



Attach2Dynamics

Manage Dynamics 365 CRM Attachments on Cloud



Attach2Dynamics

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Available on
Microsoft AppSource



Key Features

Intuitive interface to perform common file/folder actions

Upload, download, rename files and folders .

Drag & Drop

Drag & Drop interface to upload multiple files and folders to SharePoint easily at one go.

Email link or file as an attachment

Email SharePoint files as attachment with a single click

Save Storage Space

Move Attachments from Notes, Email & Sales Literature to SharePoint and leave behind the link to the file for easy reference.

Security Privileges

Control user privileges to perform the various actions supported by the solution such as Upload, Download, Email, Create folder, Rename, Delete.

Anonymous Link

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

Available For

SUPPORTED VERSIONS

- DYNAMICS 365 8.2 AND ABOVE
- POWER APPS
- CDS

DEPLOYMENTS

- ON-PREMISES WITH IFD
- ONLINE

CLOUD STORAGES

- SHAREPOINT
- AZURE BLOB
- DROPBOX

Drag and Drop multiple files & folders

The screenshot displays the Attach2Dynamics application window, which is overlaid on a Microsoft Dynamics 365 interface. The application window has a title bar with 'Attach2Dynamics' and a close button. It features three tabs: 'SharePoint', 'Azure Blob Storage', and 'Dropbox'. The 'SharePoint' tab is active, showing a search bar and a dropdown menu for 'SharePoint Site'. Below this, there is a list of files with columns for 'Name', 'Size (KB)', and 'Modified On'. The files listed are 'Alpha.docx' (19.15 KB, 10/15/2019 1:13 AM) and 'Beta.docx' (19.14 KB, 10/15/2019 1:13 AM). A 'Drop files here' area is visible at the bottom of the file list, with a 'Move' button next to it. The background shows the Dynamics 365 interface with a sidebar containing 'Home', 'Recent', 'Pinned', 'My Work', 'Dashboards', 'Activities', 'Customers', 'Accounts', 'Contacts', 'Sales', 'Leads', 'Opportunities', 'Competitors', 'Collateral', 'Quotes', and 'Orders'. The main content area displays the 'Summary' tab for an account named 'Alpine Ski House'.

Attach2Dynamics

SharePoint | Azure Blob Storage | Dropbox

SharePoint : SharePoint Site

Alpine Ski House_01408B5E... / Deal

Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115

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

Name	Size (KB)	Modified On
Alpha.docx	19.15	10/15/2019 1:13 AM
Beta.docx	19.14	10/15/2019 1:13 AM

Drop files here.

Close

Upload/Download files & folders

The screenshot displays the Attach2Dynamics application window overlaid on the Microsoft Dynamics 365 Sales Hub interface. The Attach2Dynamics window has three tabs: SharePoint, Azure Blob Storage, and Dropbox. The SharePoint tab is active, showing a search bar and a dropdown menu with the selected item 'Alpine Ski House_01408B5E...'. Below the search bar, there is a toolbar with buttons for UPLOAD, DOWNLOAD, RENAME, EMAIL, COPY A LINK, and CREATE FOLDER. A mouse cursor is hovering over the UPLOAD button, which has opened a sub-menu with options for Files and Folder. Below the toolbar, there is a table listing files and folders:

	Size (KB)	Modified On
Deal		10/15/2019 1:50 AM
Deal- Alpha		10/15/2019 1:26 AM
Deal- Beta		10/15/2019 1:26 AM
Deal- Delta		10/15/2019 1:24 AM

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

Upload files & folders to multiple CRM records

The screenshot displays the Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', and 'CORE > Accounts'. The 'Attach2Dynamics' app is highlighted in the top bar. Below the navigation bar, a table lists accounts with checkboxes for selection. The table has columns for 'Account Name', 'Main Phone', 'Address', and 'Primary Contact'. The accounts listed are: Fourth Coffee (sample), Litware, Inc. (sample), Adventure Works Pvt. Ltd., Fabrikam, Inc. (sample), Blue Yonder Airlines (sample), and City Power & Light (sample). 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 Phone	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 a Read-only or Editable Anonymous Shareable link of files & folders

