

Drag & Drop

Setup and User Guide for Microsoft Dynamics 365 Business Central



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Drag & Drop Business Central

Setup

After installing the Drag & Drop app for Dynamics 365 Business Central start the guided setup. Setup is fast and easy since you only need to setup authorizations.

Go to **Assisted Setup** and select **Set up Drag & Drop**. Click **Next** when you are ready to start configuration.

In the next screen you can select the User Groups to which you would like to give access. If you do not want to give access on User Group level but rather on User level, you can leave this section empty and click **Next** to continue. In the following screen you can select the users you would like to give access.

Click **Next** and in the next window click **Finish** to finalize the window.

DRAG AND DROP

WELCOME TO DRAG AND DROP SETUP

This extension allows users to use the standard Business Central attachments functionality to drag and drop files of all types to records and posted documents in Business Central. A FactBox is used to create a drop zone for files. This requires some additional setup.

LET'S GO!

Choose Next to setup permissions for users and groups

Back Next Finish

DRAG AND DROP

Select user groups for which you want to assign permissions to the extension.

> | Manage

USER GROUP CODE	USER GROUP NAME
<input type="text"/>	

Back Next Finish

DRAG AND DROP

Thank you for setting up the extension.

THAT'S IT!

To apply the settings, click on the Finish button.

Back Next Finish

Drag & Drop

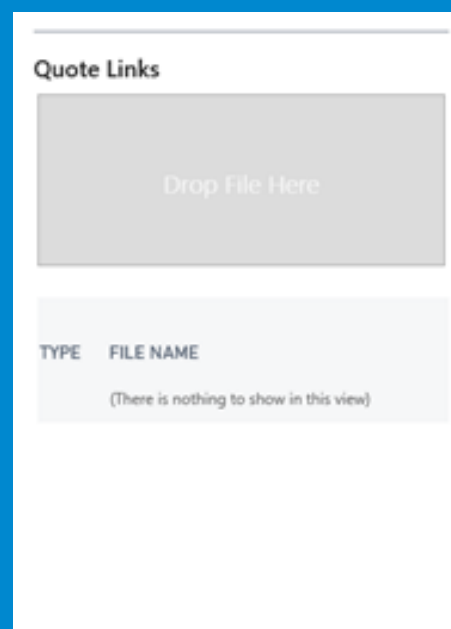
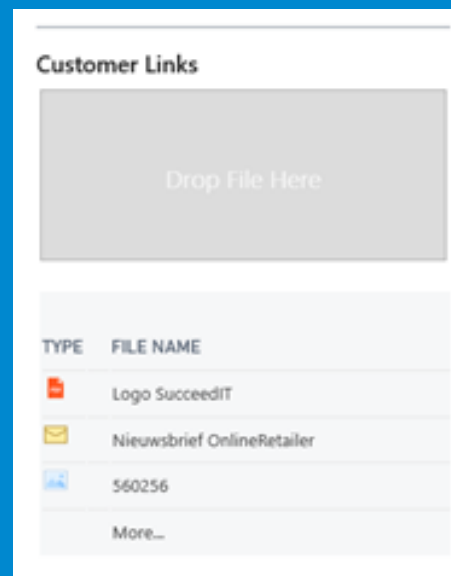
Business Central

User Guide

How does Drag & Drop work? Simply drag the file to your browser in the **Drop File Here** section and the file will be uploaded and attached to the document, customer, vendor, item, or any of the other 150 supported pages.

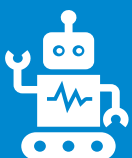
In the example below we will explain how to Drag & Drop files to your Customer Card in Dynamics 365 Business Central.

1. On the Home Page, click **Customers**.
2. Locate the Drag & Drop factbox on the right hand side of the window. Open the factbox pane if necessary.
3. Drag any file to the drop zone indicated by **Drop File Here**. This will trigger the standard attachments functionality in Business Central. The file will appear in the list of linked attachments.
4. Click **More...** to open the attachments window and inspect your attached document.





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