Attach2Dynamics

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









# 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**

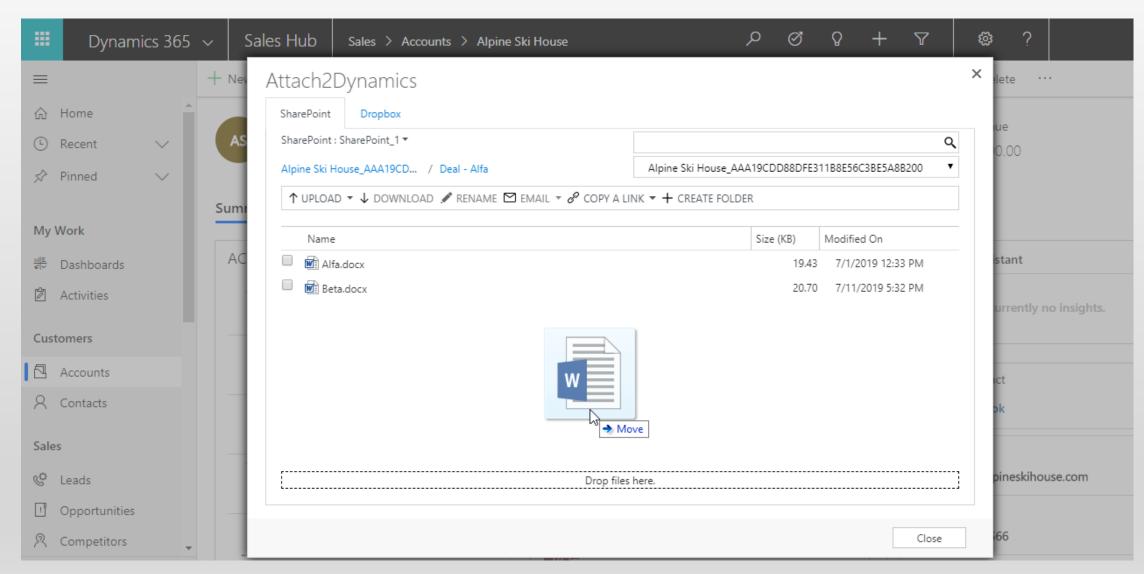
- SHAREPOINT
- AZURE BLOB
- DROPBOX







