
- Paste the following link in the **Redirect URI** field. Replace **your-directory-id** and **database-name** in the link.
<https://businesscentral.dynamics.com/your-directory-id/database-name?page=70838577>.
- Copy the redirect URL into the PDF file under the **Redirect URL** field.
- Select the **Access Tokens** and **ID Tokens** checkboxes.
- To create the redirect URL, click **Configure**.



Copy Access Token URL

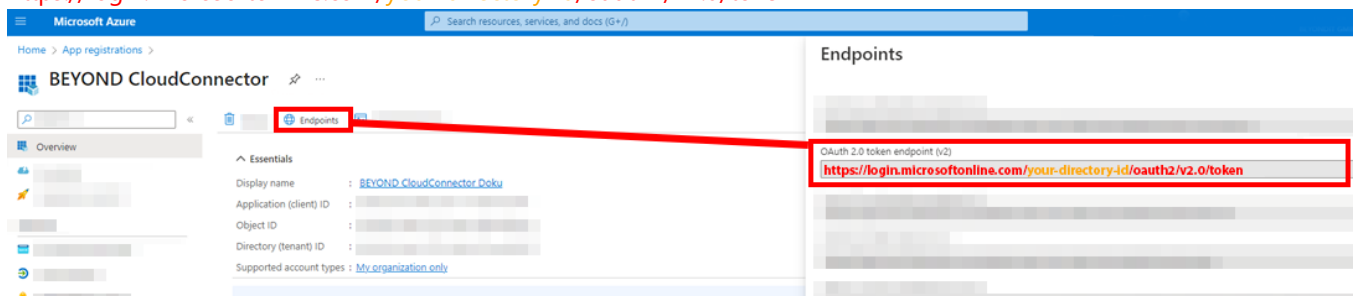
This subsection describes where to get the **Access token URL** information for BEYOND CloudConnector setup in Business Central.

1. Open the website for Microsoft Azure <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click the **App Registrations** menu item.



3. The **App Registrations** page is displayed.
4. In the **App registrations** table that appears, click the application that you created in the [Register application in Microsoft Azure](#) section.
5. Click **Overview** in the menu bar.
6. In Microsoft Azure, under the overview of the registered application **BEYOND CloudConnector**, click **Endpoints** in the menu bar. The access token URL is composed of the following components:

<https://login.microsoftonline.com/your-directory-id/oauth2/v2.0/token>



7. From Microsoft Azure, copy the field value for **OAuth 2.0 token endpoint (v2)** and paste it into the **Access token URL** field in the PDF file.

NOTE


Resource URL

The **Resource URL** is automatically added by the system when creating the cloud application.

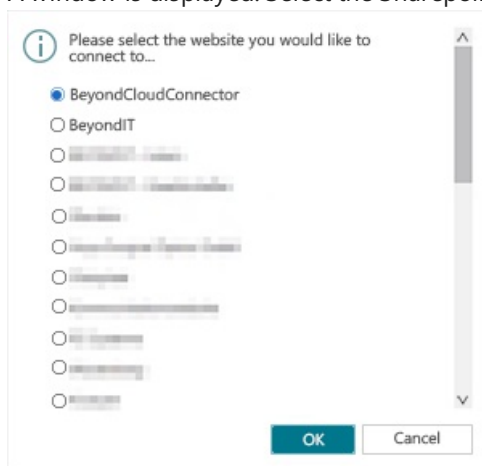
Connect BeyondCloudConnector with Sharepoint in Business Central

This section describes how to connect Sharepoint to Microsoft Business Central using Beyond CloudConnector.

To connect Sharepoint via the BeyondCloudConnector extension in Microsoft Dynamics 365 Business Central, proceed as follows:

1. Open your Business Central and the PDF file with the collected data.
2. From the role center, open the search function (**ALT+Q**) .
3. Search for the **Cloud Applications** page and click the corresponding search result.
4. The **Cloud Applications** page is displayed.
5. To connect Sharepoint to your Business Central, click **New** in the menu bar.
6. The **Cloud Application** page is displayed.

7. In the **Code** field, specify the value **Sharepoint**.
8. The information **Resource URL** is automatically added by the system.
9. In the **Application type** field, select **Sharepoint** from the drop-down menu.
10. In the **Description** field, you can enter a description for the new cloud application.
11. Use the **File Deletion Allowed** slider to control whether files stored in the cloud can be deleted via Business Central.
12. Open the PDF file with the saved data. You have already collected the information for the setup in the [Prepare access data](#) section.
13. Copy the data from the PDF file and paste it on the **Cloud Application** page under the **Sharepoint** tab.
14. When you are done with entering the data, click **Select Drive** from the menu bar.
15. A window is displayed. Select the Sharepoint website (document library in Sharepoint) which you want to connect to.



16. Click **OK**.

You have connected your Sharepoint to Microsoft Dynamics 365 Business Central.

For a complete setup, you still need to define the tables on which you want the dropzones to be displayed for storing files from Business Central in Sharepoint. For more information on how to set up dropzones, see the [Set up dropzone](#) chapter.

You can also set up automatic report archiving. For more information, see the chapter [Set up report archiving](#).

Set Up Azure Files as Cloud Storage

This chapter describes how to connect your Business Central (using BeyondCloudConnector) to Azure Files. Connecting Azure Files allows you to directly access and edit files stored in the cloud without leaving Business Central.

NOTE

Administrator Privileges required in Microsoft Azure

The following descriptions require administrator privileges in Microsoft Azure. To set up the connection, you must have permission to create storage accounts and containers, and to create SAS tokens. If you need help with setup or have any questions in this regard, please feel free to contact us at info@beyondit.gbmh.

Please download the file from the link below:

[Download PDF File](#)

Follow the steps below to connect Azure Files in Business Central:

- [Create Storage Account in Microsoft Azure](#)
- [Generate Shared Access Signatures](#)
- [Connect BeyondCloudConnector with Azure Files in Business Central](#)

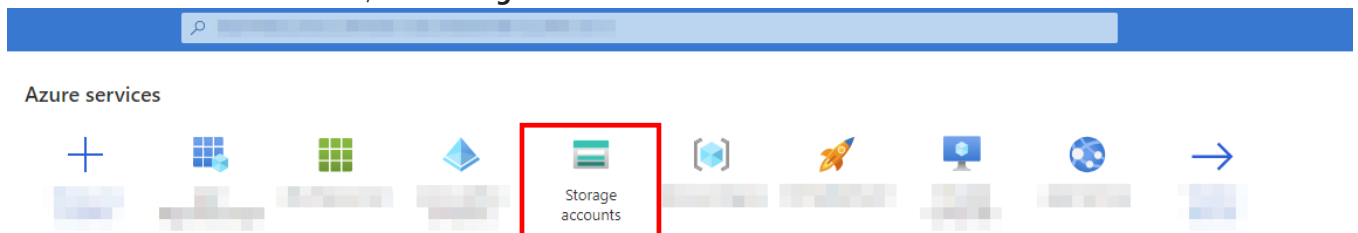
Optional (if you already have files stored in Azure Files):

- [Import Files from Azure Files](#)

Create Storage Account in Microsoft Azure

This section describes how to create a storage account in Microsoft Azure. The storage account provides a unique namespace for your Azure storage data that can be accessed from anywhere in the world using HTTP or HTTPS. Data in your storage account is persistent and highly available, secure, and extremely scalable.

1. Open the website <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click **Storage Accounts**.



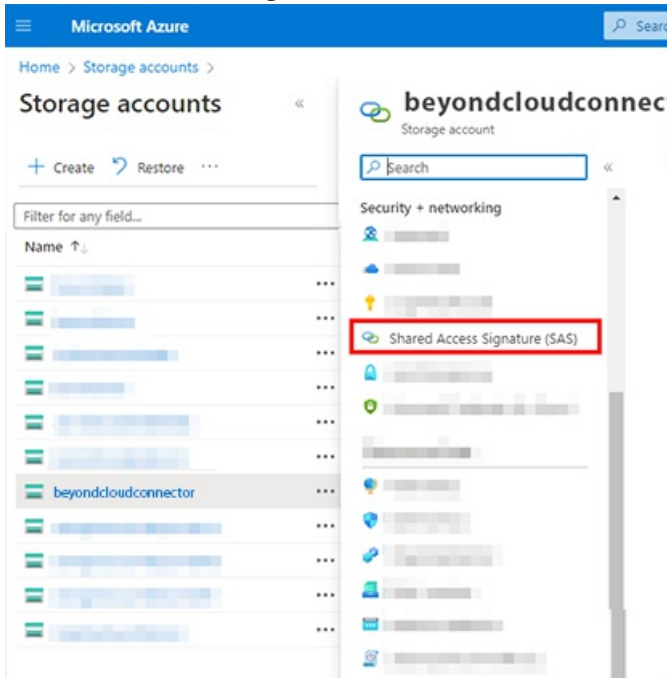
3. Click **Create** in the menu bar.
4. Complete the required information to create a new storage account. We recommend that you name the storage account **beyondcloudconnector**. Since storage account settings depend largely on your organization's policies, we do not provide any values. For more information about storage account settings and how to create a storage account, see the Microsoft Azure Help chapter [Create a storage account](#).
5. For the storage account, click **Endpoints** under the **Settings** menu item.
6. Copy the value for the **File Service** and enter it in the PDF file under the **Account URL** field.
7. Create a file share for the storage account.
8. Enter the name of the created file share in the PDF file under the **Share Name** field.

You have created a new storage account with a container. Two Shared Access Signatures (SAS) are still missing to set up the cloud storage. The SAS are created under the [Generate Shared Access Signatures](#) section.

Generate Shared Access Signatures

This section describes how to create the two Shared Access Signatures (SAS) to set up Azure Files for BEYOND CloudConnector.

1. Open the website <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click **Storage Accounts**.
3. Select the storage account that you created in the [Create Storage Account in Microsoft Azure](#) step.
4. Click **Shared Access Signature** in the menu bar under the **Security + Networking** section.



5. Under the **Allowed Permissions** section, enable all permissions for the SAS.
6. Generate the SAS and enter it in the PDF document under the **SAS Token** field.
7. Then generate another SAS. For this SAS, clear all the check boxes under the **Allowed Services** section except for the **Read** permission.
8. Copy the SAS (read permissions only) string into the PDF file in the **Read only SAS Token** field.

You have created the SAS.

Connect BeyondCloudConnector with Azure Files in Business Central

This section describes how to connect Azure Files via BeyondCloudConnector in Microsoft Business Central.

To connect Azure Files via the BeyondCloudConnector extension in Microsoft Dynamics 365 Business Central, proceed as follows:

1. Open your Business Central and the PDF file with the collected data.
2. From the role center, open the search function (**ALT+Q**) □.
3. Search for **Cloud Applications** and click on the corresponding search result.
4. The **Cloud Applications** page is displayed.
5. To connect Azure Files to your Business Central, click **New** in the menu bar.
6. The **Cloud Application** page is displayed.

