



# The Drag and Drop Solution for D365 F&O<sup>\*</sup>

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: 19<sup>th</sup> October 2023



Developed by  elysian2



# 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.

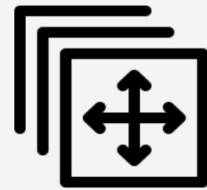


# All Versions benefit from the following features:



## 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



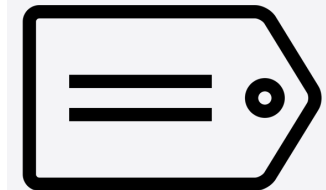
## Time Saving

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

# 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.

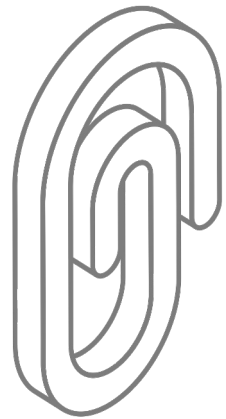
## Increased Functionality

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.



## Available Versions

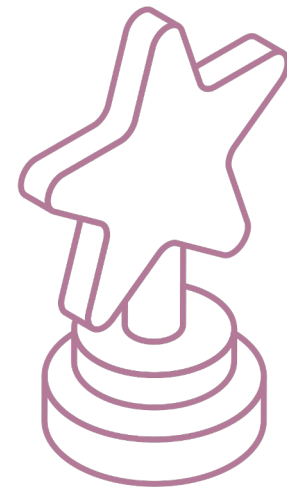
**Freebie**



**Enterprise**

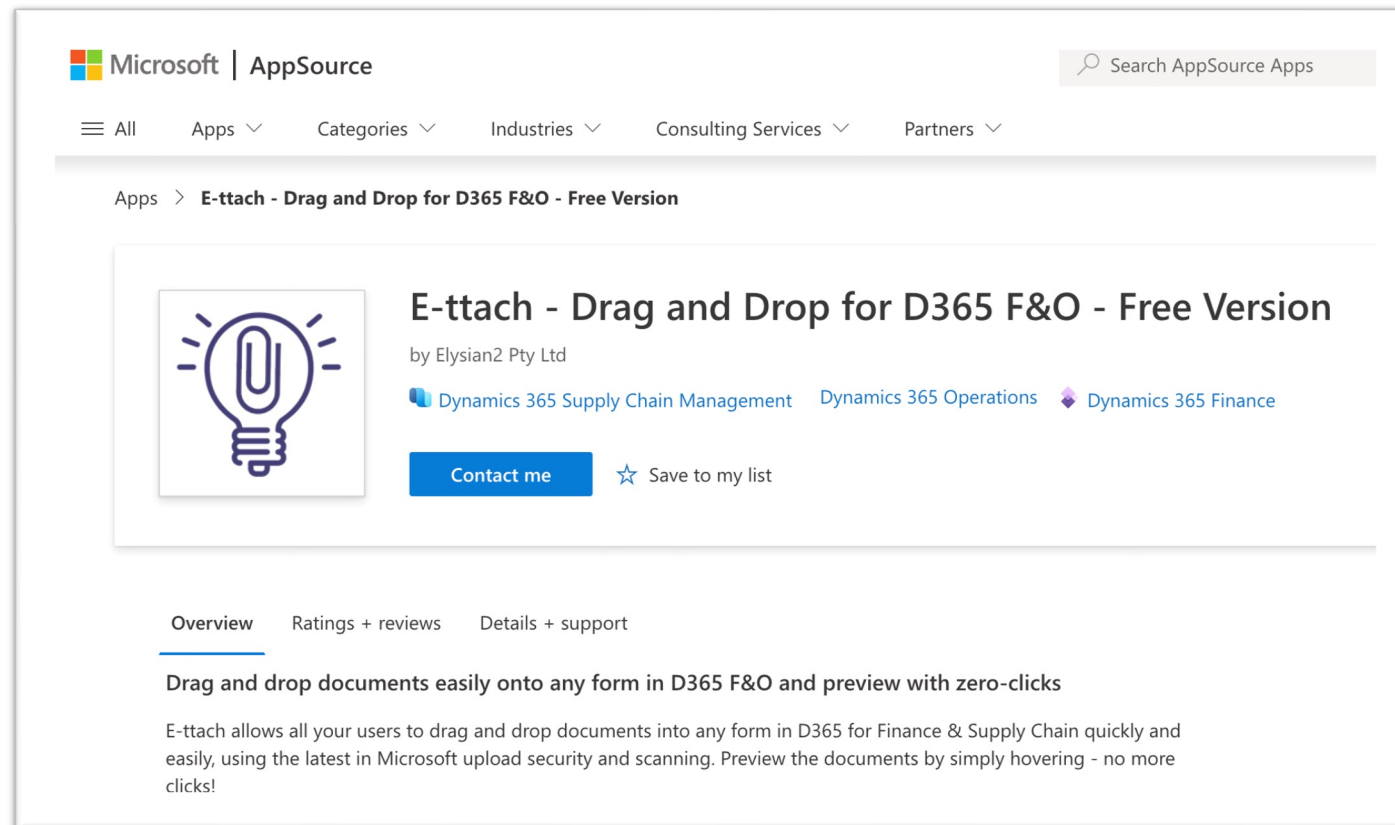


**Extra**





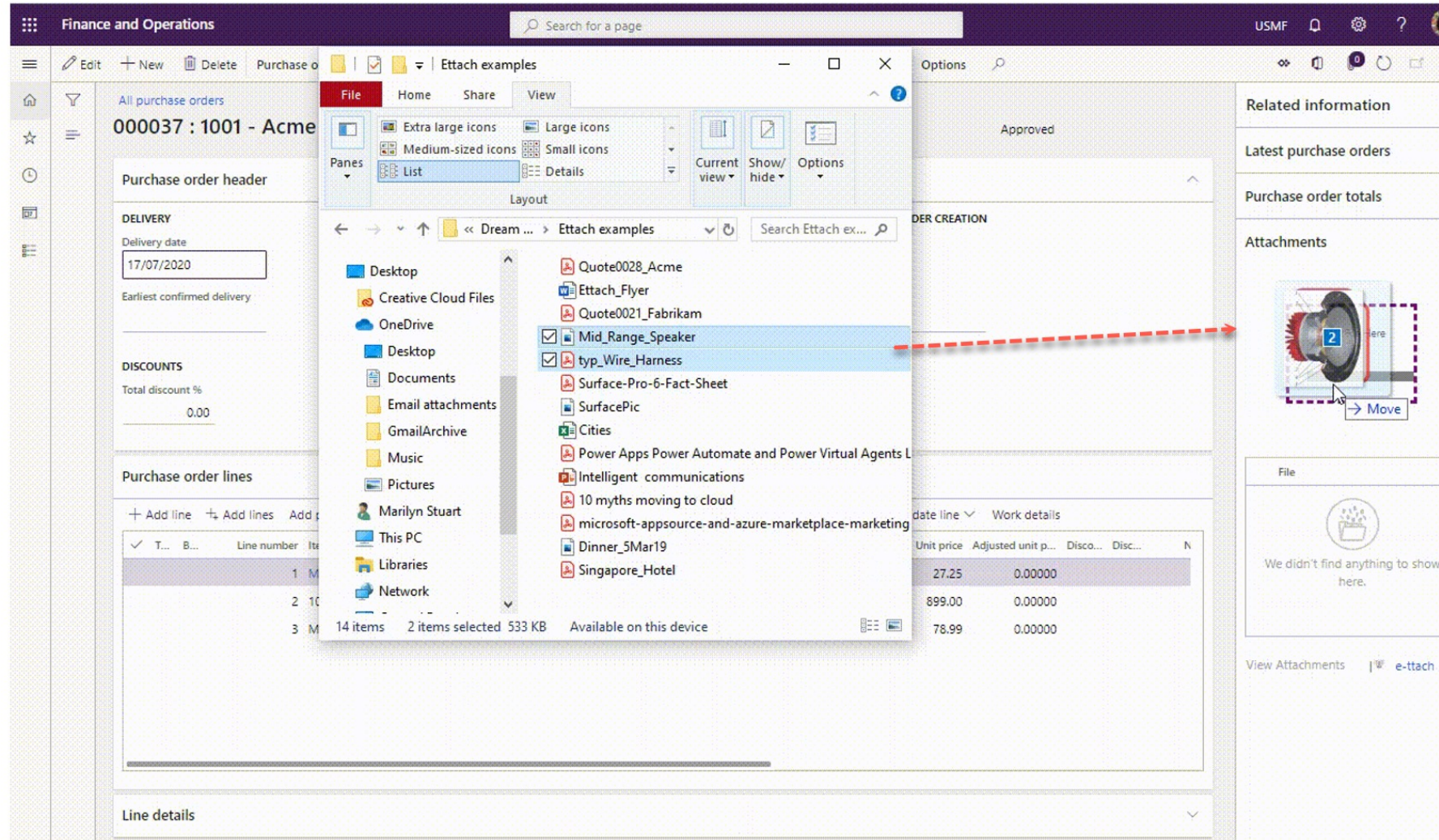
# Approved by Microsoft



The screenshot shows the Microsoft AppSource interface for the 'E-ttach - Drag and Drop for D365 F&O - Free Version' app. The page includes a search bar, navigation tabs for 'All', 'Apps', 'Categories', 'Industries', 'Consulting Services', and 'Partners'. The app title is 'E-ttach - Drag and Drop for D365 F&O - Free Version' by Elysian2 Pty Ltd. It is categorized under 'Dynamics 365 Supply Chain Management', 'Dynamics 365 Operations', and 'Dynamics 365 Finance'. There are 'Contact me' and 'Save to my list' buttons. Below the app card, there are tabs for 'Overview', 'Ratings + reviews', and 'Details + support'. The 'Overview' tab is active, showing a description: 'Drag and drop documents easily onto any form in D365 F&O and preview with zero-clicks'. A paragraph below states: 'E-ttach allows all your users to drag and drop documents into any form in D365 for Finance & Supply Chain quickly and easily, using the latest in Microsoft upload security and scanning. Preview the documents by simply hovering - no more clicks!'.

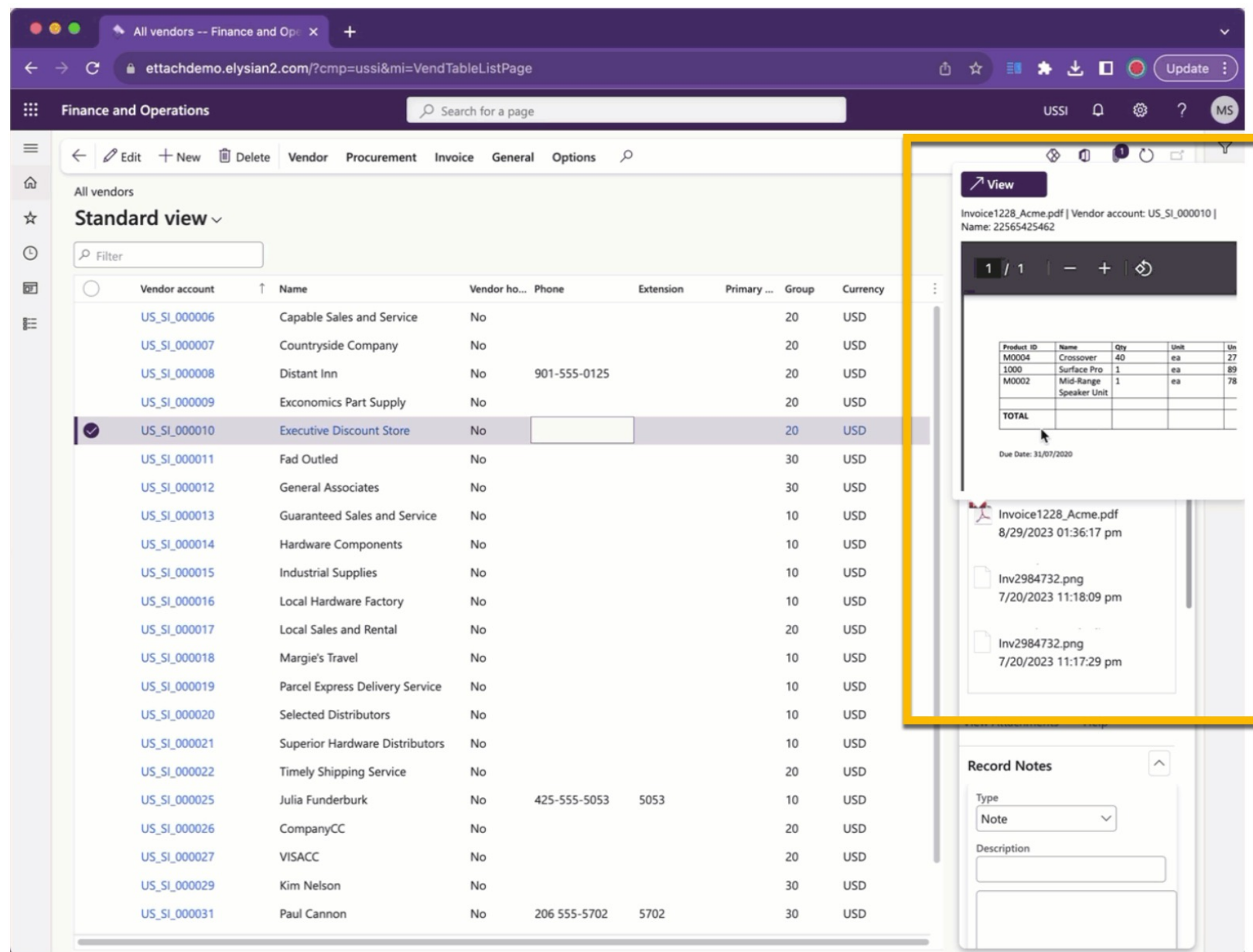
Reviewed and approved by Microsoft and featured on AppSource

