



# Attach2Dynamics

## inogic

White Paper

## Attach2Dynamics - White Paper

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### Aim:

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Attach2Dynamics is a productivity app for Microsoft Dynamics 365 CRM which helps users to use document management systems like Dropbox, SharePoint and Azure Blob Storage within Dynamics 365 CRM.

The main purpose of Attach2Dynamics is to store files/folders in cloud storages. Currently it supports three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

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### Features:

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- Supports all types of entities, records and documents.
- Multiple files and folders can be dragged and dropped at one time to Drop Box, SharePoint and Azure Blob Storage.
- Single as well as multiple files and folders can be uploaded.
- User can download documents from cloud storages by choosing the storage system from Dynamics 365 CRM.
- Files/Folders can be renamed by selecting required documents.
- Sharable links of files/folders can be created which can also be copied for external use.
- Folders can be created on configured connector.
- Deep search for files/folders related to the entered keyword in the search tab can be done.
- Dynamics 365 CRM Notes/Email attachments/Sales Literature attachments can be Moved/Copied to Dropbox, SharePoint and Azure Blob Storage.
- Email anonymous link(of a file) or file as an attachment
- Support for uploading files from home page
- Access control of user actions on Attach2Dynamics
- Delete files from cloud storages
- View files before downloading
- Support for configuring multiple connectors
- Support for single sign-on
- Support for setting default from, to, cc and bcc for an email using Email Configuration

- Support for hierarchy structure to store attachments/documents in SharePoint.
- Support to directly open record folder present on SharePoint site from the UI

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### Supported Versions

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**Versions:** Dynamics 365 8.2 and above, Dataverse (Power Apps).

**Deployment Models:** Online.

**Sharepoint:** Online

**Dropbox:** Personal Dropbox and Dropbox for Business

**Azure Blob Storage**

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### Who needs it?

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Attach2Dynamics can help Dynamics 365 CRM users who want to store files/folders on cloud storages like SharePoint, Dropbox and Azure Blob Storage. This is an interface that allows direct uploading/downloading of files from Dynamics 365 CRM to cloud storage. It has features to rename, download, delete, view files, create a sharable link, create folder, upload, drag and drop, bulk move documents, etc. that makes the task of user easier within Dynamics 365 CRM.

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### Ease of Access

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'Attach2Dynamics' can be accessed easily by clicking the button available on Entity form



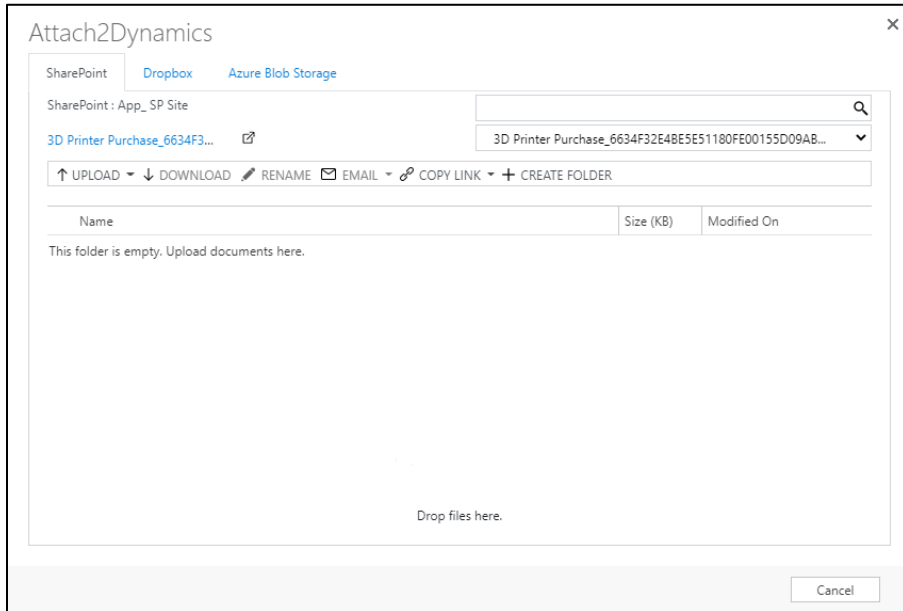
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### UI

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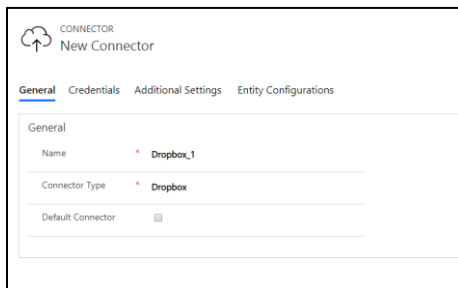
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The button click opens up a user friendly UI to perform various actions and see the list of files on the configured cloud storage.