← [Edit] [Share] [Add] [Delete] Not saved [Share] [Refresh]

Cloud Application

General

Code * Description

Application Type Azure Files File deletion allowed ☒

Azure Files

Account Url

Share Name

SaS Token

Read Only SaS Token

7. In the **Code** field, specify the value **Azure Files**.
8. In the **Application Type** field, select **Azure Files** from the dropdown menu.
9. In the **Description** field, you can enter a description for the new cloud application.
10. Use the **File Deletion Allowed** slider to control whether files stored in the cloud can be deleted via Business Central.
11. Open the Azure Files setup PDF file that you filled with information in the previous sections and transfer the values to the appropriate fields in Business Central.

You have connected Azure Files to your Business Central. If you already have files stored in Azure Files, you can import them using a JSON file for use with BeyondCloudConnector. For more information, see the [Import Files from Azure Files](#) section.

Import Files from Azure Files

This section describes how to import existing files from Azure Files into Business Central.

This feature is supported for Azure Files only. Note that no cloud storage must be set up yet for importing the files.

To import files from Azure Files into your Business Central, do the following:

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**)
3. Search for **Cloud File Import Entries** page and click the appropriate search result.
4. The **Cloud File Import Entries** page is displayed.

← Cloud File Import Entries ✓ Saved [Bookmark] [Share] [Refresh]

Search Manage Scan Cloud Storage Scan Cloud Files from Database ...

Entry No. ↑	Status	Record Identifier	File Name	File URL
(There is nothing to show in this view)				

5. Click **Scan Cloud Storage** in the menu bar.
6. The **Edit - Scan Cloud Files...** window is displayed.

Options

Welcome to the cloud file import. Please specify the cloud application you want to import from. In order to scan files correctly, you need to add a file named "beyondcloudconnector.json" to the root of the selected cloud storage. This file will be used to assign the files to business central records. When you are ready, click start to create import entries based of the informations from the cloud storage.

[Download Example Json](#)

Cloud Application Code

OK

Cancel

7. To import the files from Microsoft Azure, you need to edit a JSON file (beyondcloudconnector.json). Download the sample file by clicking **Download Example Json**.
8. Open the JSON file in Visual Studio Code. If you don't have Visual Studio Code installed, get the latest version from this link: [Download Visual Studio Code](#).

```
{
  "Customer: 12008": [
    "Invoice.pdf",
    "Shipments\\Shipment.pdf",
    "Images\\ProfilePicture.jpg"
  ],
  "Vendor: 70001": [
    "Invoice.pdf",
    "Shipments\\Shipment.pdf",
    "Images\\ProfilePicture.jpg"
  ]
}
```

9. Press **CTRL+SHIFT+P** to open the command menu of Visual Studio Code and type **Format Document**. Confirm the command with **Enter**.
10. The JSON file is formatted. Complete the mappings. You can see the following from the files and mappings specified in the sample file:
 - The **Invoice.pdf** file is located in the root directory in Azure Files just like the JSON file. The **Invoice.pdf** file is assigned to customer **12008** and vendor **70001**.
 - The file **Shipment.pdf** is stored in the directory **Shipments** and is assigned to customer **12008** and vendor **70001**.
 - The file **ProfilePicture.jpg** is stored in the directory **Images** and is assigned to the customer **12008** and the vendor **70001**.

If you need help importing files from Azure Files or have any questions in this regard, please feel free to contact us at info@beyondit.gbmh.

```
1 {
2   "Customer: 12008": [
3     "Invoice.pdf",
4     "Shipments\\Shipment.pdf",
5     "Images\\ProfilePicture.jpg"
6   ],
7   "Vendor: 70001": [
8     "Invoice.pdf",
9     "Shipments\\Shipment.pdf",
10    "Images\\ProfilePicture.jpg"
11  ]
12 }
```

11. Save the JSON file under the name **beyondcloudconnector.json** in the root directory of the Azure Files storage.
12. In Business Central, under the **Cloud Application Code** drop-down menu, select the appropriate Azure Files cloud application.
13. Click **OK**.
14. The files are imported from Azure Files and the appropriate mappings are made in Business Central.

You have successfully connected Azure Files to Microsoft Dynamics 365 Business Central.

For a complete setup, you still need to define the tables on which you want the dropzones to appear for storing files from

Business Central in Azure Files. For more information about setting up Dropzones, see the [Set Up Dropzone](#) chapter.

You can also set up automatic report archiving. For more information, see the chapter [Set Up Report Archive](#).

Set Up Azure Blob Storage as Cloud Storage

This chapter describes how to connect your Business Central (using BeyondCloudConnector) to Azure Blob Storage. Connecting Azure Blob Storage allows you to directly access and edit files stored in the cloud without leaving Business Central.

i NOTE

Adminstator Privileges required in Microsoft Azure

The following descriptions require administrator privileges in Microsoft Azure. To set up the connection, you must have permission to create storage accounts and containers, and to create SAS tokens. If you need help with setup or have any questions in this regard, please feel free to contact us at info@beyondit.gbmh.

Please download the file from the link below:

DOWNLOAD [Download PDF File](#)

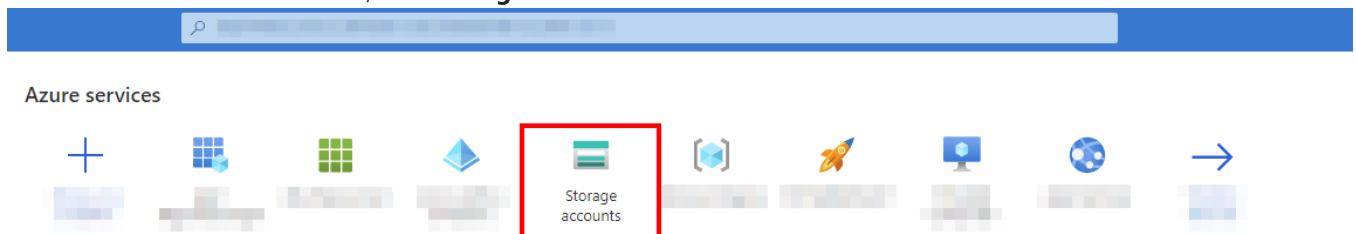
Follow the steps below to connect Azure Blob Storage in Business Central:

- [Create Storage Account in Microsoft Azure](#)
- [Generate Shared Access Signatures](#)
- [Connect BeyondCloudConnector with Azure Blob Storage in Business Central](#)

Create Storage Account in Microsoft Azure

This section describes how to create a storage account in Microsoft Azure. The storage account provides a unique namespace for your Azure storage data that can be accessed from anywhere in the world using HTTP or HTTPS. Data in your storage account is persistent and highly available, secure, and extremely scalable.

1. Open the website <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click **Storage Accounts**.



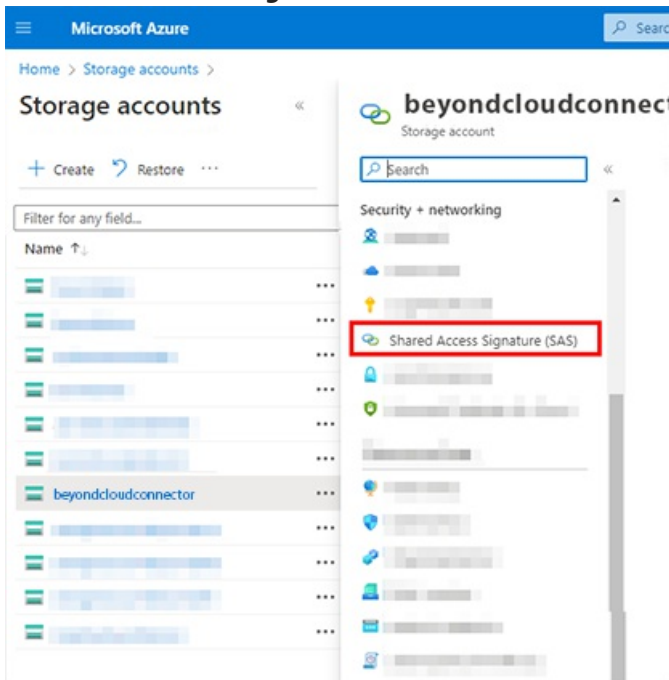
3. Click **Create** in the menu bar.
4. Complete the required information to create a new storage account. We recommend that you name the storage account **beyondcloudconnector**. Since storage account settings depend largely on your organization's policies, we do not provide any values. For more information about storage account settings and how to create a storage account, see the Microsoft Azure Help chapter [Create a storage account](#).
5. For the storage account, click **Endpoints** under the **Settings** menu item.
6. Copy the value for the **File Service** and enter it in the PDF file under the **Account URL** field.
7. Create a container for the storage account.
8. Enter the name of the created container in the PDF file under the **Container** field.

You have created a new storage account with a container. Two Shared Access Signatures (SAS) are still missing to set up the cloud storage. The SAS are created under the [Generate Shared Access Signatures](#) section.

Generate Shared Access Signatures

This section describes how to create the two Shared Access Signatures (SAS) to set up Azure Blob Storage for BEYOND CloudConnector.

1. Open the website <http://www.portal.azure.com/> and log in.
2. In the Microsoft Azure menu bar, click **Storage Accounts**.
3. Select the storage account that you created in the [Create Storage Account in Microsoft Azure](#) step.
4. Click **Shared Access Signature** in the menu bar under the **Security + Networking** section.




5. Under the **Allowed Permissions** section, enable all permissions for the SAS.
6. Generate the SAS and enter it in the PDF document under the **SAS Token** field.
7. Then generate another SAS. For this SAS, clear all the check boxes under the **Allowed Services** section except for the **Read** permission.
8. Copy the SAS (read permissions only) string into the PDF file in the **Read only SAS Token** field.

You have created the SAS.

Connect BeyondCloudConnector with Azure Blob Storage in Business Central

This section describes how to connect Azure Blob Storage via BeyondCloudConnector in Microsoft Business Central.

To connect Azure Blob Storage via the BeyondCloudConnector extension in Microsoft Dynamics 365 Business Central, proceed as follows:

1. Open your Business Central and the PDF file with the collected data.
2. From the role center, open the search function (**ALT+Q**) .
3. Search for **Cloud Applications** and click on the corresponding search result.
4. The **Cloud Applications** page is displayed.
5. To connect Azure Blob Storage to your Business Central, click **New** in the menu bar.
6. The **Cloud Application** page is displayed.



Not saved



Cloud Application

General

Code	*	<input type="text"/>	Description	<input type="text"/>
Application Type		Azure BLOB Storage ▼	File deletion allowed	<input checked="" type="checkbox"/>

Azure BLOB Storage

Account Url	<input type="text"/>
Container	<input type="text"/>
SaS Token	<input type="text"/>
Read Only SaS Token	<input type="text"/>

7. In the **Code** field, specify the value **Azure Blob Storage**.
8. In the **Application Type** field, select **Azure Blob Storage** from the dropdown menu.
9. In the **Description** field, you can enter a description for the new cloud application.
10. Use the **File Deletion Allowed** slider to control whether files stored in the cloud can be deleted via Business Central.
11. Open the Azure Blob Storage setup PDF file that you filled with information in the previous sections and transfer the values to the appropriate fields in Business Central.

You have connected Azure Blob Storage to Microsoft Dynamics 365 Business Central.

For a complete setup, you still need to define the tables on which you want the dropzones to appear for storing files from Business Central in Azure Blob Storage. For more information about setting up Dropzones, see the [Set Up Dropzone](#) chapter.

You can also set up automatic report archiving. For more information, see the chapter [Set Up Report Archive](#).

