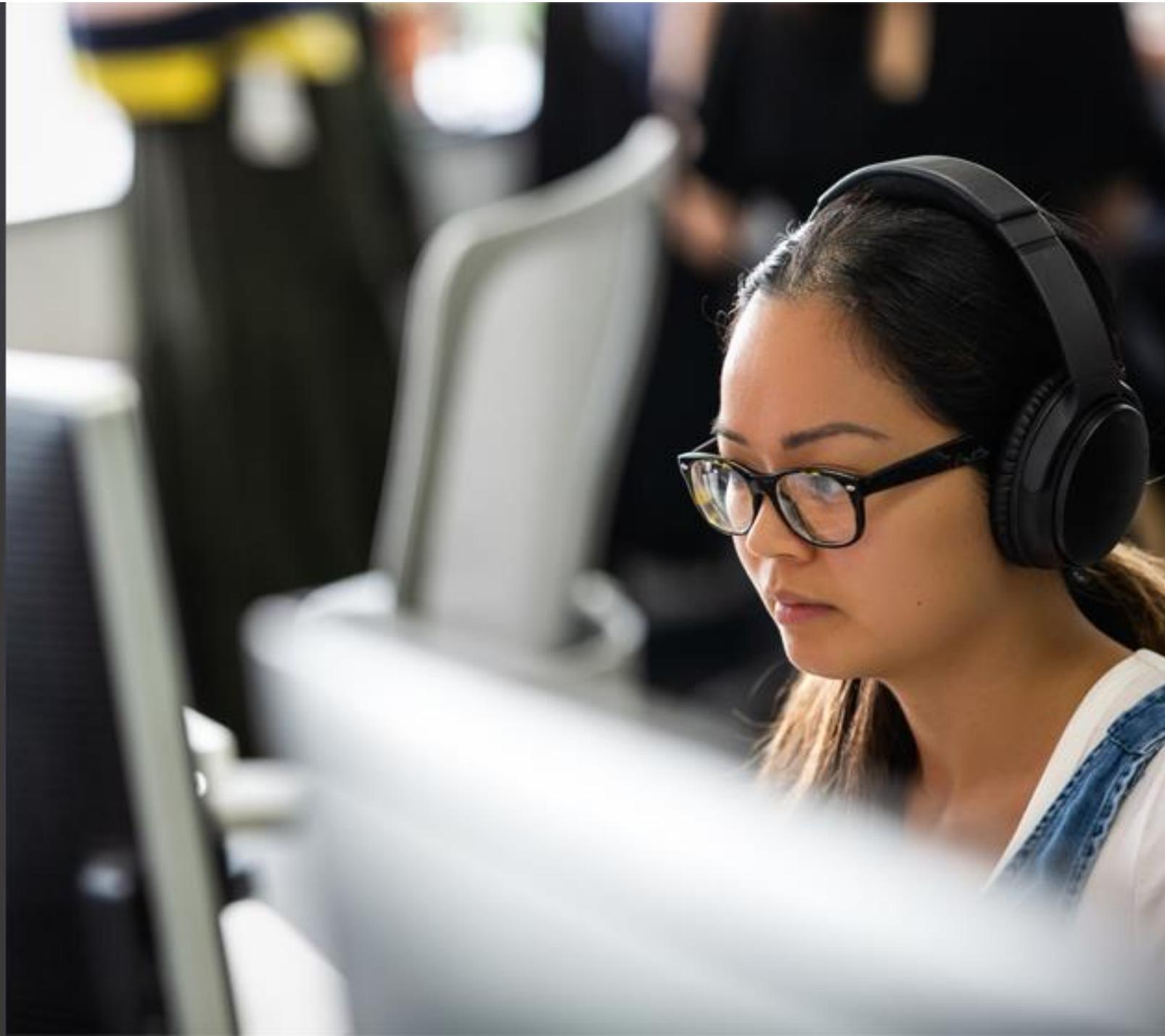


Zap Objects: Zap Attachment Viewer



View/Preview all attachments from
Notes, emails and portal comments

Works with: Dynamics 365 Sales,
Customer Service, Field Service &
Power Apps.