### Drag and Drop multiple files & folders

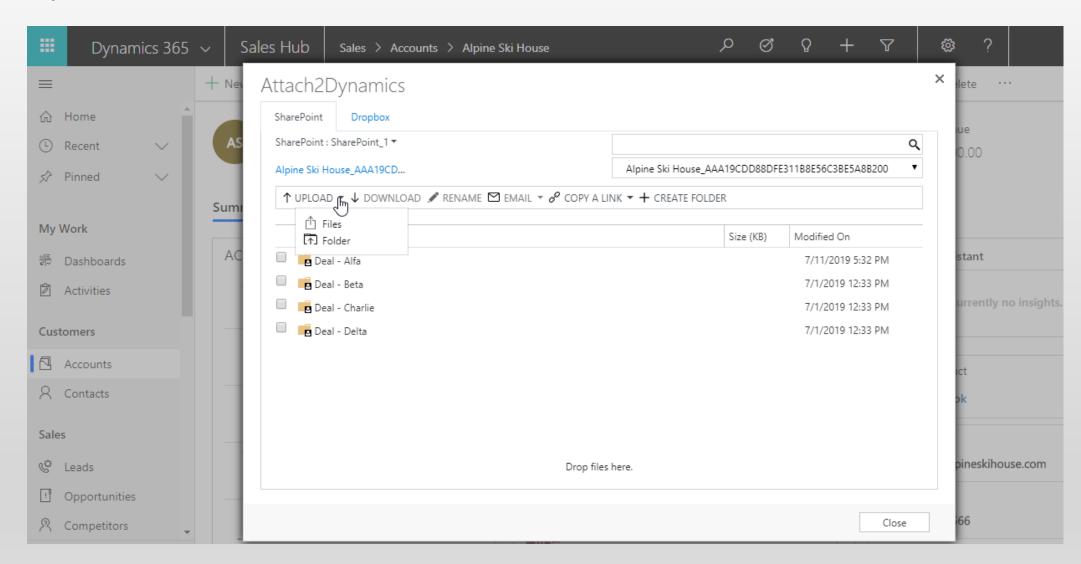








### Upload/Download files & folders

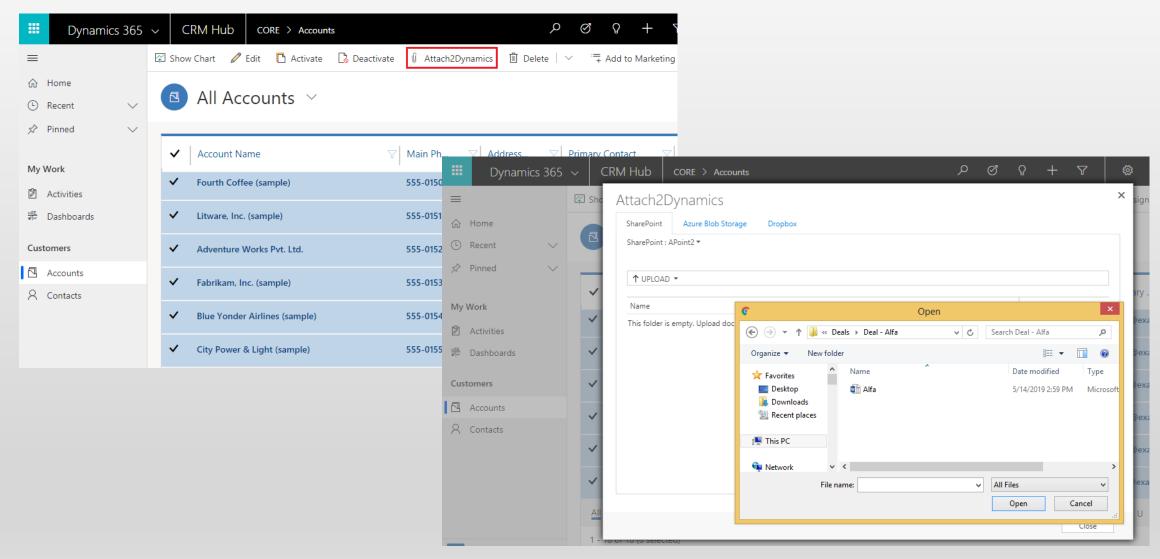








## Upload files & folders directly