



Administrator & User Guide

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MSD DocStore is a product of

DotWood CRM B.V.

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1 Introduction

The DocStore is a tool which automatically stores attachments from Microsoft Dynamics 365 (MSD) into SharePoint. DocStore allows for better management of files from MSD and reduction of data storage costs in MSD online. The following shows an overview of the functionality.

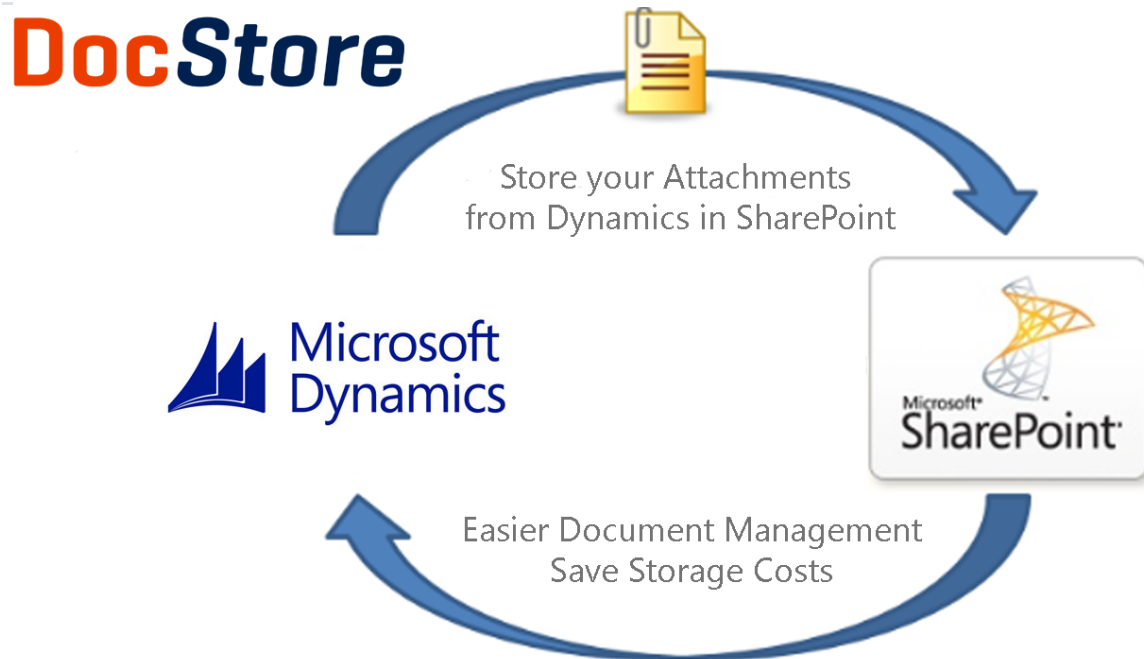


Figure 1: overview functionality DocStore

Both on-premise and online versions of MSD and SharePoint (Office365) are supported. Attachments are stored within the Email document library which is generated by configuring the Document Settings within MSD. Stored files remain visible in MSD from the Related Documents area on the Email form. Furthermore, direct links to the stored files are available on the Email form which allow the user to open the files quickly. Docstore can easily be customized to provide roll-up file overviews and field mappings into SharePoint.

This documents contains explanations to get started with DocStore, on required settings, customization options and functionalities. The assumption is made that the DocStore is retrieved via the Appsource. The trial process is not explained in this document as this is explained on the website www.appsource.com.

A separate migration tool is available for DocStore in case existing e-mail or note attachments in MSD need to be migrated. Although explained in this guide, please consult your MSD partner or contact support@crmdocstore.com for further assistance.

2 Prerequisite Settings

2.1 Prerequisite Document Management Settings

PLEASE NOTE: IN ORDER TO CONFIGURE AND CORRECT FUNCTIONING OF DOCSTORE THE DOCUMENT INTEGRATION WITHIN MSD MUST BE ENABLED AND CONFIGURED WITHIN THE DOCUMENT MANAGEMENT SETTINGS. SEE ALSO APPENDIX I FOR ENABLING SERVER SIDE INTEGRATION.

- Select Document Management within Settings area
- Verify that the Email entity and Note entity is enabled within Document Management Settings.

Document Management Settings



Select entities

Document management will be enabled on the selected entities.

<input type="checkbox"/>	Entities
<input type="checkbox"/>	License Logic
<input type="checkbox"/>	License Settings
<input type="checkbox"/>	Mail Merge Template
<input type="checkbox"/>	Mailbox
<input type="checkbox"/>	Marketing List
<input type="checkbox"/>	New Process
<input checked="" type="checkbox"/>	Note
<input type="checkbox"/>	Nurture Program
<input type="checkbox"/>	Office Groups Header
<input type="checkbox"/>	Opportunity Close
<input type="checkbox"/>	Opportunity Sales Process

SharePoint site

The selected SharePoint site will be used as the default site for document management.

