



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

MICROSOFT DYNAMICS
365 v9.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 window, which is overlaid on a Microsoft Dynamics 365 Sales Hub interface. The Attach2Dynamics window has a title bar with a close button (X) and a tabbed interface with three tabs: 'SharePoint' (selected), 'Azure Blob Storage', and 'Dropbox'. Below the tabs, there is a search bar and a dropdown menu showing 'Alpine Ski House_01408B5E...' / 'Deal'. A toolbar contains buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A table lists files with columns 'Name', 'Size (KB)', and 'Modified On':

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

Below the table is a large dashed box with the text 'Drop files here.' and a 'Move' button. The background Dynamics 365 interface shows the 'Sales Hub' navigation pane with options like Home, Recent, Pinned, My Work, Customers, Sales, and Collateral. The main content area shows details for 'Alpine Ski House'.

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 this, 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 sub-menu, there is a list of files and folders with columns for checkboxes, names, sizes, and modification dates.

		Size (KB)	Modified On
<input type="checkbox"/>	Deal		10/15/2019 1:50 AM
<input type="checkbox"/>	Deal- Alpha		10/15/2019 1:26 AM
<input type="checkbox"/>	Deal- Beta		10/15/2019 1:26 AM
<input type="checkbox"/>	Deal- Delta		10/15/2019 1:24 AM

Drop files here.

Close

Upload files & folders to multiple CRM records

The screenshot displays the 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 the 'All Accounts' view. The 'Attach2Dynamics' app is highlighted with a red box in the top toolbar. Below the app list, a table shows account details:

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

The 'Attach2Dynamics' dialog box is open, showing the 'Azure Blob Storage' tab. It includes a 'SharePoint' dropdown set to 'APoint2', an 'Upload' button, and a 'Name' field. A file explorer window is also open, showing the 'Deals > Deal - Alfa' folder containing a file named 'Alfa'.

Get a Read-only or Editable Anonymous Shareable link of files & folders

The screenshot illustrates the Attach2Dynamics application interface within the Dynamics 365 Sales Hub. The main window shows a list of files (Alpha.docx, Beta.docx) with options to view or edit. A secondary window displays the 'Shared link of Alpha.docx' with a copy button.