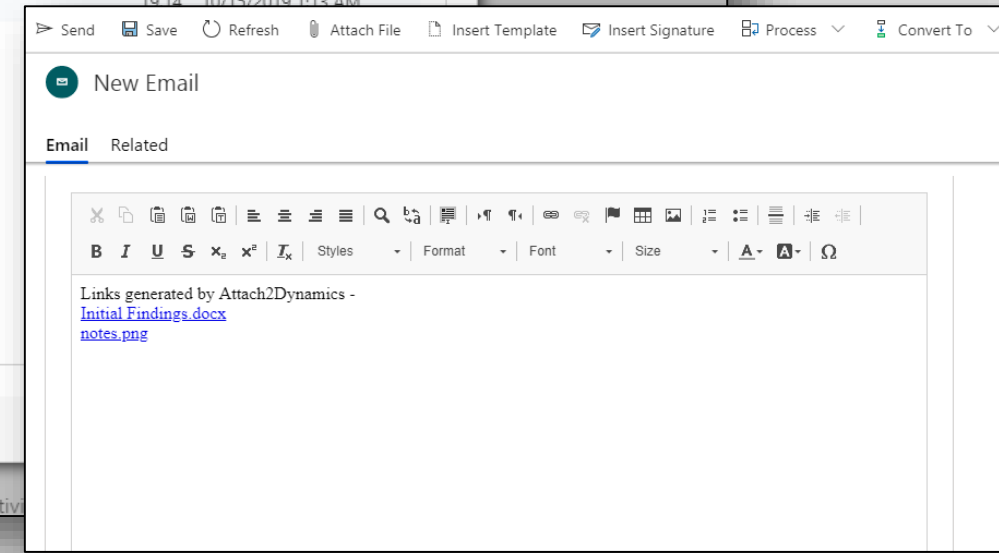
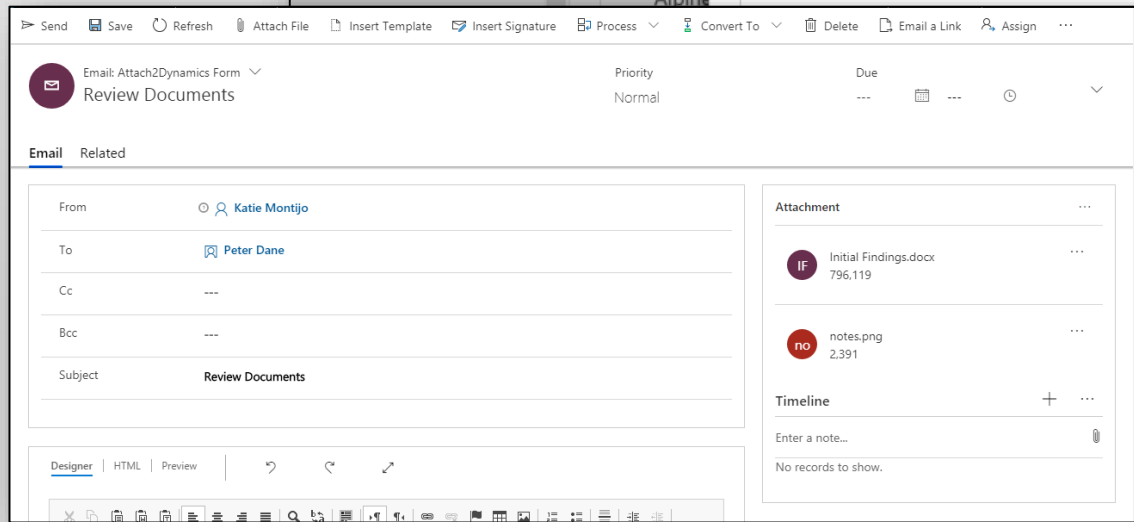
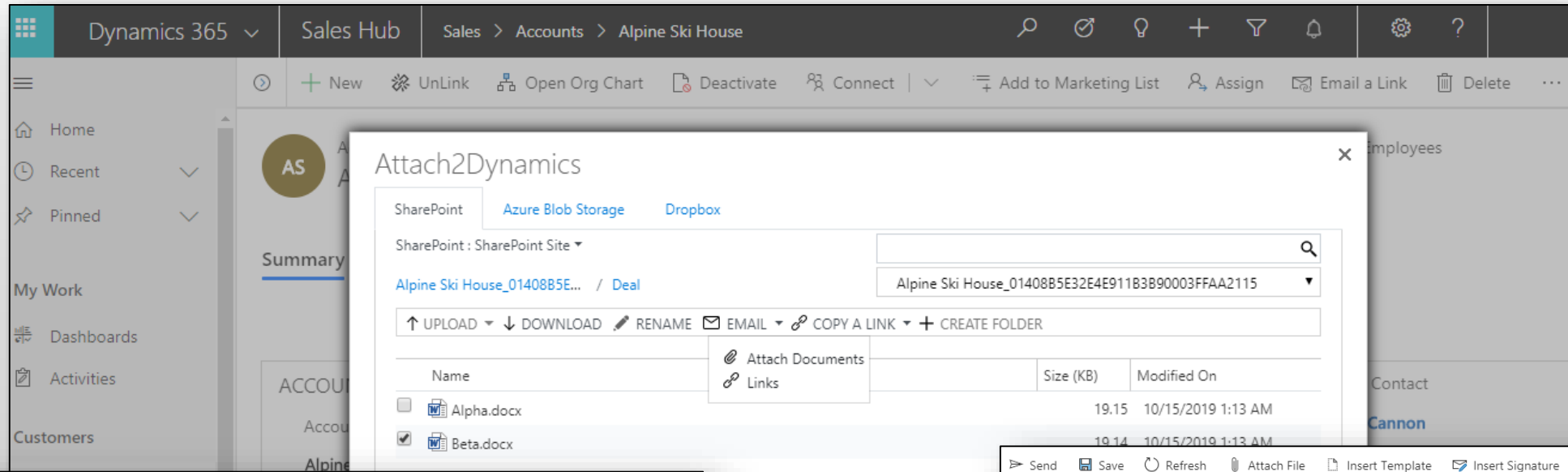
The screenshot displays the Attach2Dynamics application interface, which is overlaid on a Microsoft Dynamics 365 Sales Hub window. The application is titled "Attach2Dynamics" and features a sidebar with navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, and Orders. The main area shows a "Summary" tab for an account named "Alpine Ski House".

The application interface includes a "SharePoint" section with tabs for "Azure Blob Storage" and "Dropbox". Below this, there is a "SharePoint : SharePoint Site" dropdown menu and a search bar. The "Alpine Ski House_01408B5E..." / Deal is selected. Action buttons include "UPLOAD", "DOWNLOAD", "RENAME", "EMAIL", "COPY A LINK", and "CREATE FOLDER".

A table lists files with columns for "Name", "Size (KB)", and "Modified On". The files listed are "Alpha.docx" (19.15 KB, 10/15/2019 1:13 AM) and "Beta.docx" (19.14 KB, 10/15/2019 1:13 AM). A "View/Edit" icon is visible next to the file names.

A "Shared link of Alpha.docx" dialog box is open, showing a long URL and a "Copy" button. The background application window is dimmed, and the "Attach2Dynamics" window is in the foreground.

Email files as an attachment or share the link to the files



Deep Search

The screenshot shows the Dynamics 365 Sales Hub interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and the breadcrumb 'Sales > Accounts > Alpine Ski House'. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, and Orders. The main area displays the 'Summary' tab for the 'Alpine Ski House' account. A modal window titled 'Attach2Dynamics' is open, showing the 'SharePoint' tab. It displays a search for 'Alpha' with results including 'Deal- Alpha' and 'Alpha.docx'. The modal also features a table with columns for Name, Path, and Size (KB).

Name	Path	Size (KB)
Deal- Alpha	/account/Alpine...	
Alpha.docx	/account/Alpine...	19.15

Drop files here.

Close

Delete File

Dynamics 365 Sales Hub Sales > Accounts > Alpine Ski House

Home Recent Pinned My Work Dashboards Activities Customers Accounts Contacts Sales Leads Opportunities Competitors Collateral Quotes

Summary

Attach2Dynamics

SharePoint Azure Blob Storage Dropbox

SharePoint : SharePoint Site

Alpine Ski House_01408B5E... / Deal

Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115

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

Name	Size (KB)	Modified On
<input type="checkbox"/> Alpha.docx	19.15	10/15/2019 1:13 AM
<input checked="" type="checkbox"/> Beta.docx	19.14	10/15/2019 1:13 AM

Drop files here.