# Drag & Drop Multiple Files



## Time Saver!

# Preview Attached Files with Zero Clicks



The screenshot shows a web application interface for 'Finance and Operations'. The main area displays a table of vendors. The vendor 'Executive Discount Store' (US\_SI\_000010) is selected. A preview window is open over this vendor, showing an invoice document. The preview window includes a 'View' button, a document title, a table of items, and a list of attached files. The table of items is as follows:

Product ID	Name	Qty	Unit	Un
M0004	Crossover	40	ea	27
1000	Surface Pro	1	ea	89
M0002	Mid-Range Speaker Unit	1	ea	78
<b>TOTAL</b>				

Below the table, the due date is listed as 31/07/2020. The attached files list includes:

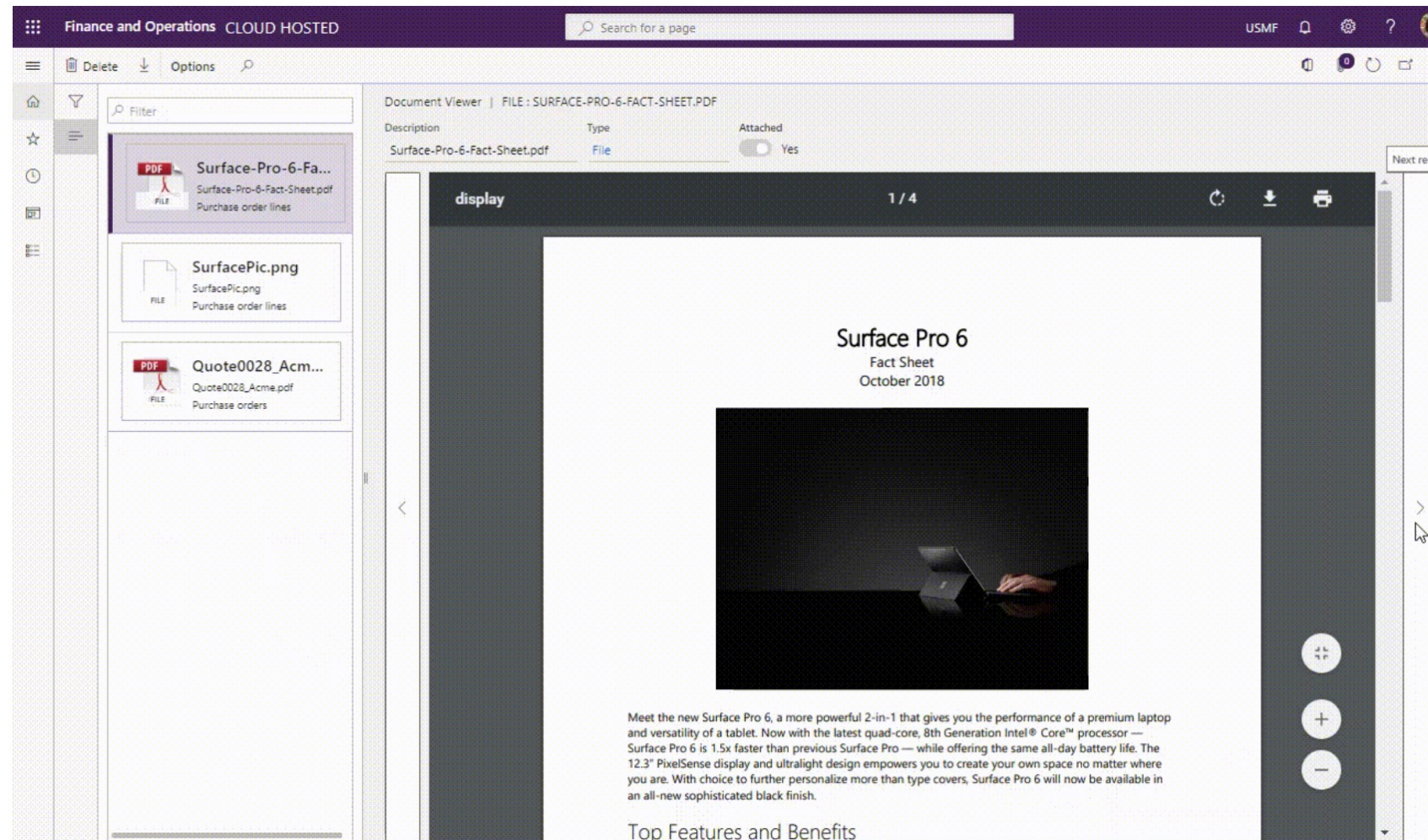
- Invoice1228\_Acme.pdf (8/29/2023 01:36:17 pm)
- Inv2984732.png (7/20/2023 11:18:09 pm)
- Inv2984732.png (7/20/2023 11:17:29 pm)

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



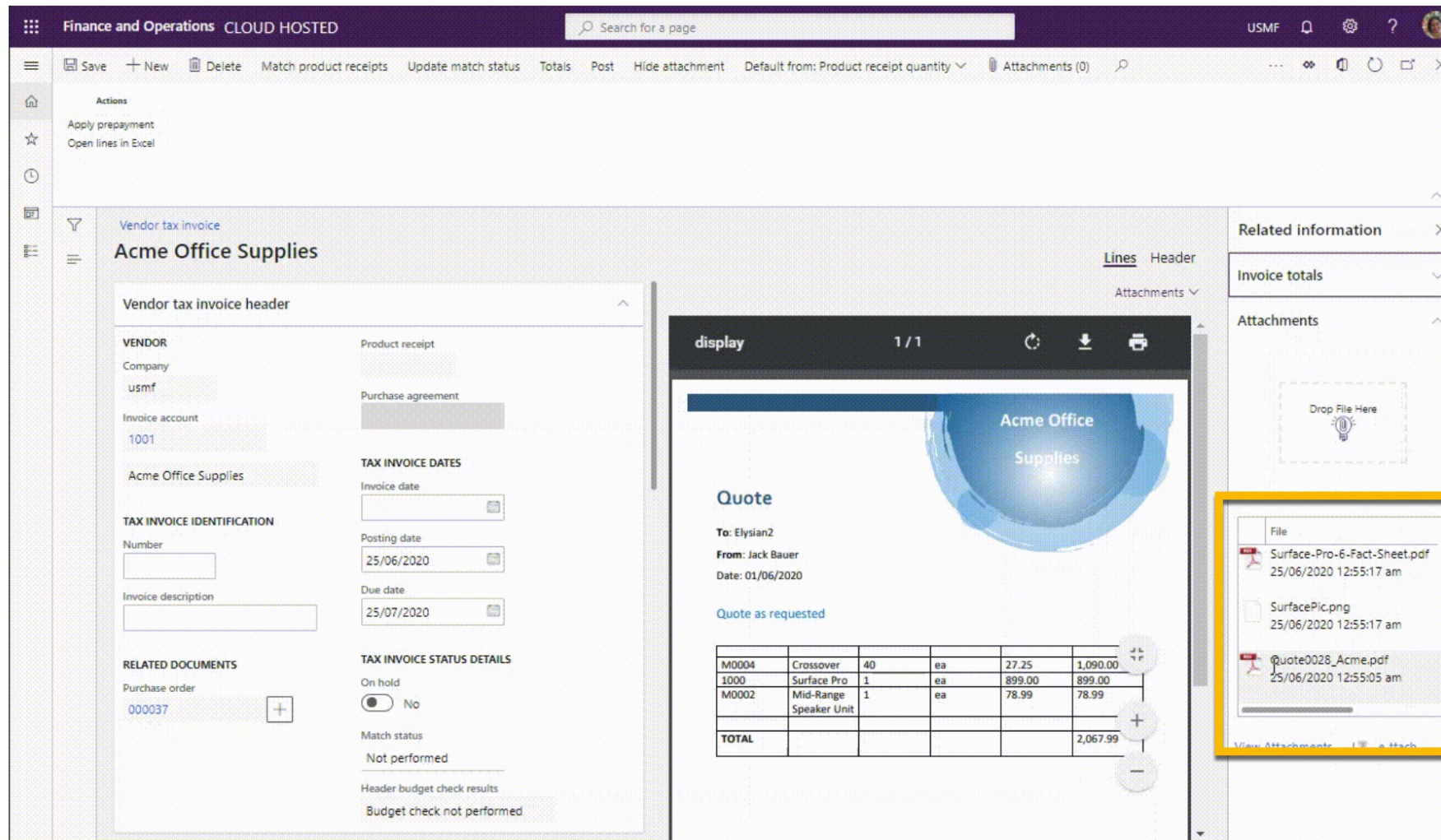
## Zero Downloads Required

E-ttach comes with its 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.