Features

- Detailed View – with additional details (like Notes Title, Email Subject, Recipient [From/To], Email Status [Sent / Received])
- Gallery View – with Zoom-In / Zoom-Out Image Capability
- Hyperlink to source record
- View Attachments from not only current but also Related Entities
- Rename Attachment File Name & Notes Title easily
- Optimize Database storage by deleting unwanted attachments easily
- 1-Click Actions – to boost productivity. Select single / multiple attachments and perform below actions: Attach to Email, Attach to a new Note, Zip & Download, Zip & Attach to Email, Zip & Attach to a new Note, Preview Attachments
- Preview attachment without the need to download them. Further you also have the ability to resize the preview to full screen! To preview attachment... click on the filename.
- Easily upload multiple files using Drag-and-drop to notes of any entity record.

Feature Highlight #1: View Attachments list in Details View with additional details (like Notes Title, Email Subject, Recipient [From/To], Email Status [Sent / Received]) with direct hyperlink to source.

Zap Attachment Viewer – Details View

The screenshot shows the Dynamics 365 interface for the Zap Attachment Viewer in the Details View. The interface includes a navigation pane on the left, a search bar at the top, and a main content area with several sections: Notes, Emails, and an Upload section. Annotations highlight key features and actions:

- Select Details or Gallery View:** Points to the 'Details View' dropdown menu.
- Filter attachments by Notes/Emails/Portal Comments:** Points to the filter dropdown menu.
- Filter by specific Email Record:** Points to the '[R] From: sume' dropdown menu.
- Delete unwanted attachments in bulk:** Points to the 'Delete' button.
- Rename attachment filenames:** Points to the 'Rename' button.
- 1-Click Actions: Download / Attach to New Note / Zip & Download etc:** Points to the 'Download' dropdown menu.
- Sort:** Points to the sort icon in the 'Notes' table.
- Meta Columns:** Points to the 'Title' and 'Created On' columns in the 'Notes' table.
- Click to Preview Image:** Points to the 'Error3.png' link in the 'Emails' table.
- Meta Columns:** Points to the 'From', 'To', and 'Subject' columns in the 'Emails' table.
- Direct Hyperlink to Source Record:** Points to the 'Getting_error_when_importing_leads' link in the 'Emails' table.
- Meta Columns:** Points to the 'Direction' and 'Sent/Received On' columns in the 'Emails' table.
- Drag-and-Drop multiple files to upload to notes:** Points to the 'Choose Files' button in the Upload section.

File Name	File Size	File Type	Title	Created On
Error.txt	10 Bytes	txt	Link	12/26/2023, 12:44:00 PM
Leads Import Sample File - Rectified.xlsx	6 KB	xlsx	Link	12/26/2023, 12:28:00 PM
Import Errors & Resolutions.pdf	1 MB	pdf	Link	12/26/2023, 12:28:00 PM

File Name	File Size	File Type	From	To	Subject	Direction	Sent/Received On
Error3.png			sumeet.ballani@gmail.com	support@zapobjects.com;	Getting_error_when_importing_leads	Received	12/26/2023, 12:10:00 PM
Error1.png			sumeet.ballani@gmail.com	support@zapobjects.com;	Getting_error_when_importing_leads	Received	12/26/2023, 12:10:00 PM
Leads Import Sample			sumeet.ballani@gmail.com	support@zapobjects.com;	Getting_error_when_importing_leads		
Error2.PNG			sumeet.ballani@gmail.com	support@zapobjects.com;	Getting_error_when_importing_leads		

✓ View all attachments from Notes, emails as well as portal comments in one-place

Feature Highlight #2: Preview Attachments list in Gallery View with ability to filter attachments by particular email record

