e-ttach

The Drag and Drop Solution for D365 F&O*

E-ttach is an add-on solution that adds drag and drop capability to D365 F&O forms. It streamlines workflows, reduces data input time and provides users with extra functionality not found in D365 F&O attachments functionality as standard.

E-ttach offers three versions: Free, Enterprise and Extra, each with its own unique set of features and advantages.

Last Updated: 19th October 2023

Get it from Microsoft AppSource

Developed by elysian2

* We know, it's not F&O anymore, but you know everyone still calls it that right? At least we didn't call it AX 😉

Introduction to E-ttach

E-ttach offers a simple and intuitive solution to one of the biggest challenges faced by users of D365 F&O - the inability to drag and drop documents into forms.

Enable users to simply drag and drop files or images into forms and reduce data entry time, and multiple clicks per attachment.

+ e-ttach

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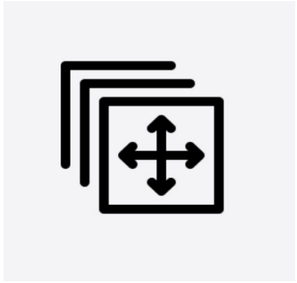
All Versions benefit from the following features:

Drag & Drop

Drag and drop capability on all forms, which adds more power to document workflows and reduces data input time.



Multiple Documents

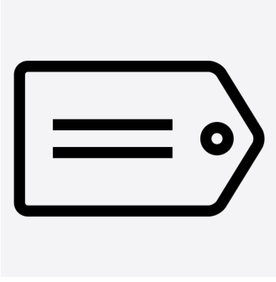
Easily upload multiple documents at once with E-ttach

Time Saving

Easily attach files and images to forms without the need to manually upload them – saving on average 7 clicks per file!

Viewing Gallery

Preview files from the main form page, without having to click into the attachments, and a full-size preview gallery.



Tagging

E-ttach automatically assigns tags to documents. Users can also add custom tags to associate the file with other records or documents

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Benefits of using E-ttach

Efficiency

The drag and drop capability speeds up workflow processes, saves time and reduces data entry errors. On average, each file dropped saves 7 clicks!

User-Friendly

E-ttach is easy to use and understand, eliminating the need for specialised training.
Installation as per any other ISV solution.

Cost Effective

With E-ttach, users can save on costs by reducing data entry time and eliminating click-based procedures.

Licensing is perpetual and covers all users, on all instances, on the same Tenant.

Increased Functionality

E-ttach provides additional functionality over standard D365 F&O, which simplifies document management and storage processes, and creates a more efficient and productive workflow.

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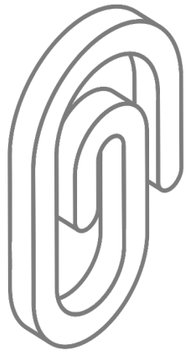
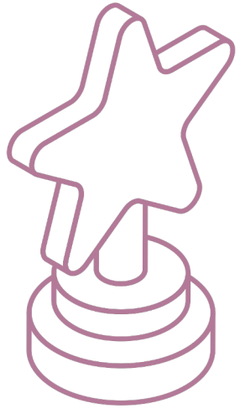
Available Versions

Freebie



Enterprise

Extra



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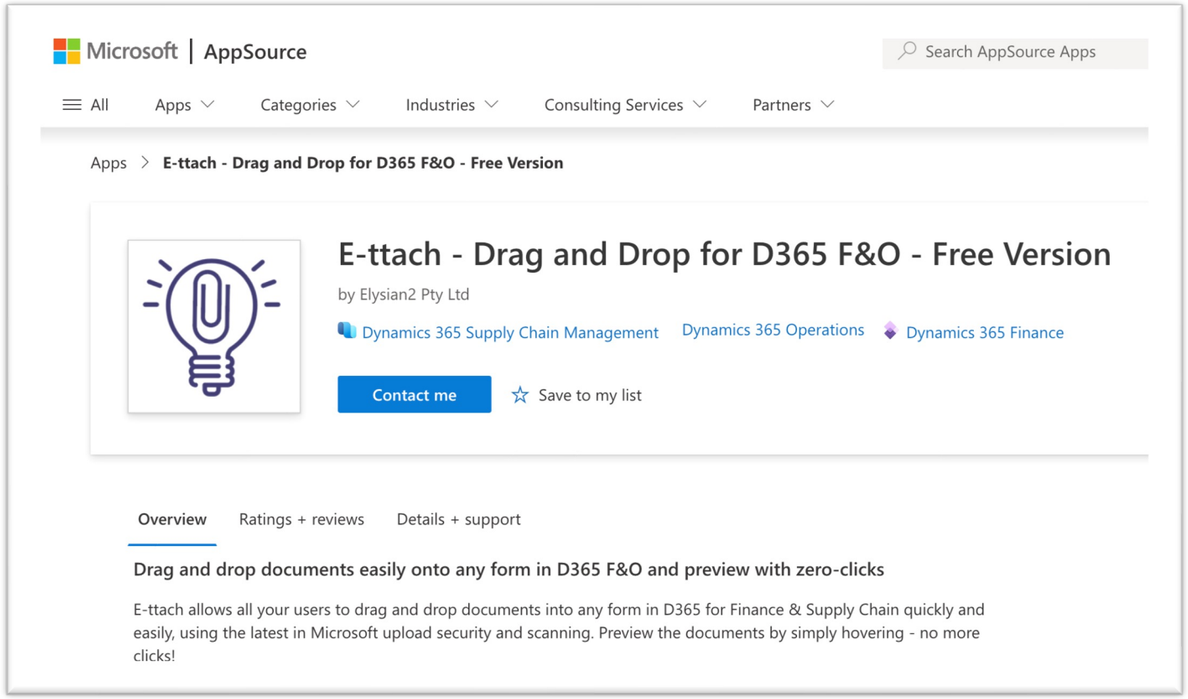
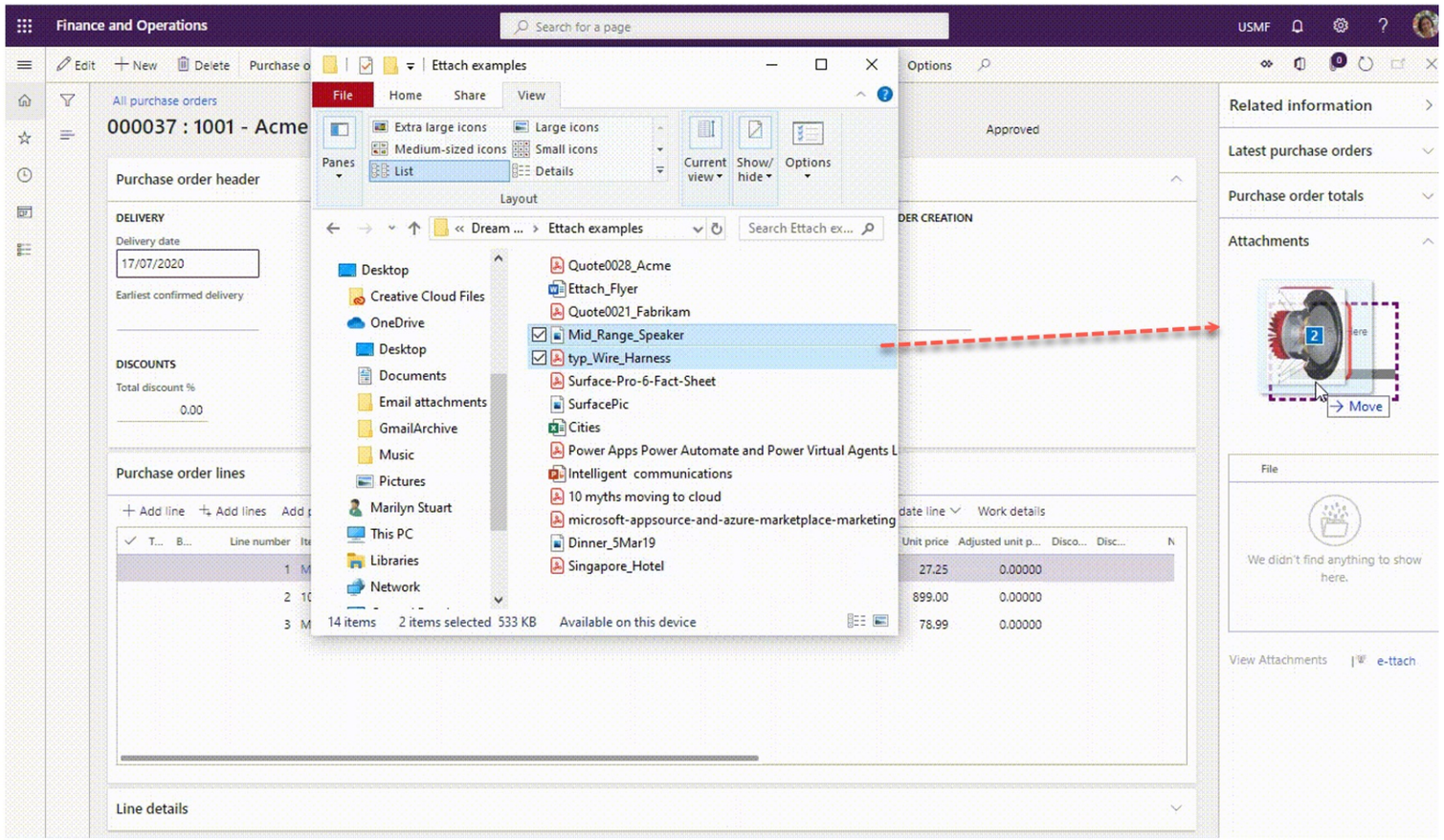
Approved by Microsoft