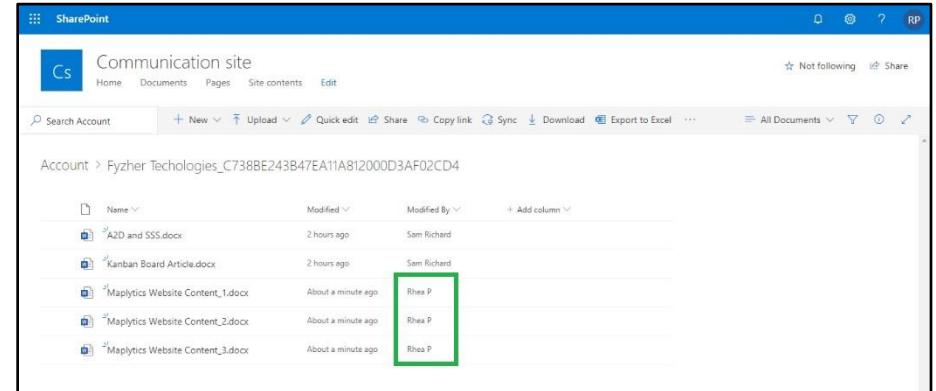
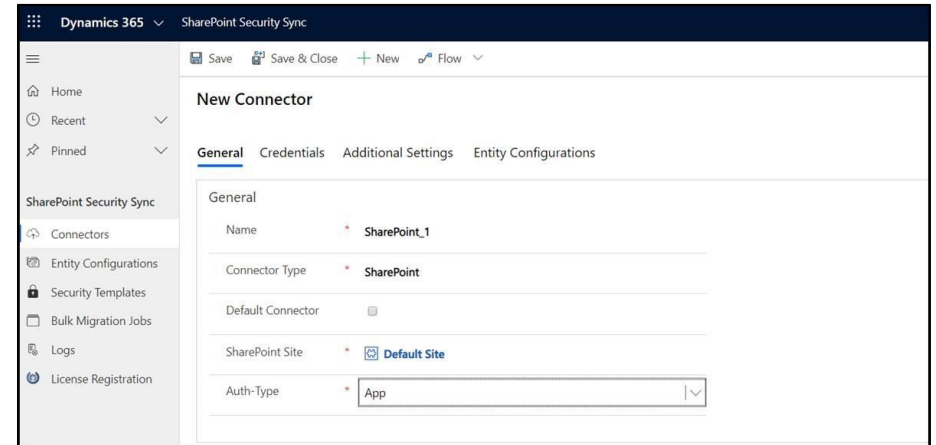
### Configure Connectors

Configure Connectors to enable cloud storages like Dropbox, SharePoint and Azure Blob Storage.



### Support for single sign-on

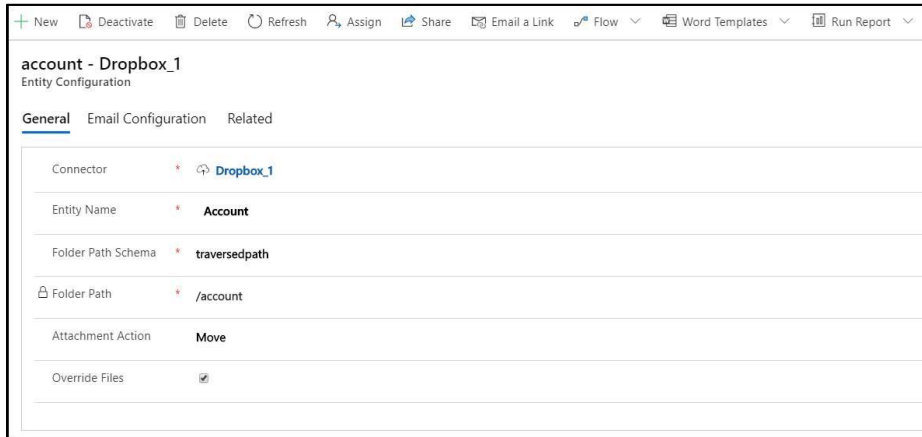
Perform all actions in the context of logged-in user. For SharePoint connector, when Auth-Type is credential, then for any attachment action the name of that user appears who has authenticated the connector while, when auth-type is App, for any attachment action the name of logged in user appears.



