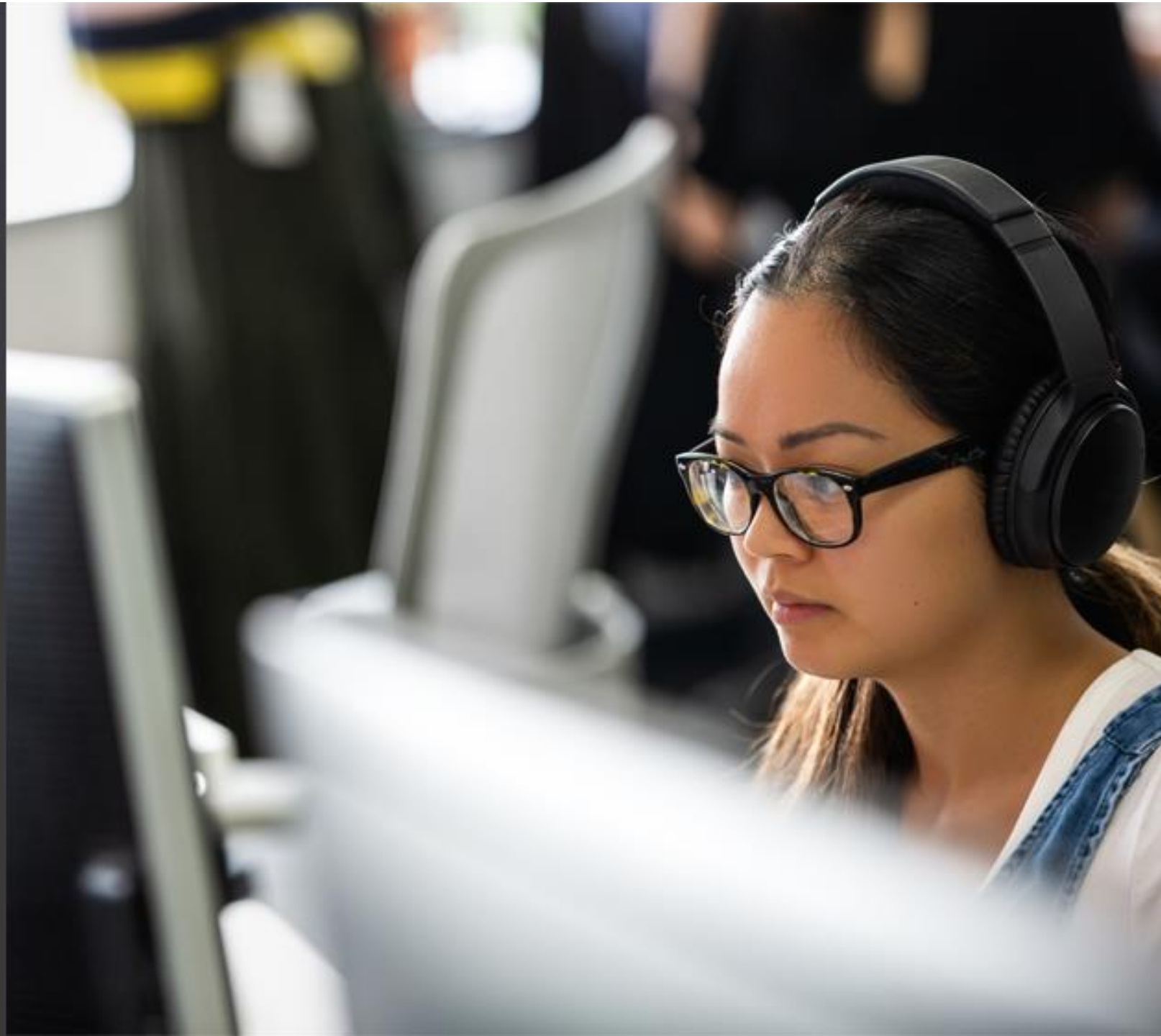


Zap Objects: Zap Attachment Viewer



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

Select Details or Gallery View

Filter attachments by Notes/Emails/Portal Comments

Filter by specific Email Record

Delete unwanted attachments in bulk

Rename attachment filenames

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

Meta Columns

Sort

Click to Preview Image

Meta Columns

Direct Hyperlink to Source Record

Meta Columns

Drag-and-Drop multiple files to upload to notes

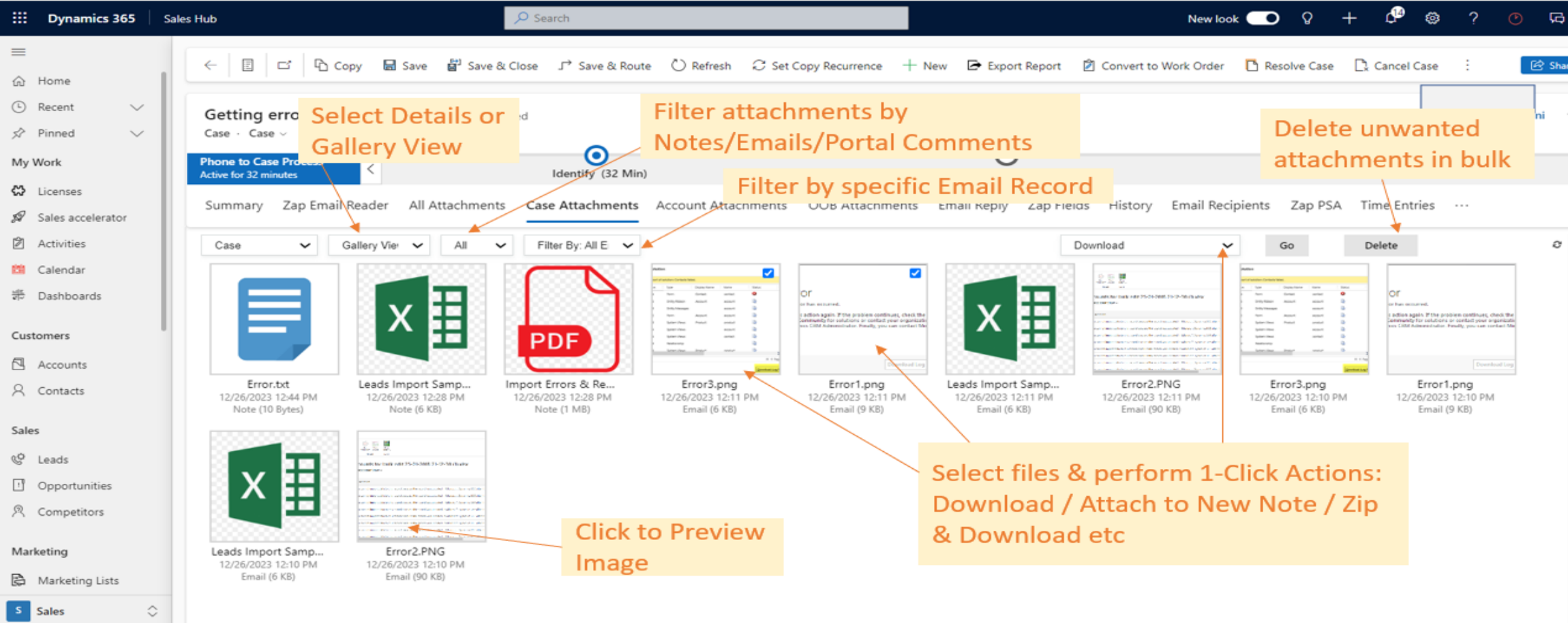
File Name	File Size	File Type	Title	Created On
Error.txt	10 Bytes	txt	Link	12/26/2023, 12:44:00 PM
Leads Import Sample File - Rectified.xlsx	6 KB	xlsx	Link	12/26/2023, 12:28:00 PM
Import Errors & Resolutions.pdf	1 MB	pdf	Link	12/26/2023, 12:28:00 PM

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



Preview Attachments in Gallery view

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

Zap Attachment Viewer – Gallery View – Image Zoom-In

Attachment Viewer - Gallery View with Image Carousel

[\[Email\]](#) Error1.png (9 KB)

Hyperlink to Source Record

Image Zoom In-Out

Error
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.