Get it from Microsoft AppSource



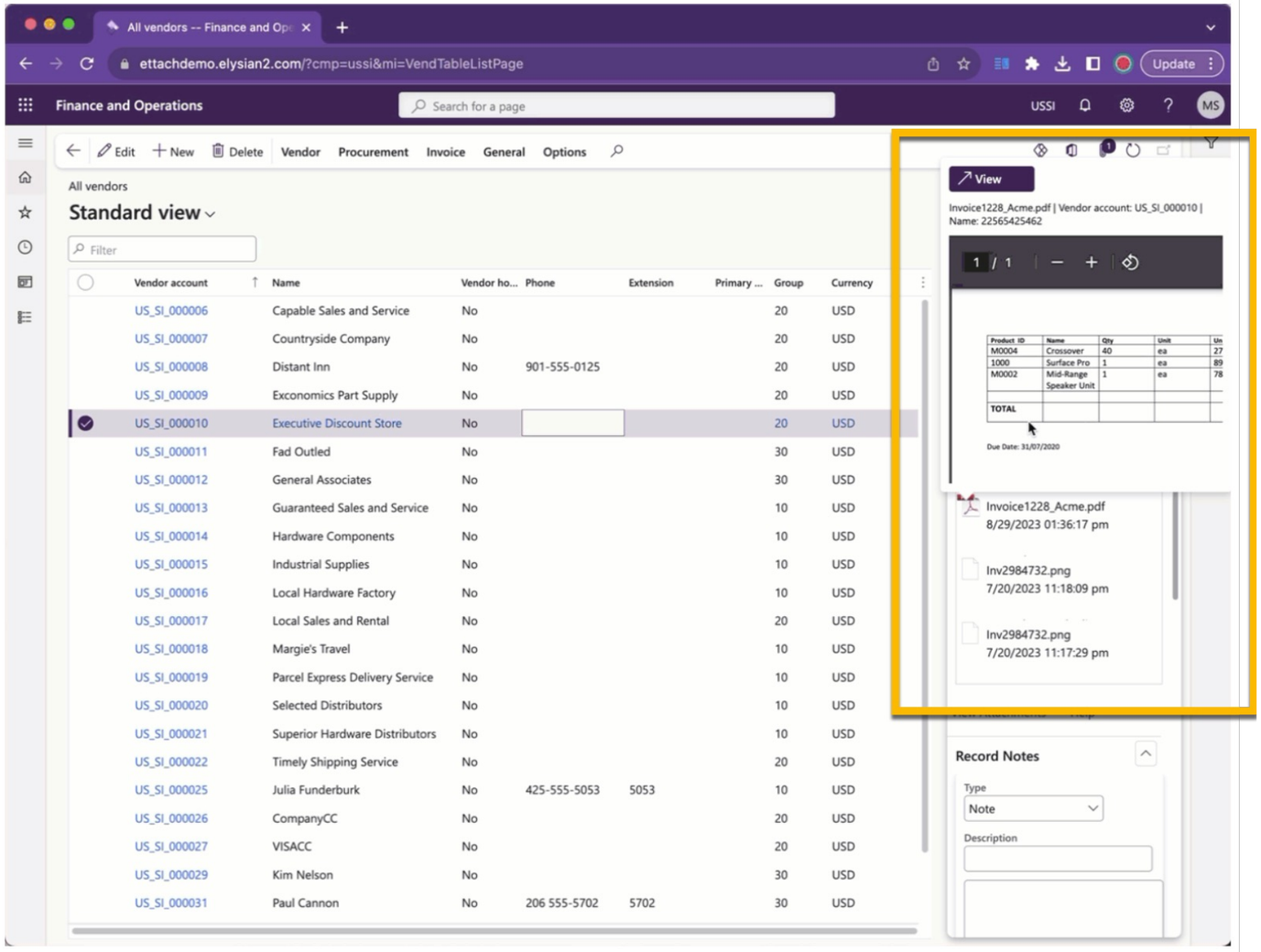
Reviewed and approved by Microsoft and featured on AppSource

Drag & Drop Multiple Files



Time Saver!

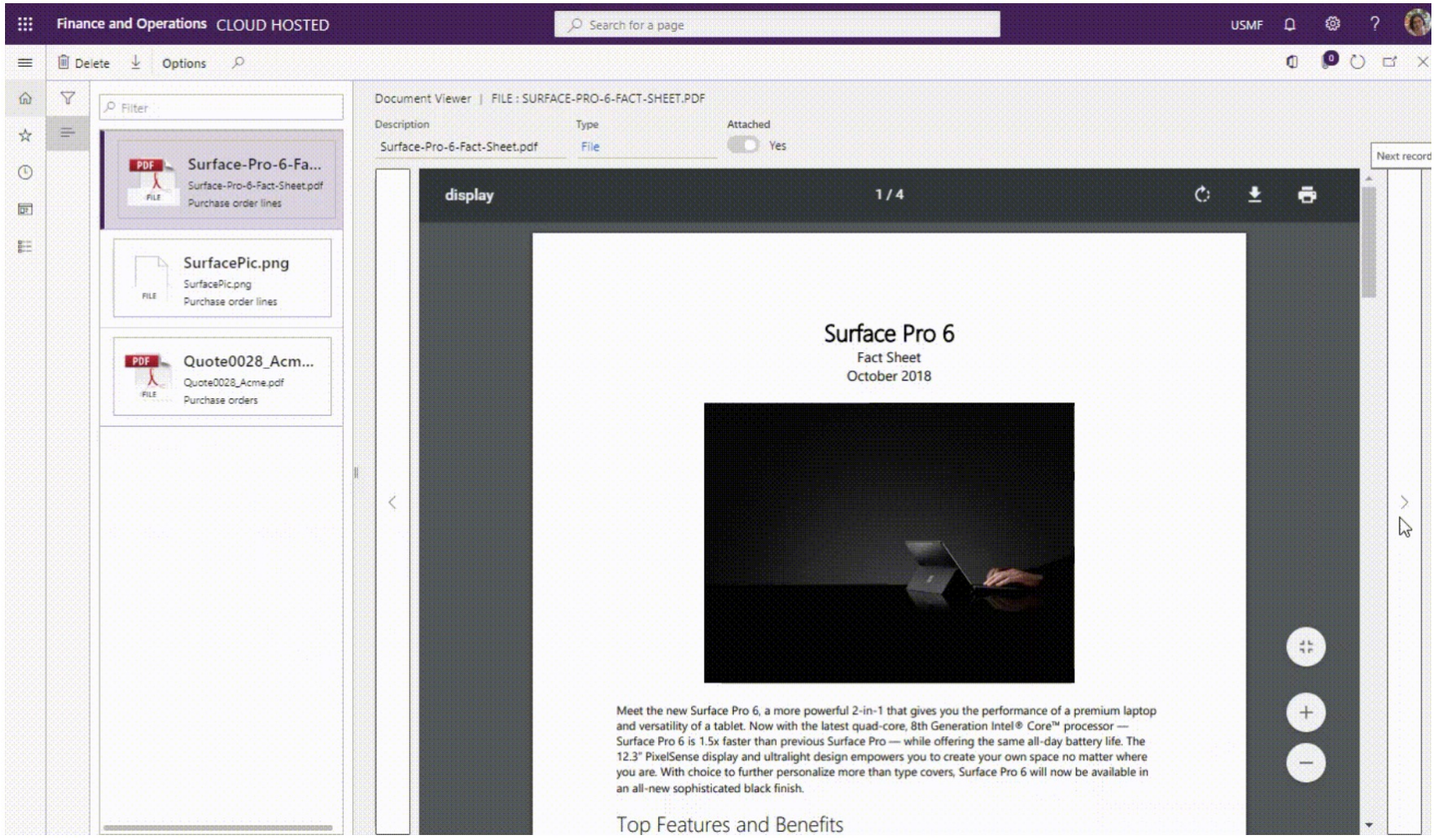
Preview Attached Files with Zero Clicks



Quickly find and preview what you are looking for

Simply hover over the File names to preview the document in a mini window – no clicking required!

Full Screen Gallery View



Zero Downloads Required

E-ttach comes with it's own document gallery viewer – so that you can actually *see* the document preview in full screen!

Your notes and documents have never been easier to view with our full screen gallery. Flip through notes, documents and images with ease.

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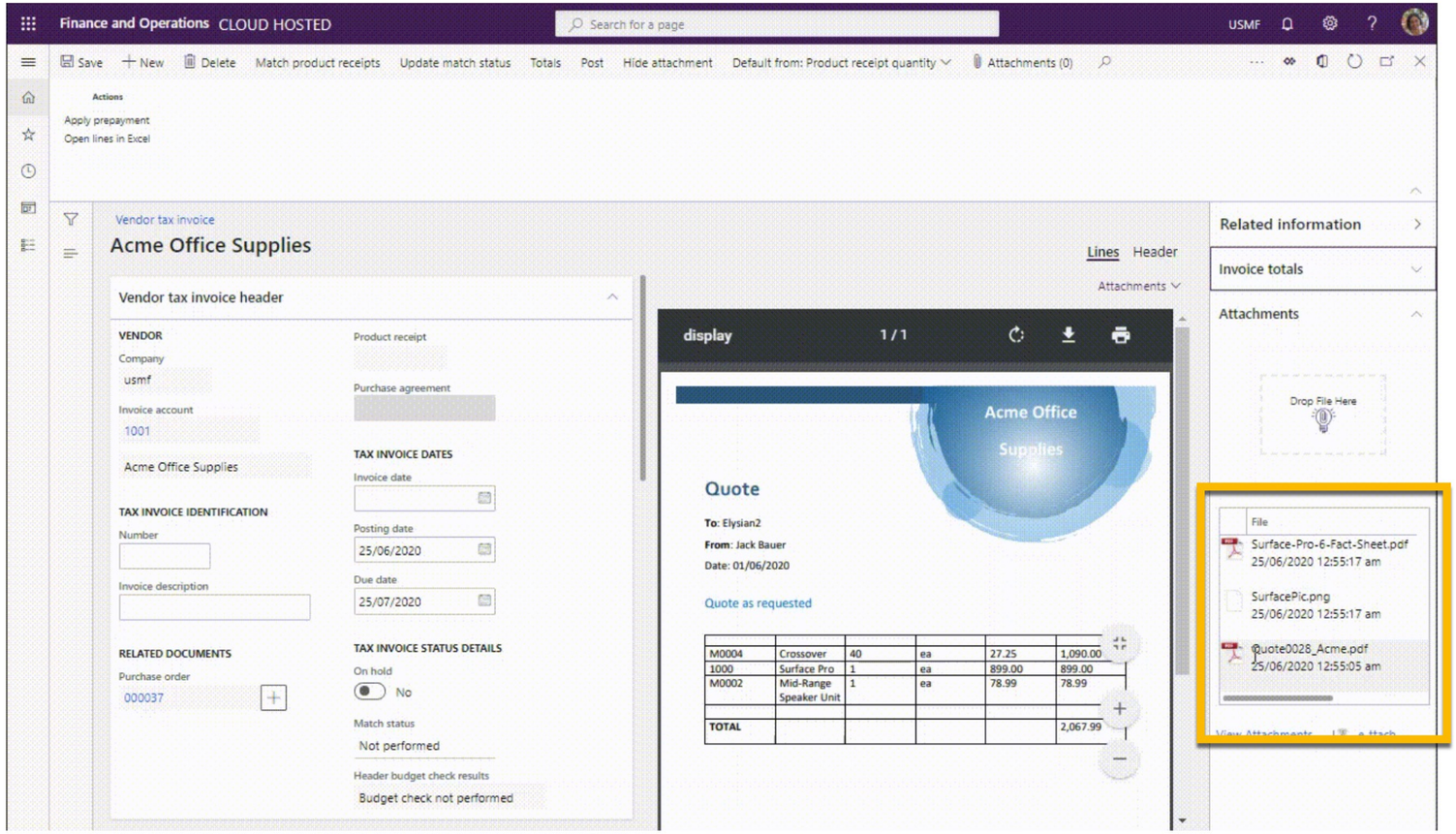
Version Availability

