Attach2Dynamics

Inoglic

White Paper

Aim:

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.

Features:

- 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

Supported Versions

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

Who needs it?

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.

Ease of Access

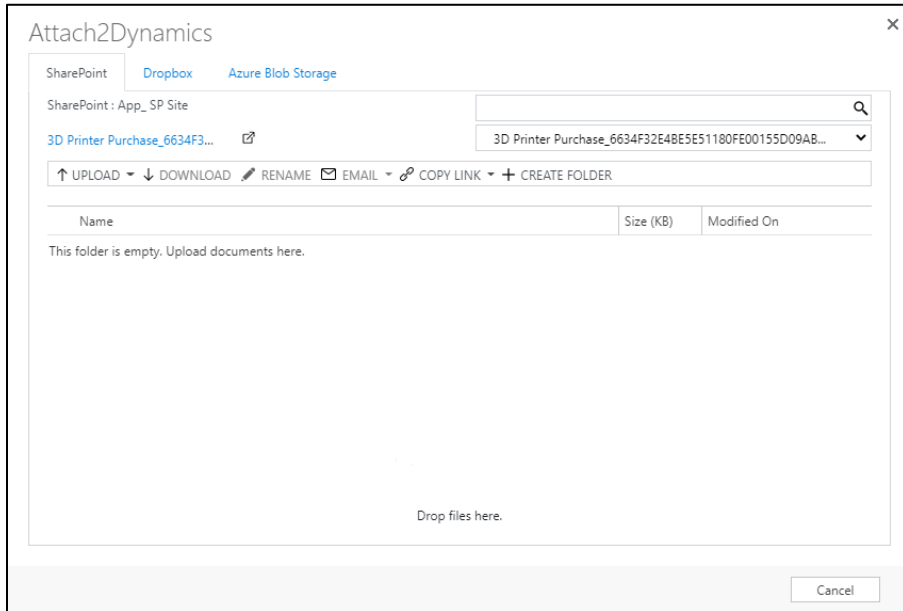'Attach2Dynamics' can be accessed easily by clicking the button avaliable on Entity form

UI

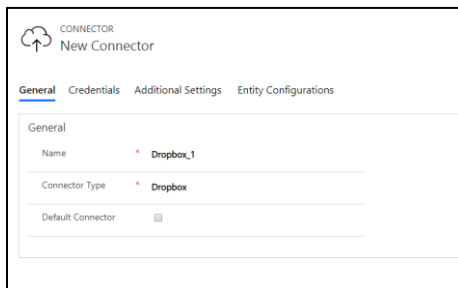The button click opens up an user friendly UI to perform various actions and see the list of files on the configured cloud storage.
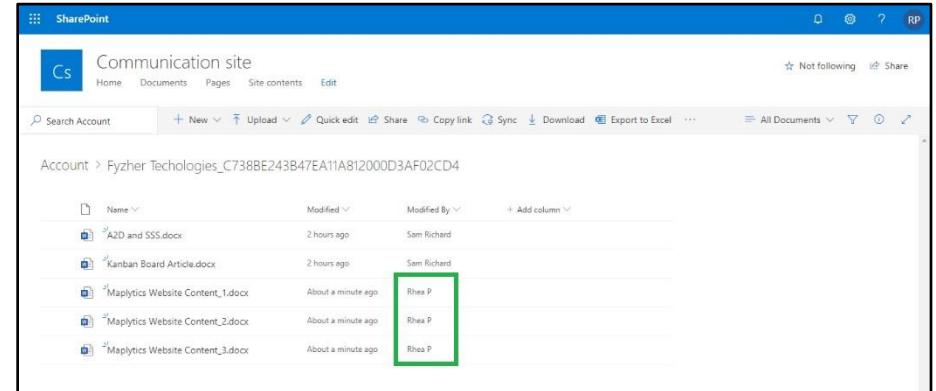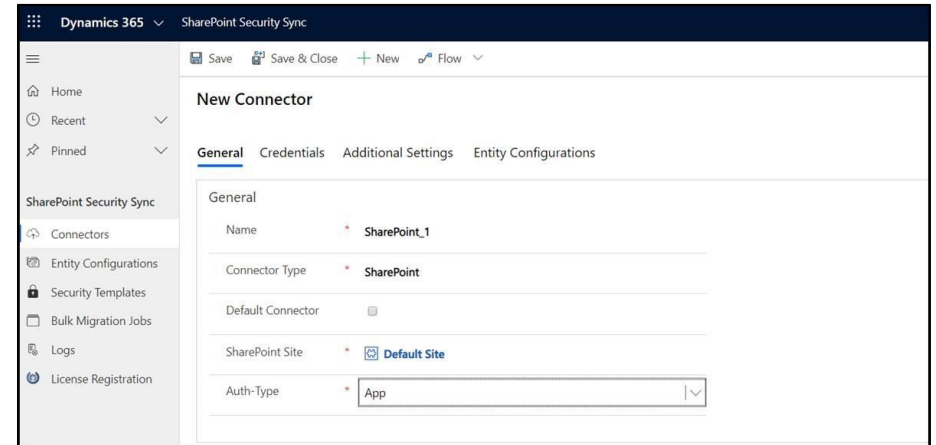