# View Same Files in Related Forms



The screenshot displays a software interface for a Vendor tax invoice. The main form is titled "Acme Office Supplies" and includes fields for Vendor (usmf), Invoice account (1001), and Tax Invoice Dates (Invoice date: 25/06/2020, Due date: 25/07/2020). A "RELATED DOCUMENTS" section shows a Purchase order (000037). A "Quote" document is displayed in a viewer, showing details for Elysian2, Jack Bauer, and a table of items:

Item	Description	Quantity	Unit	Price	Total
M0004	Crossover	40	ea	27.25	1,090.00
1000	Surface Pro	1	ea	899.00	899.00
M0002	Mid-Range Speaker Unit	1	ea	78.99	78.99
<b>TOTAL</b>					<b>2,067.99</b>

The "Attachments" list on the right is highlighted with a yellow box and contains the following items:

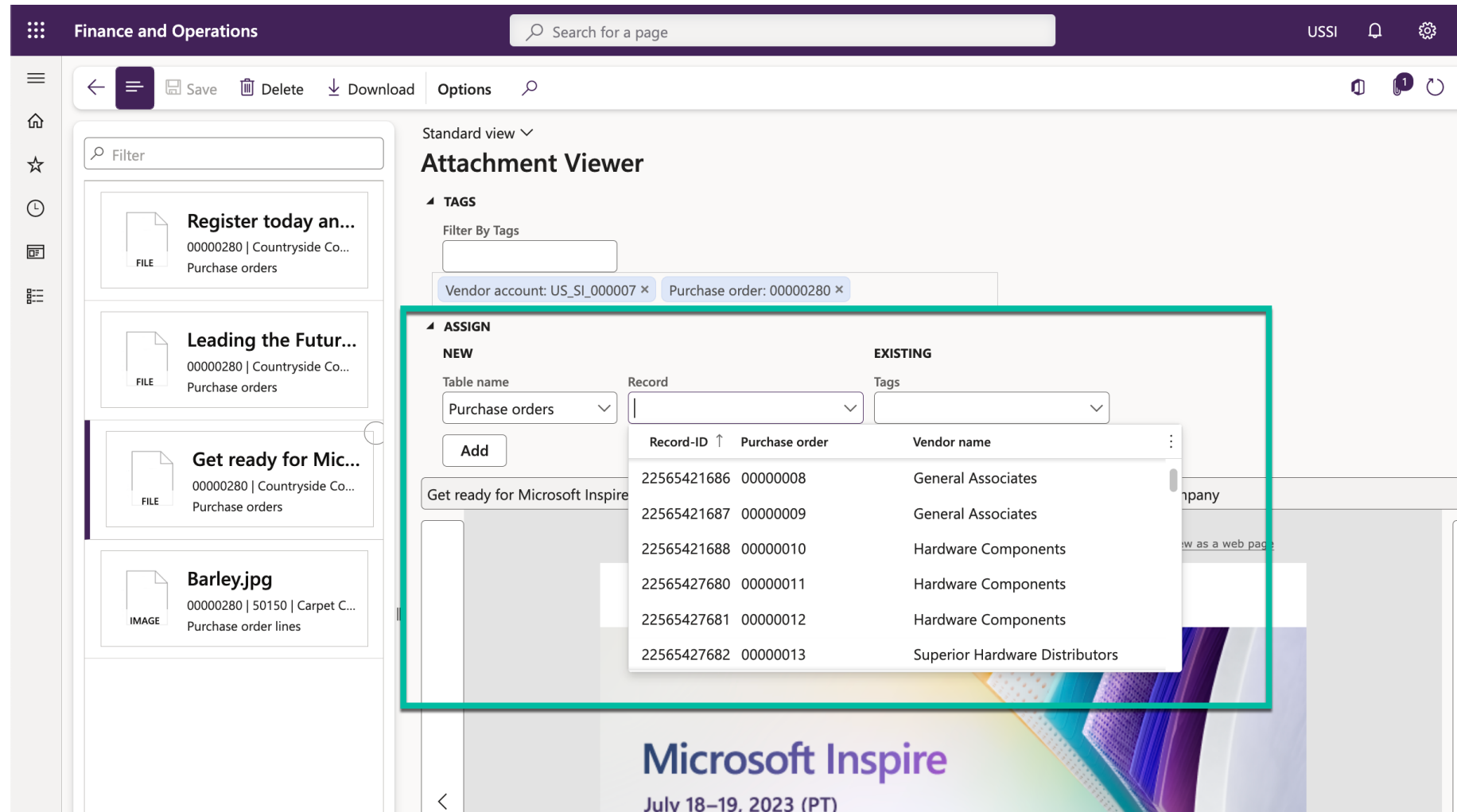
- File
- Surface-Pro-6-Fact-Sheet.pdf (25/06/2020 12:55:17 am)
- SurfacePic.png (25/06/2020 12:55:17 am)
- Quote0028\_Acme.pdf (25/06/2020 12:55:05 am)

## 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.

# Tag Management



Finance and Operations

Search for a page

USSI

Standard view

### Attachment Viewer

Filter By Tags

Vendor account: US\_SI\_000007 × Purchase order: 00000280 ×

ASSIGN

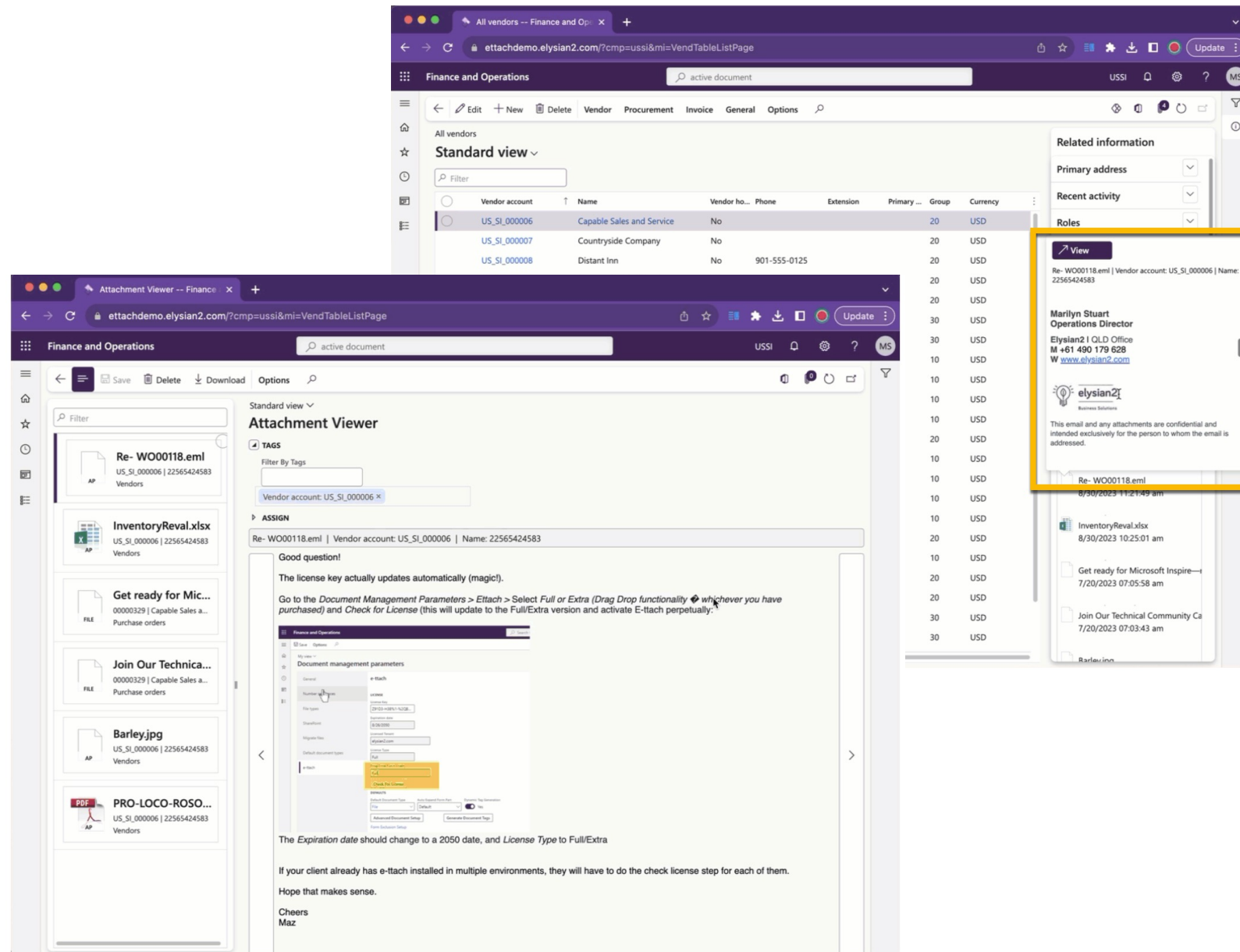
NEW	EXISTING	
Table name	Record	Tags
Purchase orders		
Add		
Get ready for Microsoft Inspire		
Record-ID ↑	Purchase order	Vendor name
22565421686	00000008	General Associates
22565421687	00000009	General Associates
22565421688	00000010	Hardware Components
22565427680	00000011	Hardware Components
22565427681	00000012	Hardware Components
22565427682	00000013	Superior Hardware Distributors

Microsoft Inspire  
July 18–19, 2023 (PT)

## 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



The screenshot displays the D365 Finance and Operations interface. At the top, a browser window shows the URL `ettachdemo.elysian2.com/?cmp=ussi&mi=VendTableListPage`. The main interface is divided into several sections:

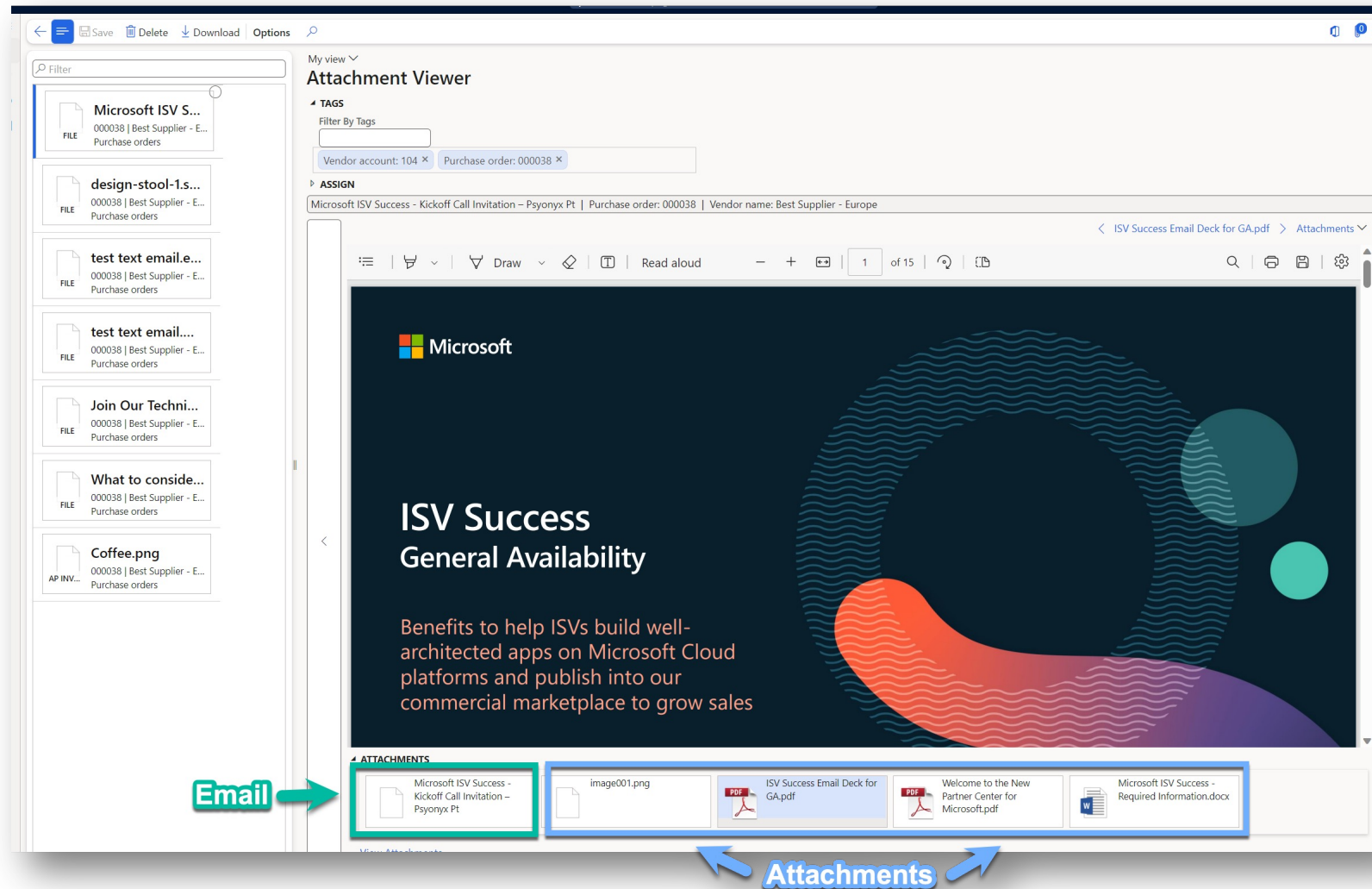
- Vendor List:** A table listing vendors with columns for Vendor account, Name, Vendor no., Phone, Extension, Primary..., Group, and Currency. The table includes entries for 'Capable Sales and Service', 'Countryside Company', and 'Distant Inn'.
- Attachment Viewer:** A sidebar on the left shows a list of attachments for the selected vendor, including 'Re- WO00118.eml', 'InventoryReval.xlsx', 'Get ready for Mic...', 'Join Our Techna...', 'Barley.jpg', and 'PRO-LOCO-ROSO...'. The 'Re- WO00118.eml' attachment is highlighted.
- Email Preview:** A 'View' popup window is open, displaying the content of the selected email. The email header shows 'Re- WO00118.eml | Vendor account: US\_SI\_000006 | Name: 22565424583'. The sender is 'Marilyn Stuart, Operations Director, Elysian2 | QLD Office, M +61 400 179 628, W www.elysian2.com'. The email body contains a message about license keys and document management parameters.