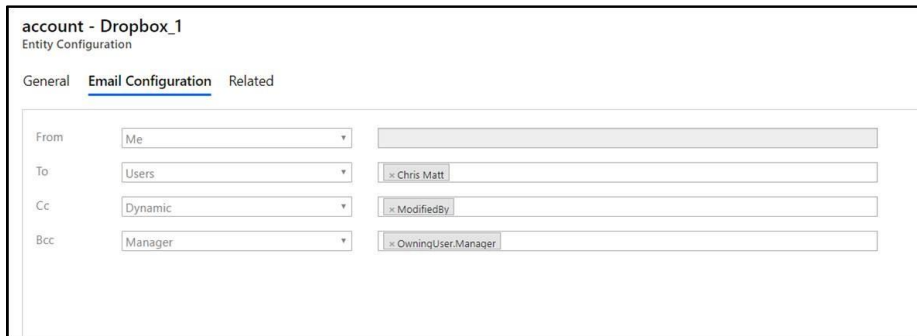
### Entity Configuration

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Configure Entities with Connectors whose attachments need to be uploaded in the cloud storage.

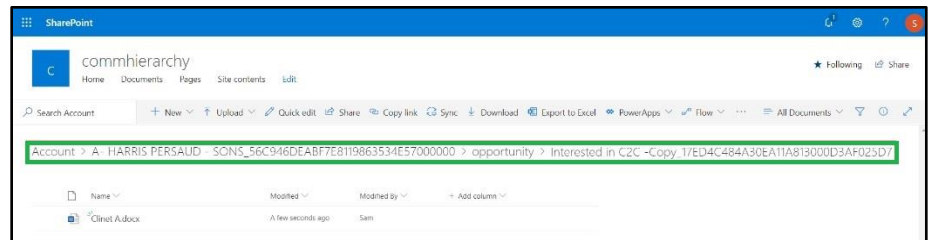
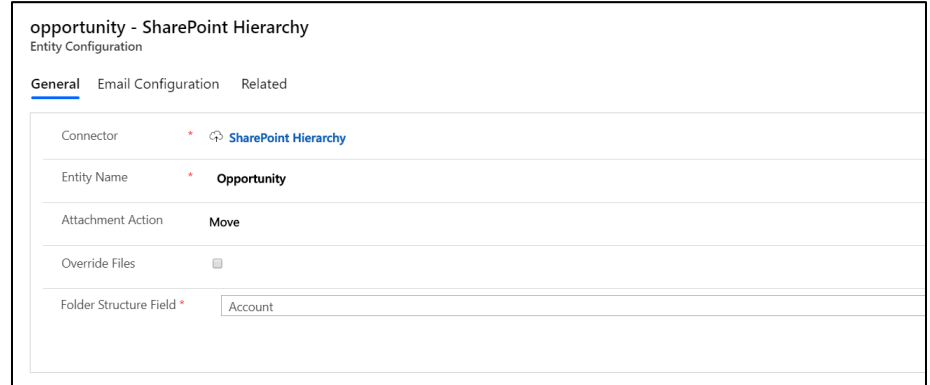


Set default from, to, cc and bcc for an email using Email Configuration.



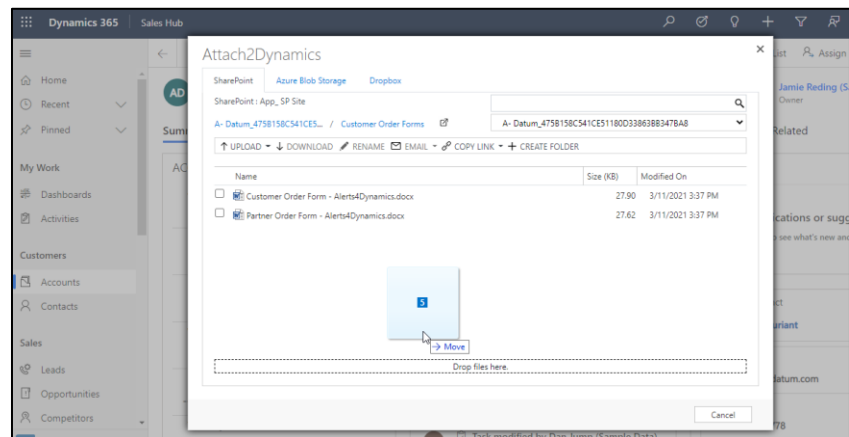
## Hierarchy Structure

Store attachments/documents of Dynamics 365 CRM records on the basis of hierarchy in SharePoint.



## Drag & Drop

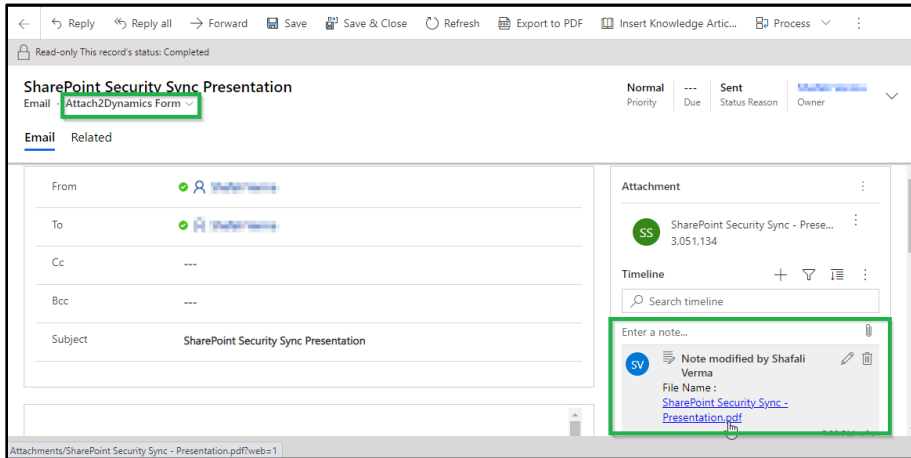
Drag and Drop files and Folders through the Attach2Dynamics UI.



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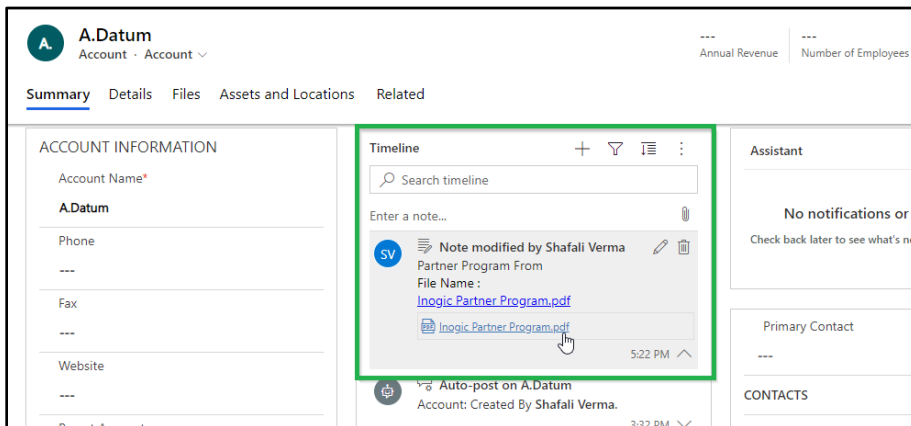
## Move/Copy Email Attachments

Move/Copy Email Attachments to cloud storage and leave a path in the Note Body of Email.



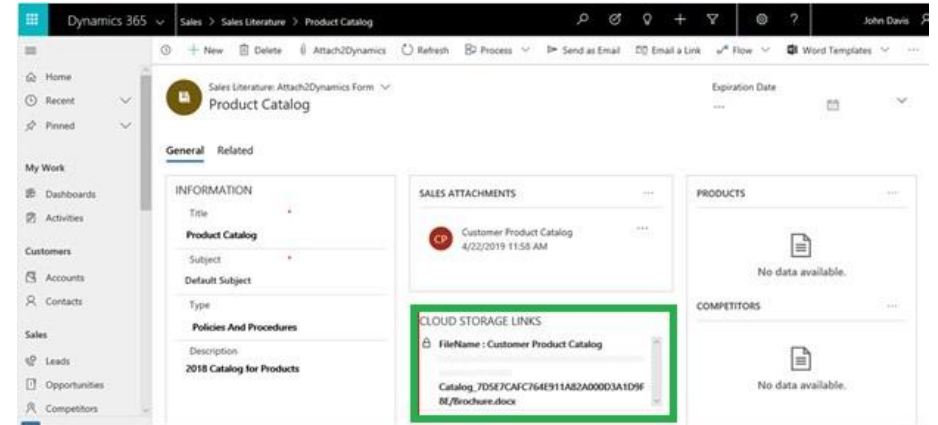
## Move/Copy Notes

Move/Copy Notes to cloud storage and leave a path back in the note body.