Configure Connectors

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

Configure Entities with Connectors whose attachments need to be uploaded in the cloud storage.
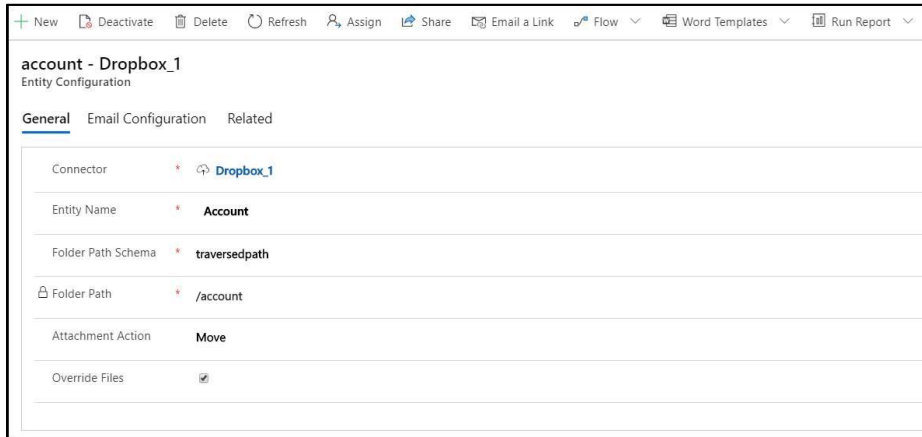
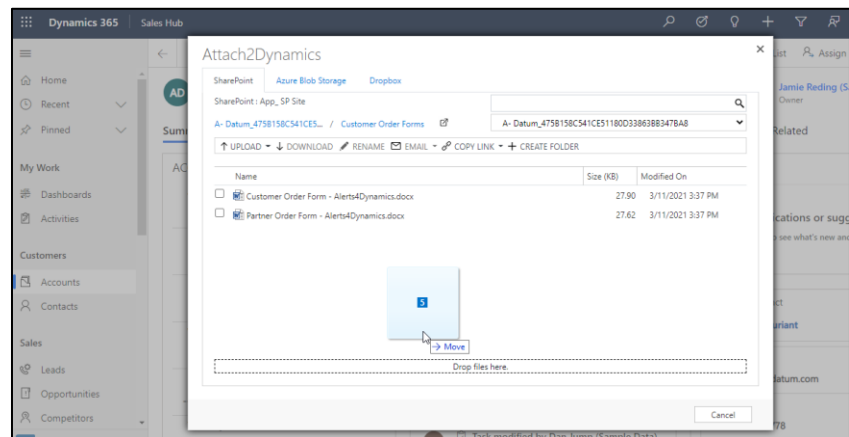Set default from, to, cc and bcc for an email using Email Configuration.
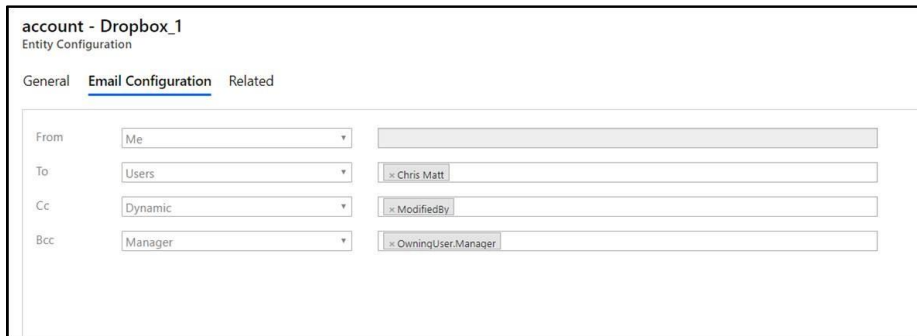
Hierarchy Structure