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

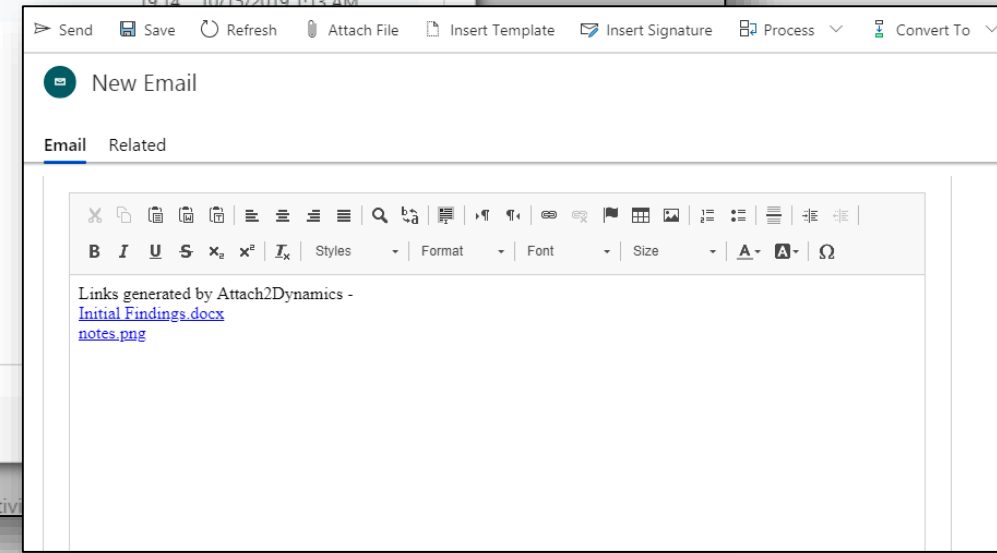
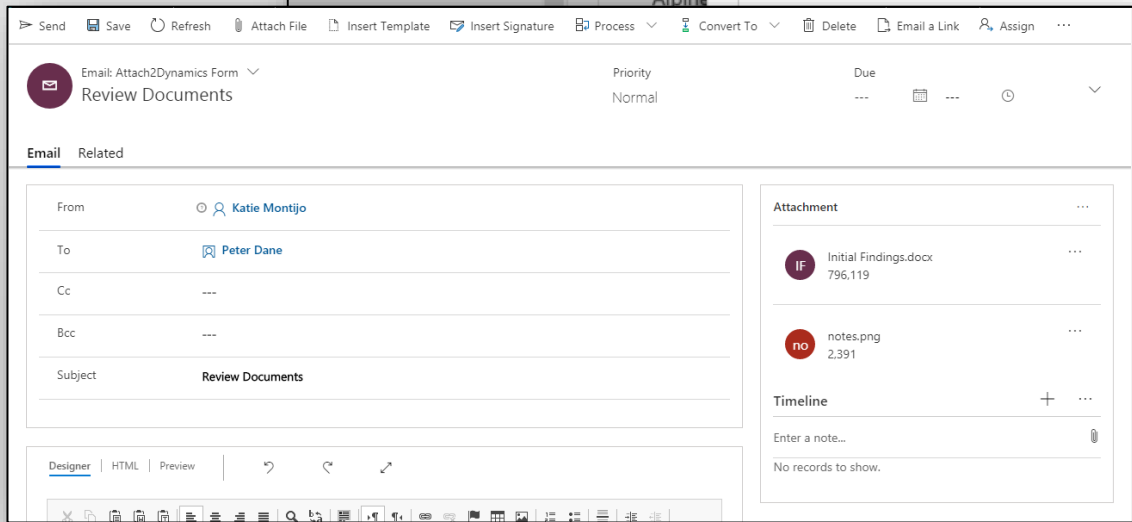
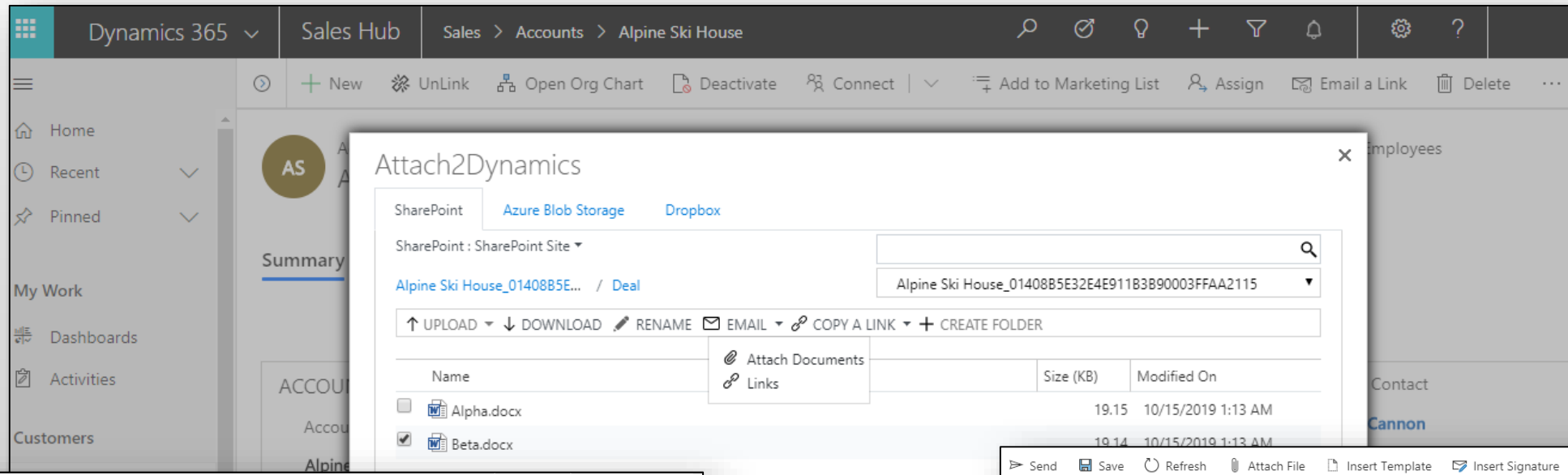
Name	Size (KB)	Modified On
Alpha.docx	19.15	10/15/2019 1:13 AM
Beta.docx	19.14	10/15/2019 1:13 AM

Drop files here.

Shared link of Alpha.docx

Copy

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



Deep Search

The screenshot displays the Attach2Dynamics application interface, which is overlaid on a Microsoft Dynamics 365 Sales Hub window. The background window shows the 'Alpine Ski House' account page with a sidebar containing navigation options like Home, Recent, Pinned, My Work, Dashboards, Activities, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Collateral, Quotes, and Orders. The Attach2Dynamics window has a title bar with 'Attach2Dynamics' and a close button. It features three tabs: 'SharePoint' (selected), 'Azure Blob Storage', and 'Dropbox'. Below the tabs, there is a search bar with the text 'Alpha' and a search icon. A dropdown menu shows the search results: 'Alpine Ski House_01408B5E...'. Below the search bar, there is a row of action buttons: 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A table displays the search results:

Name	Path	Size (KB)
<input type="checkbox"/> Deal- Alpha	/account/Alpine...	
<input type="checkbox"/> Alpha.docx	/account/Alpine...	19.15

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

Delete File

The screenshot shows the Attach2Dynamics application interface. The background is a blurred view of the Dynamics 365 Sales Hub for 'Alpine Ski House'. A modal window titled 'Attach2Dynamics' is open, displaying a file management interface. The 'SharePoint' tab is selected, showing a file list for 'Alpine Ski House_01408B5E... / Deal'. The file list has columns for 'Name', 'Size (KB)', and 'Modified On'. Two files are listed: 'Alpha.docx' and 'Beta.docx'. The 'Beta.docx' row is highlighted, and a red box highlights the delete icon (a trash can) in the rightmost column. Below the file list is a 'Drop files here.' area. At the bottom right of the modal is a 'Close' button.

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

View File

The screenshot shows the Microsoft Dynamics 365 interface with a file attachment window titled "Attach2Dynamics" open. The background interface includes a navigation pane on the left with sections like "My Work", "Customers", "Sales", and "Collateral". The main area displays the "Summary" tab for an account named "Alpine Ski House". The "Attach2Dynamics" window has tabs for "SharePoint", "Azure Blob Storage", and "Dropbox". The "SharePoint" tab is active, showing a list of files. A file named "Beta.docx" is selected, and a hand cursor is pointing at it. The file list has columns for "Name", "Size (KB)", and "Modified On".

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

Below the file list, there is a "Drop files here." instruction. The window also includes a "Close" button at the bottom right.

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

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

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

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_7D5E7C9F64E911A82A000D3A1D9FBE/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 ?	* Emails	Operator	* Last X Weeks
Connector	*  SharePoint Site	Value	* 1
Schedule Date	* 10/11/2019  7:30 AM 		
Attachment Action	* Move		







 BULK MIGRATION JOB
Emails - Last X Weeks
 Read only

Status Reason
Completed


Owner
John Inogic

General Information Bulk Migration Job Status Related

 Total Records Processed	145
Last updated:	10/15/2019 3:37 AM


 Total Succeeded Records	145	 Total Succeeded Size (KB)	11,559.09
Last updated:	10/15/2019 3:37 AM	Last updated:	10/15/2019 3:37 AM
 Total Ignored Records	0	 Total Ignored Size (KB)	0.00
Last updated:	10/15/2019 3:37 AM	Last updated:	10/15/2019 3:37 AM
 Total Failed Records	0	 Total Failed Size (KB)	0.00
Last updated:	10/15/2019 1:37 AM	Last updated:	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

Dynamics 365 | **Attach2Dynamics** | Entity Configurations > lead - SharePoint Site | John Inogic

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

ENTITY CONFIGURATION
lead - SharePoint Site

Owner
John Inogic

General Related

Connector	* SharePoint Site
Entity Name	* Lead
Attachment Action	Move
Override Files	<input checked="" type="checkbox"/>

Logs

Refresh Run Report ...

✓	Record Id	Entity Configuration	Information	Record URL	Created On
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Next Steps

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

