



**Attach2Dynamics
White Paper**

Attach2Dynamics - White Paper

Aim:

Attach2Dynamics is a new ISV add-on for Microsoft Dynamics 365 CRM which helps users to use document management systems like Dropbox, SharePoint and Azure Blob Storage within Dynamics 365 CRM.

The main purpose of Attach2Dynamics is to store files/folders in cloud storages. Currently it supports three cloud storages – SharePoint, Dropbox and Azure Blob Storage.

Features:

- Supports all types of entities, records and documents.
- Multiple files and folders can be dragged and dropped at one time to Drop Box, SharePoint and Azure Blob Storage.
- Single as well as multiple files and folders can be uploaded.
- User can download documents from cloud storages by choosing the storage system from Dynamics 365 CRM.
- Files/Folders can be renamed by selecting required documents.
- Sharable links of files/folders can be created which can also be copied for external use.
- Folders can be created on configured connector.
- Deep search for files/folders related to the entered keyword in the search tab can be done.
- Dynamics 365 CRM Notes/Email attachments/Sales Literature attachments can be Moved/Copied to Dropbox, SharePoint and Azure Blob Storage.
- Email anonymous link(of a file) or file as an attachment
- Support for uploading files from home page
- Access control of user actions on Attach2Dynamics
- Delete files from cloud storages
- View files before downloading
- Support for configuring multiple connectors

Supported Versions

Versions: Microsoft Dynamics 365 CRM 2016 and above.

Deployment Models: On-Premises with IFD and Dynamics 365 Online

Sharepoint: Online

Dropbox: Personal Dropbox and Dropbox for Business

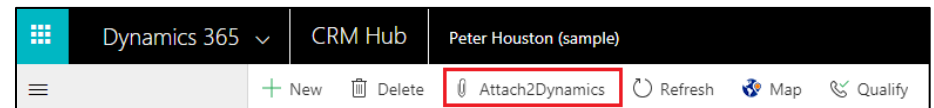
Azure Blob Storage

Who needs it?

Attach2Dynamics can help Dynamics 365 CRM users who want to store files/folders on cloud storages like SharePoint, Dropbox and Azure Blob Storage. This is an interface that allows direct uploading/downloading of files from Dynamics 365 CRM to cloud storage. It has features to rename, download, delete, view files, create a sharable link, create folder, upload, drag and drop, bulk move documents, etc. that makes the task of user easier within Dynamics 365 CRM.

Ease of Access

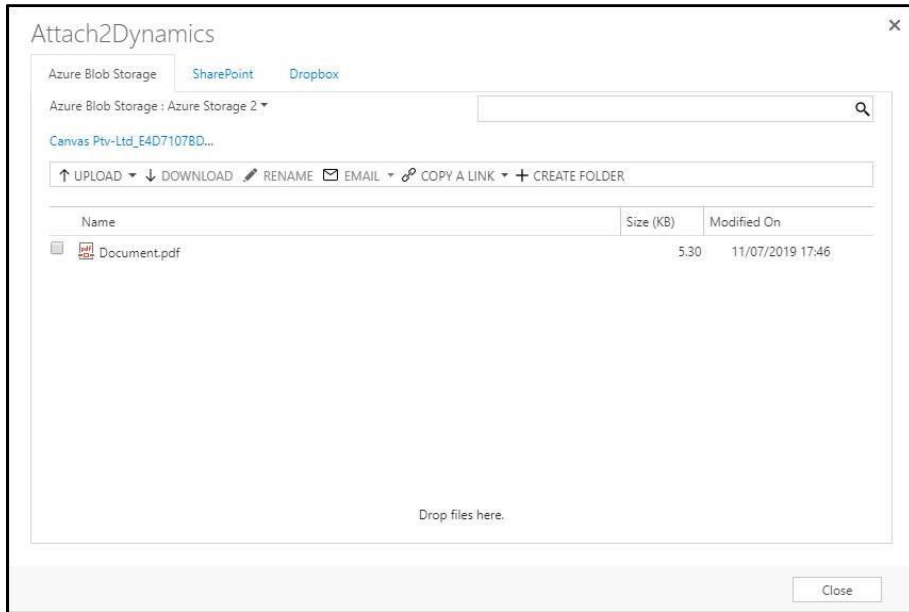
'Attach2Dynamics' can be accessed easily by clicking the button available on Entity form



