



**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 and SharePoint within Dynamics 365 CRM.

The main purpose of Attach2Dynamics is to store files/folders in cloud storages. Currently it supports two cloud storages - SharePoint and Dropbox.

Features:

- Supports all types of entities, records and documents.
- Multiple files and folders can be dragged and dropped at one time to Drop Box and SharePoint.
- 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 can be Moved/Copied to Dropbox or SharePoint.
- Email anonymous link(of a file) or file as an attachment

Supported Versions

Versions: Microsoft Dynamics 365 CRM 2016 and above.

Deployment Models: Online and Partner Hosted.

Sharepoint: Online

Dropbox: Personal Dropbox and Dropbox for Business

Who needs it?

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

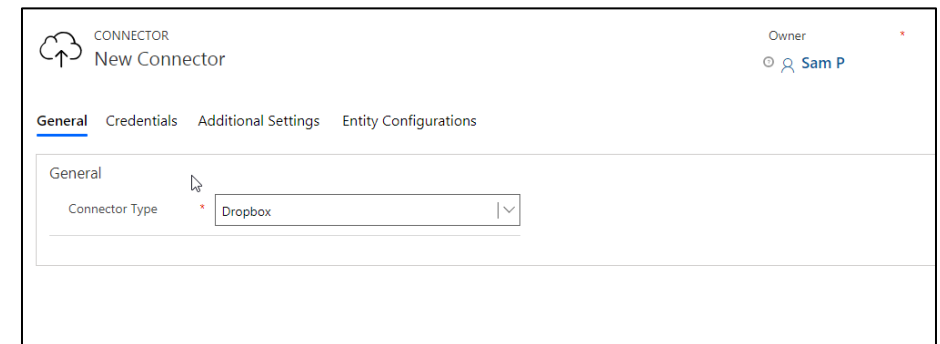
Ease of Access

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



Configure Connectors

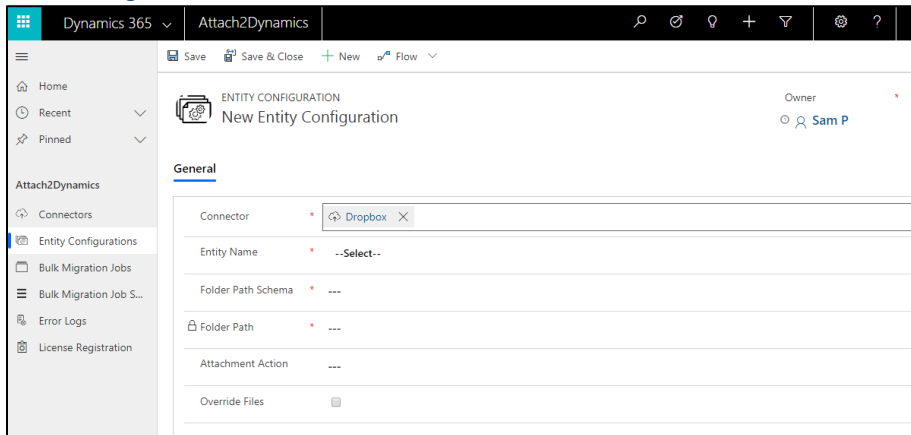
Configure Connectors to enable cloud storages like Dropbox and SharePoint..



Entity Configuration

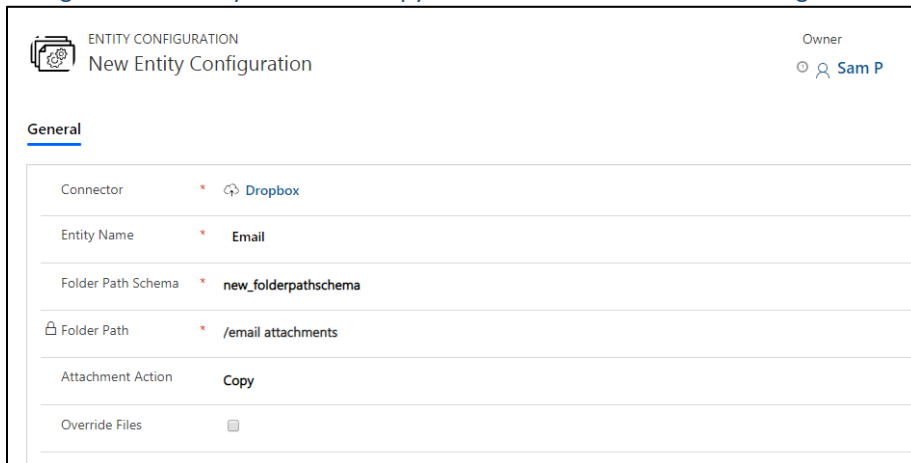
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Configure Entities with Connectors whose attachments need to be uploaded in the cloud storage.