Set Up Dropzone

This chapter describes how to set up a Dropzone in Business Central. The Dropzone allows you to upload files to your cloud storage ([Sharepoint](#), [Azure Files](#), or [Azure Blob Storage](#)) and as well as access those files in Business Central.

The following description explains how to set up a Dropzone for items.

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**)
3. Search for **Cloud Storage** and click on the appropriate search result. The **Cloud Storage** page is displayed.
4. To set up a new Dropzone, click **New** in the menu bar.
5. From the **Type** dropdown list, select **Dropzone**.

The screenshot shows the 'Cloud Storage' page in Business Central. At the top, there's a navigation bar with a back arrow, 'Cloud Storage', a pencil icon, a share icon, a plus icon, a trash icon, and a 'Not saved' status. Below this is the title 'Dropzone • 0'. The main content area has a menu bar with 'Activate' (checked), 'Deactivate' (X), 'Cloud Application' (globe icon), and 'Cloud Files' (document icon). The 'General' tab is active, showing a form with the following fields: 'Type' (dropdown set to 'Dropzone'), 'Table ID' (dropdown set to '0'), 'Table Name' (text field, currently empty), 'Active' (toggle switch, currently on), 'Cloud Application Code' (dropdown), 'Initialized' (toggle switch, currently off), 'Foldername' (text field), and 'Use Categories' (toggle switch, currently off). Below the form is a 'Metadata' tab and a 'Manage' button. At the bottom, there's a table with columns 'Type', 'No.', and 'Name'. The table has one row with a right arrow icon in the 'Type' column, 'Code' in the 'No.' column, and an empty 'Name' column.

6. From the **Table ID** dropdown list, select the table for which you want to add a Dropzone. Note that the Dropzone can only be added for tables that are stored in this dropdown list. To set up a Dropzone for items, enter the ID **27** in this field.
7. After specifying the table ID, the **Table Name** field is automatically filled by the system.
8. In the **Cloud Application Code** field, specify the cloud application you want to use to store the data.
9. In the **Folder Name** field, specify a name for the folders to be created in the cloud storage hierarchy to store the uploaded data. This field defaults to the name for the table ID.
10. **Optional:** Activate the **Use Categories** slider to save files into freely definable categories (for example into images, videos, e-mails and PDF documents). The categories can also be used as search criteria when searching for files. For more information about categories, see the section [Set Up Categories For Dropzone](#).
11. Under the **Metadata** tab, you can define additional information that is stored when files are uploaded to the cloud storage via the Dropzone. The metadata can be defined as a search criterion when searching for files in the cloud (see chapter [Search Files](#)).
12. Click **Activate** in the menu bar to add the Dropzone to the table. The **Active** slider will be grayed out, indicating that this Dropzone is set up correctly.

You have set up the Dropzone. The Dropzone is displayed on the set tables in the FactBox (**ALT+F2**).



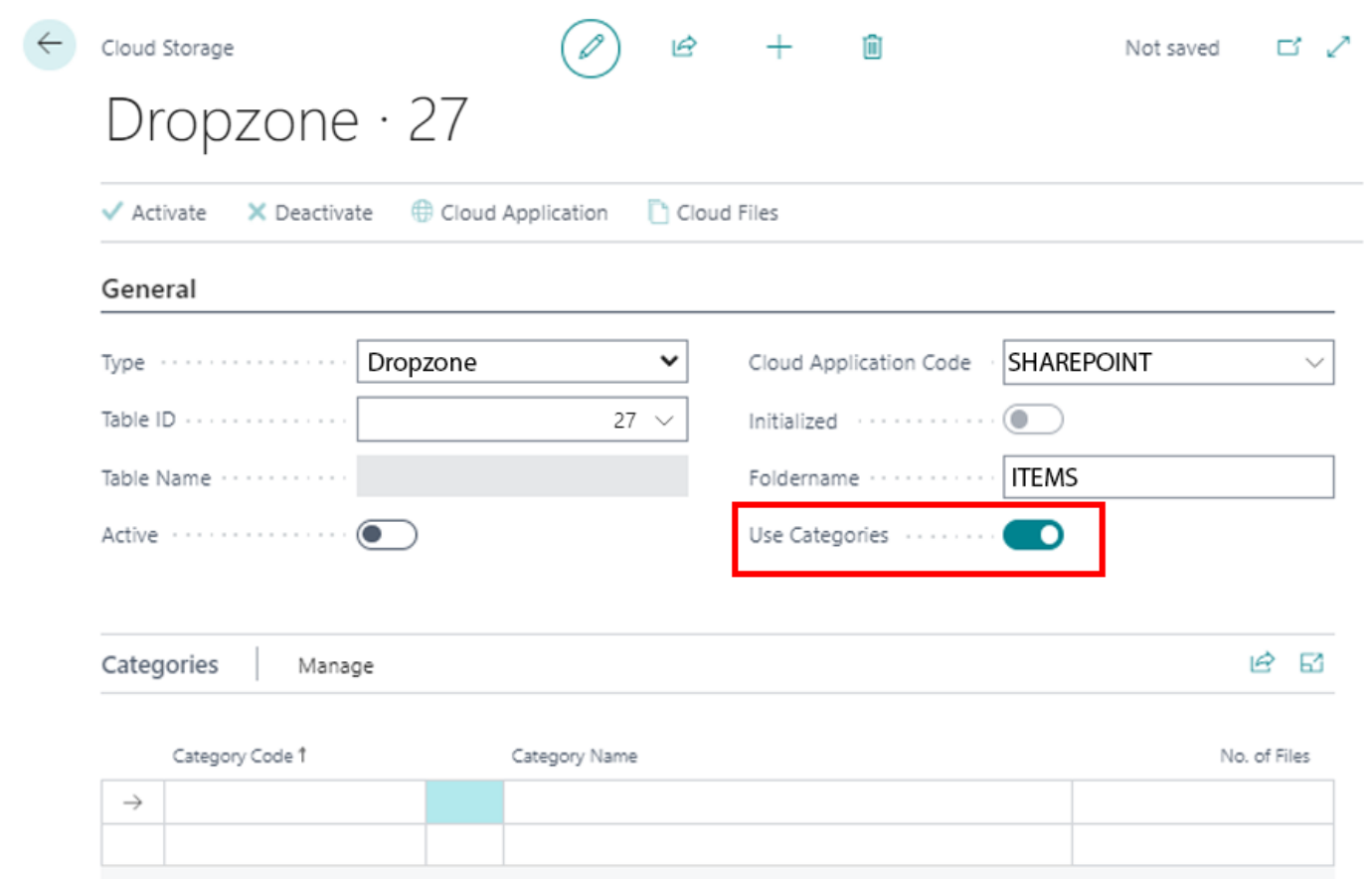
For more information about the Dropzone functions, see the chapters:

- [Upload Files](#)
- [Delete Files](#)
- [Show File Preview](#)
- [Merge PDF Files](#)
- [Move Files to Different Category](#)

Set Up Categories for Dropzone

This section describes how to set up categories for a Dropzone. Categories allow you to store files in a structured way and make it easier to search and find files in a record.

When setting up a Dropzone for a table, you have the option to enable the **Use Categories** option.



Cloud Storage

Dropzone · 27

✓ Activate ✗ Deactivate Cloud Application Cloud Files

General

Type Dropzone

Table ID 27

Table Name

Active

Cloud Application Code SHAREPOINT

Initialized

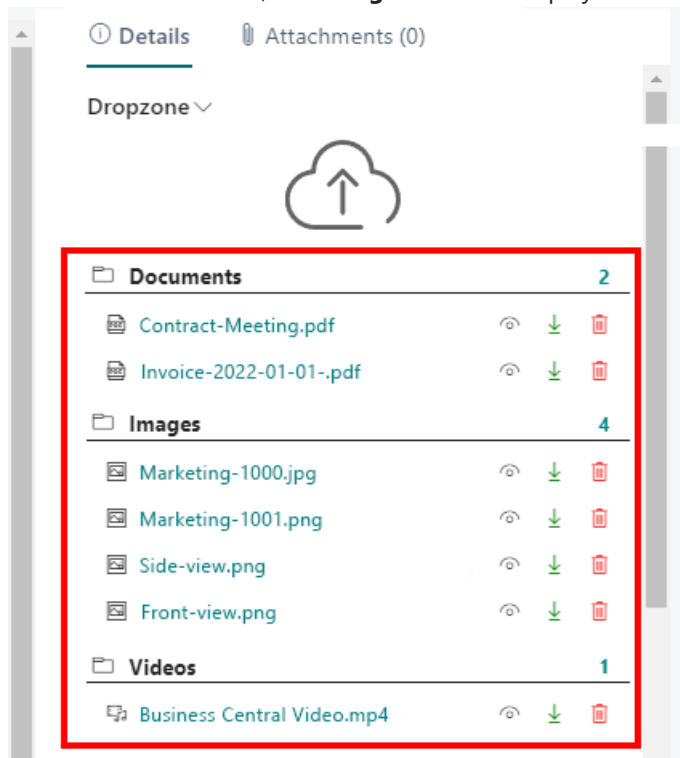
Foldername ITEMS

Use Categories

Categories | Manage

Category Code ↑	Category Name	No. of Files
→		

If the slider is activated, the **Categories** tab is displayed. Here you can create categories for the Dropzone.



Details Attachments (0)

Dropzone ▾

Cloud icon with upward arrow

Documents 2

- Contract-Meeting.pdf
- Invoice-2022-01-01-.pdf

Images 4

- Marketing-1000.jpg
- Marketing-1001.png
- Side-view.png
- Front-view.png

Videos 1

- Business Central Video.mp4

To create categories for the Dropzone, proceed as follows:

- Cloud Storage

Not saved

Dropzone · 27

✓ Activate

✗ Deactivate

Cloud Application

Cloud Files

General

Type	Dropzone	Cloud Application Code	SHAREPOINT
Table ID	27	Initialized	<input type="checkbox"/>
Table Name		Foldername	ITEMS
Active	<input type="checkbox"/>	Use Categories	<input checked="" type="checkbox"/>

Select - Cloud File Categories

+ New

Edit List

Code ↑	Name
→	
VIDEOS	Videos
EMAIL	E-Mails
DOCUMENTS	Documents
GENERAL	General
IMAGES	Images

OK

Cancel

11. You will be redirected back to the cloud storage card.
12. Under the **Categories** tab, specify the categories you created.



Dropzone · 27

✓ Activate

✗ Deactivate

🌐 Cloud Application

📁 Cloud Files

General

Type Dropzone ▼

Cloud Application Code · SHAREPOINT ▼

Table ID 27 ▼

Initialized ☐Table Name

Foldername ITEMS

Active ☒Use Categories ☒

Categories

Manage



	Category Code †		Category Name	No. of Files
	DOCUMENTS		Documents	—
→	EMAIL	⋮	E-Mails	—
	IMAGES		Images	—
	VIDEOS		Videos	—


You have added one or more categories to this Dropzone. Note that the cloud storage (i.e. the Dropzone) is **Active** to be able to use the categories. When uploading files, you will now be asked which category the file corresponds to. For more information, see the [Upload Files](#) chapter.