Close

View File

The screenshot shows the Microsoft Dynamics 365 interface with a browser window open to `ipcrmug.crm.dynamics.com`. The browser tab is labeled "Beta.docx". The Dynamics 365 interface shows the "Sales Hub" and "Accounts" section for "Alpine Ski House". A modal window titled "Attach2Dynamics" is open, displaying a file list for "Alpine Ski House_01408B5E... / Deal". The file list includes "Alpha.docx" and "Beta.docx". A hand cursor is pointing at "Beta.docx".

Attach2Dynamics

SharePoint Azure Blob Storage Dropbox

SharePoint : SharePoint Site

Alpine Ski House_01408B5E... / Deal

Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115

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

Name	Size (KB)	Modified On
<input type="checkbox"/> Alpha.docx	19.15	10/15/2019 1:13 AM
<input checked="" type="checkbox"/> Beta.docx	19.14	10/15/2019 1:13 AM

Drop files here.

Close

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		POSTS	ASSISTANT	ACTIVITIES	NOTES	ONENOTE
Topic *	Good Prospect (sample)					
Name *	Peter Houston (sample)	Product Demo				
Job Title	-----	Initial Notes.docx				
Business Phone	-----	You - Just now				
Mobile Phone	-----	https://[redacted].sharepoint.com/lead/Peter Houston (sample)_923420488936E911A95B000D3AF2C9D4/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/emails/Capture - Copy \(8\).PNG](https://www.dropbox.com/home/account/Canvas Pvt LTD_3228D913E282E911A97C000D3AF03D2E/emails/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_7D5E7C4FC764E911A82A000D3A1D9FBE/Brochure.docx](#)


PRODUCTS

No data available.

COMPETITORS

No data available.

Bulk Migrate Dynamics 365 CRM Attachments



BULK MIGRATION JOB
Emails - Last X Weeks

Status Reason
Scheduled

Owner
John Inogic

General

Information

Bulk Migration Job Status

Related

For ?
Connector
Schedule Date
Attachment Action

Emails

SharePoint Site


10/11/2019 7:30 AM

Move

Operator
Value

Last X Weeks

1



BULK MIGRATION JOB
Emails - Last X Weeks

Status Reason
Completed

Owner
John Inogic

General

Information

Bulk Migration Job Status

Related

Total Records Processed
Last updated:

145
10/15/2019 3:37 AM

Total Succeeded Records
Last updated:

145
10/15/2019 3:37 AM

Total Ignored Records
Last updated:

0
10/15/2019 3:37 AM

Total Failed Records
Last updated:

0
10/15/2019 1:37 AM

Total Succeeded Size (KB)
Last updated:

11,559.09
10/15/2019 3:37 AM


Total Ignored Size (KB)
Last updated:

0.00
10/15/2019 3:37 AM

Total Failed Size (KB)
Last updated:


0.00
10/15/2019 3:37 AM

Security Templates


 SECURITY TEMPLATE
SharePoint security template

Owner
John Inogic


General Permissions Related

Name	* SharePoint security templ...
Connector	*  SharePoint Site

Users

 Add Existing User ...

✓	Full Name	↑	Site	Business Unit	Title
	John Inogic	---		ipcrmug	---

 SharePoint security template

General Permissions Related

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

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

Configuring Connectors

New Connector

General

Credentials

Additional Settings

Entity Configurations

Permissions

General

Name

*

SharePoint_1

Connector Type

*


SharePoint

Default Connector

☐

SharePoint Site

*

 Default Site

Auth-Type

*

--Select--

--Select--

Credential

App

Entity Configuration

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

account - Dropbox_1

Entity Configuration

General Email Configuration Related

Connector	*	Dropbox_1
Entity Name	*	Account
Folder Path Schema	*	traversedpath
Folder Path	*	/account
Attachment Action		Move
Override Files		<input checked="" type="checkbox"/>

account - Dropbox_1

Entity Configuration

General Email Configuration Related

From	Me	
To	Users	× Chris Matt
Cc	Dynamic	× ModifiedBy
Bcc	Manager	× OwningUser.Manager

Next Steps

- Learn more about [Attach2Dynamics](#) today.
- Get your free **Attach2Dynamics** trial from [Microsoft AppSource](#) or [our website!](#)
- Email: crm@inogic.com

