Attach2Dynamics

Drag and Drop multiple files
and folders to Cloud Storage
within your Dynamics 365 CRM

Attach2Dynamics

crm@inogic.com

Available on
Microsoft AppSource

innovative logic
inogic

Key Features

Upload/Download files & folders
Upload & download multiple files and single folder to SharePoint, Dropbox and Azure Blob Storage.

Ease of use - Drag & Drop
Drag & Drop multiple files and folders to SharePoint, Dropbox and Azure Blob Storage.

Deep Search
Search for file and folders within hierarchies by entering keyword in search tab.

Move/Copy Attachments
Move or Copy Notes/Email/Sales Literature attachments to cloud storage and leave a path back on the Entity record.

Email link or file as an attachment
Email Dynamics 365 CRM files as attachment or file's link.

Anonymous Link
Generate anonymous shareable link for the selected file/folder and share it with required users.

Key Features

Rename files & folders
Rename files and folders based on your business requirement.

Create Folder
Create folders as per requirement in all three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

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

Delete Files
Delete files that are not needed anymore from cloud storages – SharePoint, Dropbox and Azure Blob Storage.

View Files
View necessary files before downloading with just a single click.

Support for uploading files from Home Page
Upload files from home page directly for multiple selected records.

- Configure multiple instances for all three cloud storages – SharePoint, Dropbox and Azure Blob Storage

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Available For

SUPPORTED VERSIONS	DEPLOYMENTS	CLOUD STORAGES
MICROSOFT DYNAMICS v8.x and above.	• ON-PREMISES WITH IFD • DYNAMICS 365 ONLINE	• SHAREPOINT • AZURE BLOB • DROPBOX

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Drag and Drop multiple files & folders

Upload/Download files & folders

Upload files & folders directly from Home Page

Get an Anonymous Shareable link of files & folders

Email link or file as an attachment

Deep Search

Delete Files

View Files

Move/Copy Dynamics 365 CRM Attachments

Bulk Migrate Dynamics 365 CRM Attachments

New | Delete | Refresh | Assign | Share | Email a Link | Flow | Word Templates | Run Report

BULK MIGRATION JOB
Emails - Last X Weeks

Status Reason
Scheduled

Owner
John Sam

General | Information | Bulk Migration Job Status | Related

For ?	* Emails	Operator	* Last X Weeks
Connector	* SharePoint_TeamSite	Value	* 2
Schedule Date	* 09-08-2019	13:30	
Attachment Action	* Move		

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
Last updated: 08-09-2019 14:37

Total Succeeded Size (KB): 46,234.85
Last updated: 08-09-2019 14:37

Total Ignored Records: 1
Last updated: 08-09-2019 14:37

Total Ignored Size (KB): 0.89
Last updated: 08-09-2019 14:37

Total Failed Records: 0
Last updated: 08-09-2019 14:37

Total Failed Size (KB): 0.00
Last updated: 08-09-2019 14:37

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Security Templates

SECURITY TEMPLATE
Access

Owner
⊙ 👤 Sam P

General Permissions Related

Name	*	Access
Connector	*	☁ SharePoint

Users   📋 Add Existing User ⋯

✓	Full Name ↑	Site	Business Unit	Title
	⊙ Sam P	---	forgear	---

SECURITY TEMPLATE
Access

Owner
⊙ 👤 Sam P

General **Permissions** Related

All	☐
Upload	☑
Download	☐
View Files	☑
Rename	☐

Email	☐
Copy A Link	☑
Create Folder	☐
Delete	☑

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Configuring Connectors

Entity Configuration

Next Steps

Learn more about **Attach2Dynamics** today.

Get your free **Attach2Dynamics** trial from Microsoft AppSource or our website!

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