Set Up Report Archive

This chapter describes how to set up automatic report archiving for your cloud storage. You can set up report archiving so that your documents generated in Business Central (for example, invoices, purchase orders, credit notes, and so on) are automatically uploaded to one of your set-up cloud storages ([Sharepoint](#), [Azure Files](#), or [Azure Blob Storage](#)).







Categories cannot be used in report archiving.

To set up automatic report archiving, proceed as follows:






- 1. Open your Business Central.
- 2. From the role center, call the search function (**ALT+Q**) .
- 3. Search for **Cloud Storages** and click on the appropriate search result. The **Cloud Storages** page is displayed.
- 4. To set up a new drop zone, click **New** in the menu bar.
- 5. From the **Type** drop-down list, select **Report Archive**.
- 6. The **Cloud storage** tab is extended by the **Report** tab.



Cloud Storage



Report Archive · 0

 Activate  Deactivate  Store Reports now...  Cloud Application  Cloud Files

General

Type

Report Archive

Cloud Application Code

Table ID

0

Initialized

☒

Table Name

Foldername

Active

☒

Use Categories

☐

Report

Report ID

0



Parameters...

Report Name

Last Reports Processe...

Metadata

Manage



Type	No.	Name
→ Code		

- 7. From the **Table ID** drop-down list, select the table for which you want to add report archiving. Note that report archiving can only be added for tables that are stored in this drop-down list. For example, to set up report archiving for sales invoices, specify ID **112**.
- 8. After specifying the table ID (**112**), the **Table name** field will be automatically filled by the system (with the value **Sales Invoice Header**).
- 9. In the **Cloud Application Code** field, specify the cloud application you want to use to store the data.
- 10. Under the **Report** tab, in the **Report ID** field, specify the report you want to archive automatically.
- 11. The **Folder Name** field is automatically completed. By default, this field defaults to the name for the report ID.
- 12. Under the **Metadata** tab, you can specify additional information to be stored when uploading files to the cloud storage via report archiving. For example, for a sales invoice, you can save the field information of the **No.**, **Bill-to Customer No.**, **Bill-to Name**, **Your Reference**, and **Posting Date** fields as metadata when archiving for the file. The metadata can be defined as search criteria when searching for files in the cloud (see chapter [Search files](#)).
- 13. Click **Active** in the menu bar to start report archiving. The **Active** slider will be grayed out, indicating that this report

archive is set up correctly.

←

Cloud Storage

+

✓ Saved

Report Archive · 112

✓ Activate

✗ Deactivate

Store Reports now...

Cloud Application

Cloud Files

General

Type	Report Archive	Cloud Application Code ..	SHAREPOINT
Table ID	112	Initialized	<input checked="" type="checkbox"/>
Table Name	Sales Invoice Header	Foldername	Verkaufsrechnungskopf
Active	<input type="checkbox"/>	Use Categories	<input type="checkbox"/>

Report

Report ID	1306	Parameters...	
Report Name	Sales - Invoice	Last Reports Processe...	22.09.2022 13:59 <div><div></div></div>

You have set up the report archive. All reports/documents meeting the defined criteria are automatically uploaded to the specified cloud application.

Set Up Users

This chapter describes how to [add users](#) and [copy user permissions](#).

NOTE


User licenses and license models

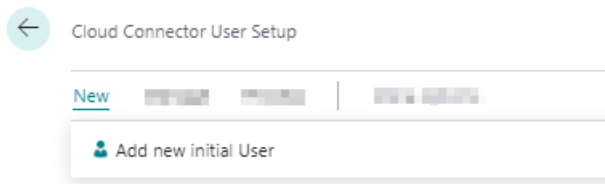
Note that if you have not purchased an unlimited license for BeyondCloudConnector, you must license all new users. If you need additional licenses or want to switch to a different licensing model, contact us at info@beyondit.gbmh.

Add Users

This section describes how to grant permission to a user to use BeyondCloudConnector.

To set up a user, proceed as follows:

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**) .
3. Search for **Cloud Connector User Setup** and click the appropriate search result. The **Cloud Connector User Setup** page is displayed.
4. The list displays all configured users and the assigned permissions.
5. Click **New > Add new initial user** in the menu bar.




6. The **User Search** page is displayed. This list displays all users that are set up in your Business Central.
7. From the table, select the user you want to add to the list of BeyondCloudConnector users.
8. Click **OK** to close the window and add the user to the **Cloud Connector User Setup** page.
9. Scroll down the list to the added user.
10. The checkboxes in the **Dropzone enabled** and **File preview enabled** columns allow you to set the user's access permissions for displaying dropzones and previewing cloud files, respectively. By default, dropzone access permission is enabled for new users.

You have added a user to the **Cloud Connector User Setup** list.

Copy User Permissions

This section describes how to copy the user permissions of an existing user to a newly added user. This gives the newly added user the same permissions as the existing user.

Proceed as follows if you want to give a newly added user the same permissions as an existing user:

1. Open your Business Central.
2. From the role center, call the search function (**ALT+Q**) .
3. Search for **Cloud Connector User Setup** and click the appropriate search result. The **Cloud Connector User Setup** page is displayed.
4. The list displays all configured users and the assigned permissions.
5. Select a user from the list and check all permissions you want to transfer for a newly added user.
6. Click **Process > Copy user settings to another user** in the menu bar.
7. The **Copy User Settings** window is displayed.

Copy User Settings



Options

User Name

Set new init Values? ☒

Should be Dropzone enabled? ☐

Should be File Preview enabled? ... ☐

Advanced >

OK

Cancel

- From the **User Name** dropdown list, select the user. Please note that you will only transfer permissions to the newly added user that were previously selected from the list.
- Click **OK** to copy the selected permissions for the newly added user.

NOTE

Change all permissions of the user

You can change all permissions of the newly added user in the **Copy user settings** window via the **Set new init values?** option. Activate the checkboxes for **Set new init values?**, **Should be Dropzone enabled?** and **Should be File Preview enabled?** to display the Dropzone for all set tables and to enable the File Preview for the user within the Dropzone.

License Management

This chapter describes how you can view the license management of **Beyond CloudConnector**.

To view the status of the product license for **Beyond CloudConnector**, proceed as follows:

- 1. Open the search field (ALT+Q) and search for the page **Beyond License Management**.
- 2. The **Beyond License Management** page is displayed.

←

Beyond License Management

✎

🔍

+

⌵

⌵

⌵

⌵

Tenant ID									
Tenant Domain Name									
Licenses Sync License									
Company Name	Application Name	Status	Start Date	Expiry Date	Trial	Licensed Metric	Current Metric		
→	BeyondCalculation	Valid	23.08.2024 08:50	22.09.2030 08:50	<input type="checkbox"/>	1	0		
	BeyondServiceRequestion	Valid	02.04.2024 09:13	02.05.2030 09:13	<input type="checkbox"/>	1	0		
	BeyondPostCalculation	Valid	14.06.2024 09:33	13.06.2030 09:33	<input type="checkbox"/>	1	0		
	BeyondReportReview	Valid	15.07.2024 21:26	14.06.2030 21:26	<input type="checkbox"/>	1	0		
	BeyondService	Valid	30.01.2024 07:41	28.02.2030 07:41	<input type="checkbox"/>	7	0		
	BeyondCues	Valid	29.11.2023 19:15	28.02.2030 07:41	<input type="checkbox"/>	7	0		
	BeyondInventoryDetails	Valid	29.01.2024 23:28	28.02.2030 07:41	<input type="checkbox"/>	7	0		
	BeyondDataImporter	Valid	17.06.2024 22:55	17.07.2030 22:55	<input type="checkbox"/>	1	0		
	BeyondCloudConnector	Valid	04.07.2024 06:42	03.08.2030 06:42	<input type="checkbox"/>	1	0		
	BeyondAttributionCore	Valid	14.06.2024 07:51	14.07.2030 07:51	<input type="checkbox"/>	1	0		
	BeyondReports	Valid	05.07.2024 06:39	04.06.2030 06:39	<input type="checkbox"/>	1	0		
	BeyondDocumentLineTransfer	Valid	19.06.2024 20:40	31.12.2099 00:00	<input type="checkbox"/>	4	0		

- 3. Under the **Licenses** section, you will find all product licenses for BeyondIT applications that have been installed for this company. You can read all the necessary information from the values in the columns:

Column	Description
Company Name	This column indicates the name of the company.
Application Name	This column indicates the name of the application. If you use several BeyondIT products, a separate line is displayed for each product in the overview,
Status	<p>This is the status of the product license. Several values are possible:</p> <p>Valid: The product license is valid and the application can be used without restrictions.</p> <p>Expired: The product license has expired. The application can no longer be used.</p> <p>Trial: The product license is valid and the functionalities of the application can be used for a short period of time (note the value in the expiry date column) with restrictions or without restrictions.</p> <p>Exceeded: The product license has expired. The application can no longer be used.</p>
Start Date	This is the date on which the product license was registered.
Expiry Date	This is the date on which the product license becomes or became invalid. The application can no longer be used.
Trial	This checkbox indicates whether the product license is a trial license. Trial licenses are very limited licenses. You can purchase a full product license after the trial license expires (note the value in the Expiry date column).
Licensed Metric	This column shows how the application was licensed. For example, this can be a tenant license, a license per company or a license per user.
Current Metric	This column shows how many licenses are used in the environment. The difference between the values in the Licensed metric and Current metric columns indicates whether you need to purchase an additional license.

Upload Files

BeyondCloudConnector allows you to upload files to your cloud storage via the **Dropzone**. The Dropzone must be set up to upload files. For more information, please refer to the chapter [Set Up Dropzone](#).

For the following description, we assume that you are on a page, table, or card for which a Dropzone is set up and you have the appropriate user permissions to view the Dropzone.

To upload a file to the cloud storage, do the following:

- 1. Display the FactBox in Business Central (**ALT+F2**).
- 2. The Dropzone is displayed at the upper part of the FactBox.



- 3. Click the upload icon in the Dropzone and select the file you want to upload. Alternatively, you can also drag and drop the files onto the Dropzone. This is especially helpful if you want to upload multiple files at once.
- 4. If you have set up categories for the Dropzone, a window will prompt you to assign the file(s) to a category. For more information on categories, see the [Set Up Categories for Dropzone](#) chapter.

Select Category

Please specify a category for file Invoice-2022-04-04.pdf

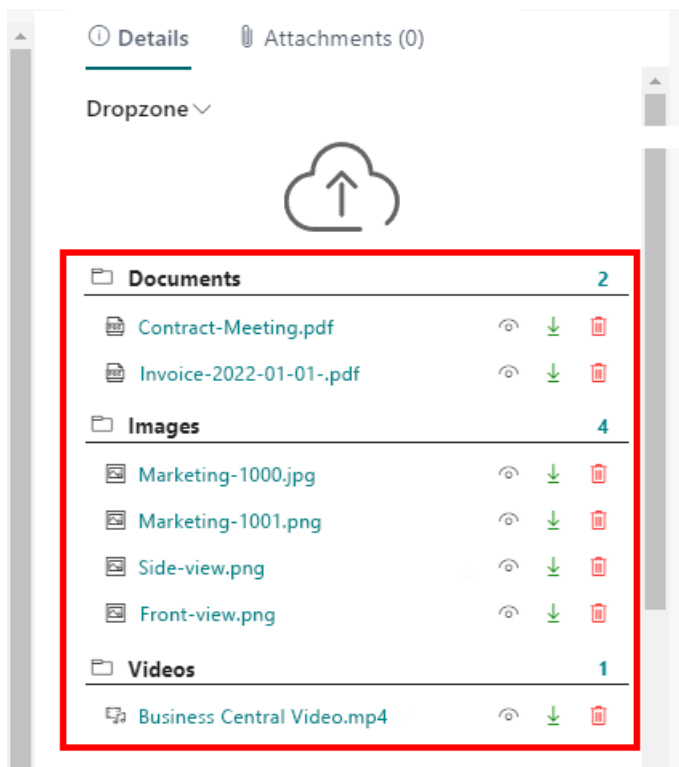
Category Code ↑	Category Name
→ DOCUMENTS	Documents
IMAGES	Images
VIDEOS	Videos

Use Category for all files

Ok

Cancel

- 5. The **Use Category for all files** slider allows you to apply the selected category to all files to be uploaded (if you are uploading multiple files).
- 6. Click **OK** to upload the file.