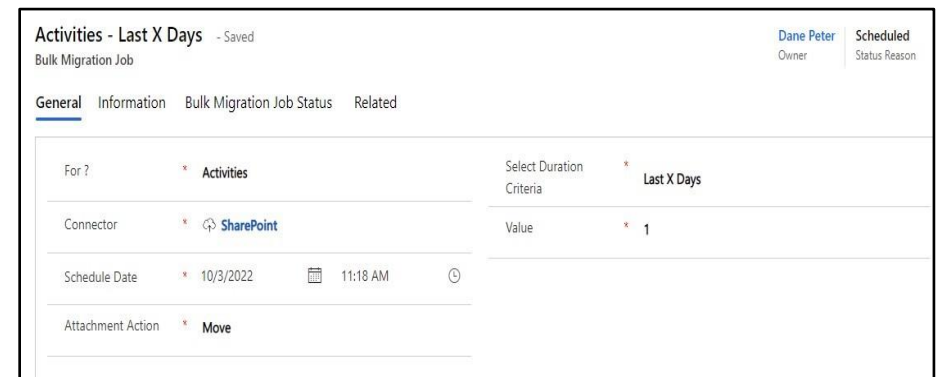
## Move/Copy Sales Literature Attachment

Move/Copy Sales Literature Attachment to cloud storage and leave a path back in cloud storage link section.



## Bulk Migration Jobs

This is where you configure Bulk Migration of the documents stored in CRM, also, it gives detailed status on the files that are migrated.



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**BULK MIGRATION JOB**  
Emails - Last X Weeks  
Read only

Status Reason  
Completed

Owner  
John Sam

General **Information** Bulk Migration Job Status Related

Total Records Processed		161	
Last updated:		08-09-2019 14:37	
Total Succeeded Records	160	Total Succeeded Size (KB)	46,234.85
Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37
Total Ignored Records	1	Total Ignored Size (KB)	0.89
Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37
Total Failed Records	0	Total Failed Size (KB)	0.00
Last updated:	08-09-2019 14:37	Last updated:	08-09-2019 14:37

Upload files directly from home page for selected records.

The screenshot shows the Dynamics 365 CRM Hub interface. The 'Attach2Dynamics' button is highlighted in green in the top toolbar. Below it, a table lists several accounts with columns for Account Name, Main Phone, Address, and Primary Contact.

Account Name	Main Ph...	Address...	Primary Contact
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (s...
Adventure Works Pvt. Ltd.	555-0152	Santa Cruz	Nancy Anderson
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (samp...
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sa...

## Security Templates

Control the access given to users over various features of Attach2Dynamics such as Upload, Download, Email, Create Folder, Delete etc.

**Security Template\_1** - Saved Dane Peter  
Owner

Security Template

General **Permissions** Related

All	<input checked="" type="checkbox"/>		
Upload File/Folder	<input checked="" type="checkbox"/>	Rename File/Folder	<input checked="" type="checkbox"/>
Download Files/Folders	<input checked="" type="checkbox"/>	View Files	<input checked="" type="checkbox"/>
Create Folder	<input checked="" type="checkbox"/>	Copy Link	<input checked="" type="checkbox"/>
Delete Files	<input checked="" type="checkbox"/>	Email	<input checked="" type="checkbox"/>

The screenshot shows the Attach2Dynamics interface with an 'Open' dialog box open. The dialog box displays a file explorer view with a list of files including 'Customer Order Form - Alerts4Dynamics.docx' and 'Partner Order Form - Alerts4Dynamics.docx'. The 'File name' field is set to 'Customer Order Form - Alerts4Dy...' and the file type is 'All Files (\*.\*)'.

## Download & Upload

## Support for uploading files from Home Page

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Download the files and folders (for Dropbox only). Upload files and Folders through the UI directly into the Online storage.

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### Deep Search Tab

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Search for file and folders within the current and subfolders by entering keyword in search tab.

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### Email

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Email anonymous link (of a file/folder) or file as an attachment.

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### Create folder

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Users can create the folder for all three cloud storages.

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### Rename

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Rename files/folders as per requirement.

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### Copy a Link

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Copy and share generated link as per requirement.

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### Delete

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Delete files from the cloud storages.

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### View Files

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View files before downloading from cloud storages.

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### Open Folder

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Open record folder present on SharePoint site directly from Attach2Dynamics document management UI.

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### Log

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Errors logs are listed in 'Log' Entity during any fallout while performing features.

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### Contact Us:

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