Download Log File OK



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 Zap Attachment Viewer interface. The top navigation bar includes the Dynamics 365 logo, a search bar, and various utility icons. The left sidebar contains navigation links for Home, Recent, Pinned, My Work, Licenses, Sales accelerator, Activities, Calendar, Dashboards, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, Marketing, and Marketing Lists.

The main content area shows a case titled "Getting error when importing leads" with a status of "Saved". Below the case title, there are tabs for "Phone to Case Process", "Identify (3 Hrs)", "Research", and "Resolve". The "Identify (3 Hrs)" tab is active.

The "Case Attachments" tab is selected, showing a table of attachments. The table has columns for File Name, File Size, File Type, Title, Created On, and Created By. The "Title" column has an edit icon (pencil) next to each entry, which is highlighted by an orange callout box labeled "Edit Notes title".

Below the attachments table, there is a section for "Emails" with a table showing email details. The "Subject" column also has an edit icon (pencil) next to each entry, which is highlighted by an orange callout box labeled "Edit File-names".

At the bottom, there is a "Drag & Drop files here (to upload to notes)" area with a "Choose Files" button and a "No file chosen" message.

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

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

ZAPOBJECTS

Zap Attachment Viewer – Delete Unwanted Attachments

Dynamics 365 | Sales Hub Search New look ? ? ? ? ? ? ? ? ? ?

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

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-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 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-J5K7W	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-J5K7W	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

Optimise database space by deleting unwanted attachments

✓ 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 case titled "Getting error when importing leads". The "Case Attachments" tab is active, showing a list of attachments under the "Notes" section. A yellow box labeled "1-Click Actions" points to the "Download" dropdown menu, which is open and shows options: "Download", "Attach to Email", "Attach to a new Note", "Zip & Download", "Zip & Attach to Email", and "Zip & Attach to a new Note". The "Go" button is also visible. Below the attachments, the "Emails" section shows a list of emails related to the case.

Case Attachments

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

Emails

File Name	File Size	File Type	From	To	Subject	Direction	Sent/Recieved 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 shows the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, Sales Hub, a search bar, and various icons. The left sidebar shows the navigation menu with options like Home, Recent, Pinned, My Work, Licenses, Sales accelerator, Activities, Calendar, Dashboards, Customers, Accounts, Contacts, Sales, Leads, Opportunities, and Competitors.

The main content area displays a case titled "Getting error when importing leads" with a status of "Pending". 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".

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 attachments list, there is a section for "Emails".

Viewing Case.Customer attachments in Case Form

✓ 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' record. The 'Zap Attachment Viewer' tab is active, showing a 'Details View' of a 'Notes' entry. A blue box with the text 'Drag & Drop files here' and 'Or Choose Files' is prominently displayed. An orange callout box points to the 'Rename' button, stating 'Edit file-name or notes title on-the-fly'. Another orange callout box points to the 'Drag Files' action, stating 'Drag Files'. A file explorer window is open, showing three files: 'BP-Error', 'img_5dd74273 0bf57', and 'Import-Data-Error'. A '+ Copy' button is visible next to the 'Drag & Drop files here' area.

Connection Status - Saved
Case - Case

Phone to Case Process
Active for 44 hours

Identify (44 Hrs)

Summary Zap Email Reader SLA SLA KPI Email Reply Zap Fields History Case Relationships Email Recipients Associated Knowledge Records **Zap Attachment Viewer** Enhanced SLA Details

Details View Notes Rename All File Type Download Delete Attach To Email

File Name File Size File Type Subject Created On Created By

No Attachments Found

Drag & Drop files here
Or
Choose Files No file chosen

Upload + Copy

Drag Files

File Home Share View Manage Picture Tools

This PC > Desktop > error

BP-Error img_5dd74273 0bf57 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

Attachment Preview

Microsoft Wo... 1 / 12 | 67% +

Click to preview PDF

Click to preview in full-screen

Download Attachment

Download

✓ 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: