

MICRO APPS

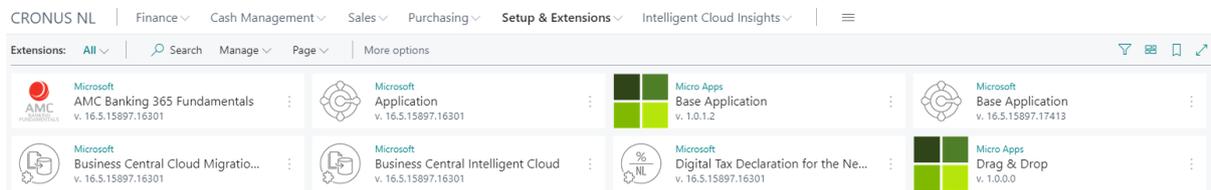
Drag & Drop APP

This document will describe all the necessary information for the use of the Drag & Drop extension, created by Micro-Apps. The extension will make use of a SharePoint connection or may be used by storing the files within the Business Central database.

Installation:

The installation of the Drag & Drop app is available via the Microsoft Marketplace for Business Central extensions/apps. From here you can automatically install the extension and make it available within every company within your Business Central environment.

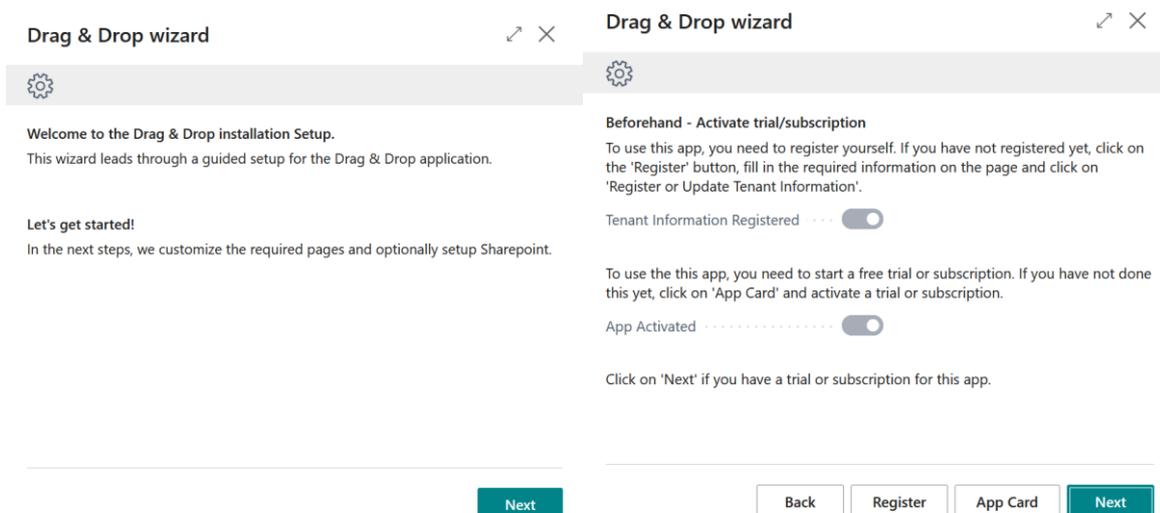
For the correct working of the app, make sure that the setting of the Micro Apps Base App is set for "allowing HttpClient Request".



Container Shipment app Setup:

After the installation has been completed, the page **Drag & Drop Wizard** is available in Business Central. With this configuration wizard we can set up the drag & drop application step by step.

Once the installation is complete, the app needs to be set up. This can be done with the Drag & Drop Wizard. This wizard contains all the necessary steps to completely set up the extension. The first step is to register yourself and to activate the trial or subscription. With the trial, you can use the app two weeks free of charge. After the trial period, you need to activate the subscription. Make sure both fields are checked (like the example in the right picture.)



Setup Drag & Drop objects

This wizard page displays the pages on which the drag & drop app currently is enabled, you may change here the pages on which the drag & drop fact box is shown. You may not add pages that aren't in the list yet. Micro-Apps will be updating the list in newer versions with more pages. If you wish to exclude the fact box from one of the provided pages, simply uncheck the corresponding checkbox at the end of the line.

Drag & Drop wizard

Select wich pages need to be Drag & Droppable (We recommend leaving all pages selected).

Drag & Drop Objects

	Page ID ↑		Page Name	Drag & Droppable	
→	21	⋮	Customer Card	<input checked="" type="checkbox"/>	↑
	22		Customer List	<input checked="" type="checkbox"/>	
	26		Vendor Card	<input checked="" type="checkbox"/>	
	27		Vendor List	<input checked="" type="checkbox"/>	
	30		Item Card	<input checked="" type="checkbox"/>	
	31		Item List	<input checked="" type="checkbox"/>	
	41		Sales Quote	<input checked="" type="checkbox"/>	↓

It's optional to connect the Drag & Drop application with SharePoint. If you want to use Sharepoint to store your files. Enable the *Use Sharepoint* field. In the Next step, you need to authenticate with your Sharepoint account by clicking on the *Authenticate* button. After this, you can log in and select the storage drive.

Drag & Drop wizard

Do you want to use Sharepoint?

Use Sharepoint

Drag & Drop wizard

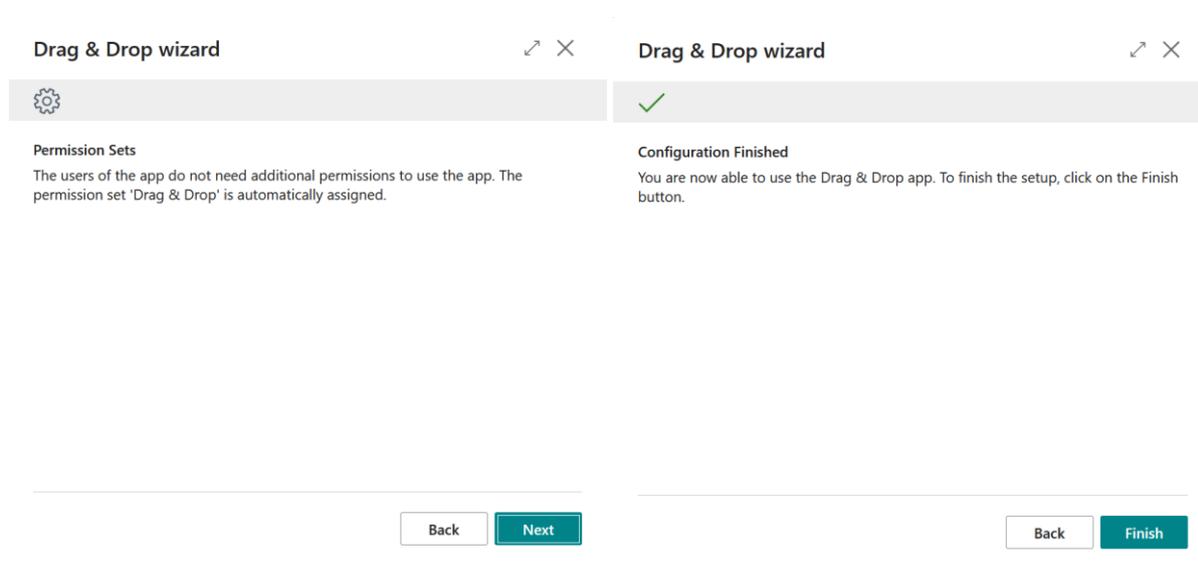
Click on the authenticate button to connect your SharePoint account, after this your drives are visible. Select the preferred drive and click next.

Drive Id ▾

Drive name

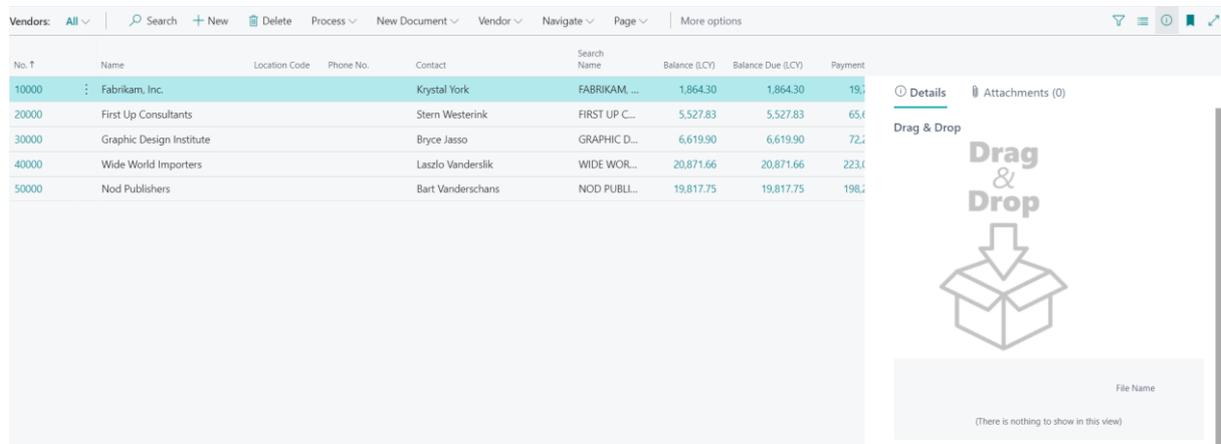
Permissions Sets

To make sure that the users have the correct permissions to add files via the Drag & Drop app, the permission set 'Drag & Drop' is automatically assigned to every user.



Using Drag & Drop

Using the Drag & Drop app is fairly straight forward, after the installation and setup of the app a fact box will appear on the page that are enabled for the setup page. You may just simply drag and drop a file to this fact box, the file will be added to the record that was selected.



In the image above, the file would have been added to the record of vendor Fabrikam, Inc. The drag and drop fact box is also visible for the card page. Files that are where added via the list page will also be visible when the card is opened.

Deleting files

To delete an added file you need to use the fact box to delete the item. This can be done by clicking the three-dotted square and choose **delete line**. The file will be deleted from the fact box and the corresponding file will be delete from the SharePoint environment in the case SharePoint is used.

Particularities

When using the drag & drop app somethings need to be taken in consideration. In the case of using SharePoint, all files are being stored in the same SharePoint folder. This means that none of the files may have the same file name. Users may need to rename their files before using the drag & drop app.

Furthermore, files that are being stored in SharePoint may only be deleted via the use of the drag & drop app. In case files are being delete from SharePoint they may not be re-added later as the link between the SharePoint file and the Business Central record may not be restored. The files need to be re-added via the drag & drop fact box.