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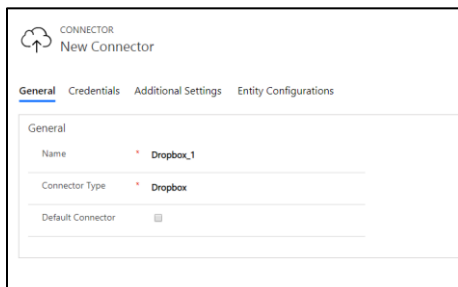
UI

The button click opens up an user friendly UI to perform various actions and see the list of files on the configured cloud storage.



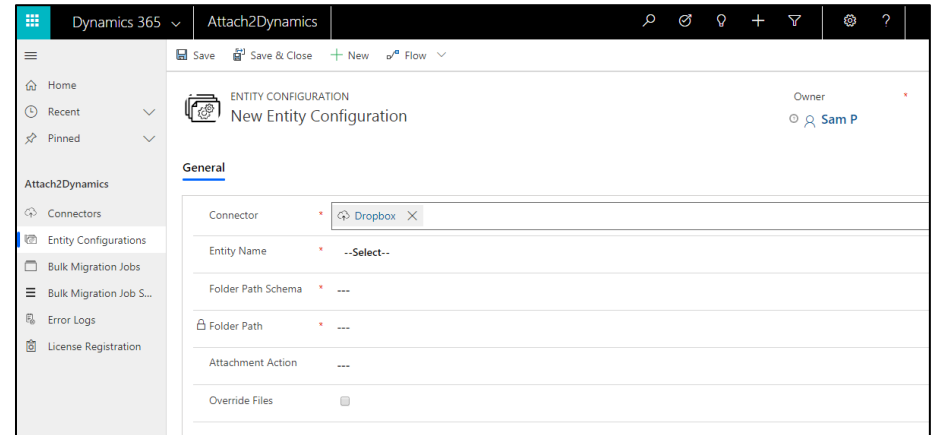
Configure Connectors

Configure Connectors to enable cloud storages like Dropbox, SharePoint and Azure Blob Storage.



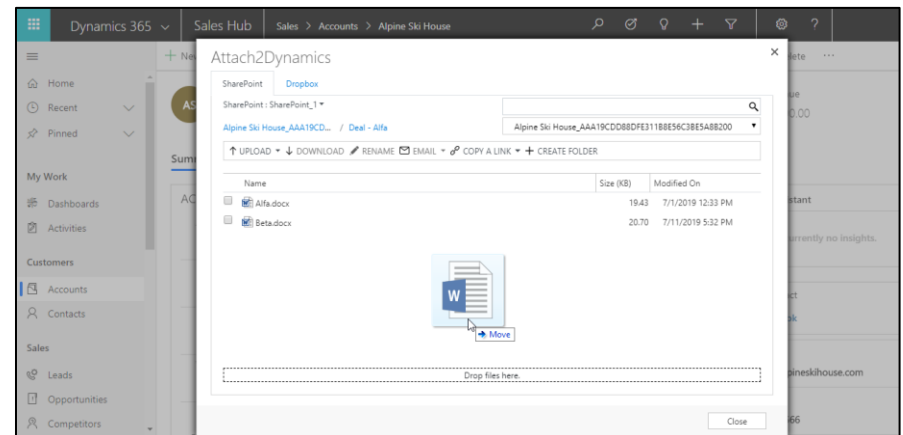
Entity Configuration

Configure Entities with Connectors whose attachments need to be uploaded in the cloud storage.