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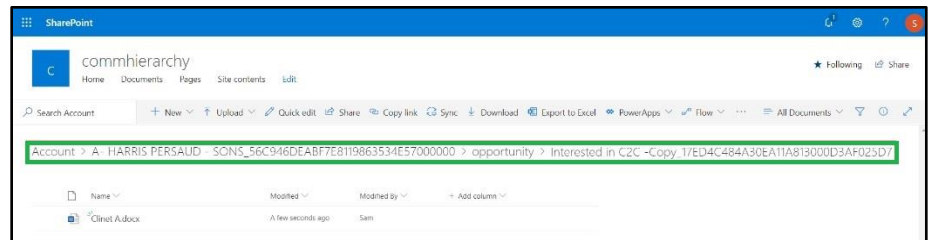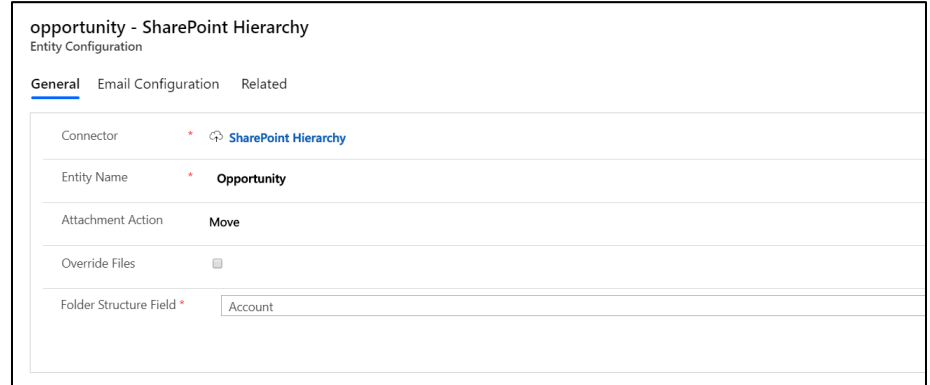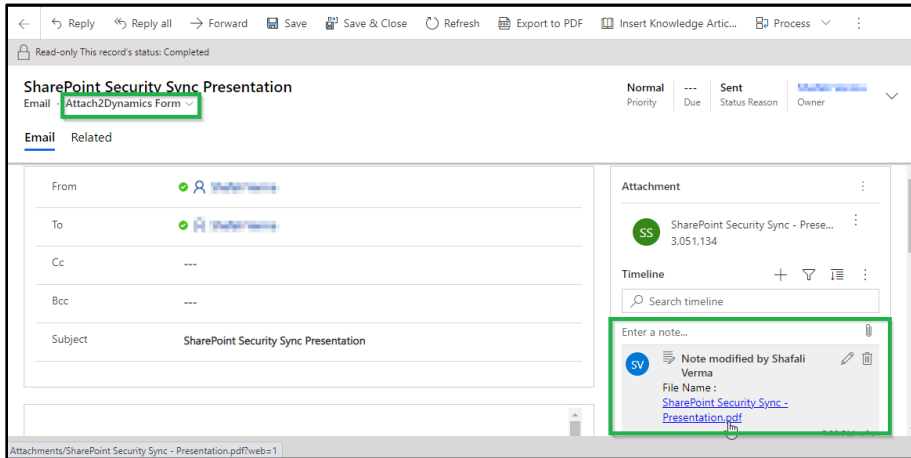