Entity Configuration for Email Entity

Configure Email Entity to move or copy email attachments to cloud storage.



Deep Search Tab

Search for file and folders within hierarchies by entering keyword in search tab.

Email

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

Download & Upload

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

Drag and drop

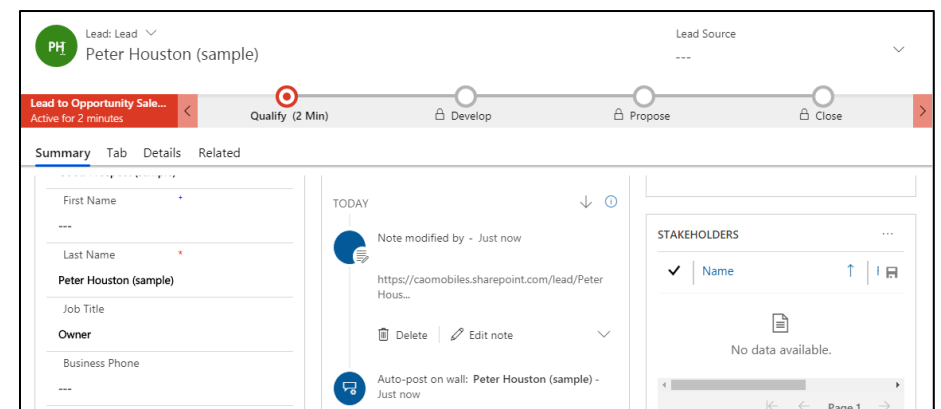
Drag and Drop files and Folders through the Attach2Dynamics UI.

Log

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

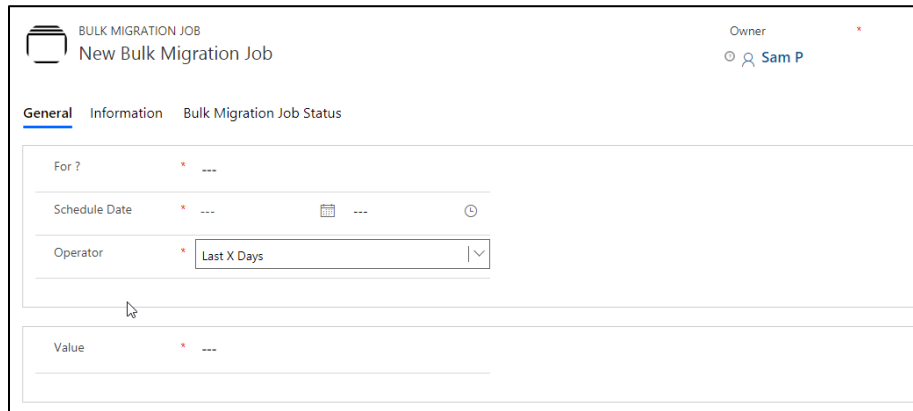
Move/Copy Notes

Move/Copy Notes to cloud storage and leave a path back in configured Entity record.



Bulk Migration Jobs

This contains the status and other details of migration jobs for notes or emails to respective cloud storages.



The screenshot shows a web interface for creating a 'New Bulk Migration Job'. At the top, there is a header with a folder icon, the text 'BULK MIGRATION JOB', and the title 'New Bulk Migration Job'. To the right, it indicates the 'Owner' is 'Sam P'. Below the header are three tabs: 'General' (selected), 'Information', and 'Bulk Migration Job Status'. The form contains several input fields: 'For ?' with a red asterisk and a dropdown menu; 'Schedule Date' with a red asterisk, a calendar icon, and a dropdown menu; 'Operator' with a red asterisk and a dropdown menu currently showing 'Last X Days'; and 'Value' with a red asterisk and a text input field. A mouse cursor is visible over the 'Operator' dropdown.

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