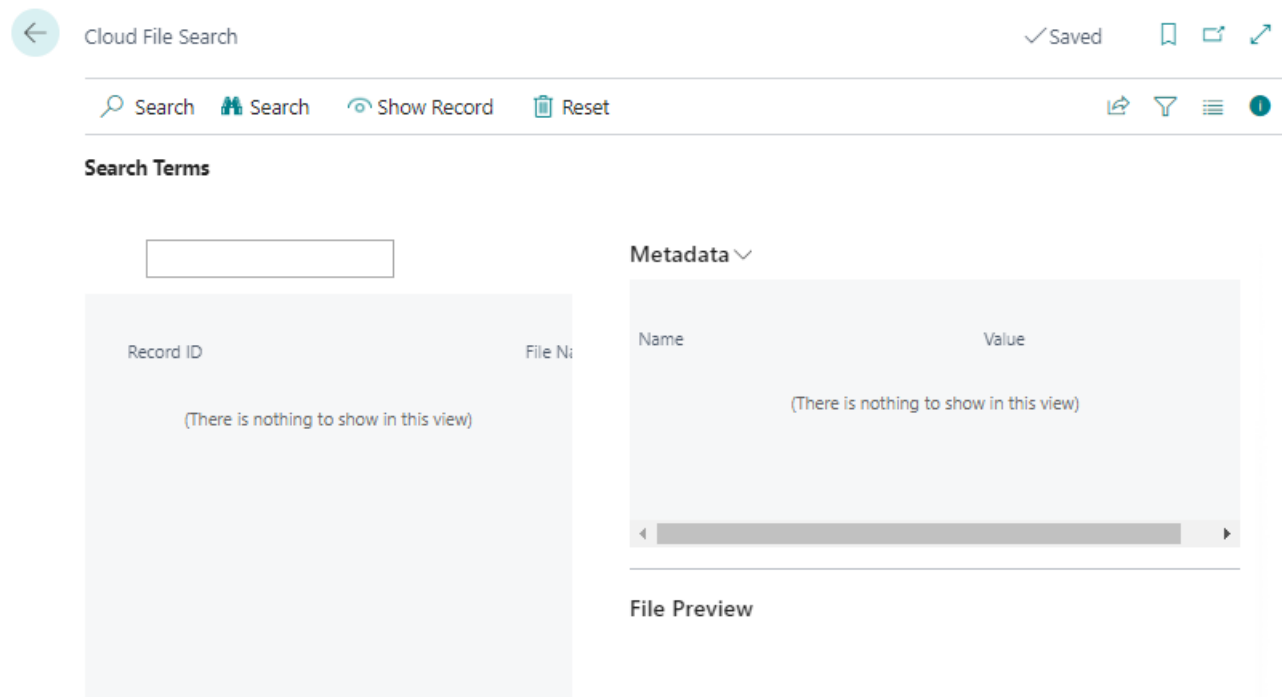
In the FactBox below the Dropzone, the corresponding category is displayed with the file you uploaded. If you click on a file, the file is displayed in the file preview below the Dropzone in the Factbox. For more information about previewing files and the possible functions, see the [Show File Preview](#) chapter.

Search Files

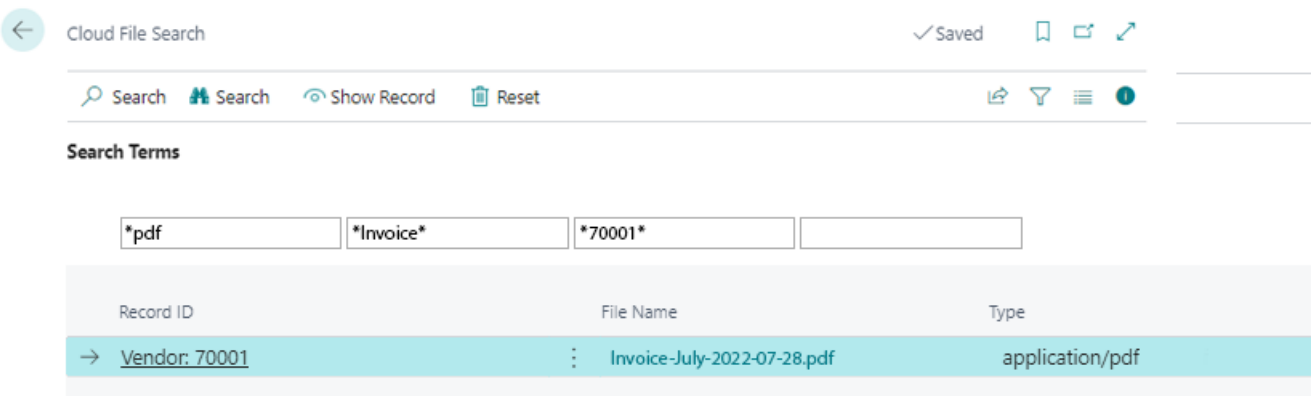
This chapter describes how to search for files in Business Central via BeyondCloudConnector in the connected cloud storage. Metadata and categories stored on the files can be defined as search criteria.

Follow these steps to search for a file in cloud storage via BeyondCloudConnector:

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**)
3. Search for the **Cloud Files Search** page and click on the corresponding search result.
4. The **Cloud Files Search** page is displayed.



5. Enter a search criterion in the input field.
6. Click **Search** in the menu bar.
7. If necessary, narrow down the search results by defining additional search criteria. You can also use metadata and categories as search criteria.



8. Click **Show Record** in the menu bar to navigate directly to the record.
9. You can open the file you are looking for in the FactBox (**ALT+F2**) in the Dropzone. Click on the eye symbol next to the file name.

You have found your file. If the file cannot be accessed via the Dropzone, this may be because the file has been deleted from the cloud storage, but the link is still stored in Business Central. For more information, see the chapter [Delete Files](#).

Delete Files

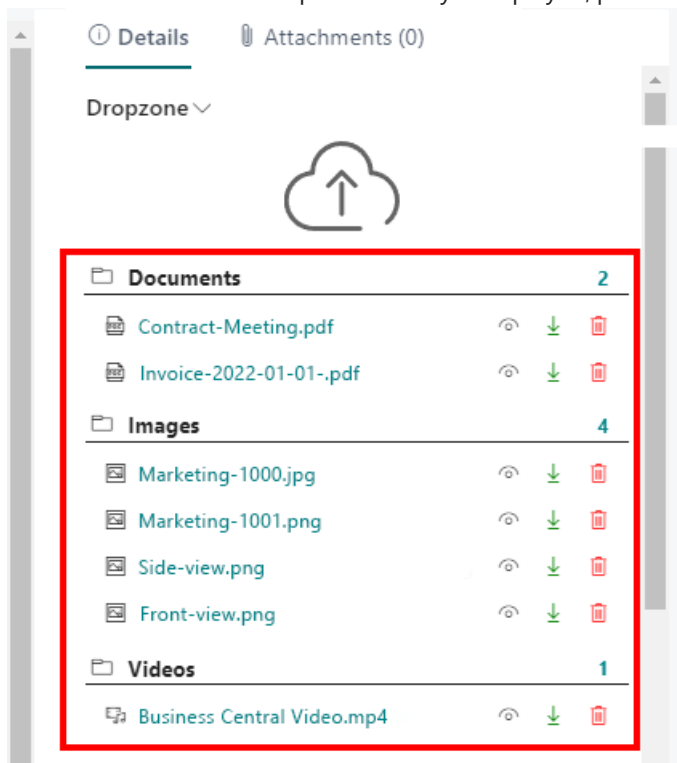
This chapter describes how to delete files in the cloud storage via Business Central.

NOTE

Deleting files

Delete files only when you are absolutely sure that they are no longer needed. If you delete files directly in cloud storage, the connection/link to the file will still appear in Business Central, but the connected file will not be opened. Administrators can delete files that are no longer linked from the records. To delete files and file connections, follow only the steps described in this chapter. For more information on deleting file connections, see the [Delete Connections to Files Saved in the Cloud](#) section.

1. If the FactBox with the Dropzone is not yet displayed, press **ALT+F2** to display it.



2. Click the trash can icon in the Dropzone to delete the file.
3. You will be asked if you really want to delete the file. Confirm the message with **Yes**.

You have deleted the file in the cloud storage and the specific file connection between Business Central and the connected cloud storage. Restoring the file to the cloud storage does not restore the link to Business Central. You have to re-upload the corresponding file via Business Central.

Delete Connections to Files Saved in the Cloud

This section describes how to delete a file connection. You must delete the file connection if the file to be displayed in Business Central (in the Dropzone) has been deleted from the connected cloud storage.

To delete the file connection between Business Central and the cloud storage, proceed as follows:

1. Note the name of the file and its metadata.
2. From the role center, open the search function (**ALT+Q**)
3. Search for **Cloud Files** and click on the corresponding search result. The **Cloud Files** page is displayed.
4. Show the filter area (**SHIFT+F3**).
5. Define a filter for the file based on the file name (or metadata, if applicable).
6. Select the file whose file link you want to delete.
7. Click **Force Deletion** in the menu bar.



✕ Force deletion

You have successfully deleted the file connection.

NOTE

Delete File Connection

Note that the file connection in Business Central to the file in cloud storage is deleted. When you restore the file to cloud storage, it **does not** appear in Business Central. To restore the link to the file, you must upload the file for the corresponding record using the drop zone. For more information, see the [Upload files](#) chapter.

Show File Preview

BeyondCloudConnector allows you to preview files stored in the cloud storage.

NOTE

User permissions required

The **File Preview Enabled** setting on the **Cloud Connector User Setup** page controls the file preview below the Dropzone for the corresponding tables. If the user does not have the permissions (**Dropzone Enabled** and **File Preview Enabled**), neither the Dropzone nor the file preview will be displayed to the user.

Follow the steps below to preview a file stored in the cloud storage:

1. Click the file name in the Dropzone.
2. A reduced preview of the file is displayed in the info box area under the **File Preview** tab.

