DRAG & DROP AND METADATA FOR DYNAMICS 365 CE

What is Drag & Drop and Metadata for Dynamics 365 ?

The solution for maximizing efficiency within Dynamics 365. It allows for a quick and seamless way to attach a large number of documents into Dynamics all at once without the need to toggle to a different service.

It is also possible to update the SharePoint managed metadata of each file directly from your Dynamics 365 environment.

This solution removes the need to toggle between the two products – Dynamics and SharePoint. It allows for the user to work more efficiently and save time on their day-to-day tasks, resulting in a greater ROI for the company.
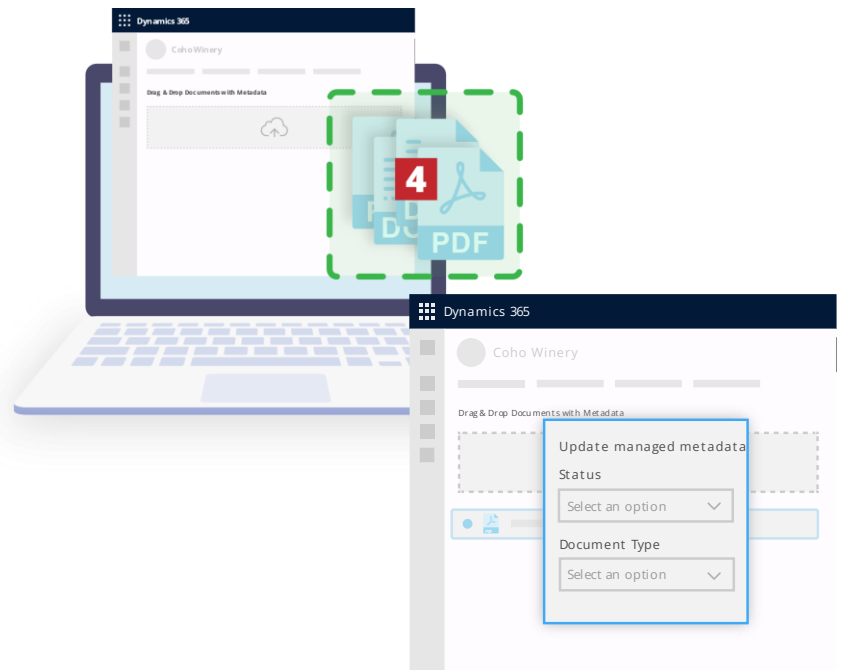
Use Cases

- Efficiency enhancements by allowing users to quickly organize and retrieve documents using SharePoint managed metadata without leaving Dynamics. Saving time and supporting faster data-driven decisions.

- Automation of retention policy compliance as users are able to consistently tag files with mandatory metadata, facilitating trigger-based retention actions and reducing the need for manual oversight, enhancing regulatory compliance and operational efficiency.

- Automating approval processes through metadata tagging enabling an efficient routing of documents for approval, reducing processing time, improving user compliance of internal standard operating procedures, and minimizing errors.

Why customers use Drag & Drop and Metadata for Dynamics 365 CE

- Simple dragging and dropping of single or multiple files inside Dynamics 365.

- Increases ROI as users are not wasting time switching systems.

- Enhances user productivity.

- Improves compliance of internal standard operating processes.

- Allows for users to update managed metadata right within the Dynamics 365 User Interface.

How does it work?

Drag & Drop and Metadata for Dynamics 365 CE is installed via Microsoft PowerApps and allows users to do both: drag & drop single or multiple documents and update managed metadata directly from the Dynamics 365 interface.

Key Benefits

Increase productivity

Users can quickly tag files with managed metadata from SharePoint and upload single or multiple files at once. This, together with faster searches, boosts their productivity.

Faster Uploads

With the drag-and-drop functionality, users can attach multiple documents simultaneously to entities within Dynamics 365 CE. This reduces the time of each user.

Optimized Organization

By applying metadata, users improve document management. This makes locating files, creating reports, and automating of flows/processes more efficient.

Improved Compliance

By capturing all required regulatory details in metadata fields, you can automate processes and generate reports as needed to maintain compliance with legal and policy standards.

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Our promise to you:
We will increase user productivity and reduce wasted time toggling between services.

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