Drag & Drop

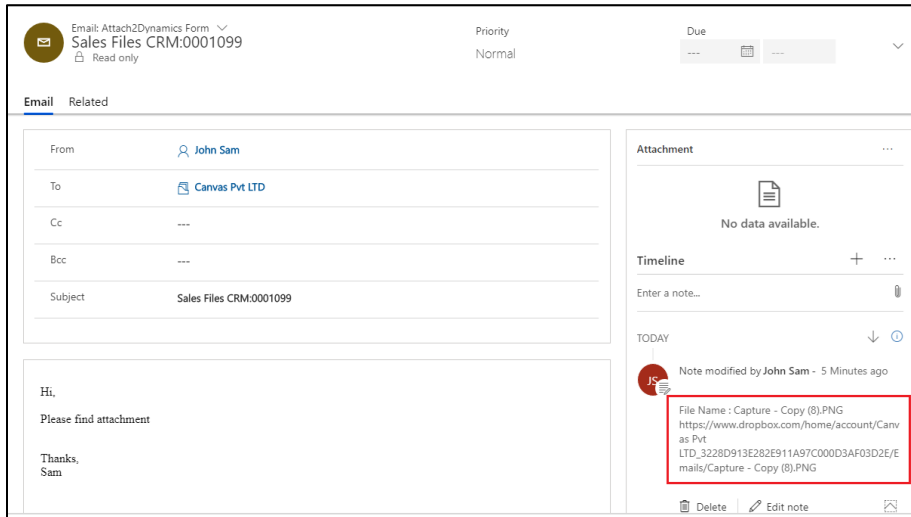
Drag and Drop files and Folders through the Attach2Dynamics UI.



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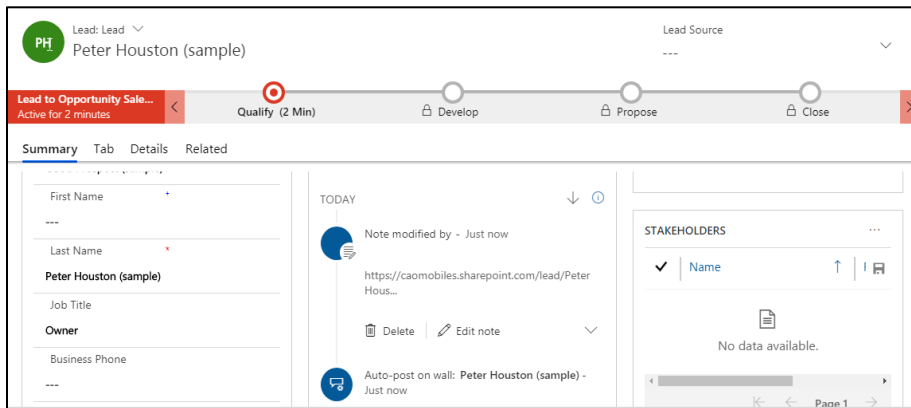
Move/Copy Email Attachments

Move/Copy Email Attachments to cloud storage and leave a path in the Note Body of Email.



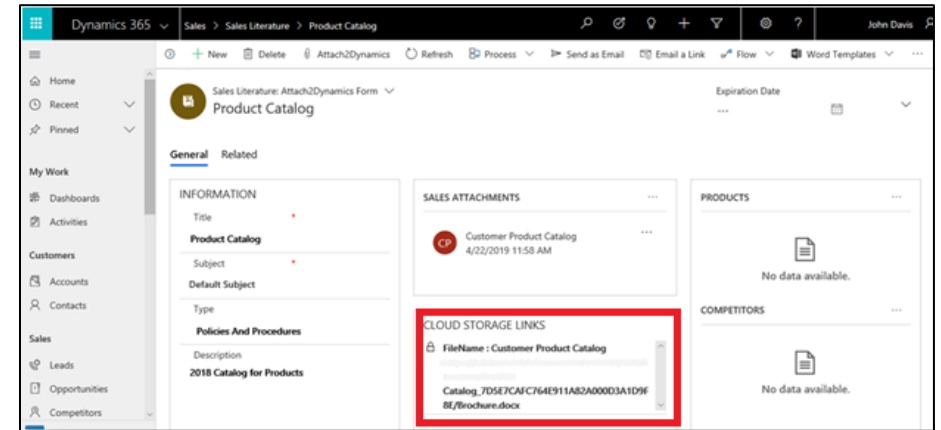
Move/Copy Notes

Move/Copy Notes to cloud storage and leave a path back in the note body.