Details

Attachments (0)

Dropzone

Documents2

Contract-Meeting.pdf

Invoice-2022-01-01-.pdf

Images4

Marketing-1000.jpg

Marketing-1001.png

Side-view.png

Front-view.png

Videos1

Business Central Video.mp4

File Preview

Invoice

103215

Document Date

Due Date

Payment Conditions

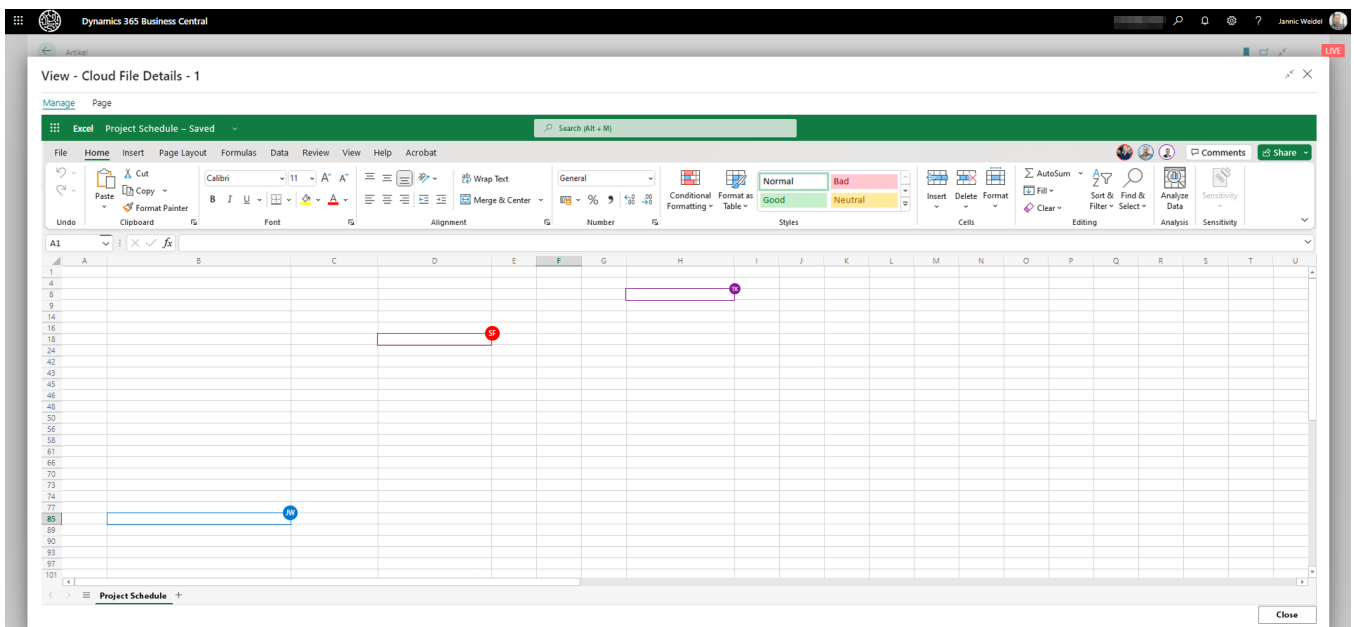
17th January 2022

17th January 2022

90 days from Delivery

Total €

3. If you want to see a larger preview of the file, click the eye icon next to the file in the Dropzone.
4. The file view opens. In this file view, you can view the files stored in the cloud storage - without leaving Business Central.



File preview allows handling files within Business Central (with multiple people), playing video files and editing PDF documents.

BeyondCloudConnector offers a wide range of functions for editing files. All of these functions can be performed in the file preview (eye icon). Below is an overview, sorted by file type, of the functions you can perform on files stored in the cloud within the file preview via Business Central:

File Type	Feature/s for File Handling
PDF Files (.pdf)	<ul style="list-style-type: none"> • Rotate pages • Add text • Highlight text • Draw objects • Revert changes • Save changes • Print • Read Aloud
Excel Files Word Files PowerPoint Files OneNote Files (.xlsx, .docx, .pptx, .one)	<ul style="list-style-type: none"> • Work simultaneously with other employees on a file in and outside of Business Central in real time
Video Files (.mpg, .mpeg, .mp4, .avi, .wmv, .mov, .flv, .webm, ...)	Playback with different options: <ul style="list-style-type: none"> • Play in fullscreen mode • Play in picture-in-picture • Change playback speed • Change volume

NOTE

Merge PDF files

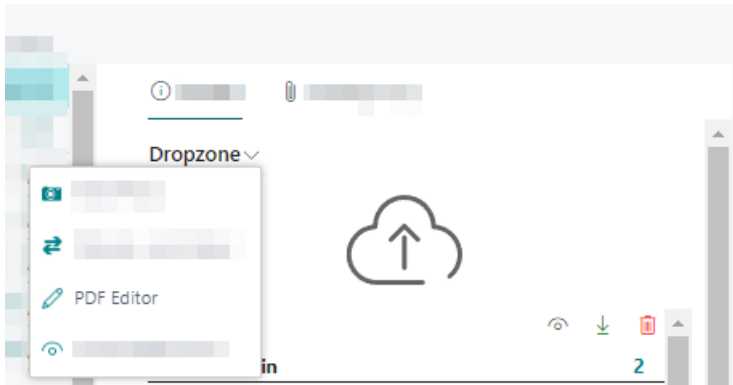
In addition to the above mentioned functions for the preview, BeyondCloudConnector also allows you to merge multiple PDF files into one PDF file. For more information, see the chapter [Merge PDF files](#).

Merge PDF Files

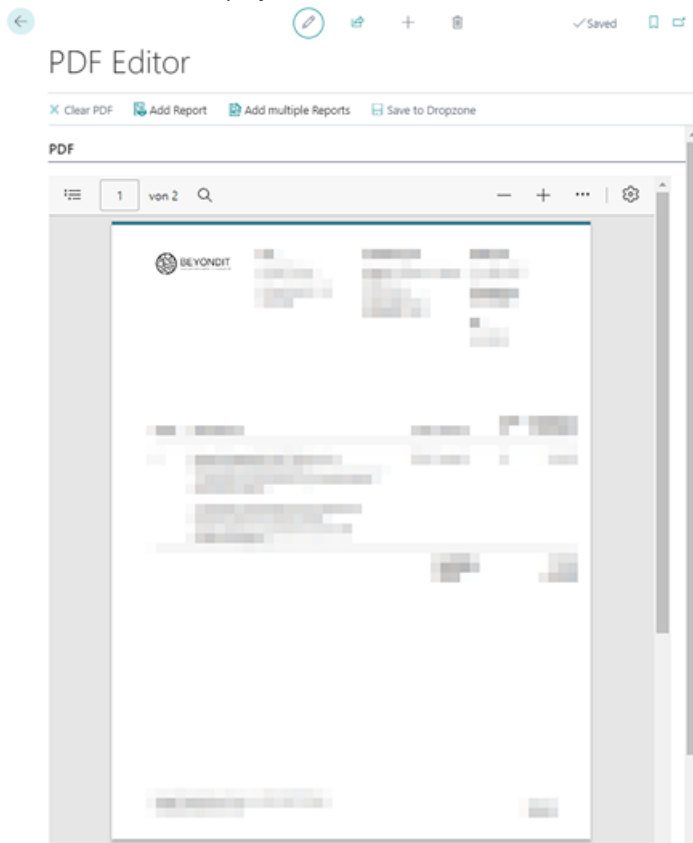
BeyondCloudConnector allows you to merge two or more PDF files into one file.

To merge two or more pdf files, proceed as follows:

1. Show the FactBox (**ALT+F2**) on the corresponding card.
2. The FactBox with the Dropzone is displayed.
3. To select the PDF file, click the icon in front of the PDF file name in the Dropzone.
4. A check mark icon will be displayed in front of the selected file.
5. To open the PDF editor for combining PDF files, click **Dropzone**.
6. Click **PDF Editor**.



7. The PDF Editor is displayed.



8. To merge the PDF file with a PDF report, click **Add Report**. You can attach more than one PDF file using the **Add Multiple Reports** action.
9. The **Report Lookup** window opens.
10. Select the report or reports you want to merge with the PDF selected from the Dropzone.
11. Click **OK**.
12. A new window will be displayed. Define the report parameters.
13. To merge the report or reports, click **OK**.
14. To save the merged PDF, click **Save to Dropzone** in the menu bar of the **PDF Editor** page. The **Clear PDF** function

allows you to delete the contents of the PDF file.

15. Specify the file name for the newly created PDF file.

16. Click **OK**. If you have set up categories for the Dropzone, you are prompted to specify a category for the file.

17. Select the category and confirm the dialog box with **OK**.

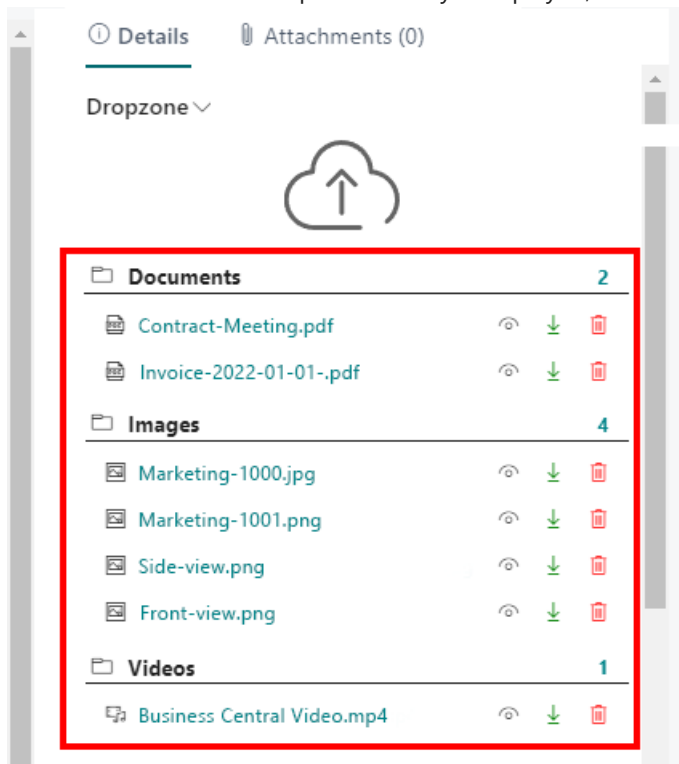
The file has been added to the Dropzone. You can now view it in the file preview or edit it using the additional functions for PDF file in the file preview. For more information about the file preview and the different editing options (depending on the file format), see the [Show File Preview](#) chapter.

Move Files to a Different Category

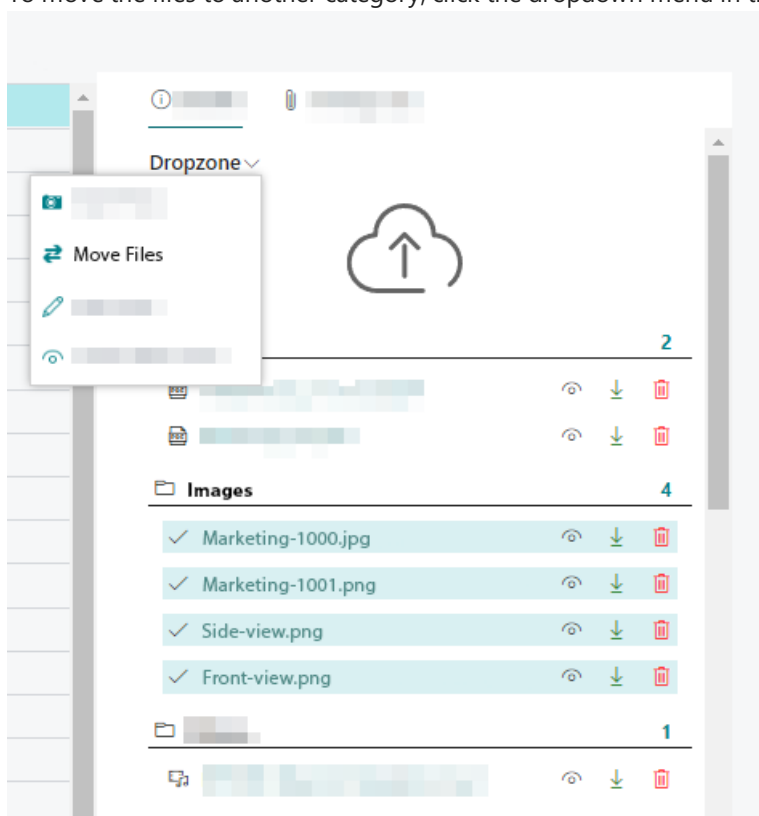
When uploading files to cloud storage, you are prompted to specify a category per file. The following instructions describe how to move one or more files to a different category.

To do this, proceed as follows:

1. If the FactBox with the Dropzone is not yet displayed, show it with the keyboard combination **ALT+F2**.



2. In the drop zone, click the icons in front of the file names to select individual files. Alternatively, you can select all files in a category by clicking the icon in front of the category name.
3. A check mark icon will be displayed in front of the selected files.
4. To move the files to another category, click the dropdown menu in the Dropzone.



5. Select **Move File** from the dropdown menu.

6. The **Select Category** window is displayed.
7. Select the category to which you want to move the selected files.
8. To move the files to the selected category, click **OK**.

You have moved the files to the category.

For more information on how to set up categories, see the chapter [Set Up Categories for Dropzone](#).

Move Files to a Different Cloud Storage

BeyondCloudConnector allows to move files between two cloud storages (for example, to use a more suitable cloud storage or to save costs).

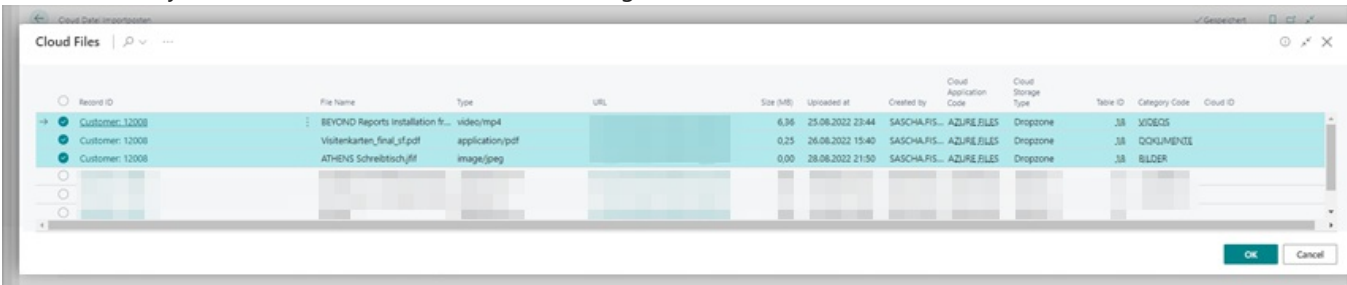
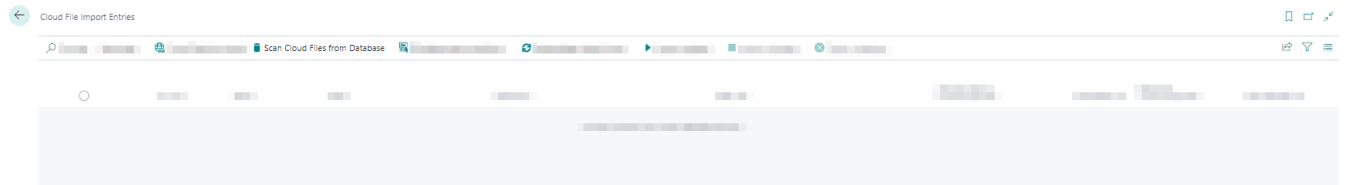
NOTE

Increased System Load

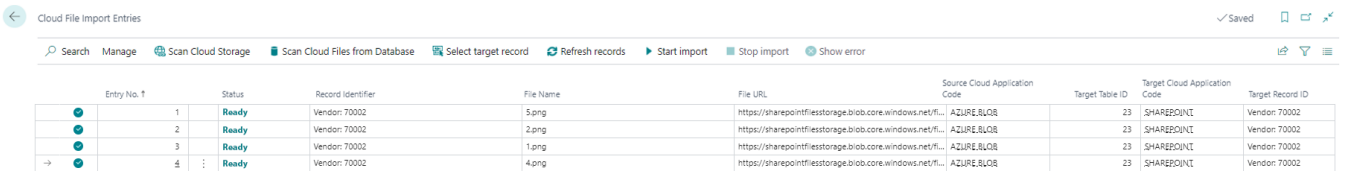
Note that copying files between two records ties up a lot of system resources. The system may become busy if a large number of files are copied, i.e. operation may be impaired. Do not perform this function with large amounts of data and, if possible, outside opening or business hours.

Follow these steps to move files between two cloud storages using BeyondCloudConnector:

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**).
3. Search for the **Cloud File Import Entries** page and click the appropriate search result.
4. The **Cloud File Import Entries** page is displayed.
5. From the menu, click **Scan Cloud Files from Database**.
6. The **Edit – Scan Cloud Files...** window is displayed.
7. Enter the application code of the cloud storage to which you want to transfer the files in the **New Cloud Application Code** field.
8. Click **OK**.
9. The **Cloud Files** window is displayed. This list displays all files from all cloud storages that are linked via Business Central.
10. Select the files you want to move to the new cloud storage.



11. Click **OK**. The selected files are displayed in the **Cloud Files Import Entries** list. Under the **Source Cloud Application Code** column, the current cloud location (application code) of the files is displayed. Under the **Target Cloud Application Code** column, the new cloud location (application code) of the files is displayed.



12. Select the files and click **Start import** in the menu bar.
13. The files are moved to the new cloud storage.

You have moved the files to another cloud storage.

If you want to copy one or more files to another record (Dropzone), you can upload the files using the corresponding Dropzone area or copy them in batch using the cloud file import entries. For more information on this topic, see the [Copy Files to a Different Record](#) chapter.

Copy Files to a Different Record


If you want to move multiple files in dropzones to another record (dropzone), you can upload the files manually or use the cloud file import entries. In this case, you copy the files to the new record, and all the files remain at the copy location.

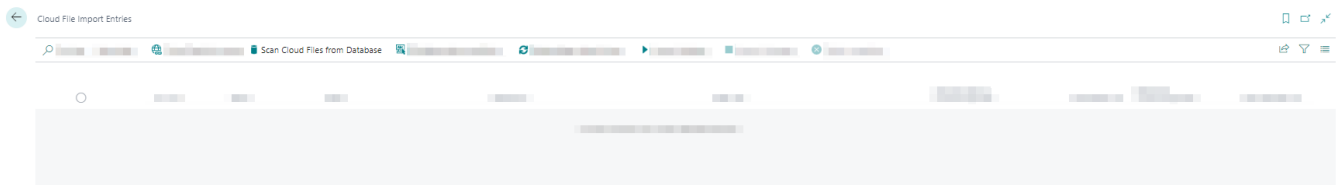
NOTE

Increased System Load

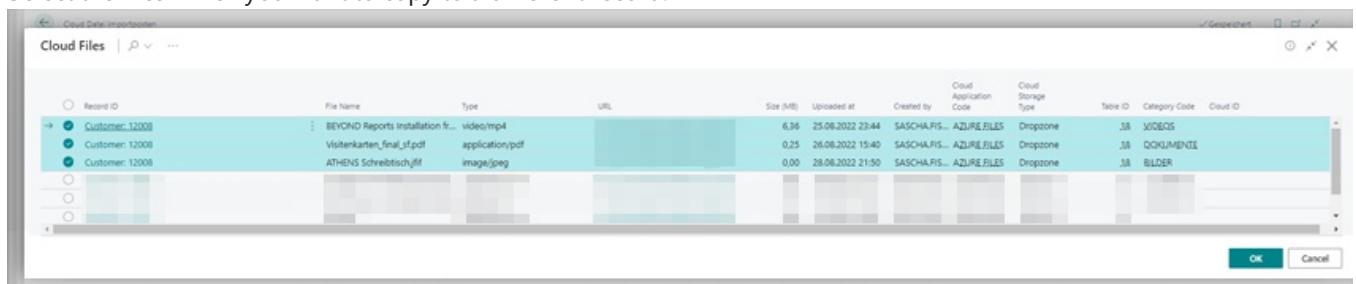
Note that copying files between two records ties up a lot of system resources. The system may become busy if a large number of files are copied, i.e. operation may be impaired. Do not perform this function with large amounts of data and, if possible, outside opening or business hours.

To copy files to another record via BeyondCloudConnector, proceed as follows:

1. Open your Business Central.
2. From the role center, open the search function (**ALT+Q**) .
3. Search for **Cloud File Import Entries** and click on the corresponding search result.
4. The **Cloud File Import Entries** page is displayed.
5. From the menu, click **Scan Cloud Files from Database**.



6. The **Edit – Scan Cloud Files...** window is displayed.
7. In the **New Cloud Application Code** field, specify the application code of the cloud storage to which you want to copy the files.
8. Click **OK**.
9. The **Cloud Files** window is displayed. This list shows all files stored in the connected cloud storages.
10. Select the files which you want to copy to a different record.



11. Click **OK**. The selected files are displayed in the **Cloud File Import Entries** table.
12. Select the files in the table and click **Select target record** from the menu.
13. The **Dropzone Tables** window is displayed.

	ID ↑		Name
→	15	:	G/L Account
	17		G/L Entry
	18		Customer
	21		Cust. Ledger Entry
	124		Purch. Cr. Memo Hdr.
	156		Resource
	167		Job
	242		Purch. Order

OK Cancel

14. Select the drop zone table to which the selected files should be moved.
15. Click **OK**.
16. The corresponding table with the records is displayed. Select the corresponding record.
17. Click **OK** to save the settings for copying the files.
18. The saved copy settings are displayed on the **Cloud File Import Entries** page.
19. Select all files to be copied in the list.
20. Click **Start import** in the menu bar. The files are copied to the record specified under the **Target Record ID** column.
21. Click **Refresh records** and check if all files have been copied.

You have copied one or more files into a new record. You can view and edit the file/s in the drop zone associated with the record. For more information on viewing and editing files in the drop zone, see the [Show File Preview](#) chapter.

Frequently Asked Questions

In this section we address frequently asked questions about BeyondCloudConnector.

If you have a question that is not listed in this chapter, contact us at info@beyondit.gbmh.

I have several new users who should use BeyondCloudConnector. How do I set the user permissions?

You have several options for granting user permissions:

You can copy the permissions of an existing user for the new user or define all permissions for the dropzone/s and file preview at the same time. For more information, please refer to the chapter [Set Up Users](#).

BeyondCloudConnector was able to connect to cloud storage in the past, but this no longer works. What should I do?

Verify that the cloud application is set up correctly. The secret key (for Sharepoint setup: [Create and Copy Secret](#)) or the Shared Access Signature in Microsoft Azure has expired. For more information regarding Azure Files Setup go to [Setup > Set Up Azure Files as Cloud Storage > Create Shared Access Signatures](#) and regarding Azure Blob Storage Setup go to [Setup > Set Up Azure Blob Storage as Cloud Storage > Create Shared Access Signatures](#).

If the issue persists, contact us: info@beyondit.gbmh.

I get a message that my license has expired. What do I need to do?

If you wish to continue using BeyondCloudConnector, you must purchase a license or multiple licenses. For more information on current pricing as well as ongoing marketing campaigns or special offers, please visit our website <https://www.beyond-cloudconnector.de/>.

If you do not want to continue using BeyondCloudConnector, you can uninstall the app via the extension management.

Which license model is suitable for my company?

We offer different licensing models. Licensing is based on the number of users in the system. All users in the system are counted, regardless of whether they have access to BeyondCloudConnector.

For more information on current pricing, as well as ongoing marketing campaigns or special offers, please visit our website at <https://www.beyond-cloudconnector.de/>.

I have been informed that a new version of BeyondCloudConnector is available. How do I update the app?

The new version of the application is updated automatically with each update from Microsoft. If you do not want to wait for the

next update from Microsoft, you can update the application manually. To update the application manually, proceed as described in the section [Update to the latest version of CloudConnector](#).

Which cloud storage is the cheapest?

By default, an Office 365 subscription includes storage for **SharePoint Online**. So you don't have to pay extra for storage. The storage size for Sharepoint depends on the licenses in your organization. You can see the storage size for Sharepoint in the Sharepoint Admin Center.

If you select Azure Files or Azure Blob Storage as cloud storage, additional costs will apply depending on the size and characteristics of the storage volume. For more information about associated storage costs, see:

[Pricing for Sharepoint Online](#)

[Pricing for Azure Files](#)

[Pricing for Azure Blob Storage](#)

I want to change the folder structure in Sharepoint/Azure Files or Azure Blob Storage. Is there anything I need to consider?

Yes, you should back up the files before changing the structure. Then delete the data from Business Central and the cloud storage and then rebuild the structure. By changing the folder structure in the cloud storage, the connections between Business Central and the cloud storage are lost, i.e. you need to reimport the files so that the connections between Business Central and the cloud storage are created.

I want to migrate file attachments from an OnPremise environment to the cloud. Is this possible and if so how do I do that?

Yes, this is possible. We have programmed a codeunit especially for this use case, which allows you to export the file attachments of an OnPremise environment, so that you can upload them to the cloud via the CloudConnector. Please note that at the time of the file export, no cloud storage must have been set up in the **Beyond CloudConnector**.

Download the file export code unit: [Codeunit for exporting files](#)

Export the files and then upload them to Azure Files.

Then proceed as described in the chapter [Import files from Azure Files](#). Please note that the JSON file must also be uploaded to Azure Files.

Afterwards, you can also move the files to another cloud storage (for example, Sharepoint or Azure Blob). To do this, proceed as described in the chapter [Move files to another cloud storage](#).

Error Messages

In today's fast-paced digital world, software applications and systems are constantly evolving to meet the demands of users. However, with new features and updates come new potential errors and bugs. When these issues occur, error messages are displayed to the user. While error messages can be frustrating and confusing, they are crucial in helping users identify and troubleshoot problems. In this chapter, we will provide examples of common types of errors, and best practices for solving the error.

Authentication Failed

The **Authentication Failed** error occurs when a user attempts to log in to a system or application, but the credentials haven't been accepted. This can be due to various reasons, such as incorrect username or password combinations, invalid access permissions, or problems with the authentication server.

Authentication Failed

Server failed to authenticate the request. Make sure the value of Authorization header is formed correctly including the signature.

To solve this error you have to update the CloudConnector to the latest version. Refer to the section [Update to the latest version of CloudConnector](#).

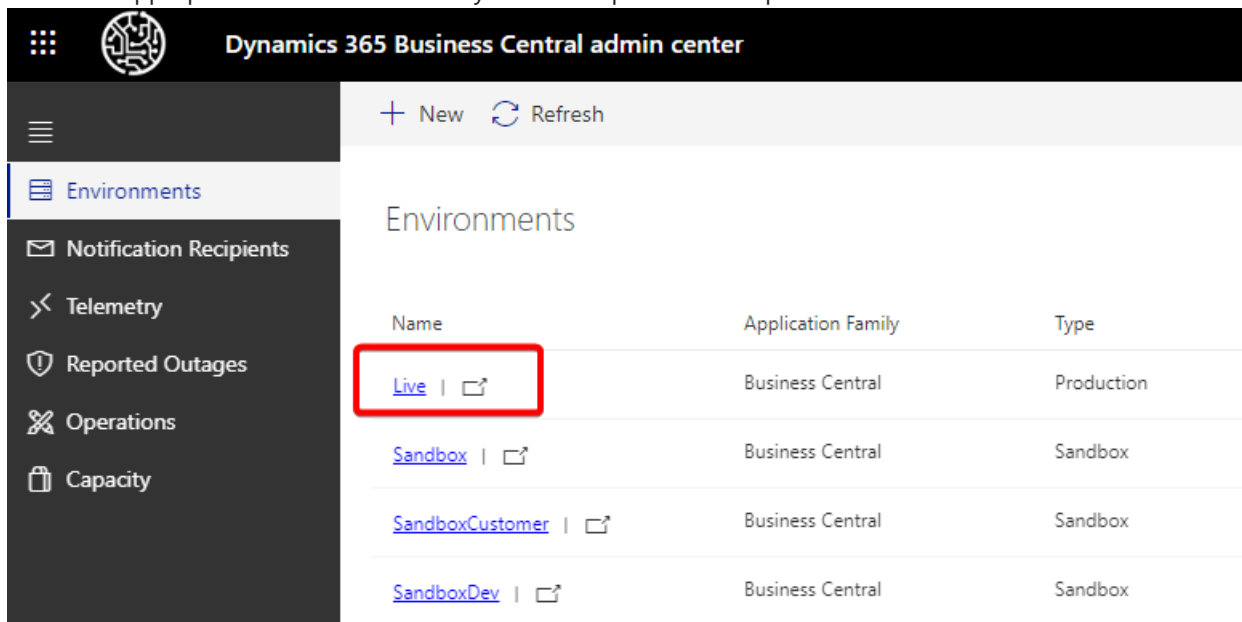
Update to the latest version of CloudConnector

This chapter describes how to manually update BEYOND CloudConnector to the latest version.

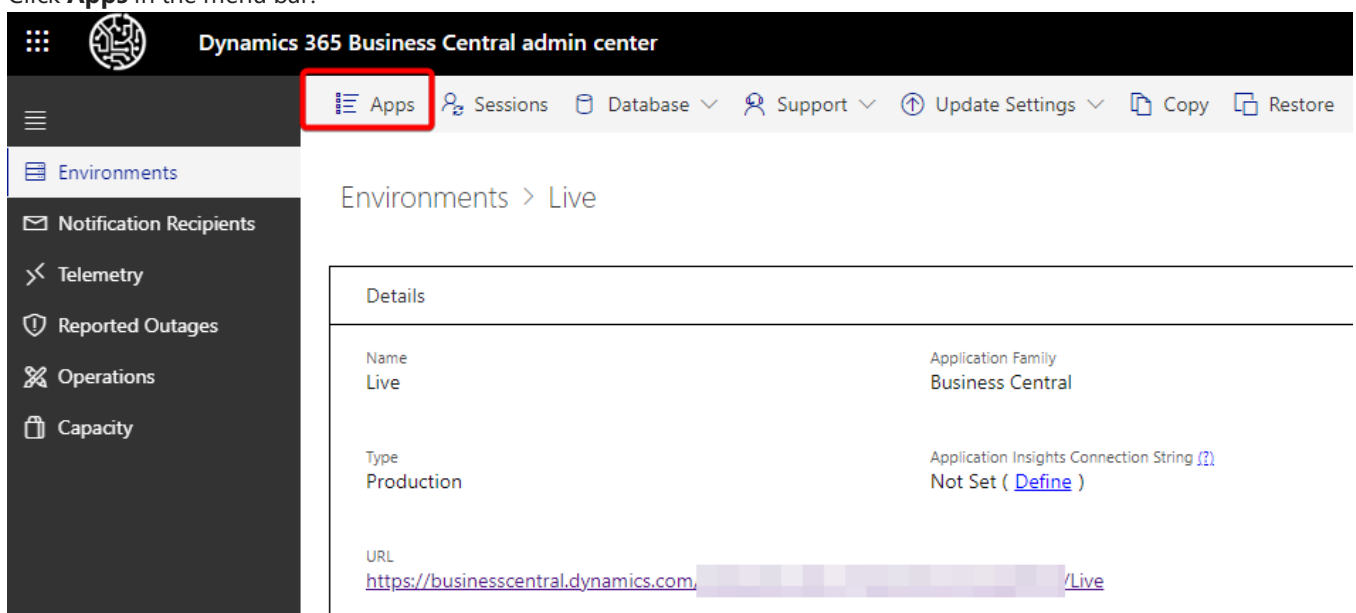
BEYOND CloudConnector is a living product, which means we are continuously working on further development and user experience. Through exchanges with our customers, we investigate use cases and implement the resulting improvements. The latest version is usually installed with the next Microsoft update, but you also have the option to manually update your apps before the update.

To manually install the latest version of BEYOND CloudConnector for your Business Central, proceed as follows:

1. Open the Admin Center. You can reach the Admin Center via the following URL:
<https://businesscentral.dynamics.com/your-directory-id/admin>.
2. Select the appropriate database for which you want to perform the update.



3. Click **Apps** in the menu bar.



4. The list shows all installed apps for the selected environment.

Dynamics 365 Business Central admin center				
Environments > Manage apps				
Live-Business Central				
Name ↑	Publisher	Installed Version	Latest Available Version	Available Update Action
AMC Banking 365 Fundamentals	Microsoft	20.5.45456.46014		Up to Date
Application	Microsoft	20.5.45456.46014		Up to Date
Base Application	Microsoft	20.5.45456.46567		Up to Date
BeyondBarcodes	BEYONDIT GmbH	18.1.4375.0		Up to Date
BeyondCertificates	BEYONDIT GmbH	18.0.4064.0		Up to Date
BeyondCloudConnector	BEYONDIT GmbH	18.0.5894.0		Up to Date
Business Central Cloud Migration - Previous Release	Microsoft	20.5.45456.46014		Up to Date
Business Central Cloud Migration - Previous Release (DE)	Microsoft	20.5.45456.46014		Up to Date

5. Navigate to the **BeyondCloudConnector** app and check the status.
6. If an update is available, you can perform the update via an action.

Please note that an update is performed by Microsoft at regular intervals. In the course of this Microsoft update, app updates are also installed. It is therefore possible that the latest version of BeyondCloudConnector is already installed.

If you need help with the update or have any questions regarding this, please feel free to contact us at the mail address info@beyondit.gbmh.