Zap Attachment Viewer – Gallery View

The screenshot shows the Dynamics 365 interface for the Zap Attachment Viewer. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Licenses, Sales accelerator, Activities, Calendar, Dashboards, Customers, Sales, and Marketing. The main area displays a list of attachments in a gallery view. The attachments are filtered by 'All Email' records. The gallery view shows thumbnails for various file types: Error.txt (Note, 10 Bytes), Leads Import Samp... (Note, 6 KB), Import Errors & Re... (Note, 1 MB), Error3.png (Email, 6 KB), Error1.png (Email, 9 KB), Leads Import Samp... (Email, 6 KB), Error2.PNG (Email, 90 KB), Error3.png (Email, 6 KB), and Error1.png (Email, 9 KB). A 'Download' dropdown menu is visible above the attachments. Callouts highlight key features: 'Select Details or Gallery View' points to the view toggle; 'Filter attachments by Notes/Emails/Portal Comments' points to the filter dropdown; 'Delete unwanted attachments in bulk' points to the 'Delete' button; 'Filter by specific Email Record' points to the 'Filter By: All E...' dropdown; and 'Select files & perform 1-Click Actions: Download / Attach to New Note / Zip & Download etc' points to the 'Download' dropdown. A 'Click to Preview Image' callout points to a thumbnail.

Getting error...
Case · Case

Phone to Case Process
Active for 32 minutes

Identify (32 Min)

Summary Zap Email Reader All Attachments Case Attachments Account Attachments OOB Attachments Email Reply Zap Fields History Email Recipients Zap PSA Time Entries

Case Gallery View All Filter By: All E

Download Go Delete

Error.txt
12/26/2023 12:44 PM
Note (10 Bytes)

Leads Import Samp...
12/26/2023 12:28 PM
Note (6 KB)

Import Errors & Re...
12/26/2023 12:28 PM
Note (1 MB)

Error3.png
12/26/2023 12:11 PM
Email (6 KB)

Error1.png
12/26/2023 12:11 PM
Email (9 KB)

Leads Import Samp...
12/26/2023 12:11 PM
Email (6 KB)

Error2.PNG
12/26/2023 12:11 PM
Email (90 KB)

Error3.png
12/26/2023 12:10 PM
Email (6 KB)

Error1.png
12/26/2023 12:10 PM
Email (9 KB)

Leads Import Samp...
12/26/2023 12:10 PM
Email (6 KB)

Error2.PNG
12/26/2023 12:10 PM
Email (90 KB)

Select Details or Gallery View

Filter attachments by Notes/Emails/Portal Comments

Delete unwanted attachments in bulk

Filter by specific Email Record

Select files & perform 1-Click Actions: Download / Attach to New Note / Zip & Download etc

Click to Preview Image

✓ Preview Attachments in Gallery view

Feature Highlight #3: Ability to Zoom-In / Zoom-Out Images

Zap Attachment Viewer – Gallery View – Image Zoom-In

The screenshot displays the Dynamics 365 interface for a case titled "Getting error when importing leads". The main content area shows a gallery view of attachments. The first attachment is "Error1.png (9 KB)", which is a screenshot of an error message. The error message text is: "Error: An error has occurred. Try this action as CRM Community Dynamics CRM A. An error has occurred. Try this action again. If the problem continues, check the Microsoft Dynamics CRM Community for solutions or contact your organization's Microsoft Dynamics CRM Administrator. Finally, you can contact Microsoft Support." Below the error message are buttons for "Download Log File" and "OK".

Annotations in the image highlight key features:

- Hyperlink to Source Record:** An arrow points to the "[Email]" link next to the attachment name.
- Image Zoom In-Out:** An arrow points to the zoom-in and zoom-out icons in the attachment viewer toolbar.

The interface includes a navigation pane on the left with sections like Home, Recent, Pinned, My Work, Licenses, Sales accelerator, Activities, Calendar, Dashboards, Customers, Sales, and Marketing. The top navigation bar shows "Dynamics 365 | Sales Hub" and a search bar. The right side of the interface shows the user's name "Sumeet Ballani" and the case status "Pending".



Preview Attachments in Gallery view with Image Carousel

Feature Highlight #4: Ability to rename notes title and file names easily on-the-fly!

Zap Attachment Viewer – Rename File names & Notes Title

The screenshot displays the Dynamics 365 interface for a Zap attachment viewer. The main content area shows a case titled "Getting error when importing leads" with a status of "Saved". The interface includes a navigation pane on the left, a top navigation bar with search and utility icons, and a main toolbar with various actions like Copy, Save, and Refresh. The "Case Attachments" tab is active, displaying a table of attachments and notes. Two callout boxes highlight the "Edit File-names" and "Edit Notes title" features. Below the tables is a file upload area with a "Choose Files" button.