from Home Page

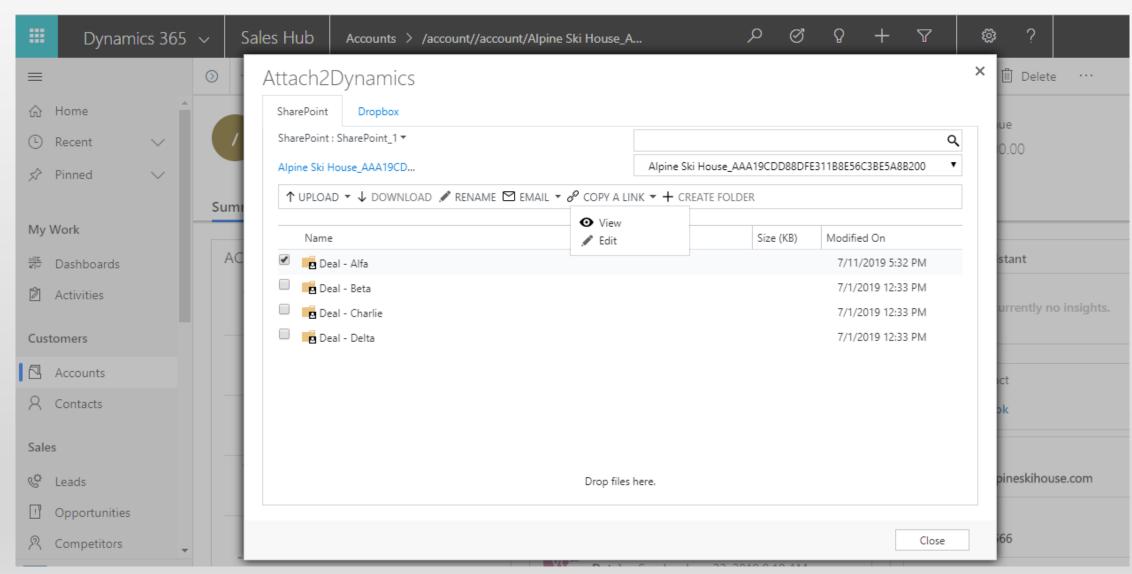








### Get an Anonymous Shareable link of files & folders

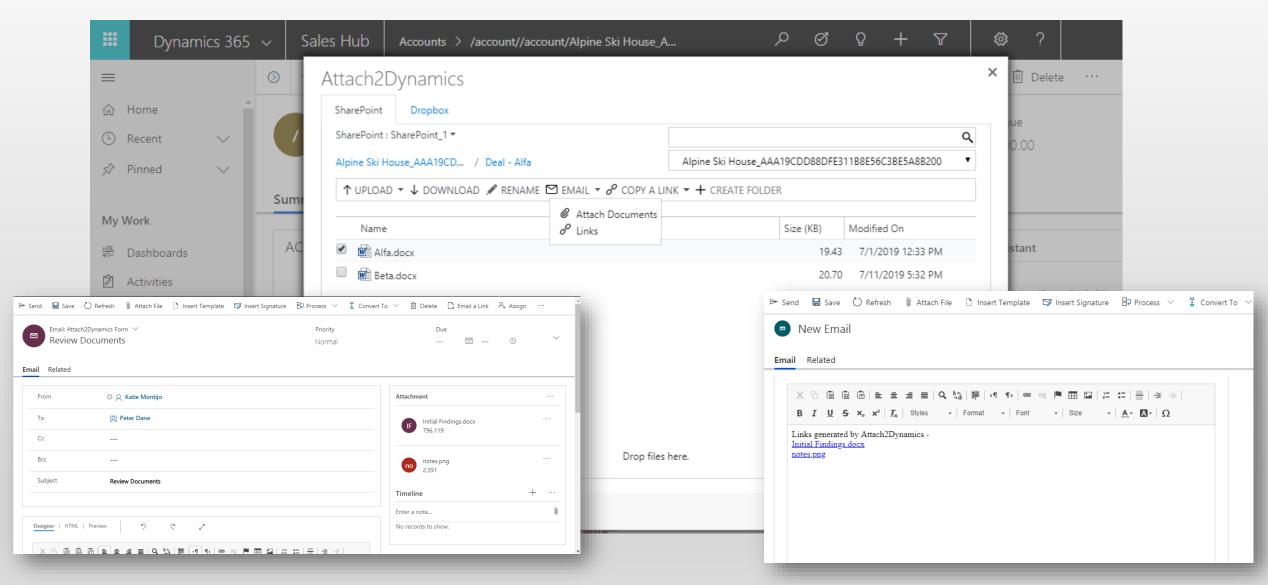








### Email link or file as an attachment

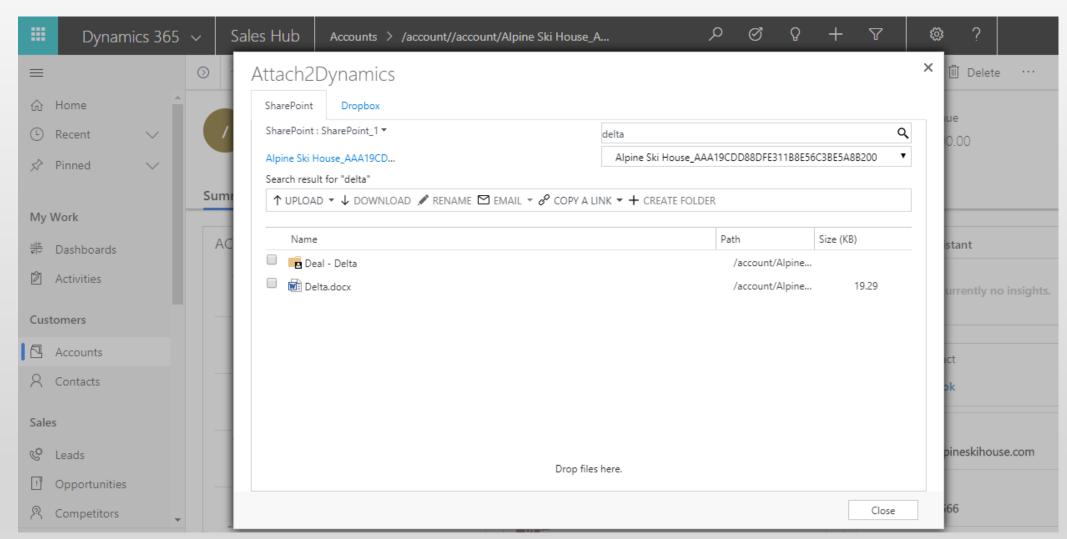








## Deep Search

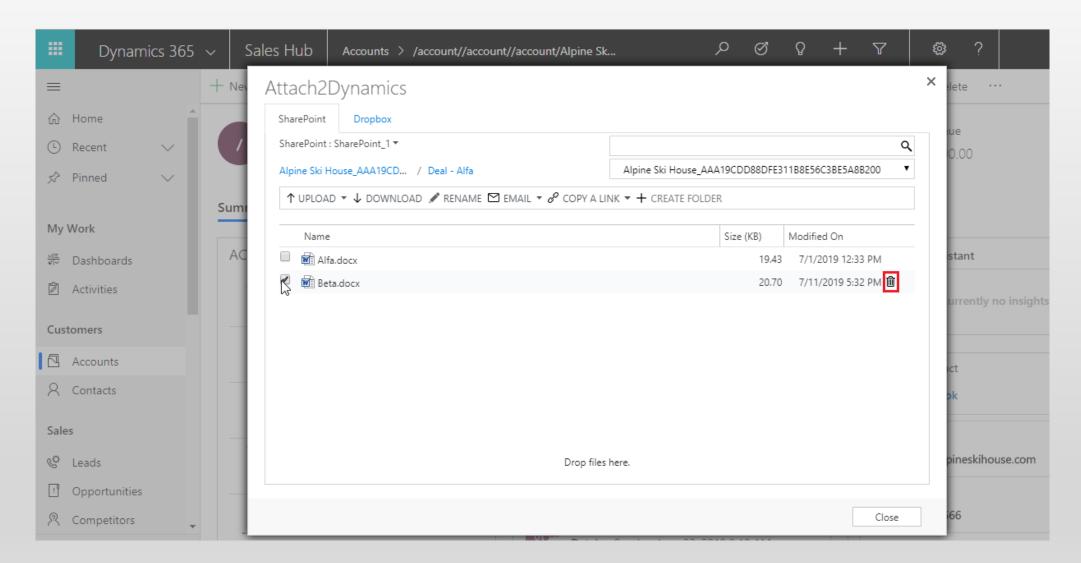








### Delete Files

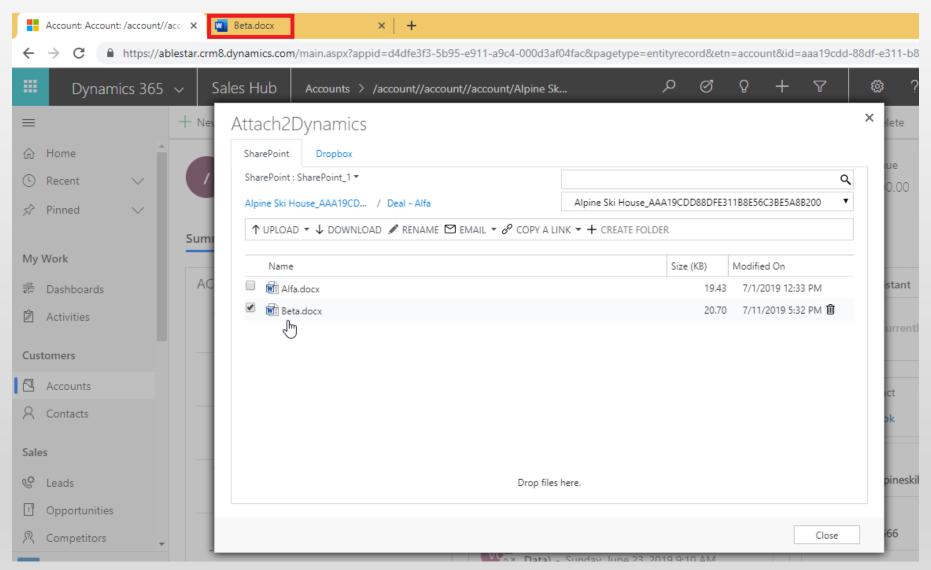








### View Files

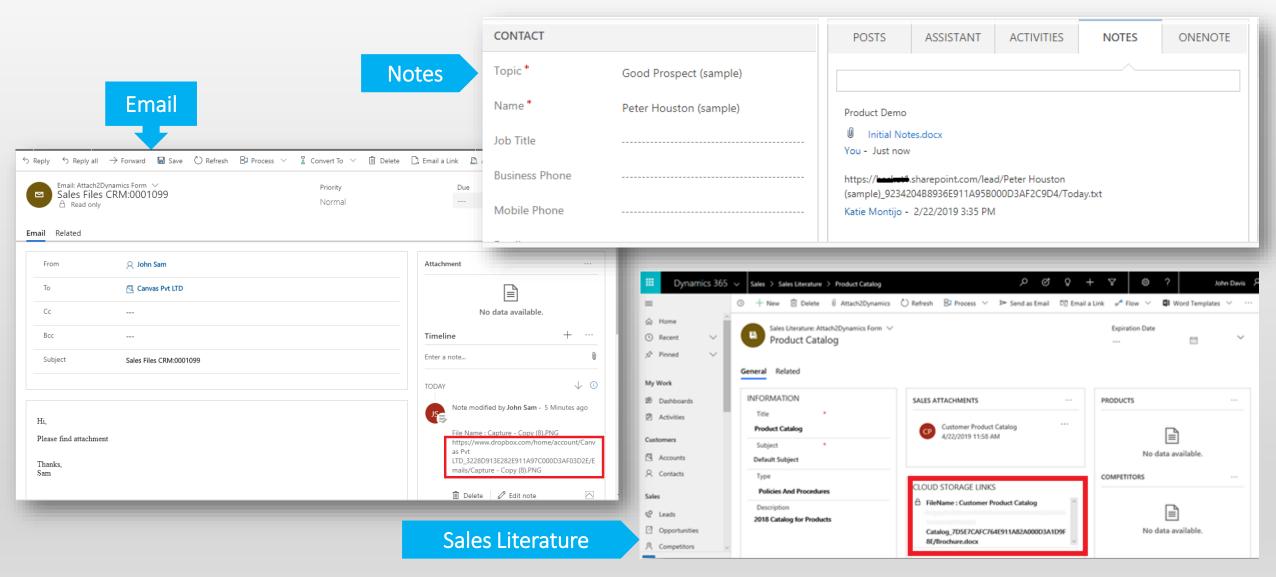








### Move/Copy Dynamics 365 CRM Attachments

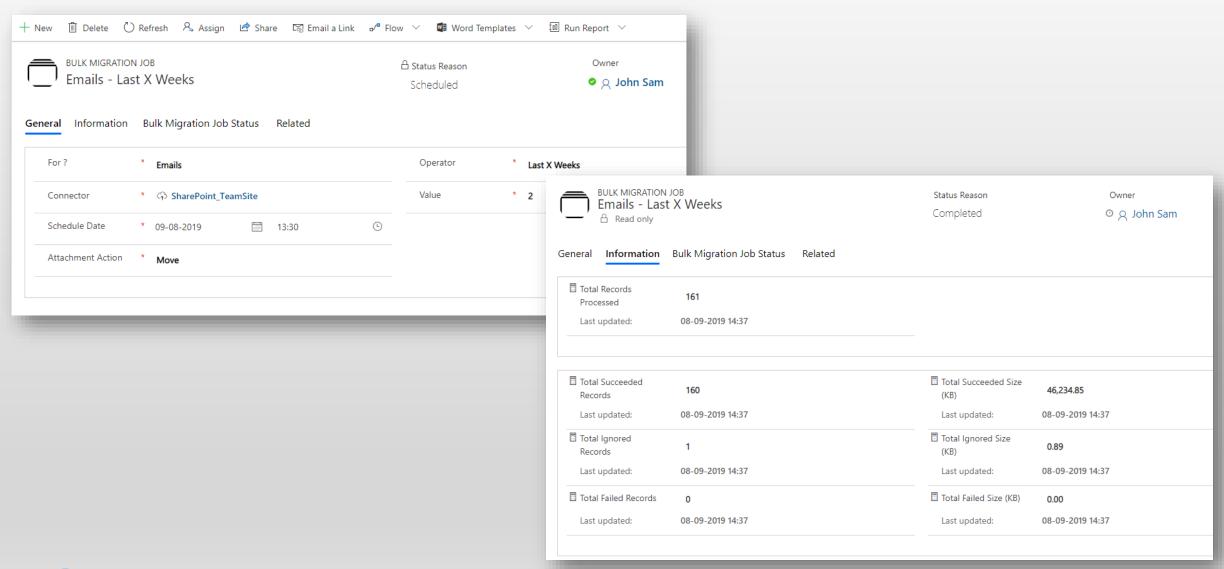








### Bulk Migrate Dynamics 365 CRM Attachments

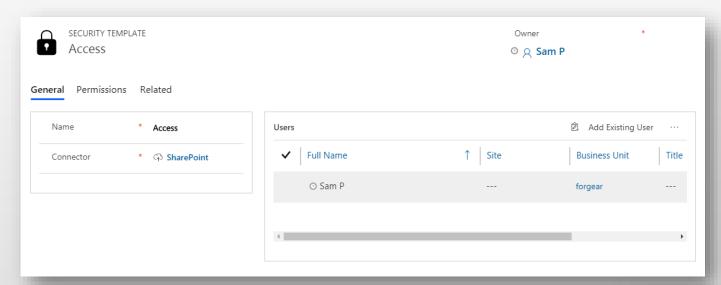


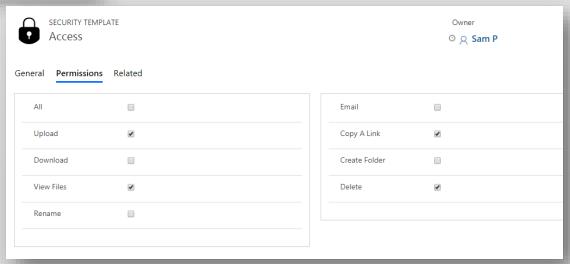






## Security Templates



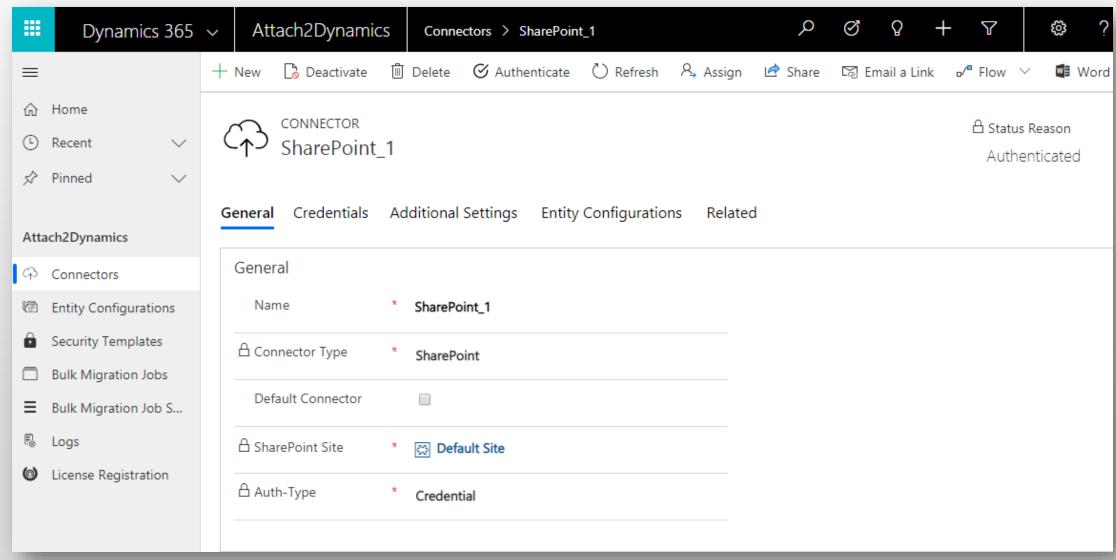








## Configuring Connectors

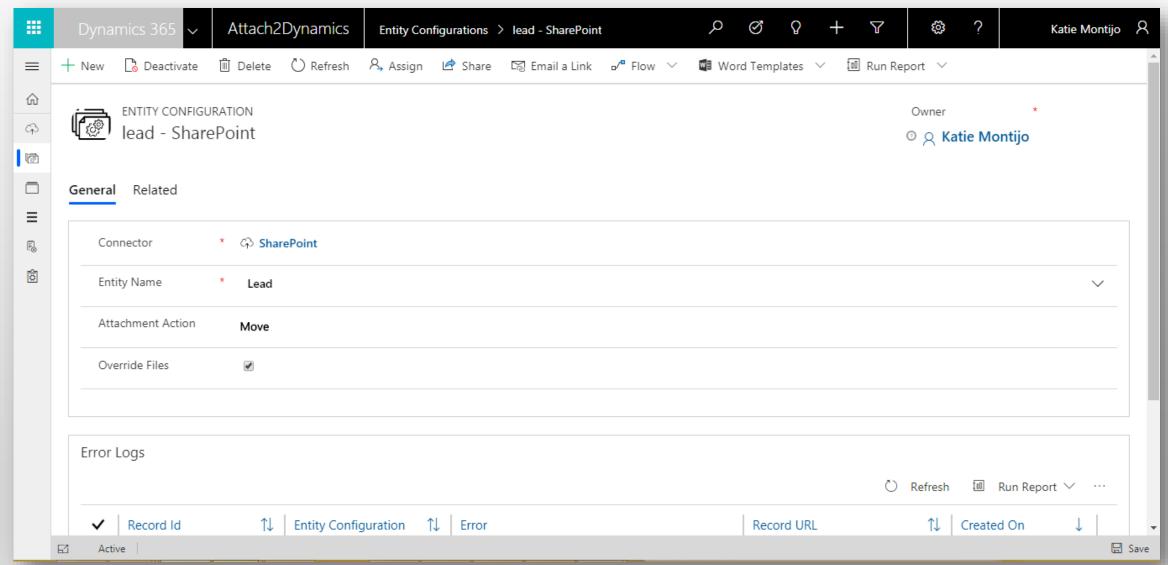








## **Entity Configuration**









## Next Steps

Learn more about <a href="https://example.com/stach2Dynamics">Attach2Dynamics</a> today.

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

Email: <a href="mailto:crm@inogic.com">crm@inogic.com</a>