Drag & Drop

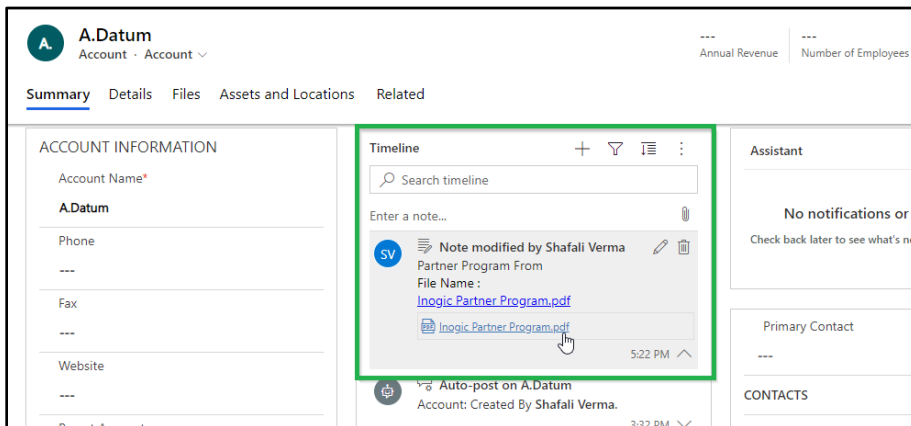Drag and Drop files and Folders through the Attach2Dynamics UI.

Move/Copy Email Attachments

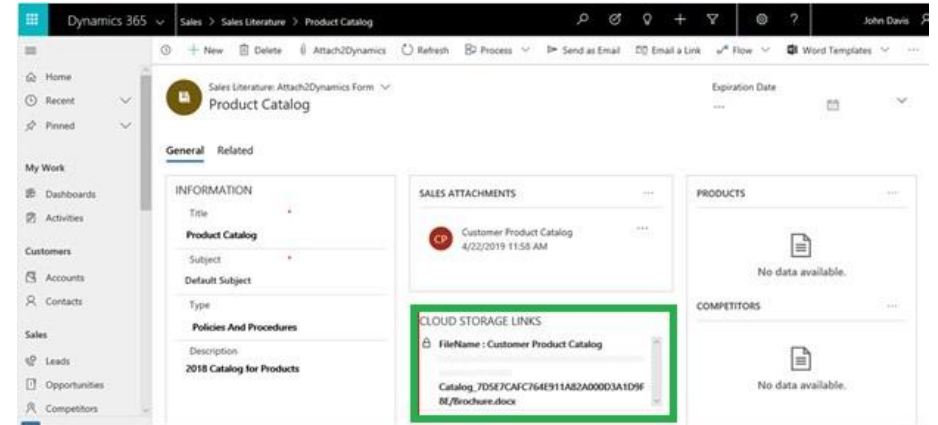Move/Copy Email Attachments to cloud storage and leave a path in the Note Body of Email.
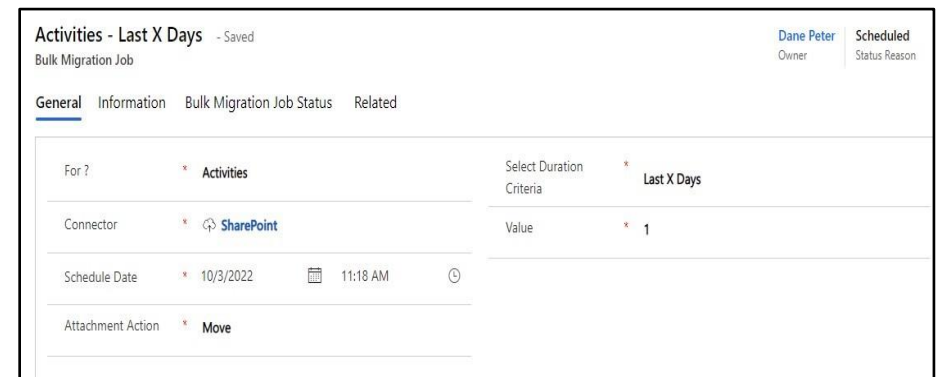

Move/Copy Sales Literature Attachment

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

Move/Copy Notes

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

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.

Security Templates

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

Support for uploading files from Home Page

Upload files directly from home page for selected records.

Download & Upload

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

Deep Search Tab

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

Email

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

Create folder

Users can create the folder for all three cloud storages.

Rename

Rename files/folders as per requirement.

Copy a Link

Copy and share generated link as per requirement.

Delete

Delete files from the cloud storages.

View Files

View files before downloading from cloud storages.

Open Folder

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

Log

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

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