SharePoint Site:

Figure 2: email and note entity must be checked

- Finish configuration of the standard SharePoint integration.

2.2 Imported solutions via AppSource

When finishing the FREE TRIAL process available at AppSource, the following solution must be in place.

All Solutions ▾

New | Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations

Name	Display Name	Version	Installed On ↓	Package Type	Publisher
DotwoodCRMDocStore	DotWoodCRM DocStore	4.0.0.5	16-2-2017	Managed	DotWoodCRM

Figure 3: imported solution after free trial process AppSource

2.3 DocStore settings

Prior to first use some initial settings must be done within MSD.

- Navigate to Settings > Document Management
- Select SharePoint Sites

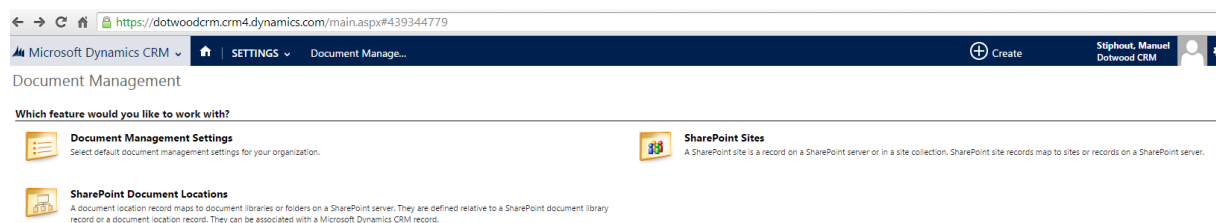


Figure 4: selecting sharepoint sites in document settings

- Select the Default Site

My Active SharePoint Sites ▾

✓	Name ↑	Absolute URL	Parent Site	Relative URL	Default Site	Last Validation Status
	Default Site	https://dotwoodcrm.sharepoint.com			Yes	Valid

Figure 5: selecting the default sharepoint site which contains docstore settings

- Go to section Doc Store Settings section on SharePoint Site form

Doc Store Settings

Username: Password:

Authentication Method:

Enabled (email entity): ☐ No ☒ Yes Enabled (note entity): ☒ No ☐ Yes

Leave Copy: ☒ No ☐ Yes

Check In Document: ☐ No ☐ Yes

Sharepoint Field Mapping Config:

Folder Pattern Mapping Config:

Figure 6: docstore settings on the sharepoint site (default) record form

The following DocStore settings are available:

Field	Description
Username	This is the user which DocStore will use to save files in SharePoint. This must be a user with both access MSD and SharePoint. A service account is recommended of which the password does not change.
Password	The is the corresponding password of the user above.
Authentication Method	The method which is used to access MSD/SharePoint. Select <i>Online Office365</i> in case of MSD online and SharePoint online.
Enabled	Select Yes to enable DocStore functionality. Select No in case the functionality must be (temporarily) disabled.
Leave Copy	Select <i>No</i> so the original attachment in MSD will be deleted when copied successfully to SharePoint. It is recommended set this option to <i>Yes</i> during trial period.
Check in Document	Leave this field blank (recommended). Only fill in Yes if checkin needs to be forced due to additional configuration for checkin in SharePoint.
SharePoint Mapping Config	This field is used to configure field mapping to SharePoint. If left blank (recommended) only the minimal standard fields will be populated in SharePoint. See next chapter for further explanations.
Folder Pattern Mapping Config	This option allows for storage of attachments in a custom document locations in SharePoint other than the standard integration explained in 4.3. Leave this field blank when standard integration between Dynamics and SharePoint is used.

PLEASE NOTE: FILES WILL BE CREATED IN SHAREPOINT BY THE SYSTEM USER. ACCESS TO FILES BY MSD USERS IN SHAREPOINT IS CONFIGURED WITHIN SHAREPOINT.

- Select Save & Close
- DocStore is ready to use.

2.4 Configuring multi-entity search (optional)

The easiest and fastest way to search for e-mail attachments is by using the multi-entity search. This search box is available in the top ribbon.

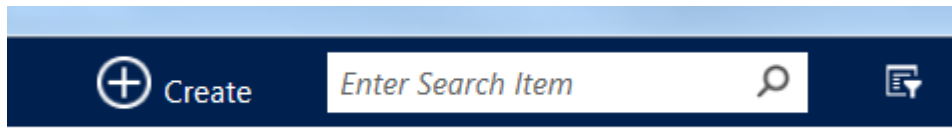


Figure 7: multi-entity search box

In order to search for email attachments the multi-entity search must be configured from Settings>Administration> System Settings in the General tab.

