

Attach2Dynamics

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



Attach2Dynamics

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Available on
Microsoft AppSource



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

Available For

SUPPORTED VERSIONS

MICROSOFT DYNAMICS
v8.x and above.

DEPLOYMENTS

- ON-PREMISES WITH
IFD
- DYNAMICS 365
ONLINE

CLOUD STORAGES

- SHAREPOINT
- AZURE BLOB
- DROPBOX

Drag and Drop multiple files & folders

The screenshot displays the Attach2Dynamics application interface, which is overlaid on a Microsoft Dynamics 365 Sales Hub window. The Dynamics 365 window shows the navigation pane on the left with options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, and Competitors. The main area shows the 'Sales > Accounts > Alpine Ski House' record.

The Attach2Dynamics window is titled 'Attach2Dynamics' and has a close button (X) in the top right corner. It features a tabbed interface with 'SharePoint' and 'Dropbox' tabs. The 'SharePoint' tab is active, showing a search bar and a dropdown menu for the SharePoint location, currently set to 'Alpine Ski House_AAA19CDD88DFE311B8E56C3BE5A8B200'. Below the search bar is a toolbar with buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A table lists the files in the selected location:

Name	Size (KB)	Modified On
<input type="checkbox"/> Alfa.docx	19.43	7/1/2019 12:33 PM
<input type="checkbox"/> Beta.docx	20.70	7/11/2019 5:32 PM

Below the table is a large blue icon representing a Word document. A mouse cursor is hovering over the icon, and a 'Move' button is visible. At the bottom of the window, there is a dashed box with the text 'Drop files here.' and a 'Close' button in the bottom right corner.

Upload/Download files & folders

The screenshot displays the Attach2Dynamics application window overlaid on the Microsoft Dynamics 365 Sales Hub interface. The Attach2Dynamics window is titled "Attach2Dynamics" and features a "SharePoint" tab with a "Dropbox" sub-tab. The main area shows a file list for "Alpine Ski House_AAA19CD..." with columns for "Size (KB)" and "Modified On". A context menu is open over the "UPLOAD" button, showing options for "Files" and "Folder".

SharePoint **Dropbox**

SharePoint: SharePoint_1

Alpine Ski House_AAA19CD...

Alpine Ski House_AAA19CDD88DFE311B8E56C3BE5A88200

↑ UPLOAD ↓ DOWNLOAD ✎ RENAME ✉ EMAIL 🔗 COPY A LINK ➕ CREATE FOLDER

	Size (KB)	Modified On
Deal - Alfa		7/11/2019 5:32 PM
Deal - Beta		7/1/2019 12:33 PM
Deal - Charlie		7/1/2019 12:33 PM
Deal - Delta		7/1/2019 12:33 PM

Drop files here.

Close

Upload files & folders directly from Home Page

The screenshot displays the Microsoft Dynamics 365 CRM Hub interface. The top navigation bar shows 'Dynamics 365', 'CRM Hub', and 'CORE > Accounts'. The left sidebar contains navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Activities', 'Dashboards', 'Customers', 'Accounts', and 'Contacts'. The main area shows a list of accounts under 'All Accounts'. The 'Attach2Dynamics' button is highlighted in the top toolbar. An 'Attach2Dynamics' dialog box is open, showing options for 'SharePoint', 'Azure Blob Storage', and 'Dropbox'. A file explorer window is also open, showing a folder named 'Alfa'.

Account Name	Main Ph	Address	Primary Contact
✓ Fourth Coffee (sample)	555-0150		
✓ Litware, Inc. (sample)	555-0151		
✓ Adventure Works Pvt. Ltd.	555-0152		
✓ Fabrikam, Inc. (sample)	555-0153		
✓ Blue Yonder Airlines (sample)	555-0154		
✓ City Power & Light (sample)	555-0155		

Get an Anonymous Shareable link of files & folders

The screenshot displays the Attach2Dynamics application interface, which is overlaid on a Microsoft Dynamics 365 Sales Hub background. The application window, titled "Attach2Dynamics", features a top navigation bar with tabs for "SharePoint" and "Dropbox". Below this, a search bar and a dropdown menu are visible. A toolbar contains icons for "UPLOAD", "DOWNLOAD", "RENAME", "EMAIL", "COPY A LINK", and "CREATE FOLDER". A table lists files with columns for "Name", "Size (KB)", and "Modified On". A context menu is open over the first file, showing "View" and "Edit" options. The background shows the Dynamics 365 interface with a sidebar menu and a main content area.

Name	Size (KB)	Modified On
Deal - Alfa		7/11/2019 5:32 PM
Deal - Beta		7/1/2019 12:33 PM
Deal - Charlie		7/1/2019 12:33 PM
Deal - Delta		7/1/2019 12:33 PM

Email link or file as an attachment

The image displays the Attach2Dynamics application interface, which is used to generate email links or attachments from Dynamics 365 data. The interface is divided into several sections:

- Top Bar:** Shows the Dynamics 365 navigation pane on the left and the Sales Hub header with the account path: Accounts > /account//account/Alpine Ski House_A...
- Attach2Dynamics Window:** A central window with tabs for SharePoint and Dropbox. It shows a file selection process for 'Alpine Ski House_AAA19CD...' / Deal - Alfa. A table lists files for upload:

Name	Size (KB)	Modified On
Alfa.docx	19.43	7/1/2019 12:33 PM
Beta.docx	20.70	7/11/2019 5:32 PM

Below the table, there are options to 'Attach Documents' or 'Links'. A 'Drop files here.' area is also visible.

The interface also shows an email composition screen with the following details:

- From:** Katie Montijo
- To:** Peter Dane
- Subject:** Review Documents
- Attachments:** Initial Findings.docx (796,119), notes.png (2,391)
- Timeline:** Enter a note... (No records to show.)

The email composition screen also includes a rich text editor with various formatting options (Bold, Italic, Underline, etc.) and a section for 'Links generated by Attach2Dynamics -' showing links to 'Initial Findings.docx' and 'notes.png'.

Deep Search

The screenshot shows the Attach2Dynamics application interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and the account path '/account//account/Alpine Ski House_A...'. The left sidebar lists navigation options: Home, Recent, Pinned, My Work (Dashboards, Activities), Customers (Accounts, Contacts), and Sales (Leads, Opportunities, Competitors). The main window displays a search for 'delta' in the 'Alpine Ski House_AAA19CD...' folder. The search results table is as follows:

Name	Path	Size (KB)
Deal - Delta	/account/Alpine...	
Delta.docx	/account/Alpine...	19.29

Below the table, there is a 'Drop files here.' prompt and a 'Close' button at the bottom right.

Delete Files

Dynamics 365

Sales Hub

Accounts > /account//account//account/Alpine Sk...

Home

Recent

Pinned

My Work

Dashboards

Activities

Customers

Accounts

Contacts

Sales

Leads

Opportunities

Competitors

Attach2Dynamics

SharePoint

Dropbox

SharePoint : SharePoint_1

Alpine Ski House_AAA19CD...

Deal - Alfa

Alpine Ski House_AAA19CDD88DFE311B8E56C3BE5A8B200

↑

UPLOAD

↓

DOWNLOAD

RENAME

EMAIL

COPY A LINK

+

CREATE FOLDER

	Name	Size (KB)	Modified On
<input type="checkbox"/>	Alfa.docx	19.43	7/1/2019 12:33 PM
<input checked="" type="checkbox"/>	Beta.docx	20.70	7/11/2019 5:32 PM

Drop files here.

Close

View Files

The screenshot shows a web browser window with a Dynamics 365 account open. A sidebar on the left contains navigation links: Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts (selected), Contacts, Sales, Leads, Opportunities, and Competitors. The main content area displays the 'Attach2Dynamics' interface. At the top, there are tabs for 'SharePoint' and 'Dropbox'. Below these, a search bar and a dropdown menu are visible. A table lists files, with 'Beta.docx' selected. The table has columns for Name, Size (KB), and Modified On. Below the table, there is a 'Drop files here.' prompt and a 'Close' button.

Name	Size (KB)	Modified On
<input type="checkbox"/> Alfa.docx	19.43	7/1/2019 12:33 PM
<input checked="" type="checkbox"/> Beta.docx	20.70	7/11/2019 5:32 PM

Move/Copy Dynamics 365 CRM Attachments

Email

Notes

Reply Reply all Forward Save Refresh Process Convert To Delete Email a Link

Email: Attach2Dynamics Form Sales Files CRM:0001099 Read only Priority Normal Due ---

Email Related

From John Sam

To Canvas Pvt LTD

Cc ---

Bcc ---

Subject Sales Files CRM:0001099

Hi,

Please find attachment

Thanks,
Sam

CONTACT

Topic * Good Prospect (sample)

Name * Peter Houston (sample)

Job Title -----

Business Phone -----

Mobile Phone -----

POSTS ASSISTANT ACTIVITIES NOTES ONENOTE

Product Demo

Initial Notes.docx

You - Just now

[https://\[redacted\].sharepoint.com/lead/Peter Houston \(sample\)_9234204B8936E911A95B000D3AF2C9D4/Today.txt](https://[redacted].sharepoint.com/lead/Peter Houston (sample)_9234204B8936E911A95B000D3AF2C9D4/Today.txt)

Katie Montijo - 2/22/2019 3:35 PM

Attachment

No data available.

Timeline + ...

Enter a note...

TODAY

Note modified by John Sam - 5 Minutes ago

File Name : Capture - Copy (8).PNG

[https://www.dropbox.com/home/account/Canvas Pvt LTD_3228D913E282E911A97C000D3AF03D2E/E-mails/Capture - Copy \(8\).PNG](https://www.dropbox.com/home/account/Canvas Pvt LTD_3228D913E282E911A97C000D3AF03D2E/E-mails/Capture - Copy (8).PNG)

Delete Edit note

Sales Literature

Dynamics 365 Sales Sales Literature Product Catalog

Home Recent Pinned

My Work Dashboards Activities Customers Accounts Contacts Sales Leads Opportunities Competitors

Sales Literature: Attach2Dynamics Form Product Catalog

Expiration Date ---

General Related

INFORMATION

Title Product Catalog

Subject

Default Subject

Type Policies And Procedures

Description 2018 Catalog for Products

SALES ATTACHMENTS

Customer Product Catalog 4/22/2019 11:58 AM

CLOUD STORAGE LINKS

File Name : Customer Product Catalog

[Catalog_7D5E7C9F764E911A82A000D3A1D9FBE/Brochure.docx](#)

PRODUCTS


No data available.

COMPETITORS

No data available.


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


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

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	<input type="checkbox"/>
Upload	<input checked="" type="checkbox"/>
Download	<input type="checkbox"/>
View Files	<input checked="" type="checkbox"/>
Rename	<input type="checkbox"/>

Email	<input type="checkbox"/>
Copy A Link	<input checked="" type="checkbox"/>
Create Folder	<input type="checkbox"/>
Delete	<input checked="" type="checkbox"/>

Configuring Connectors

The screenshot shows the Attach2Dynamics application interface. The top navigation bar includes 'Dynamics 365', 'Attach2Dynamics', and 'Connectors > SharePoint_1'. A secondary toolbar contains actions like 'New', 'Deactivate', 'Delete', 'Authenticate', 'Refresh', 'Assign', 'Share', 'Email a Link', 'Flow', and 'Word'. The left sidebar lists navigation options: Home, Recent, Pinned, Attach2Dynamics, Connectors (selected), Entity Configurations, Security Templates, Bulk Migration Jobs, Bulk Migration Job S..., Logs, and License Registration. The main content area displays the configuration for the 'SharePoint_1' connector. It shows a status of 'Authenticated' and tabs for 'General', 'Credentials', 'Additional Settings', 'Entity Configurations', and 'Related'. The 'General' tab is active, showing fields for Name (SharePoint_1), Connector Type (SharePoint), Default Connector (unchecked), SharePoint Site (Default Site), and Auth-Type (Credential).

CONNECTOR
SharePoint_1

Status Reason
Authenticated

General Credentials Additional Settings Entity Configurations Related

General

Name	*	SharePoint_1
Connector Type	*	SharePoint
Default Connector	<input type="checkbox"/>	
SharePoint Site	*	Default Site
Auth-Type	*	Credential

Entity Configuration

Dynamics 365

Attach2Dynamics

Entity Configurations > lead - SharePoint

Katie Montijo

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

ENTITY CONFIGURATION

lead - SharePoint

Owner
Katie Montijo

General Related

Connector
SharePoint

Entity Name
Lead

Attachment Action
Move

Override Files
☒

Error Logs

Refresh Run Report

Record Id

Entity Configuration

Error

Record URL

Created On

Active Save

Next Steps

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trial from [Microsoft AppSource](#)
or [our website](#)!

Email: crm@inogic.com