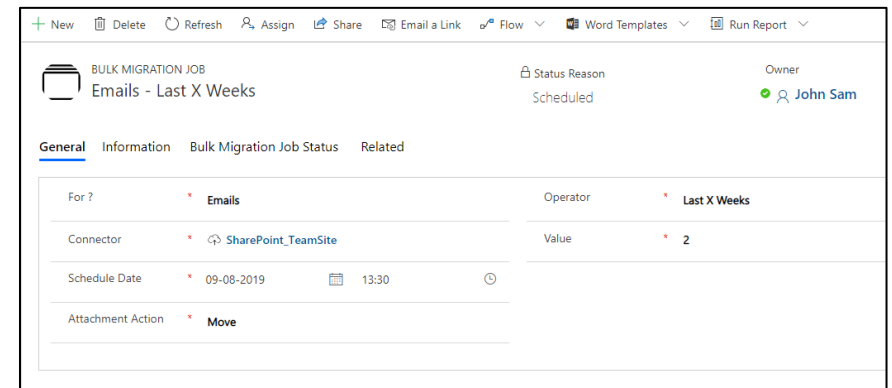
Move/Copy Sales Literature Attachment

Move/Copy Sales Literature Attachment to cloud storage and leave a path back in cloud storage link section.



Bulk Migration Jobs

This is where you configure Bulk Migration of the documents stored in CRM, also, it gives detailed status on the files that are migrated.



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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	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	

Dynamics 365 CRM Hub CORE > Accounts

Show Chart Edit Activate Deactivate **Attach2Dynamics** Delete Add to Marketing

All Accounts

Account Name	Main Ph...	Address...	Primary Contact
Fourth Coffee (sample)	555-0150	Renton	Yvonne McKay (sample)
Litware, Inc. (sample)	555-0151	Dallas	Susanna Stubberod (s...
Adventure Works Pvt. Ltd.	555-0152	Santa Cruz	Nancy Anderson
Fabrikam, Inc. (sample)	555-0153	Lynnwood	Maria Campbell (samp...
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)
City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sa...

Security Templates

Control the access given to users related over various features of Attach2Dynamics such as Upload, Download, Email, Create Folder, Delete etc.

SECURITY TEMPLATE
Access
Owner: Sam P

General Permissions Related

All	<input type="checkbox"/>	Email	<input type="checkbox"/>
Upload	<input checked="" type="checkbox"/>	Copy A Link	<input checked="" type="checkbox"/>
Download	<input type="checkbox"/>	Create Folder	<input type="checkbox"/>
View Files	<input checked="" type="checkbox"/>	Delete	<input checked="" type="checkbox"/>
Rename	<input type="checkbox"/>		

Support for uploading files from Home Page

Upload files directly from home page for selected records.

Dynamics 365 CRM Hub CORE > Accounts

Attach2Dynamics

SharePoint Azure Blob Storage Dropbox

SharePoint : APoint2

↑ UPLOAD

Name

This folder is empty. Upload documents and folders.

Open

Deals > Deal - Alfa

Search Deal - Alfa

Organize New folder

Name	Date modified	Type
Alfa	5/14/2019 2:59 PM	Microsoft

File name: File name: All Files

Open Cancel

Download & Upload

Download the files and folders (for Dropbox only). Upload files and Folders through the UI directly into the Online storage.

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Deep Search Tab

Search for file and folders within the current and subfolders by entering keyword in search tab.

Email

Email anonymous link (of a file/folder) or file as an attachment.

Create folder

Users can create the folder for all three cloud storages.

Rename

Rename files/folders as per requirement.

Copy a Link

Copy and share generated link as per requirement.

Delete

Delete files from the cloud storages.

View Files

View files before downloading from cloud storages.

Log

Errors logs are listed in 'Log' Entity during any fallout while performing features.

Contact Us:

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