View Same Files in Related Forms



Reduce document file duplication and storage

Thanks to E-ttach's tagging function, attachments from related documents can be viewed – e.g. Documents attached to the Purchase Requisition is viewable on the Purchase Order, and then viewable with the related AP Invoice.

A seamless document workflow.

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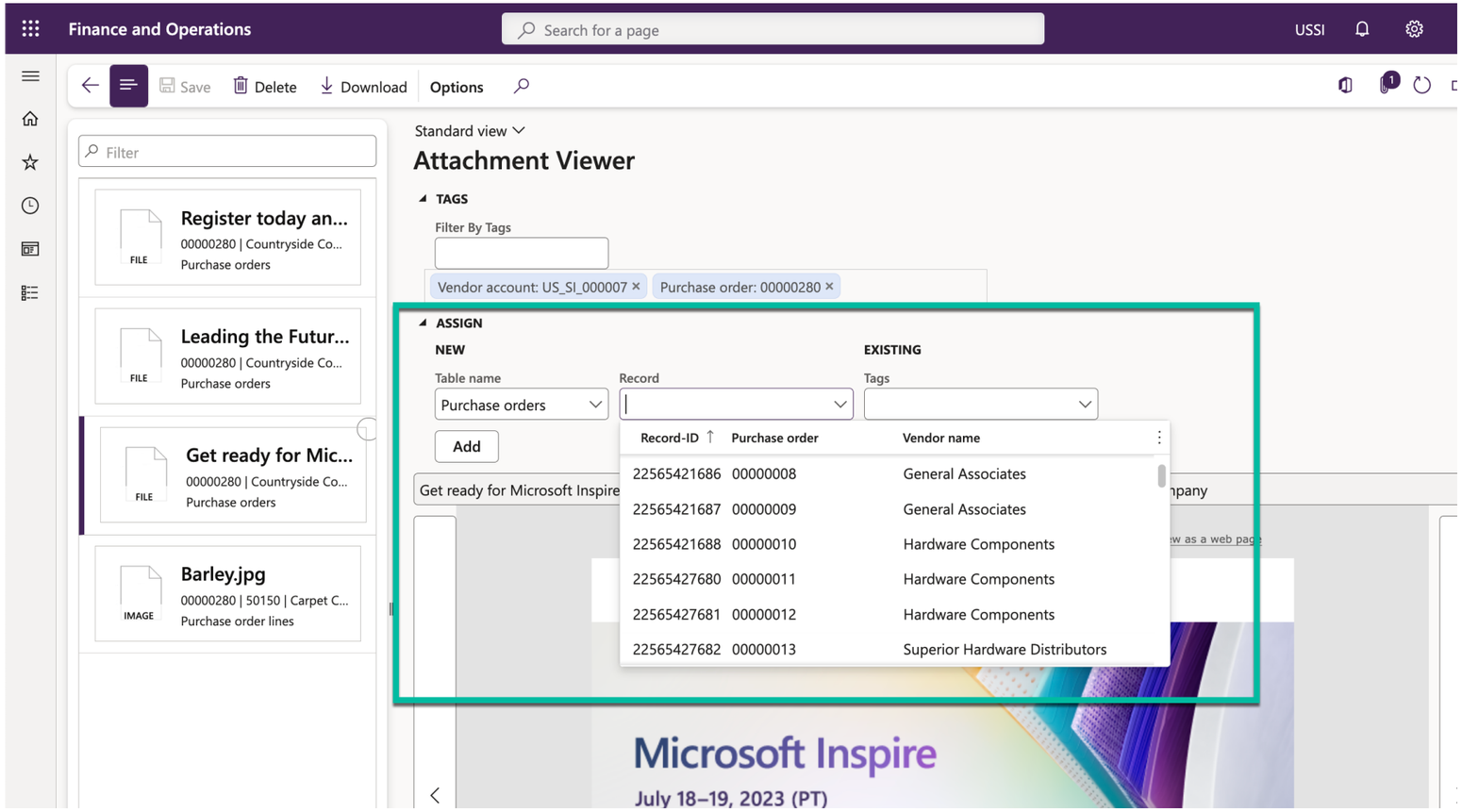
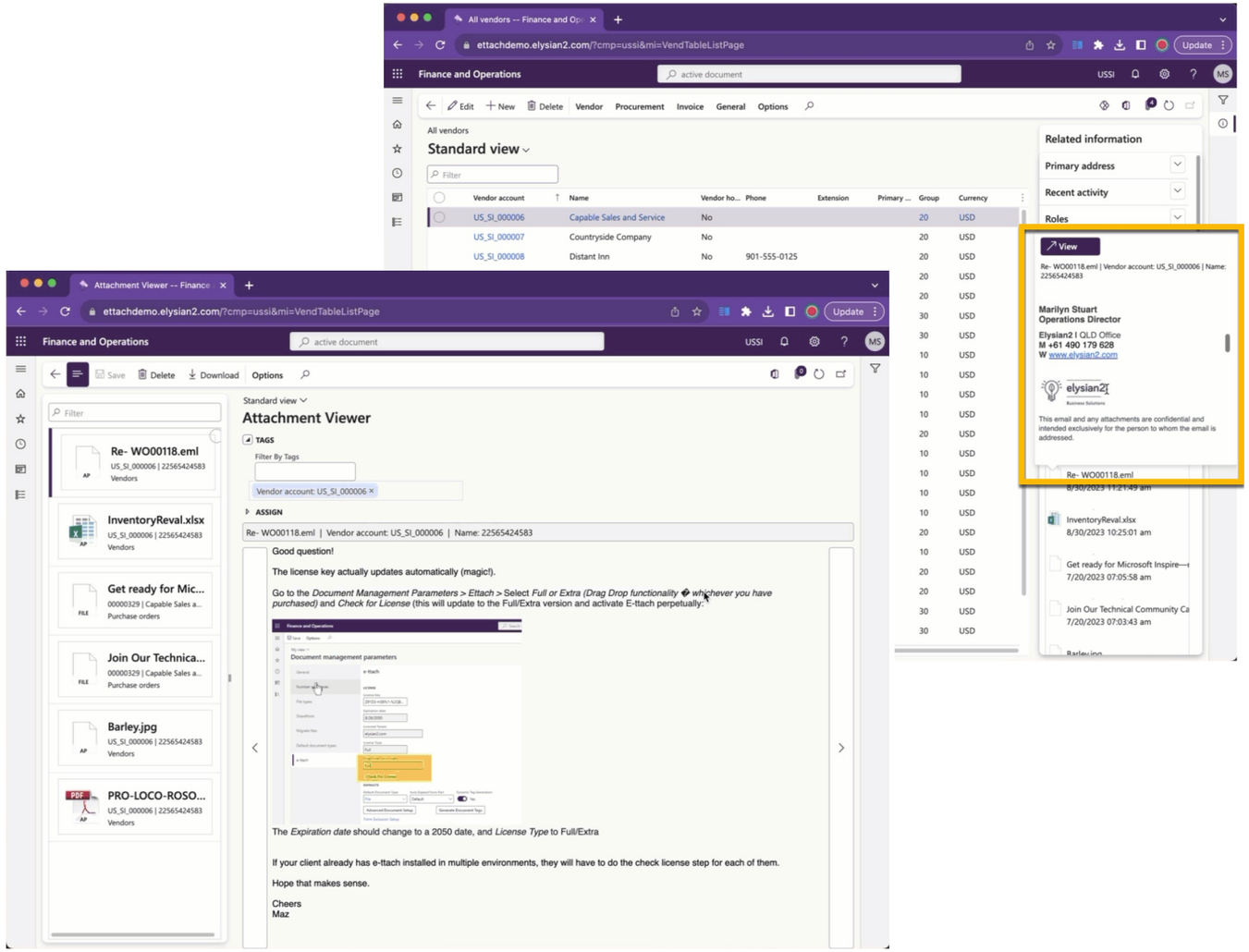
Tag Management



Add or Remove Tags

E-ttach automatically creates tags according to the record that a document is attached to, but occasionally you may want to remove a tag or add one (to link and view the same attachment with another record).

Preview Email Messages with ease

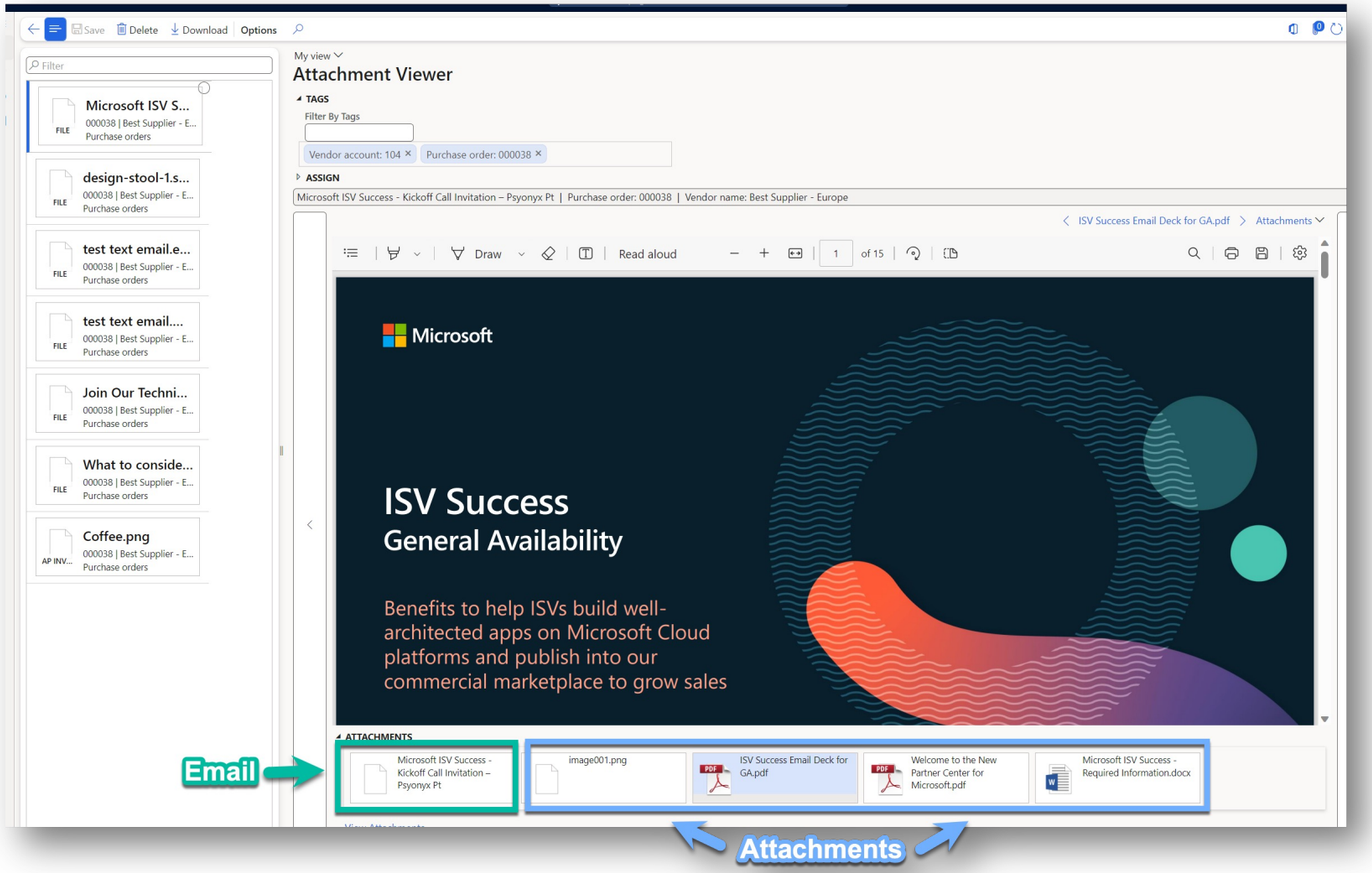


Preview Email file types

We made the impossible, possible!

You can now view emails in D365 F&O without having to download the file first!

Preview Email Messages + Attachments

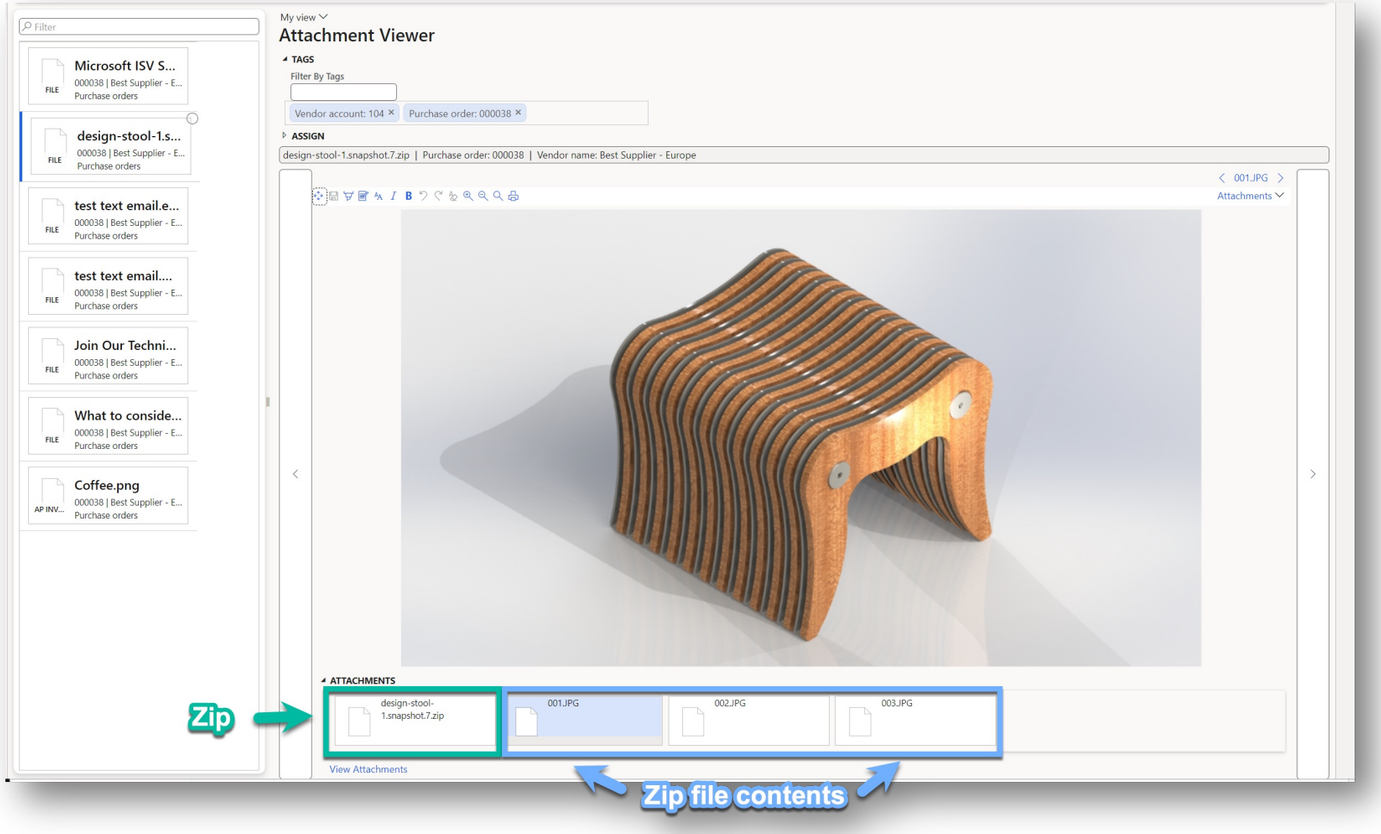


Drag & Drop Emails with their attachments in one go!

How cool is that!

You can now d&d emails with the attachments and preview the attachments linked to the email file!

Preview Zip Files + Contents

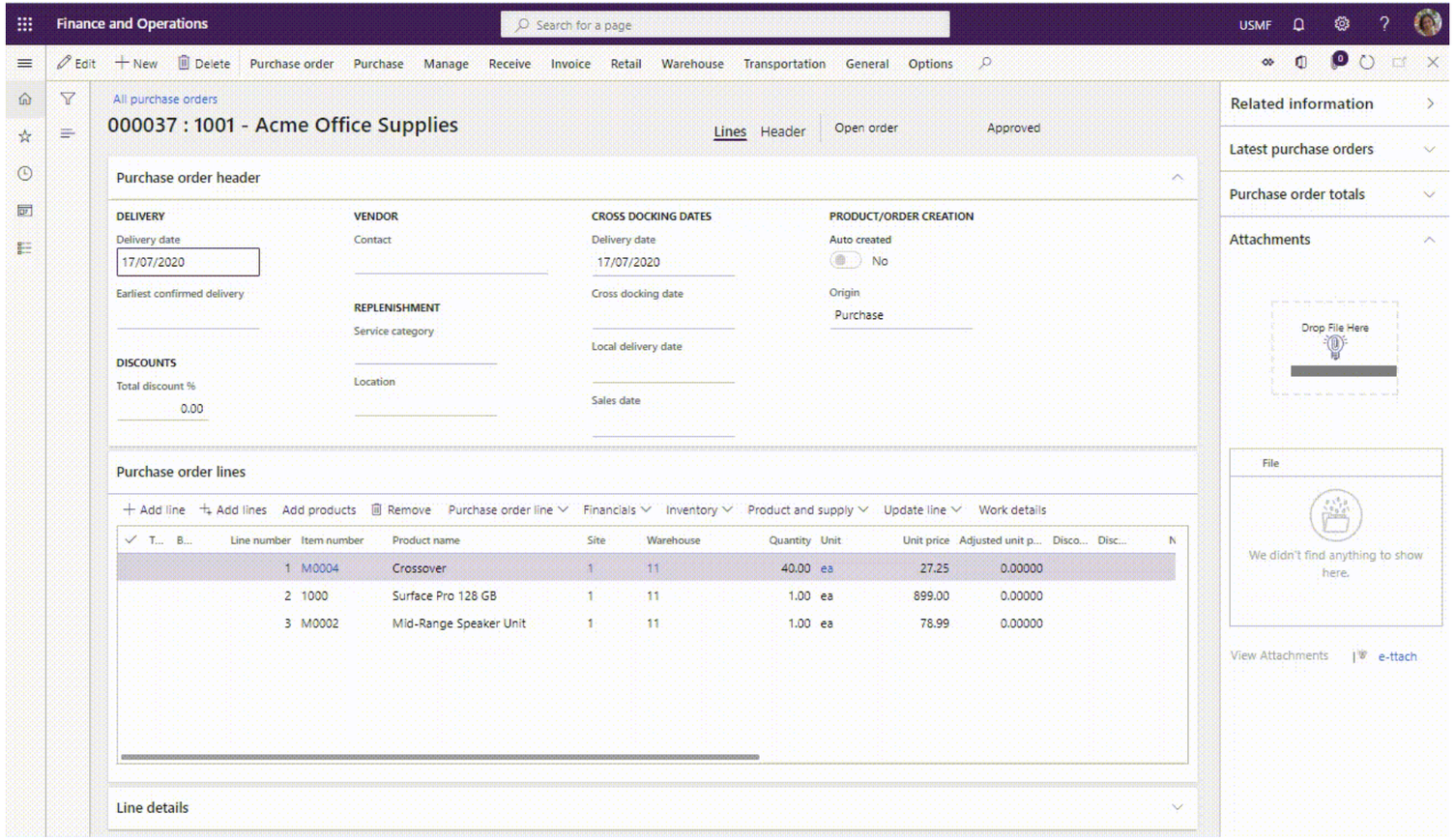


Drag & Drop Zip files and preview the contents without downloading!

Amazing!

No need to download and extract to simply preview the contents of the zip file!

Drag & Drop into All Forms

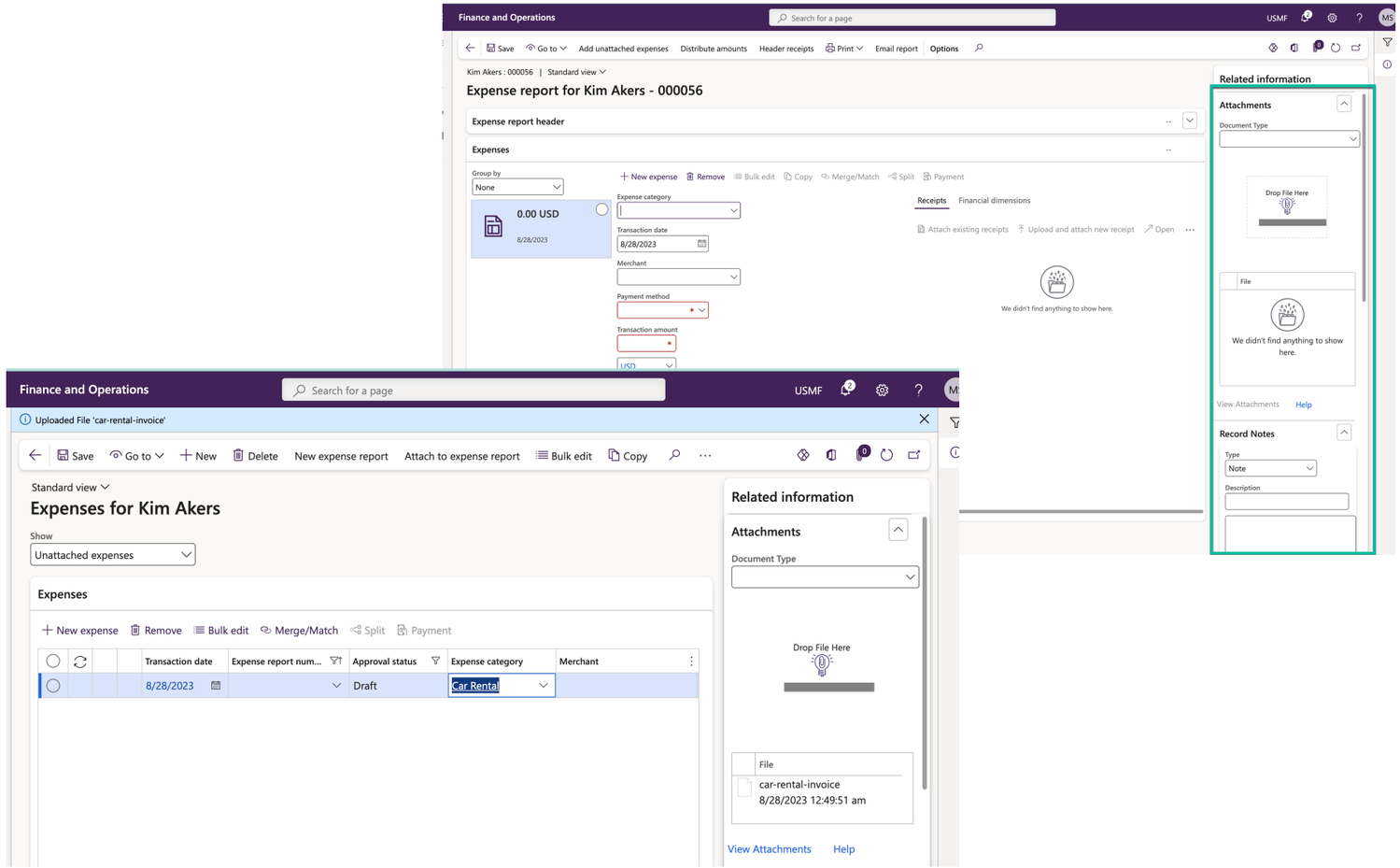


Premium feature

With the Enterprise and Extra versions, you can drag and drop on pretty much all forms that allow for attachments...

....and even a couple that don't usually allow attachments as standard!

Drag & Drop for Expenses

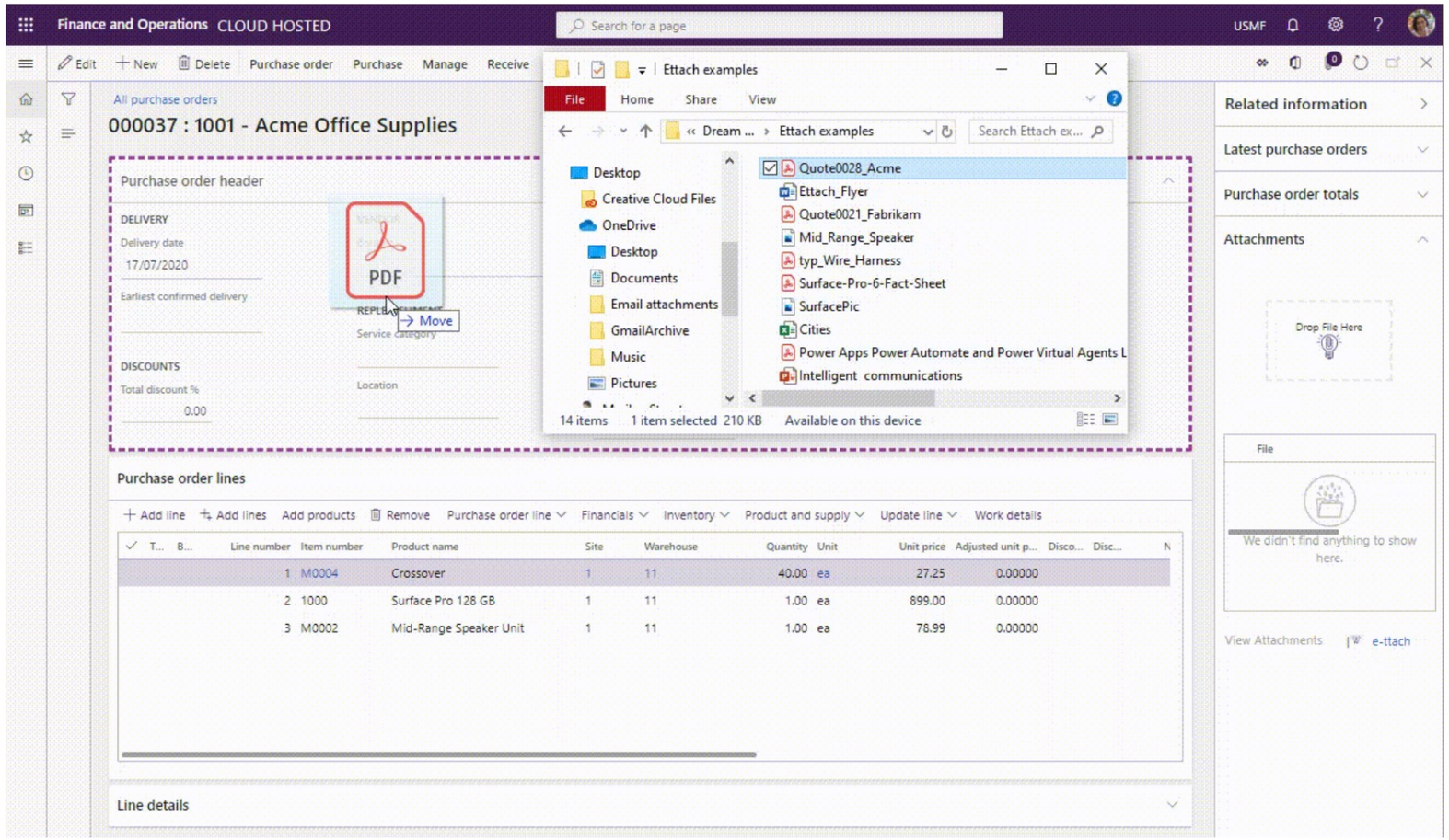


Attaching Receipts and Expenses Files

As standard, there is no side pane for Expenses, but we added one!

Now users can drag and drop expenses related files with ease, speeding up the time it takes to submit and code expense claims.

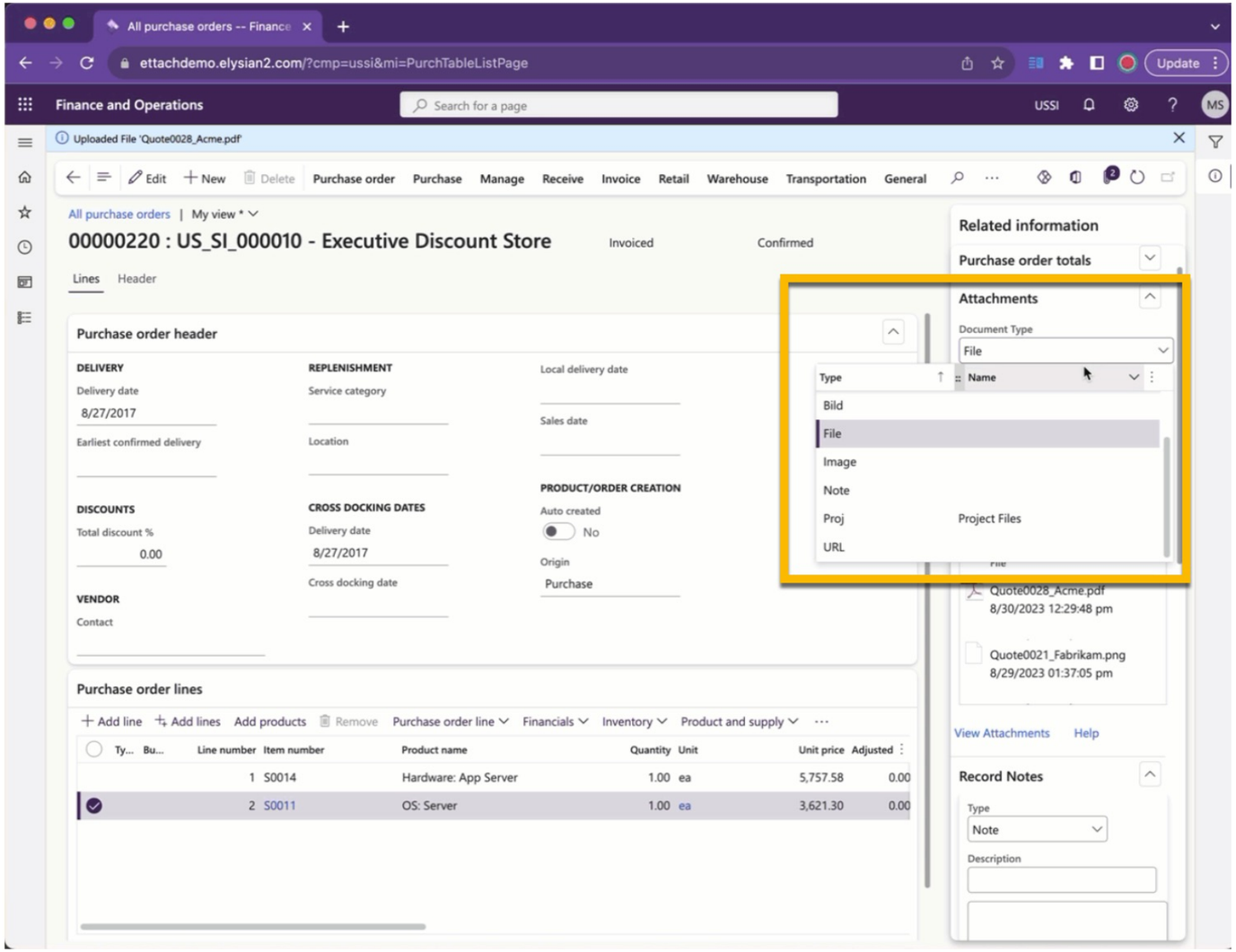
Drag & Drop into Form Header or Lines



Extra Feature

With the Extra version, you can drag and drop into the form parts – Header or individual Lines, without having to click on them first.

File Type Selection Per Drop

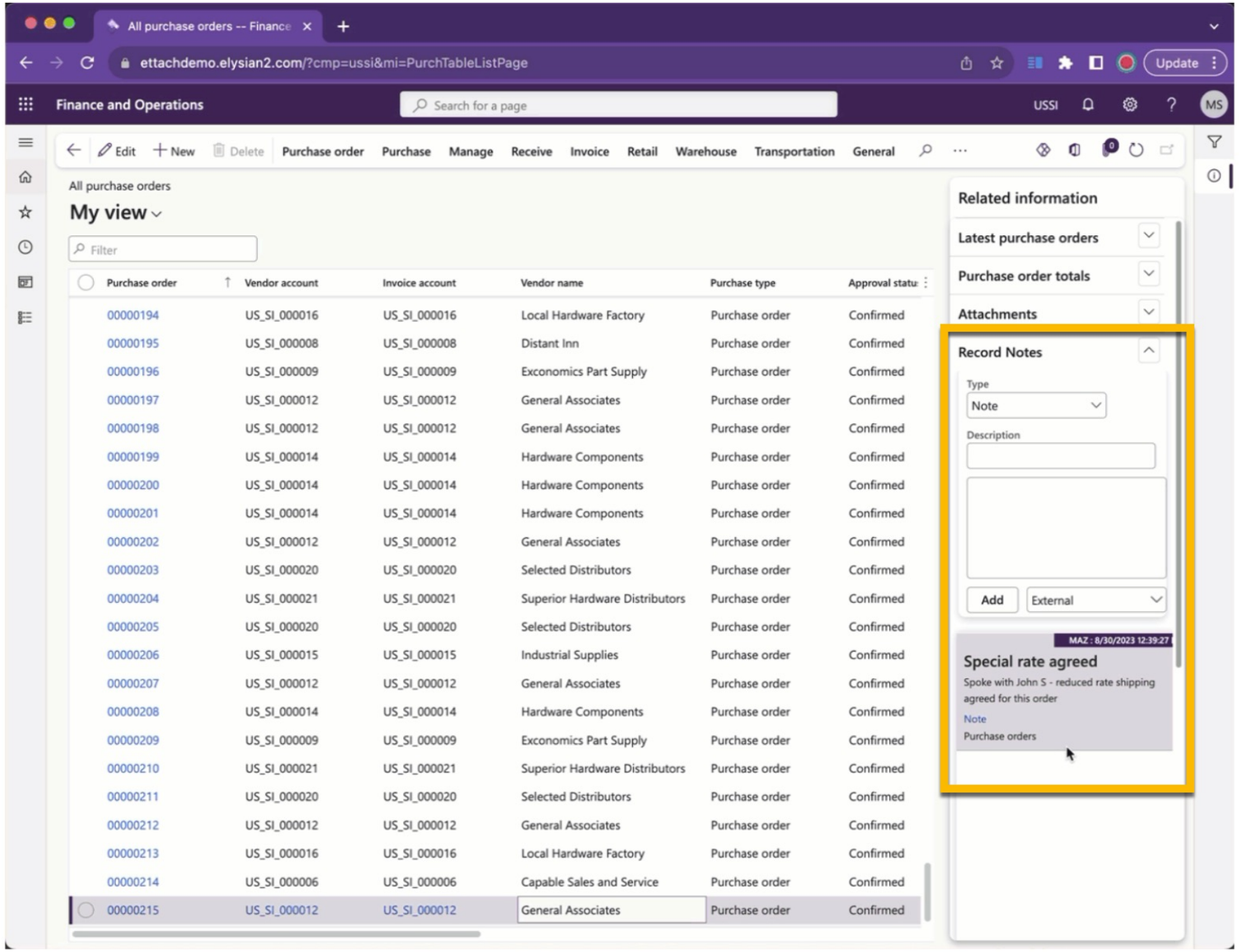


Choose a File Type

Need to select a different file type to the default? We've got you covered!

By selecting different file types before dropping the file, you can ensure that certain file types end up in the correct location, if your organization has different file type policies and storage locations.

Record notes easily



Easy-Do and Easy-View Notes

Recording notes against records is now as easy as drag & dropping a file!

View notes in the side panel along with the files.

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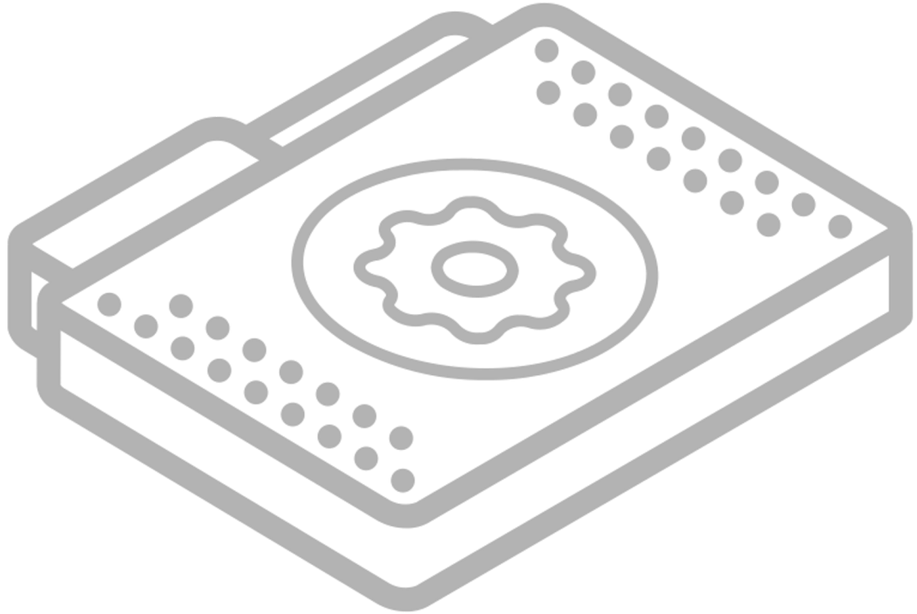
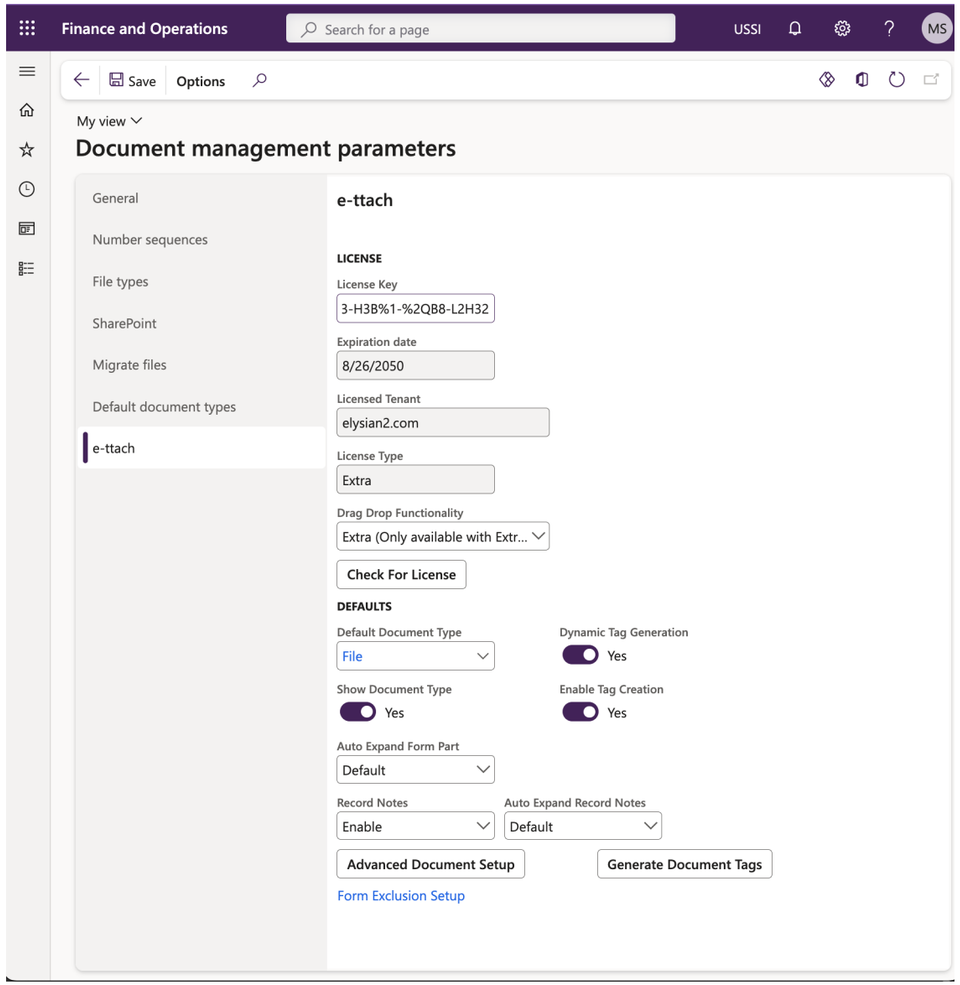
Configuration Options



Easy License Updates and Version Activation



Once installed, updating the license key and activate (or disable) E-ttach features is as easy as a click of a button!

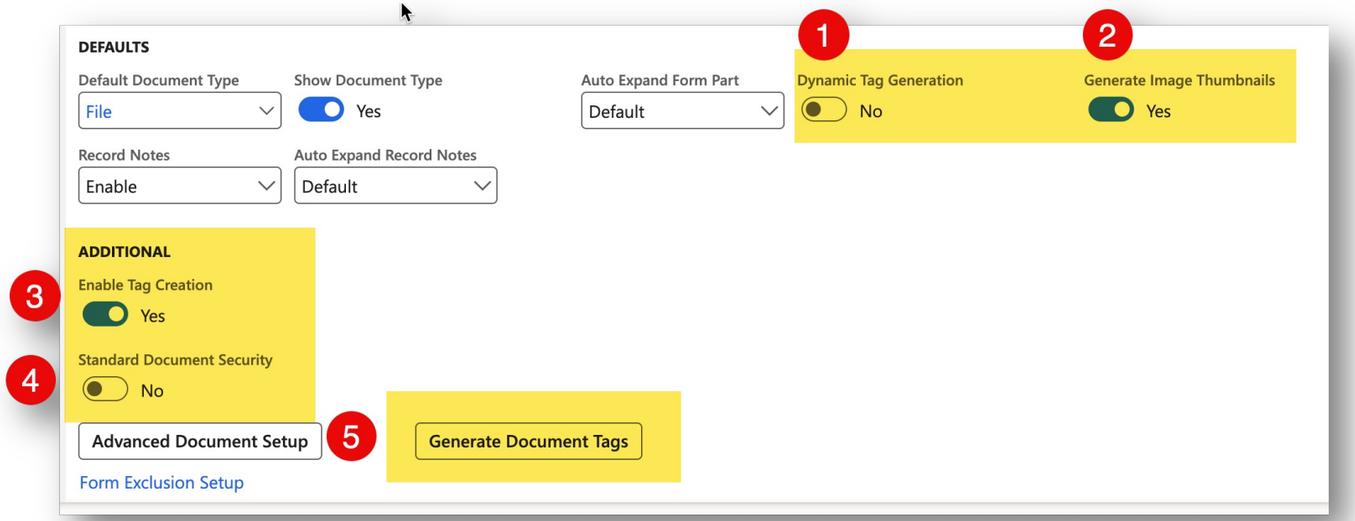
Highly Configurable to your Org Policies

1. Dynamic Tag Generation

Used to auto-create linked attachments when they don't already exist. Useful if attachments are being added via other means than just drag and drop

2. Generate Image Thumbnails

Creates and shows image thumbnails instead of a generic image icon (available with **Extra**)



3. Enable Tag Creation

Turn this off if you do not want to be able to create or assign record tags to documents on the Attachment viewer screen.

4. Standard Document Security

If the record can no longer be edited, e.g PO workflow is complete, then in Standard you can't attach documents (with E-ttach you can) - this enables that same logic.

5. Generate Document Tags

Clicked when you first install e-ttach, it generates e-ttach specific document records to ensure your existing attachments are displayed against their associated records in the e-ttach forms.

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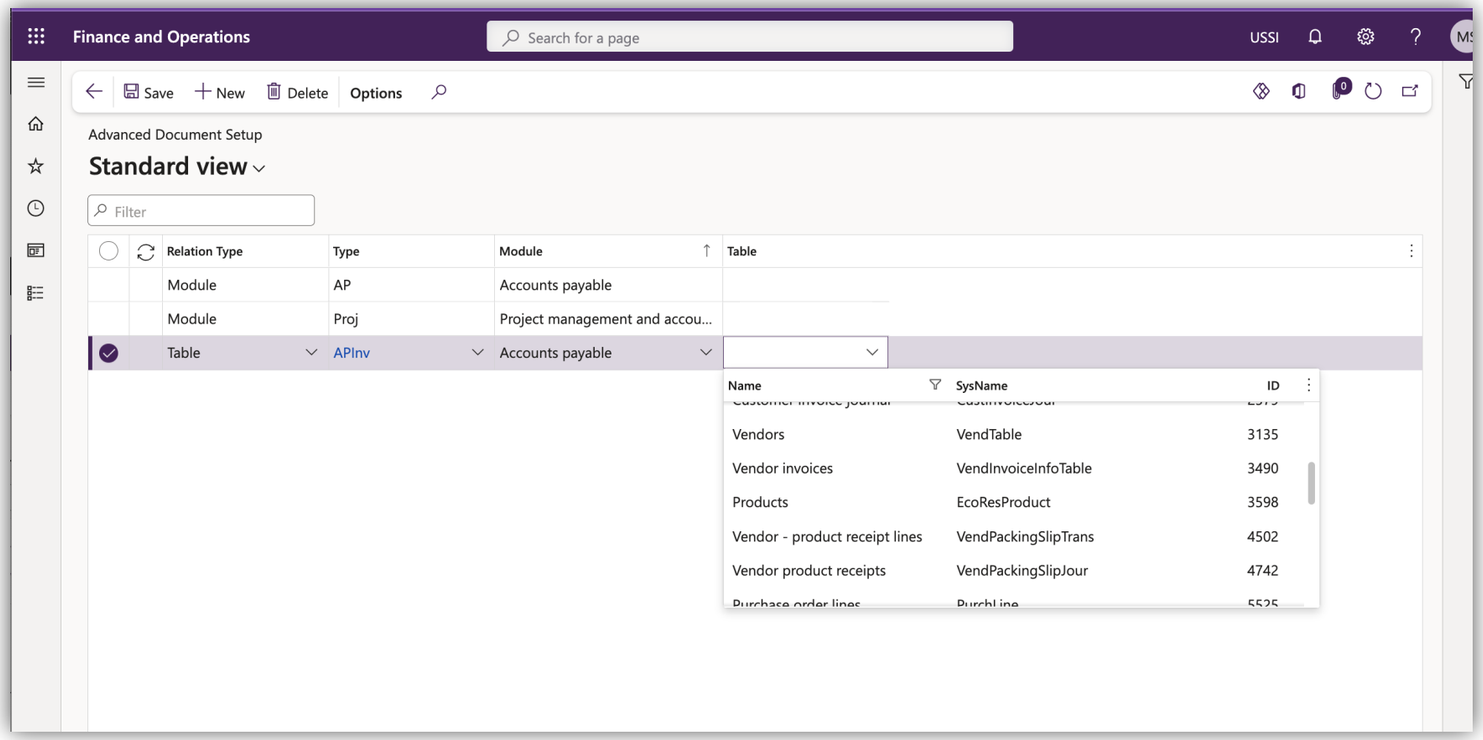
Advanced Document Setup



Different file types may be required specifically for a Module or Table – this can be defined in our advanced setup parameters

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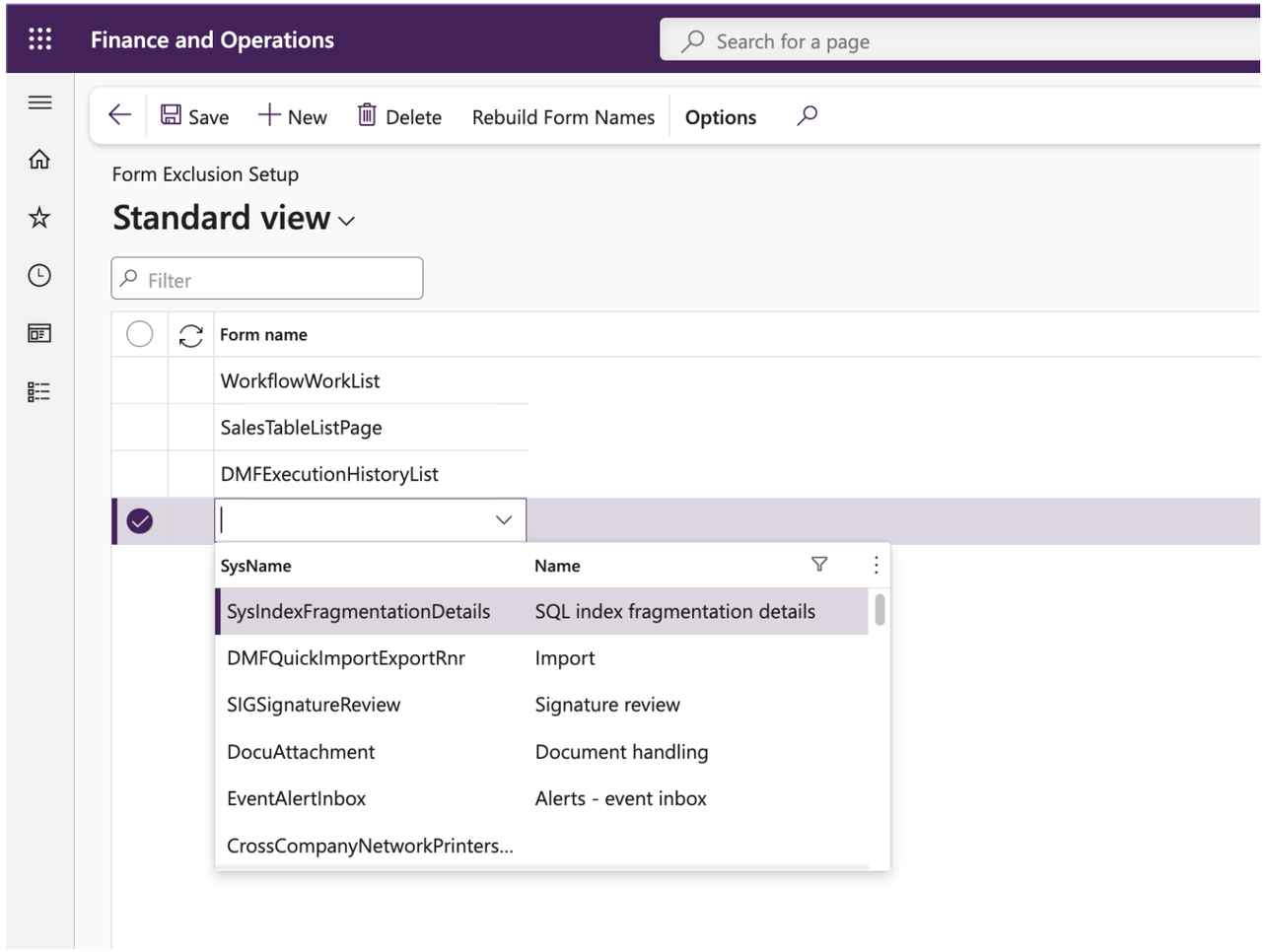
Form Exclusion Setup



Want to exclude certain forms from E-ttach functionality and attachments?

No problem, with our Form Exclusion Setup!

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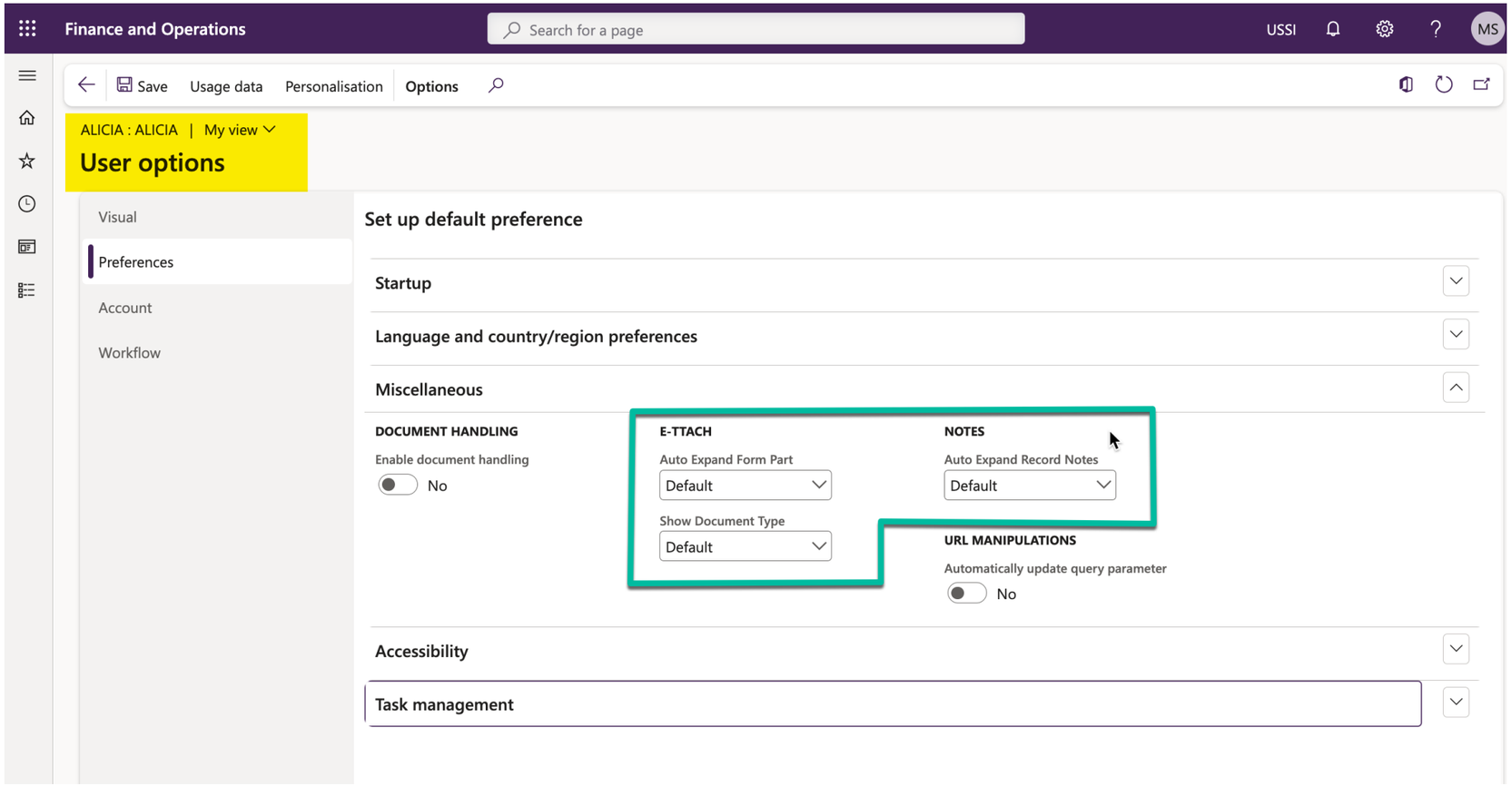
User Specific Options



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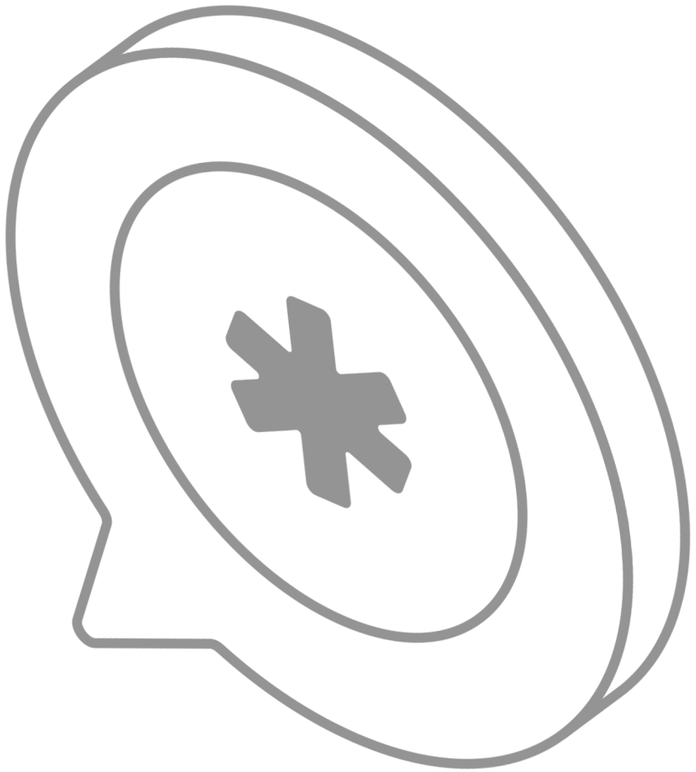
FAQ



Frequently Asked Questions

01

Does E-ttach work on all forms?

Yes, most List pages and Master Data, like Purchase Orders, Vendors, Customers, Invoices, Expenses, Credit & Collections, Sales orders, Projects, and more! You do need the Enterprise or Extra license to use E-ttach on all forms. Currently, drag and drop and standard attachments functionality is not available on Workspaces.

02

Which versions of D365 F&O is it compatible with?

10.0.8 Update 32 or higher

03

What is the difference between Freebie & Enterprise?

Freebie is our free version that is limited to only Vendors, PO's and Invoices. Preview docs you see on the side are limited to the most recent 3 attachments, and uploads are capped at 10mb - Enterprise is unrestricted (unless restricted by your organisational policies).

04

Can I upgrade from the Free version later?

Yes, that is no problem – but you won't benefit from the feature enhancements we release from time to time.
Simply purchase a license and we will update your version remotely to activate the additional features on your side.

05

What if there is a conflict or error? Is it easy to disable?

Yes! You can disable e-ttach immediately in the parameters. In ettach section of the Document management parameters you can select 'Disabled' from the Drag Drop Functionality dropdown which will disable the code for all users on the instance.

Frequently Asked Questions

06

Can I drag & drop, and preview, email file types?

Yes! For D365 F&O, only with E-ttach! You are able to preview .eml and .msg files on screen without having to download first.

07

Do I need a license per environment/company/region?

Once license covers all environments and regional installations, providing they are on the same Tenant.

08

How do I install E-ttach?

E-ttach is provided as a package in a zip file, along with activation instructions, and is installed as per any other customisation or ISV.

Microsoft no longer allow installing individual packages directly into a UAT/TEST environment so it needs to be included in what is called an "All in one" package which contains all customisations together, which your in-house technical team or partner will be used to doing.

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/dev-tools/aio-deployable-packages

09

Can Elysian2 see or access our files?

No! All files and notes are secured on your tenant and do not go via our servers in any way! E-ttach uses same methods and document handling upload and storage security provided by Microsoft.

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Declicking Dynamics – one file at a time!

E-ttach is a valuable and cost-effective software solution that provides users with enhanced functionality, improved efficiency, and an easy-to-use interface. With three versions to choose from, there is a version of E-ttach for every organisation.

Whether you are looking to reduce data entry time, eliminate errors, or simply streamline your workflows, E-ttach can help you achieve your goals. **Contact us or your Microsoft Partner today** to learn more and start boosting your productivity, and streamline your workflows.

Contact: info@elysian2.com

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