File Name	File Size	File Type	Title	Created On	Created By
Error.txt	10 Bytes	txt	Error screenshot received from customer	12/26/2023, 12:44:00 PM	
Leads Import Sample File - Rectified.xlsx	6 KB	xlsx	Rectified file	12/26/2023, 12:28:00 PM	
Import Errors & Resolutions.pdf	1 MB	pdf	Link	12/26/2023, 12:28:00 PM	

File Name	File Size	File Type	From	To	Subject	Direction	Sent/Received On
Error3.png	6 KB	png	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
Error1.png	9 KB	png	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
Leads Import Sample File.xlsx	6 KB	xlsx	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
Error2.PNG	90 KB	PNG	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM

✓ Easily Rename File-Names & Notes Title on-the-fly!

Feature Highlight #5: Optimize Database Storage by deleting unwanted attachments on-the-fly!

Zap Attachment Viewer – Delete Unwanted Attachments

Getting error when importing leads - Saved
Case · Case

Phone to Case Process
Active for 5 hours

Identify (5 Hrs) Research Resolve

Summary Zap Email Reader All Attachments **Case Attachments** Account Attachments OOB Attachments Email Reply Zap Fields History Email Recipients Zap PSA Time Entries

Case Details View All All File Types Filter By: All E Download Go **Delete** Rename

Notes

<input type="checkbox"/>	File Name	File Size	File Type	Title	Created On	Created By
<input type="checkbox"/>	Error.txt	10 Bytes	txt	Error screenshot received from customer	12/26/2023, 12:44:00 PM	Sumeet Ballani
<input checked="" type="checkbox"/>	Leads Import Sample File - Rectified.xlsx	6 KB	xlsx	Rectified file	12/26/2023, 12:28:00 PM	Sumeet Ballani
<input type="checkbox"/>	Import Errors & Resolutions.pdf	1 MB	pdf	link	12/26/2023, 12:28:00 PM	Sumeet Ballani

Optimise database space by deleting unwanted attachments

Emails

<input type="checkbox"/>	File Name	File Size	File Type	From	To	Subject	Direction	Sent/Received On
<input checked="" type="checkbox"/>	Error2.png	6 KB	png	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-JSK7W	Sent	12/26/2023, 12:13:00 PM
<input checked="" type="checkbox"/>	Error1.png	9 KB	png	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-JSK7W	Sent	12/26/2023, 12:13:00 PM
<input checked="" type="checkbox"/>	Leads Import Sample File.xlsx	6 KB	xlsx	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-JSK7W	Sent	12/26/2023, 12:13:00 PM
<input type="checkbox"/>	Error2.PNG	90 KB	PNG	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-JSK7W	Sent	12/26/2023, 12:13:00 PM
<input type="checkbox"/>	Error3.png	6 KB	png	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
<input type="checkbox"/>	Error1.png	9 KB	png	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
<input type="checkbox"/>	Leads Import Sample File.xlsx	6 KB	xlsx	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM
<input type="checkbox"/>	Error2.PNG	90 KB	PNG	sumeet.ballani@gmail.com	support@zapobjects.com;	Getting error when importing leads	Received	12/26/2023, 12:10:00 PM

✓ Select Single / Multiple attachments and click "Delete" button

Feature Highlight #6: 1-Click Actions: Download, Attach to New Email, Attach to New Note, Zip & Download, Zip & Attach to New Email, Zip & Attach to New Note

Zap Attachment Viewer – 1-Click Actions

The screenshot displays the Dynamics 365 interface for a Zap Attachment Viewer. The main content area shows a case titled "Getting error when importing leads - Saved". Below the case title, there are tabs for "Summary", "Zap Email Reader", "All Attachments", "Case Attachments", "Account Attachments", "1-Click Actions", "Reply", "Zap Fields", "History", "Email Recipients", "Zap PSA", and "Time Entries". The "1-Click Actions" tab is highlighted in orange. Below the tabs, there are filters for "Case", "Details View", "All", "All File Types", and "Filter By: All E". The "Notes" section contains a table with columns: File Name, File Size, File Type, and Title. The "Emails" section contains a table with columns: File Name, File Size, File Type, From, To, Subject, Direction, and Sent/Received On. A context menu is open over the "1-Click Actions" tab, showing options: Download, Attach to Email, Attach to a new Note, Zip & Download, Zip & Attach to Email, and Zip & Attach to a new Note. A "Go" button is visible next to the menu. A red checkmark is placed to the left of the instruction text at the bottom.

File Name	File Size	File Type	Title
<input checked="" type="checkbox"/> Error.txt	↓ 10 Bytes	txt	Error screenshot received from customer
<input checked="" type="checkbox"/> Leads Import Sample File - Rectified.xlsx	↓ 6 KB	xlsx	Rectified file
<input type="checkbox"/> Import Errors & Resolutions.pdf	↓ 1 MB	pdf	Link

File Name	File Size	File Type	From	To	Subject	Direction	Sent/Received On
<input checked="" type="checkbox"/> Error3.png	↓ 6 KB	png	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-J5K7W	Sent	12/26/2023, 12:13:00 PM
<input checked="" type="checkbox"/> Error1.png	↓ 9 KB	png	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-J5K7W	Sent	12/26/2023, 12:13:00 PM
<input type="checkbox"/> Leads Import Sample File.xlsx	↓ 6 KB	xlsx	support@zapobjects.com	sumeet.ballani@zapobjects.com;	Case Created from Email : Getting error when importing leads : ZAP-18654416-J5K7W	Sent	12/26/2023, 12:13:00 PM

✓ Select attachments, then select the "Action" and click "Go"

Feature Highlight #7: Ability to view attachments even from related entities (e.g. you could view attachments from Case.Customer(Account) within the Case form)

Zap Attachment Viewer – View attachments from Related Entities

The screenshot displays the Dynamics 365 Sales Hub interface. The main content area shows a Case form titled "Getting error when importing leads - Saved". The Case is owned by Sumeet Ballani and has a status of "Pending". The Case process is "Phone to Case Process" and is currently in the "Identify (3 Hrs)" stage. The "Account Attachments" tab is selected, showing a list of attachments. A red dashed box highlights the "Account (Case)" dropdown menu, and an orange callout box points to it with the text "Case Customer". Below the dropdown, a table lists the attachments:

File Name	File Size	File Type	Title	Created On	Created By	Regarding
Support Contract 2023 - Demo Customer.pdf	160 KB	pdf	Support Contract - Dec 2023	12/6/2023, 2:36:00 PM	Sumeet Ballani	Demo Customer

Below the table, there is a section for "Emails". An orange callout box with the text "Viewing Case.Customer attachments in Case Form" is positioned over the Emails section.

✓ View Notes & Email Attachments from either current record or related records (e.g., viewing attachments from Case.Customer record in Case form)

Feature Highlight #8: Easily upload files to Notes by Drag-and-Drop

Zap Attachment Viewer – Drag-and-Drop multiple files to Notes

The screenshot displays the Dynamics 365 interface for a case. The top navigation bar includes 'Dynamics 365 Sales Hub' and a search bar. The main content area shows the 'Connection Status' for a case, with a progress bar indicating 'Identify (44 Hrs)'. Below this, the 'Zap Attachment Viewer' tab is active, showing a table with columns for 'File Name', 'File Size', 'File Type', 'Subject', 'Created On', and 'Created By'. A blue box highlights the 'Drag & Drop files here' area, which includes a 'Choose Files' button and a 'No file chosen' message. A yellow callout box points to the 'Rename' button, indicating that file names and notes titles can be edited on-the-fly. Another yellow callout box points to a file being dragged from a Windows File Explorer window to the upload area, with the text 'Drag Files'. The File Explorer window shows three files: 'BP-Error', 'img_5dd74273 0bf57', and 'Import-Data-Error'.

✓ Easily Drag-and-Drop multiple files to Notes and Edit file-names & notes title on-the-fly!

Feature Highlight #9: Preview PDF files without the need to Download

Zap Attachment Viewer – Preview PDF file

Click to preview PDF

Click to preview in full-screen

Download Attachment

✓ Click the File-Name to preview PDF file without the need to Download!

Getting Started

- Zap Attachment Viewer features page ([link](#))
- To request trial email sales@zapobjects.com with below details:
 - Company Name:
 - Contact Number:
 - Requirements: