

Reduce costs by moving attachments from Dynamics 365 to SharePoint with AttachmentExtractor

For more than 40 years and now in the second generation, “Kelly Roofing” stands for education, technology and dedication in all matters of professional roofing. The Kelly family business success story proves its reliability and expert’s knowledge which is pioneering the whole branch.

Today “Kelly Roofing” is the largest roofing company in Collier County, Florida and has been ranked one of the Top 100 Roofing Contractors in America since 2003. A wide range of awards and prices confirm the business philosophy aiming to achieve the best result for every customer.

The story...



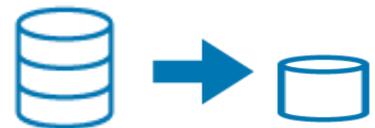
Challenges

- High demand on storage space
- High storage costs
- File and photo upload daily
- Move files & photos from Dynamics 365 to SharePoint



Our solution

- **AttachmentExtractor** saves money and Dynamics 365 data storage by moving e-mail attachments, notes and e-mail content to an alternative storage.



Customer benefits

- Saves money and database space in Dynamics 365
- Moves attachments to SharePoint
- Indexing and search options
- Solution works in the background

At-a-glance:

Customer: Kelly Roofing

Website: <https://www.kellyroofing.com/>

Customer Size: 32 employees

Country: USA, Florida

Industry: Construction

Products and Services: Roofing constructor services



Challenge

Kelly Roofing's daily business requires a substantial documentation of files and photos for every roof-project. As a bunch of roof-consultants and other specialists are working on the same order, new files and photos are uploaded to Dynamics 365 on a daily basis.

Working with a large bulk of data usually means even faster rising Dynamics 365 storage costs. Comparing annual cloud storage costs reveals a huge difference between CRM-Online (~9,99 \$) and SharePoint Online (~0,2 \$) per GB.

Solution

Whenever it's about saving Dynamics 365 storage space our [AttachmentExtractor](#) comes into play. The solution ensures that all entity-related attachments are stored in one place on SharePoint.

AttachmentExtractor recognizes any e-mail attachments and moves them to the document library related to the entity and record the email is about. In Kelly Roofing's case all files and photos associated with an opportunity need to be uploaded to the document library of its opportunity.

"AttachmentExtractor has saved us countless hours from dragging and dropping files into folders. It ensures that we look in one location for everything relating to an account. And, by storing the files in SharePoint, it keeps monthly CRM costs to a minimum."

Ken Kelly, President of Kelly Roofing

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