## 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

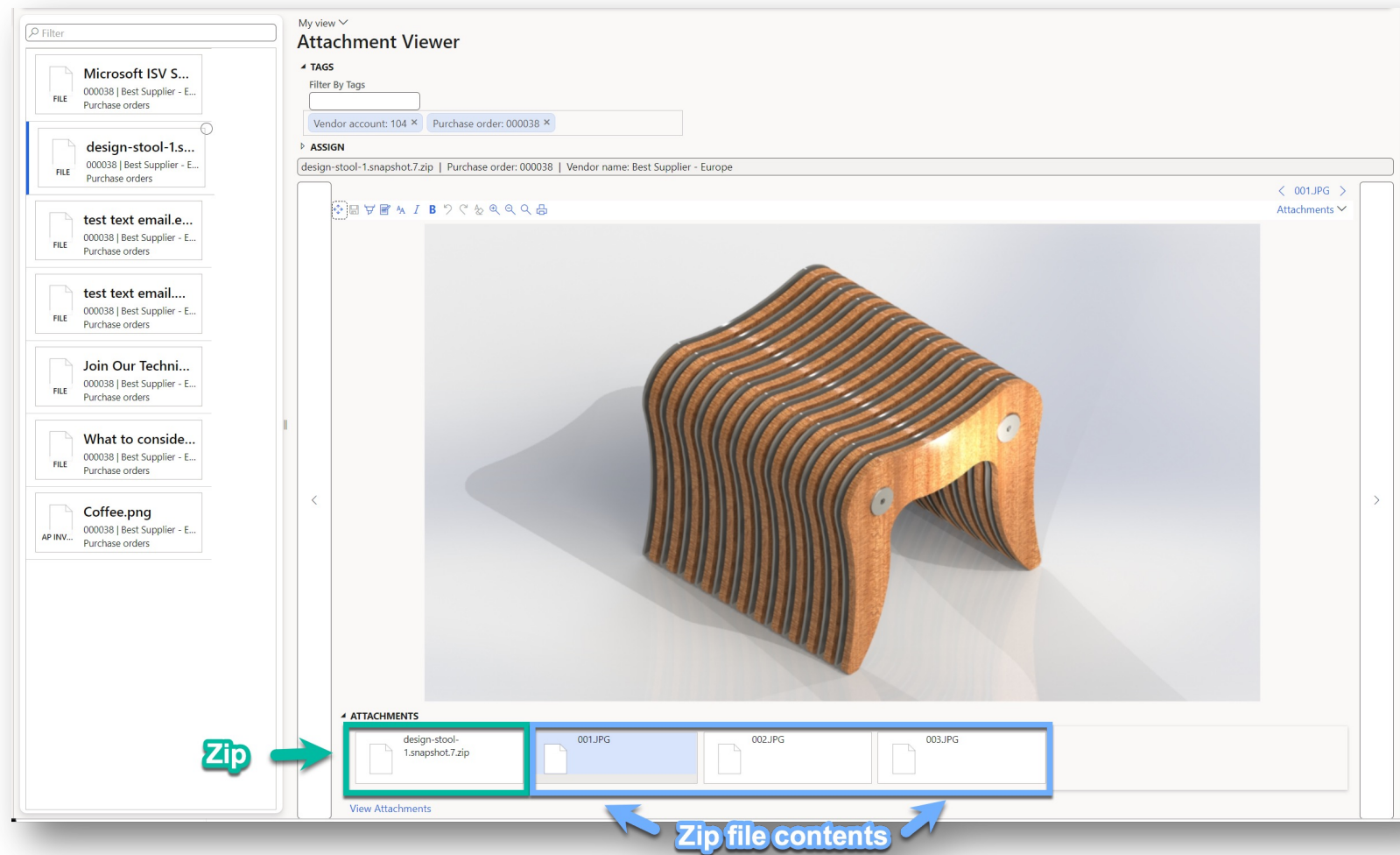


**Drag & Drop Emails with their attachments in one go!**

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

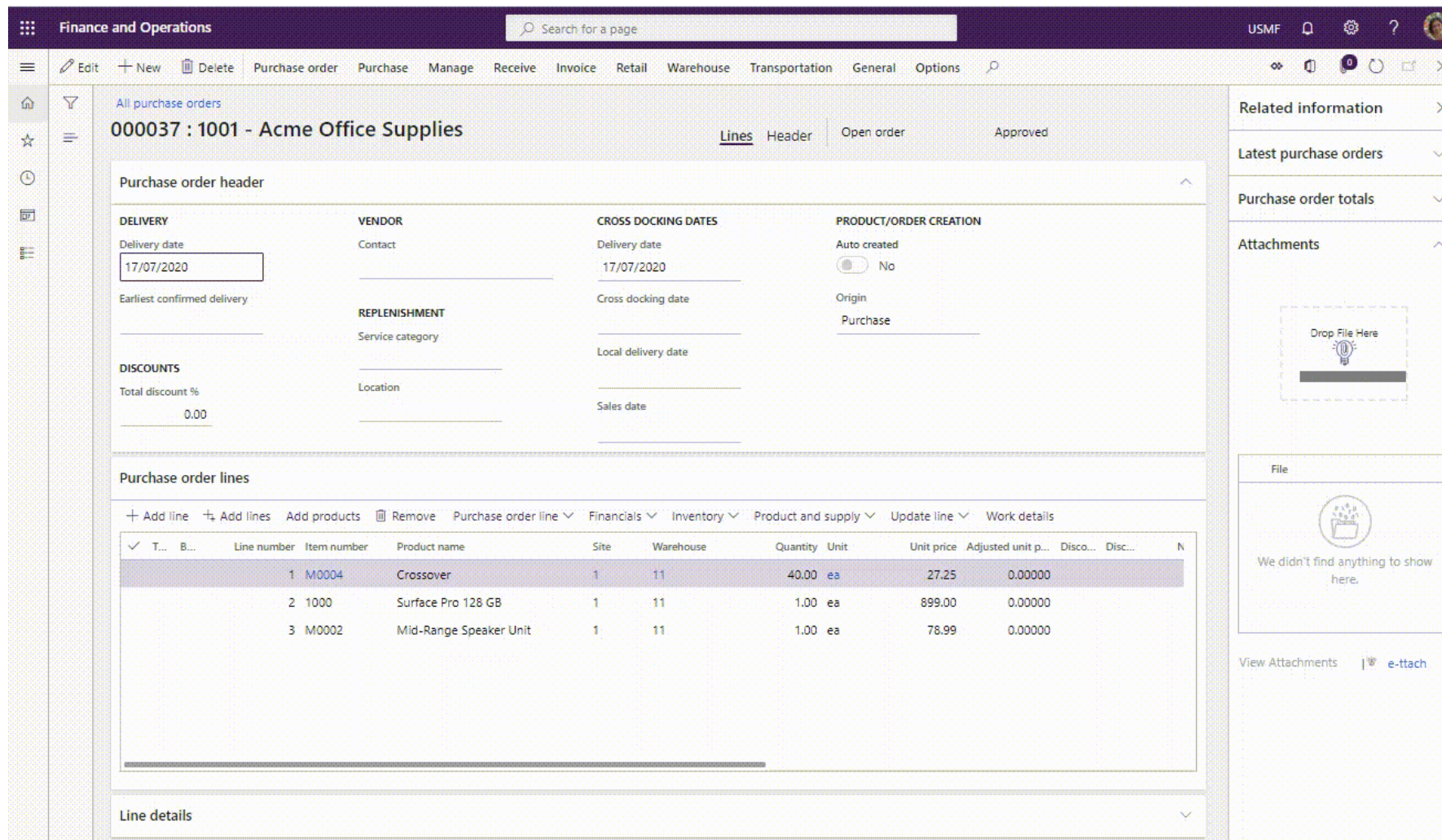


**Drag & Drop Zip files and preview the contents without downloading!**

Amazing!

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

# Drag & Drop into All Forms



The screenshot displays the Microsoft Dynamics 365 Finance and Operations interface for a purchase order. The main area shows the 'Purchase order header' and 'Purchase order lines' sections. The 'Purchase order lines' section contains a table with the following data:

Line number	Item number	Product name	Site	Warehouse	Quantity	Unit	Unit price	Adjusted unit p...	Disco...	Disc...	N
1	M0004	Crossover	1	11	40.00	ea	27.25	0.00000			
2	1000	Surface Pro 128 GB	1	11	1.00	ea	899.00	0.00000			
3	M0002	Mid-Range Speaker Unit	1	11	1.00	ea	78.99	0.00000			

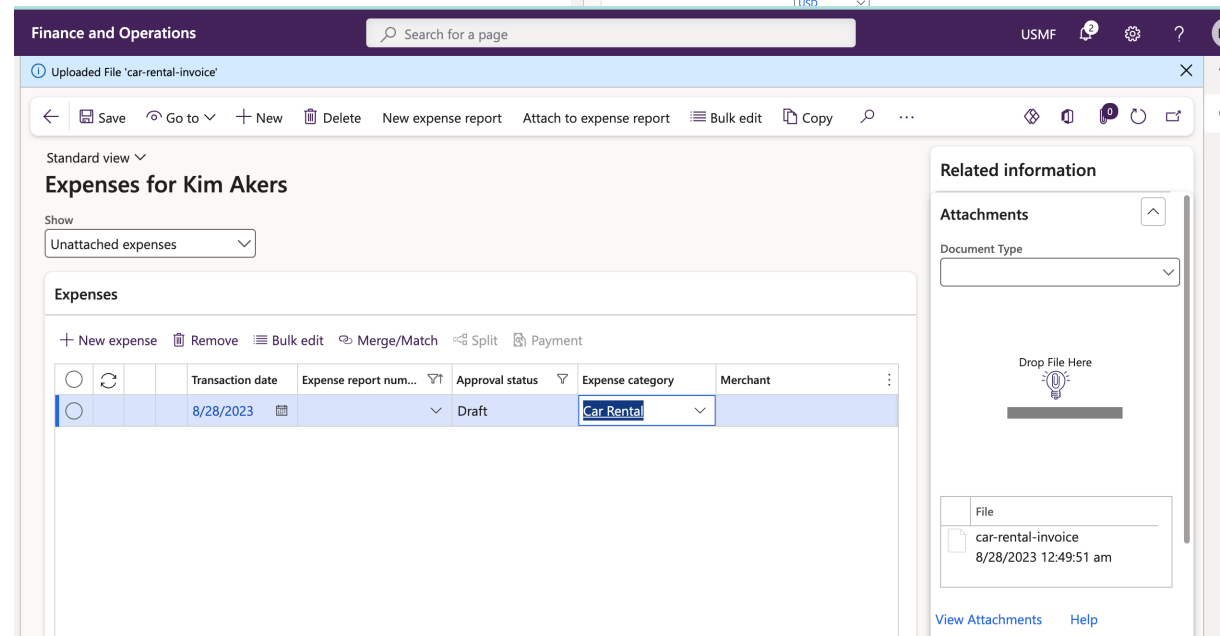
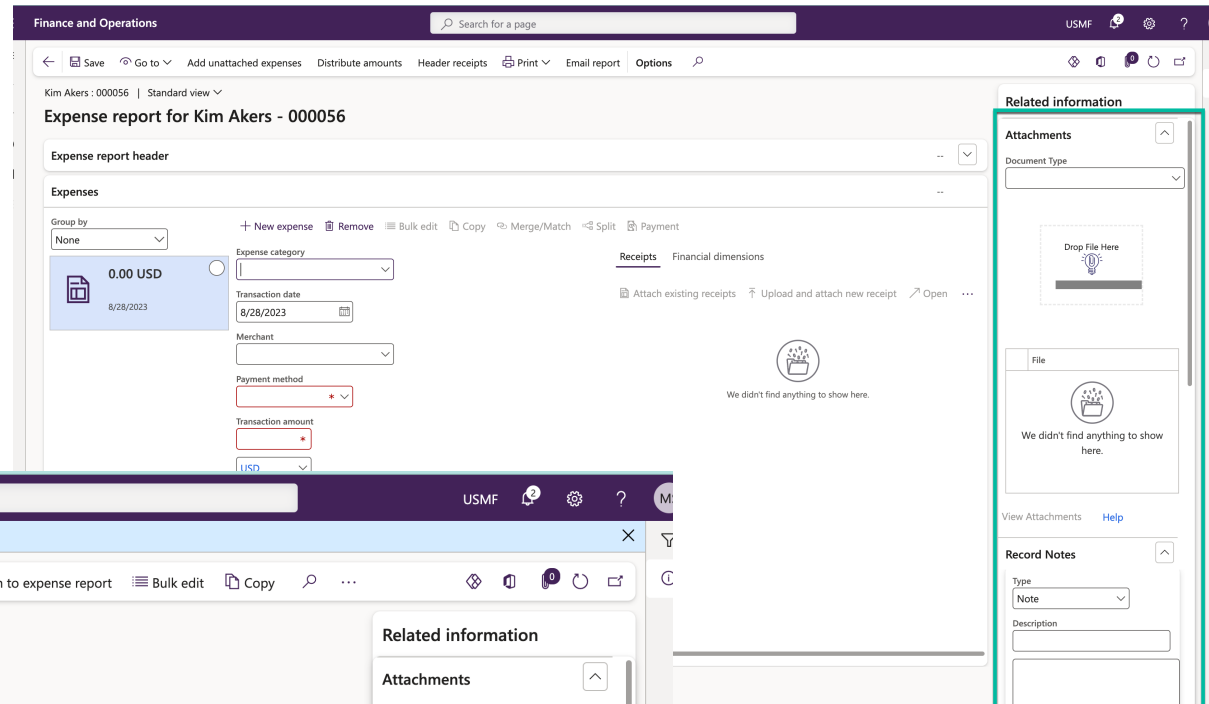
On the right side of the interface, there is a 'Related information' panel with sections for 'Latest purchase orders', 'Purchase order totals', and 'Attachments'. The 'Attachments' section features a 'Drop File Here' area with a lightbulb icon, indicating the drag-and-drop functionality.

## 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

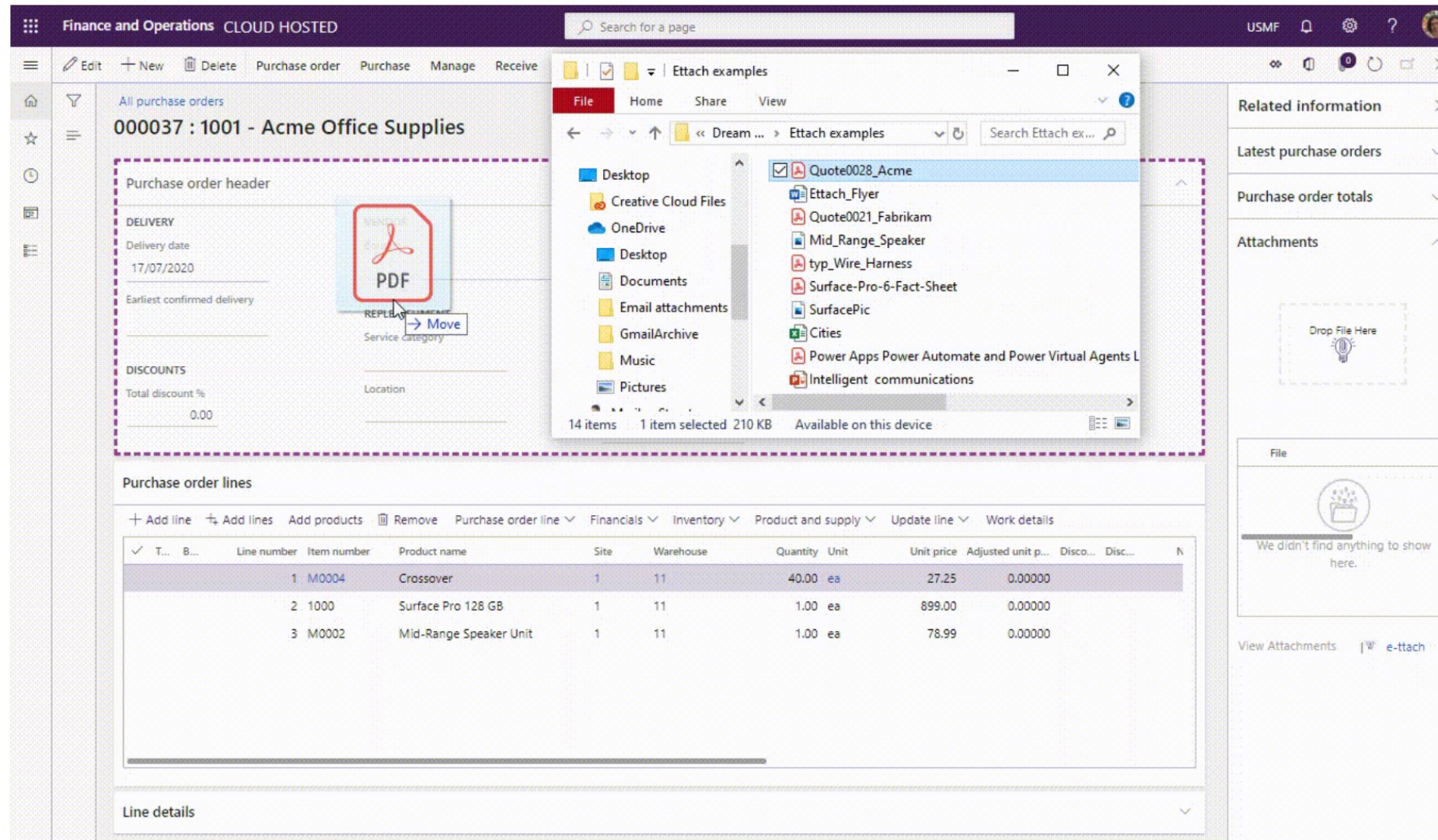
As standard, there is no side pane for Expenses, but we added one!

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



The screenshot shows the Dynamics 365 Finance and Operations interface. A purchase order form for '000037 : 1001 - Acme Office Supplies' is open. A file explorer window is overlaid on the form, showing a folder named 'Ettach examples' with several files. A red box highlights a PDF file named 'Quote0028\_Acme' in the file explorer, and a dashed red box highlights the 'Purchase order header' section of the form. A red arrow points from the PDF file to the 'REPLACE' button in the header section, indicating the drag-and-drop action.

**Purchase order header**

DELIVERY  
Delivery date  
17/07/2020  
Earliest confirmed delivery

DISCOUNTS  
Total discount %  
0.00

**Purchase order lines**

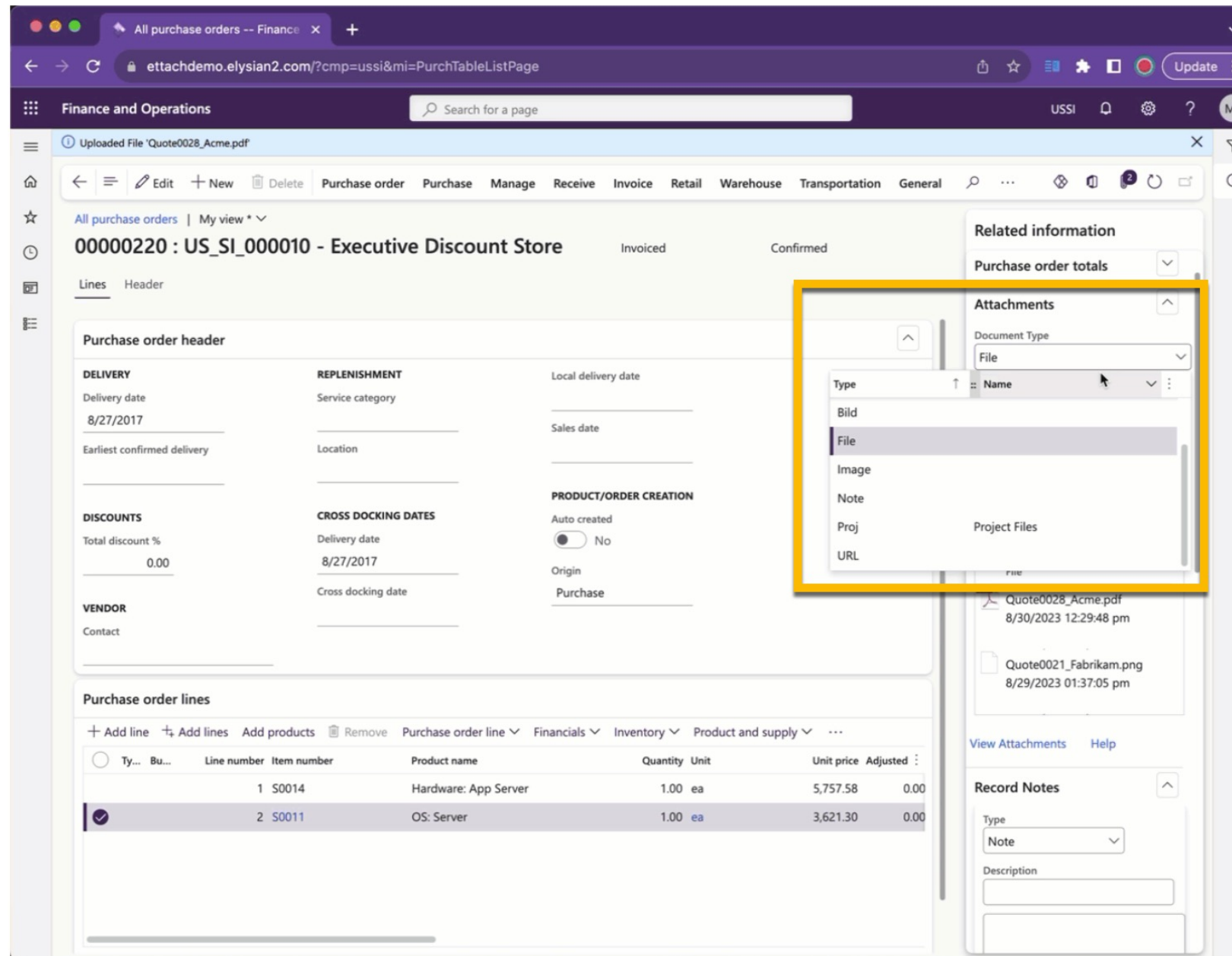
Line number	Item number	Product name	Site	Warehouse	Quantity	Unit	Unit price	Adjusted unit p...	Disco...	Disc...	N
1	M0004	Crossover	1	11	40.00	ea	27.25	0.00000			
2	1000	Surface Pro 128 GB	1	11	1.00	ea	899.00	0.00000			
3	M0002	Mid-Range Speaker Unit	1	11	1.00	ea	78.99	0.00000			

## 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



The screenshot shows the Microsoft Dynamics 365 Finance and Operations interface. The main window displays a purchase order for '00000220 : US\_SI\_000010 - Executive Discount Store'. The 'Attachments' section is highlighted with a yellow box, showing a dropdown menu with the following options: Bild, File, Image, Note, Proj, and URL. The 'File' option is currently selected. Below the dropdown, there are two existing attachments: 'Quote0028\_Acme.pdf' (8/30/2023 12:29:48 pm) and 'Quote0021\_Fabrikam.png' (8/29/2023 01:37:05 pm). The 'Purchase order lines' table is also visible, showing two lines: Line 1 (S0014, Hardware: App Server, 1.00 ea, 5,757.58) and Line 2 (S0011, OS: Server, 1.00 ea, 3,621.30).

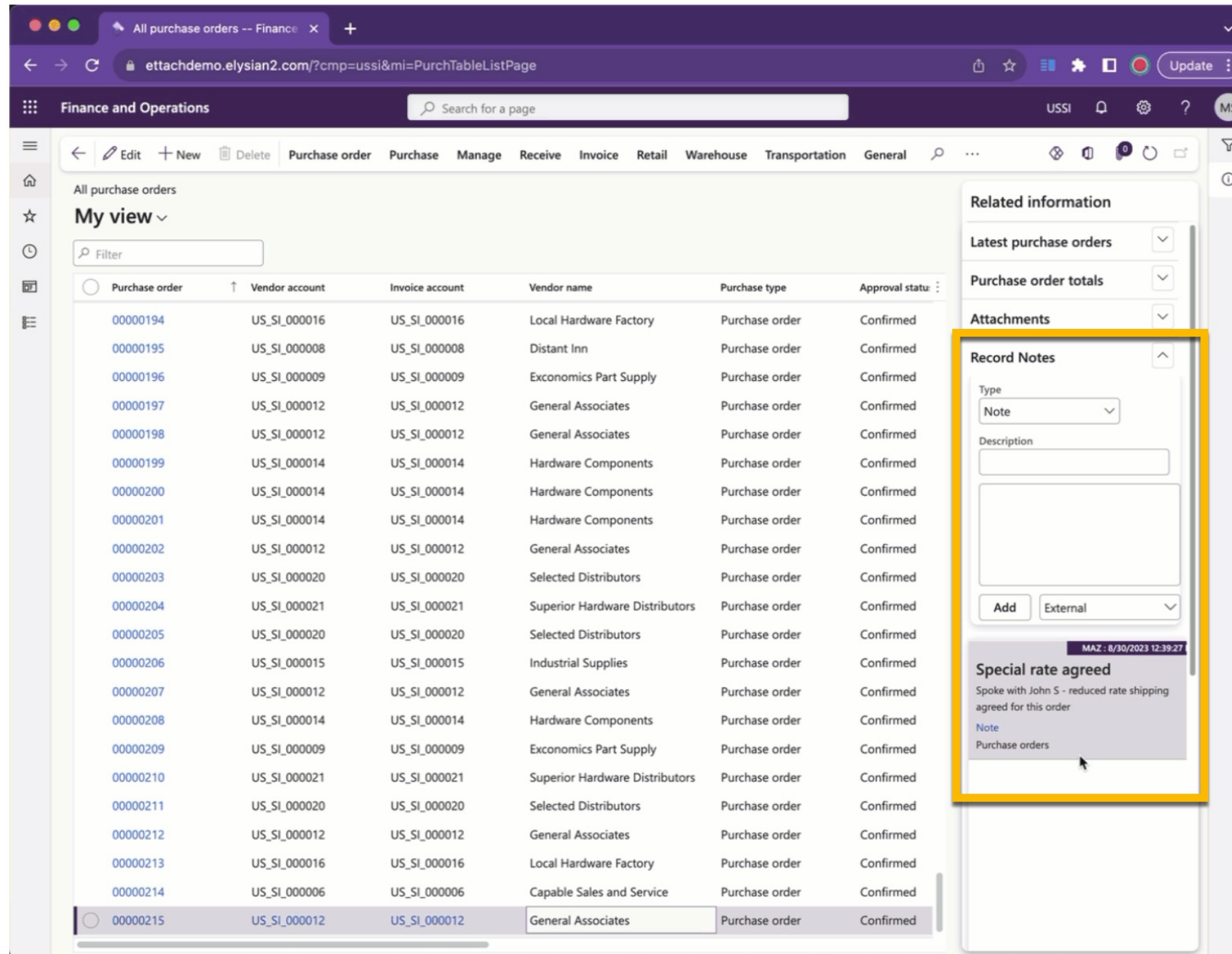
## Choose a File Type

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



The screenshot shows the 'All purchase orders' page in the e-ttach system. The main area contains a table of purchase orders with columns for Purchase order, Vendor account, Invoice account, Vendor name, Purchase type, and Approval status. The right-hand side panel is titled 'Related information' and includes sections for 'Latest purchase orders', 'Purchase order totals', and 'Attachments'. A yellow box highlights the 'Record Notes' section, which has a 'Type' dropdown set to 'Note', a 'Description' text area, and an 'Add' button. Below this, a note titled 'Special rate agreed' is visible, dated 8/30/2023 12:39:27, with the text 'Spoke with John S - reduced rate shipping agreed for this order' and a 'Note Purchase orders' link.

Purchase order	Vendor account	Invoice account	Vendor name	Purchase type	Approval status
00000194	US_SI_000016	US_SI_000016	Local Hardware Factory	Purchase order	Confirmed
00000195	US_SI_000008	US_SI_000008	Distant Inn	Purchase order	Confirmed
00000196	US_SI_000009	US_SI_000009	Exconomics Part Supply	Purchase order	Confirmed
00000197	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed
00000198	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed
00000199	US_SI_000014	US_SI_000014	Hardware Components	Purchase order	Confirmed
00000200	US_SI_000014	US_SI_000014	Hardware Components	Purchase order	Confirmed
00000201	US_SI_000014	US_SI_000014	Hardware Components	Purchase order	Confirmed
00000202	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed
00000203	US_SI_000020	US_SI_000020	Selected Distributors	Purchase order	Confirmed
00000204	US_SI_000021	US_SI_000021	Superior Hardware Distributors	Purchase order	Confirmed
00000205	US_SI_000020	US_SI_000020	Selected Distributors	Purchase order	Confirmed
00000206	US_SI_000015	US_SI_000015	Industrial Supplies	Purchase order	Confirmed
00000207	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed
00000208	US_SI_000014	US_SI_000014	Hardware Components	Purchase order	Confirmed
00000209	US_SI_000009	US_SI_000009	Exconomics Part Supply	Purchase order	Confirmed
00000210	US_SI_000021	US_SI_000021	Superior Hardware Distributors	Purchase order	Confirmed
00000211	US_SI_000020	US_SI_000020	Selected Distributors	Purchase order	Confirmed
00000212	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed
00000213	US_SI_000016	US_SI_000016	Local Hardware Factory	Purchase order	Confirmed
00000214	US_SI_000006	US_SI_000006	Capable Sales and Service	Purchase order	Confirmed
00000215	US_SI_000012	US_SI_000012	General Associates	Purchase order	Confirmed

## Easy-Do and Easy-View Notes

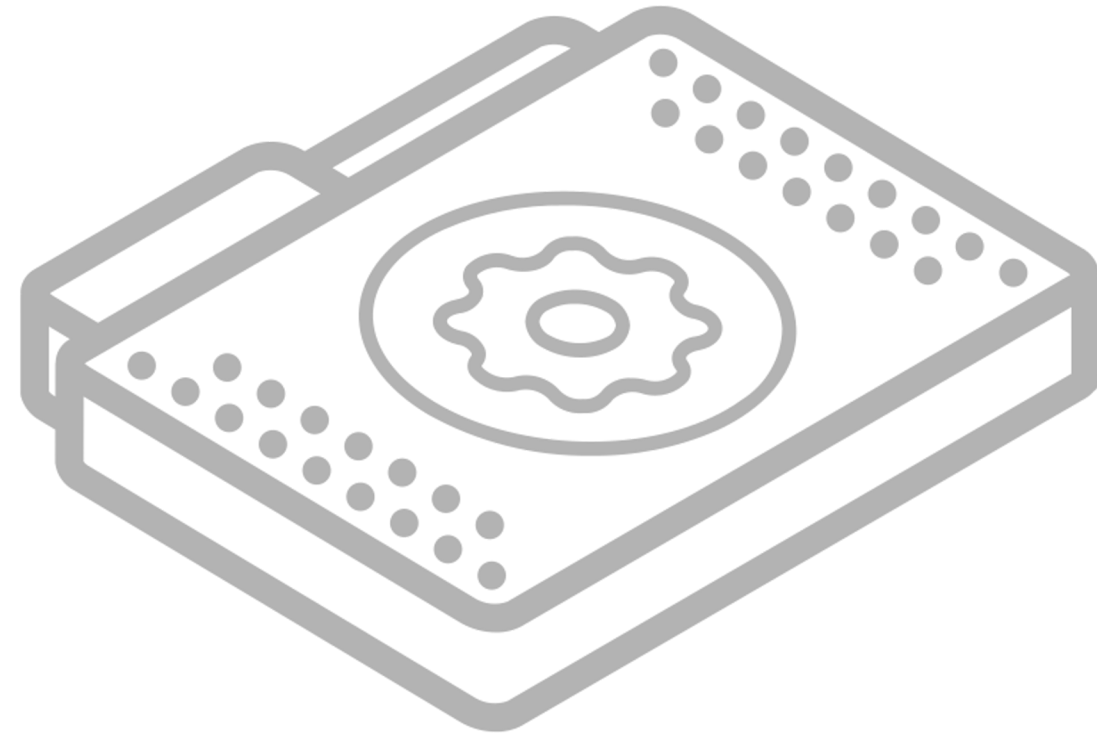
Recording notes against records is now as easy as drag & dropping a file!

View notes in the side panel along with the files.

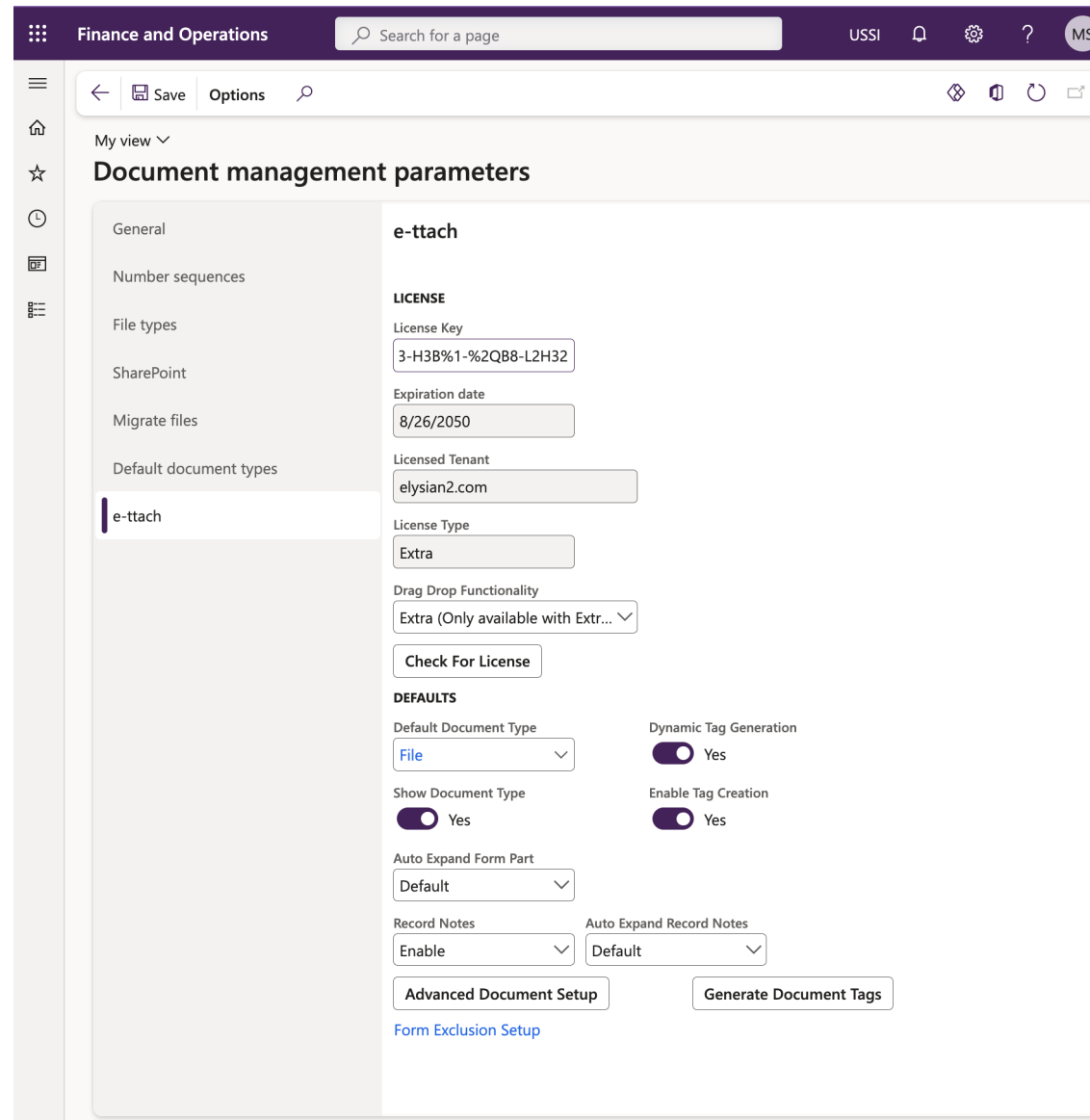


e-attach

# Configuration Options



# Easy License Updates and Version Activation

A screenshot of the Dynamics 365 configuration interface for the e-ttach application. The page title is "Document management parameters" and the sub-section is "e-ttach". The interface includes a sidebar with navigation options like "General", "Number sequences", "File types", "SharePoint", "Migrate files", and "Default document types". The main content area shows various configuration fields: "License Key" (3-H3B%1-%2QB8-L2H32), "Expiration date" (8/26/2050), "Licensed Tenant" (elysian2.com), "License Type" (Extra), and "Drag Drop Functionality" (Extra). There are also toggle switches for "Dynamic Tag Generation" and "Enable Tag Creation", both set to "Yes". At the bottom, there are buttons for "Check For License", "Advanced Document Setup", "Generate Document Tags", and a link for "Form Exclusion Setup".

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

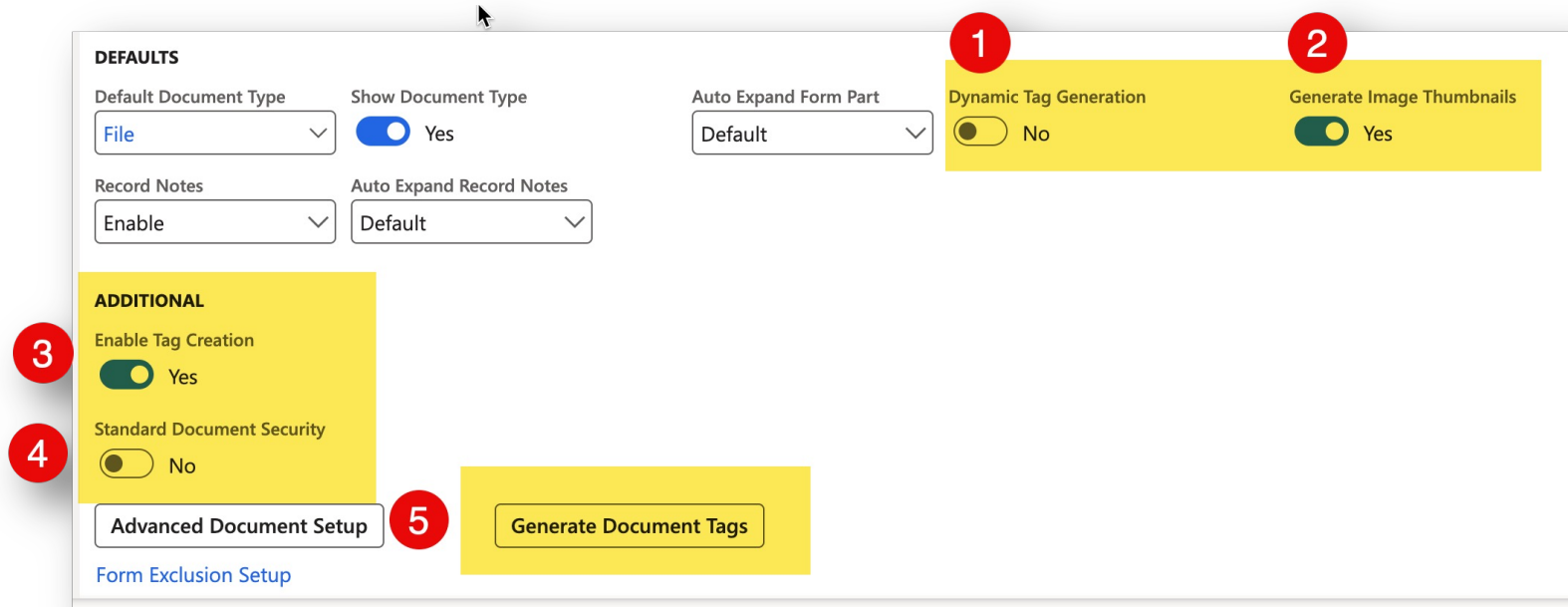
Turn this off if you do not want to be able to create or assign record tags to documents on the Attachment viewer screen.

## 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.

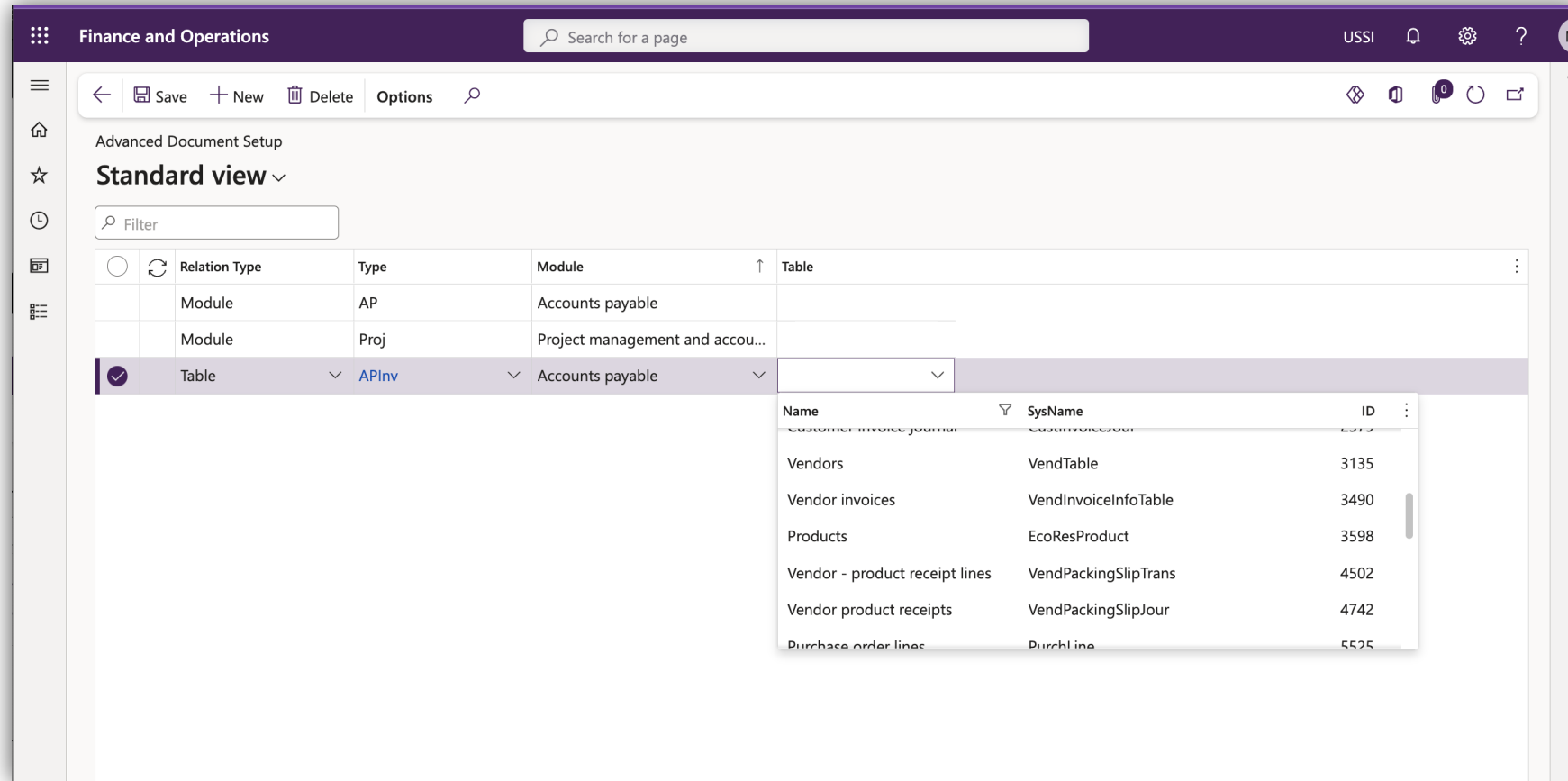


The screenshot shows the configuration interface for e-ttach, divided into 'DEFAULTS' and 'ADDITIONAL' sections. Five red circles with numbers 1 through 5 point to specific settings:

- 1:** Dynamic Tag Generation (toggle set to No)
- 2:** Generate Image Thumbnails (toggle set to Yes)
- 3:** Enable Tag Creation (toggle set to Yes)
- 4:** Standard Document Security (toggle set to No)
- 5:** Generate Document Tags button

Other visible settings include: Default Document Type (File), Show Document Type (Yes), Auto Expand Form Part (Default), Record Notes (Enable), and Auto Expand Record Notes (Default). Links for 'Advanced Document Setup' and 'Form Exclusion Setup' are also present.

# Advanced Document Setup



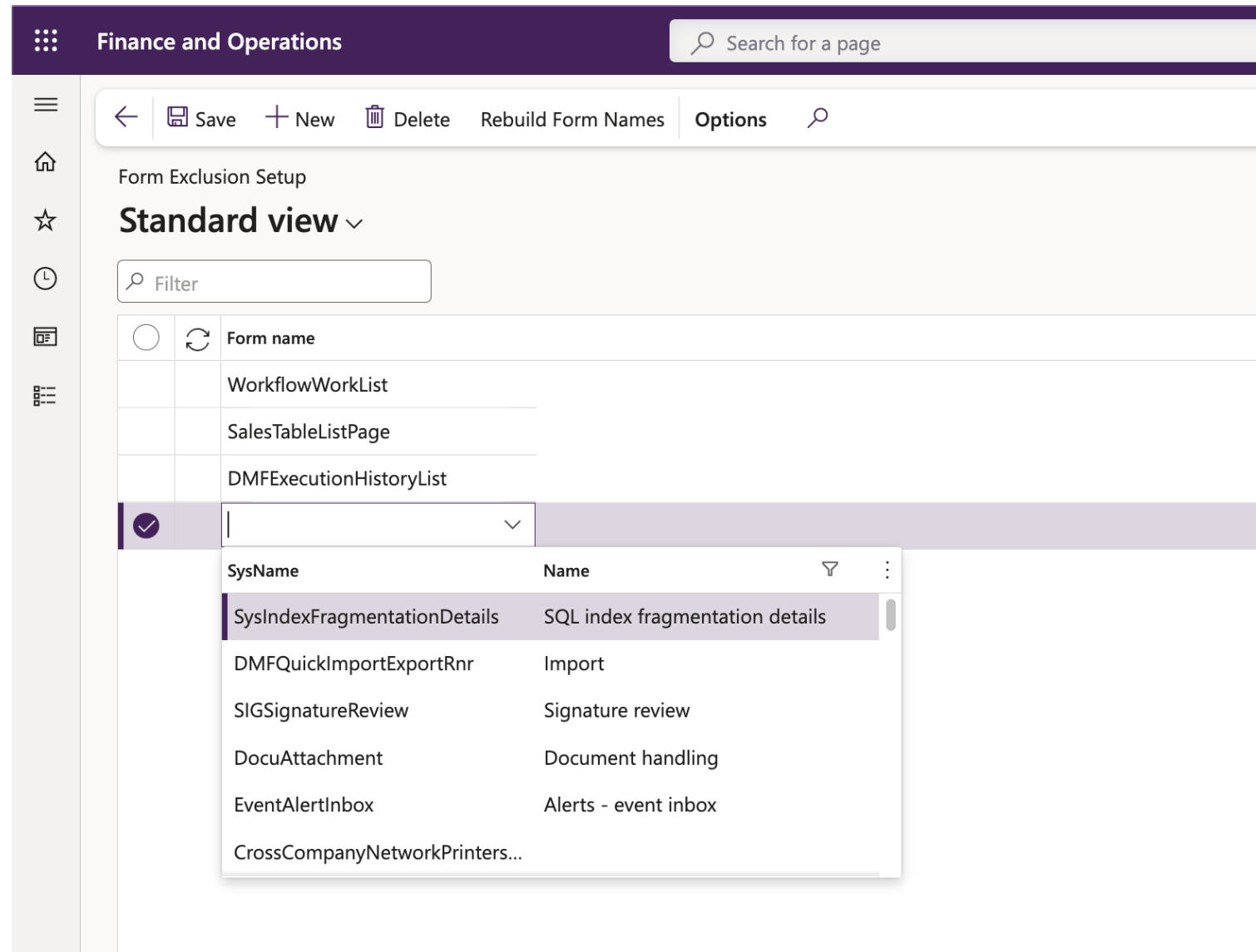
The screenshot shows the 'Advanced Document Setup' page in Microsoft Dynamics 365 Finance and Operations. The page title is 'Advanced Document Setup' and the view is 'Standard view'. The main table has columns for 'Relation Type', 'Type', 'Module', and 'Table'. The 'Table' column is currently open, showing a list of tables with columns for 'Name', 'SysName', and 'ID'. The table is currently filtered to show 'Accounts payable'.

Relation Type	Type	Module	Table
Module	AP	Accounts payable	
Module	Proj	Project management and accou...	
Table	APInv	Accounts payable	

Name	SysName	ID
Vendors	VendTable	3135
Vendor invoices	VendInvoiceInfoTable	3490
Products	EcoResProduct	3598
Vendor - product receipt lines	VendPackingSlipTrans	4502
Vendor product receipts	VendPackingSlipJour	4742
Purchase order lines	PurchLine	5525

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

# Form Exclusion Setup



The screenshot shows the 'Form Exclusion Setup' page in the 'Finance and Operations' application. The page title is 'Form Exclusion Setup' and the view is 'Standard view'. A search bar is present at the top right. The main content area contains a table with columns for 'Form name' and a checkbox. The table lists several forms: 'WorkflowWorkList', 'SalesTableListPage', and 'DMFExecutionHistoryList'. A dropdown menu is open, showing a list of forms to be excluded, including 'SysIndexFragmentationDetails', 'DMFQuickImportExportRnr', 'SIGSignatureReview', 'DocuAttachment', 'EventAlertInbox', and 'CrossCompanyNetworkPrinters...'. The 'SysIndexFragmentationDetails' form is currently selected in the dropdown.

Form name	Form name
<input type="checkbox"/>	WorkflowWorkList
<input type="checkbox"/>	SalesTableListPage
<input type="checkbox"/>	DMFExecutionHistoryList
<input checked="" type="checkbox"/>	<input type="text" value="SysIndexFragmentationDetails"/>

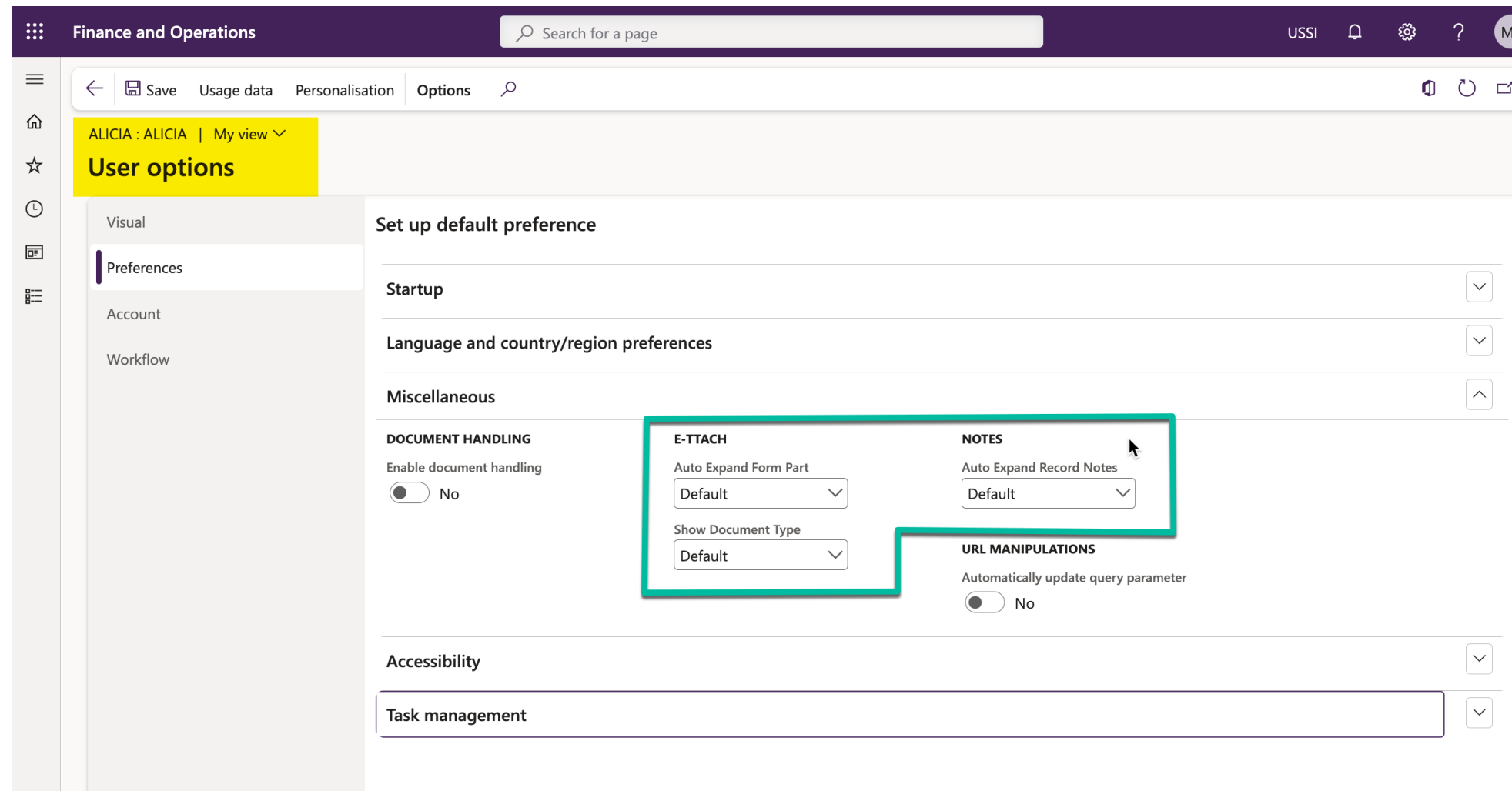
SysName	Name
SysIndexFragmentationDetails	SQL index fragmentation details
DMFQuickImportExportRnr	Import
SIGSignatureReview	Signature review
DocuAttachment	Document handling
EventAlertInbox	Alerts - event inbox
CrossCompanyNetworkPrinters...	

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

No problem, with our Form Exclusion Setup!



# User Specific Options

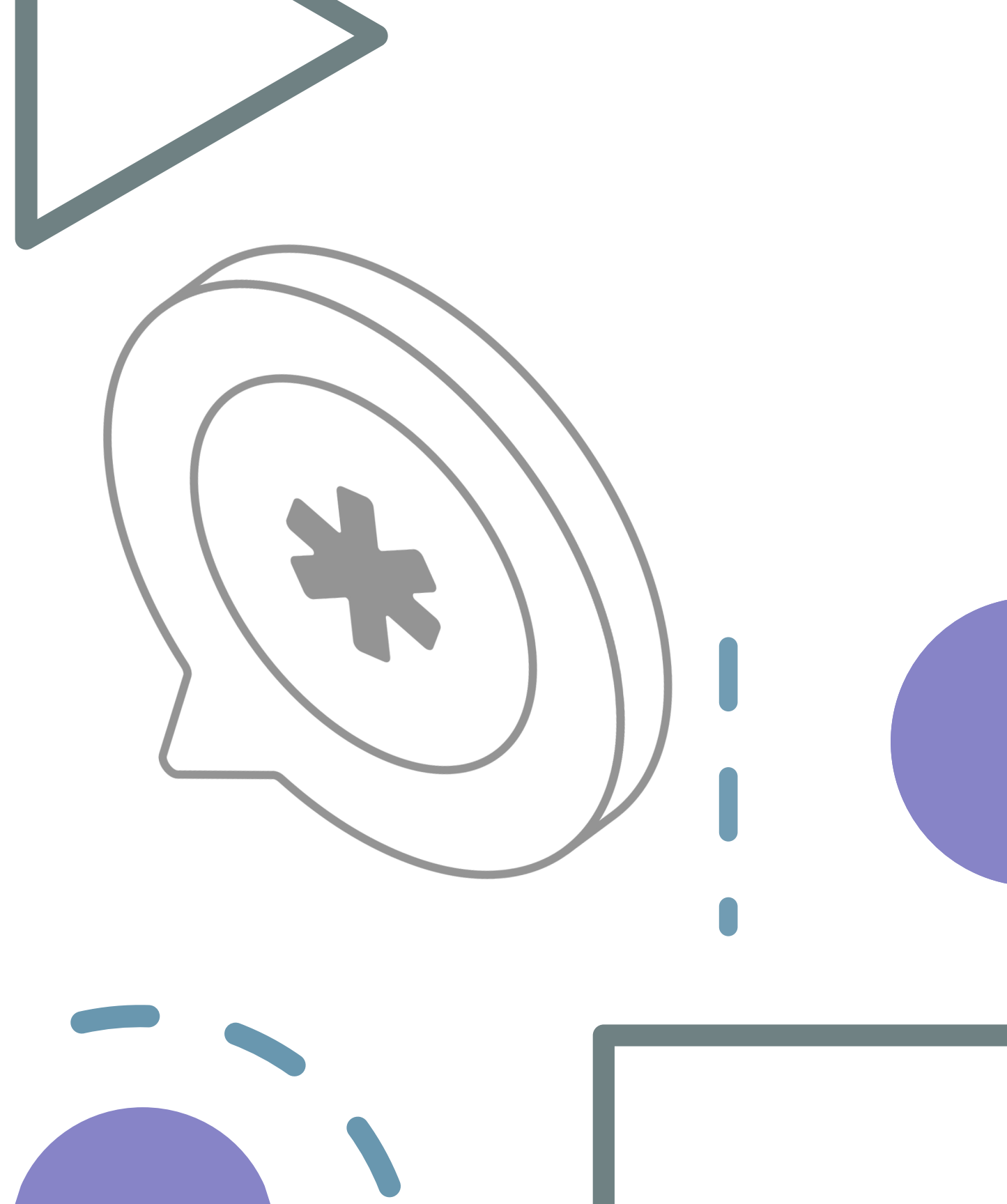


The screenshot displays the 'User options' configuration page for user ALICIA. The page is organized into several sections, each with a collapse/expand arrow on the right:

- Startup**
- Language and country/region preferences**
- Miscellaneous** (highlighted with a red box):
  - DOCUMENT HANDLING**: Enable document handling (No).
  - E-TTACH**: Auto Expand Form Part (Default), Show Document Type (Default).
  - NOTES**: Auto Expand Record Notes (Default).
  - URL MANIPULATIONS**: Automatically update query parameter (No).
- Accessibility**
- Task management**



# 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

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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.

# 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.

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