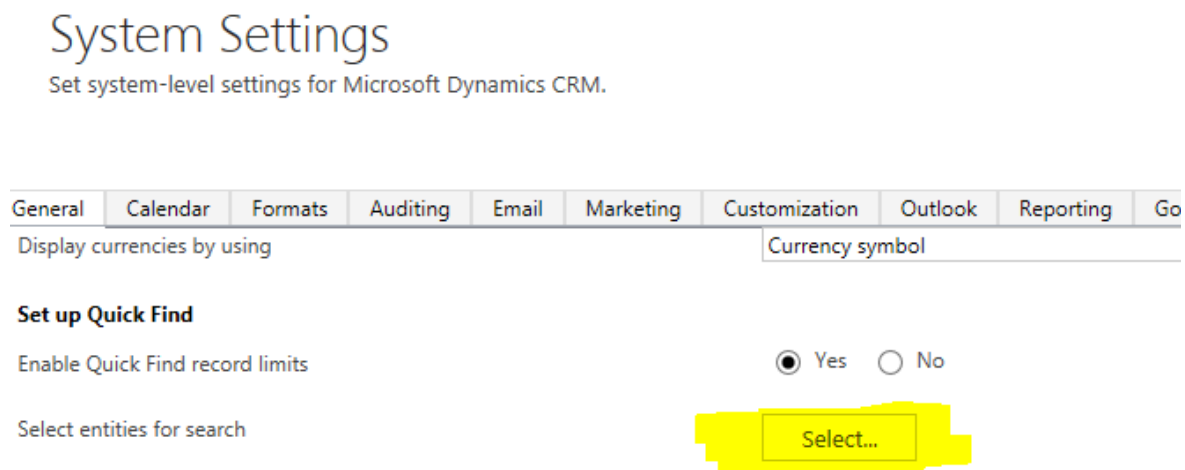
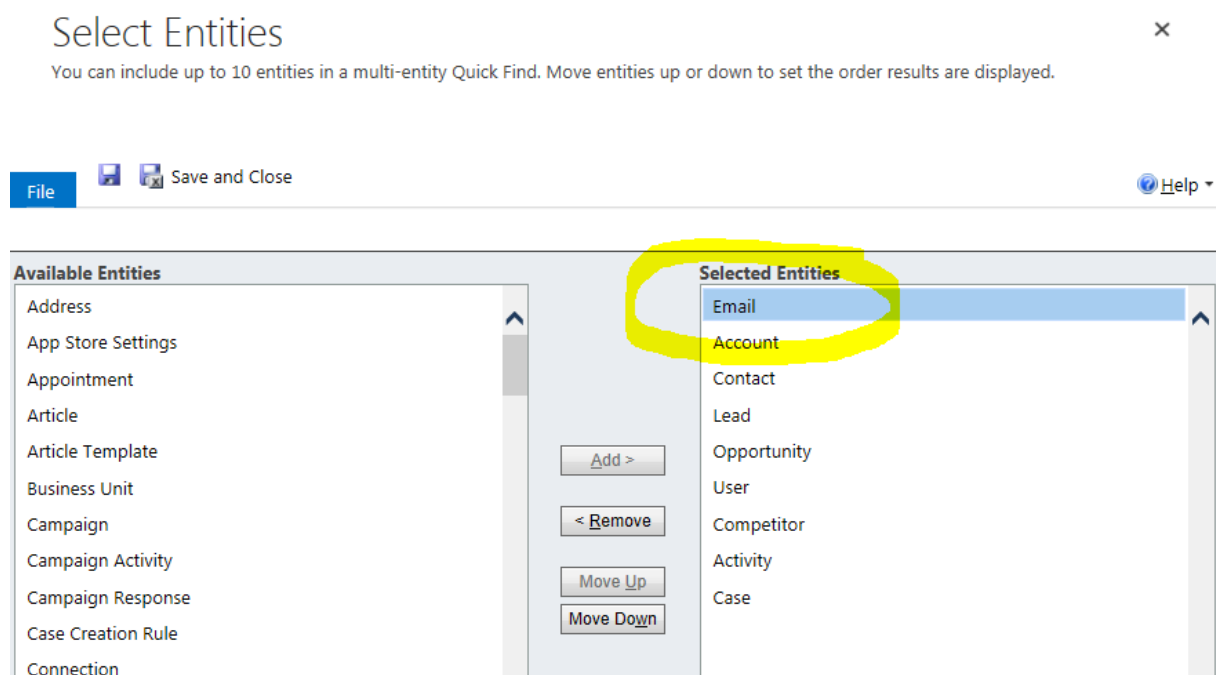


Figure 8: select entities for multi-entity search in system settings

Make sure the Email is selected so emails are included in the search results.



Next chapter will explain the use of this search functionality.

PLEASE NOTE: THE FIELD SHAREPOINT LOCATION ON EMAIL MUST BE CONFIGURED IN THE QUICK FIND VIEW OF EMAIL ENTITY AS FIND FIELD. FOR VERSION DOCSTORE .23 AND EARLIER THIS MUST BE DONE MANUALLY.

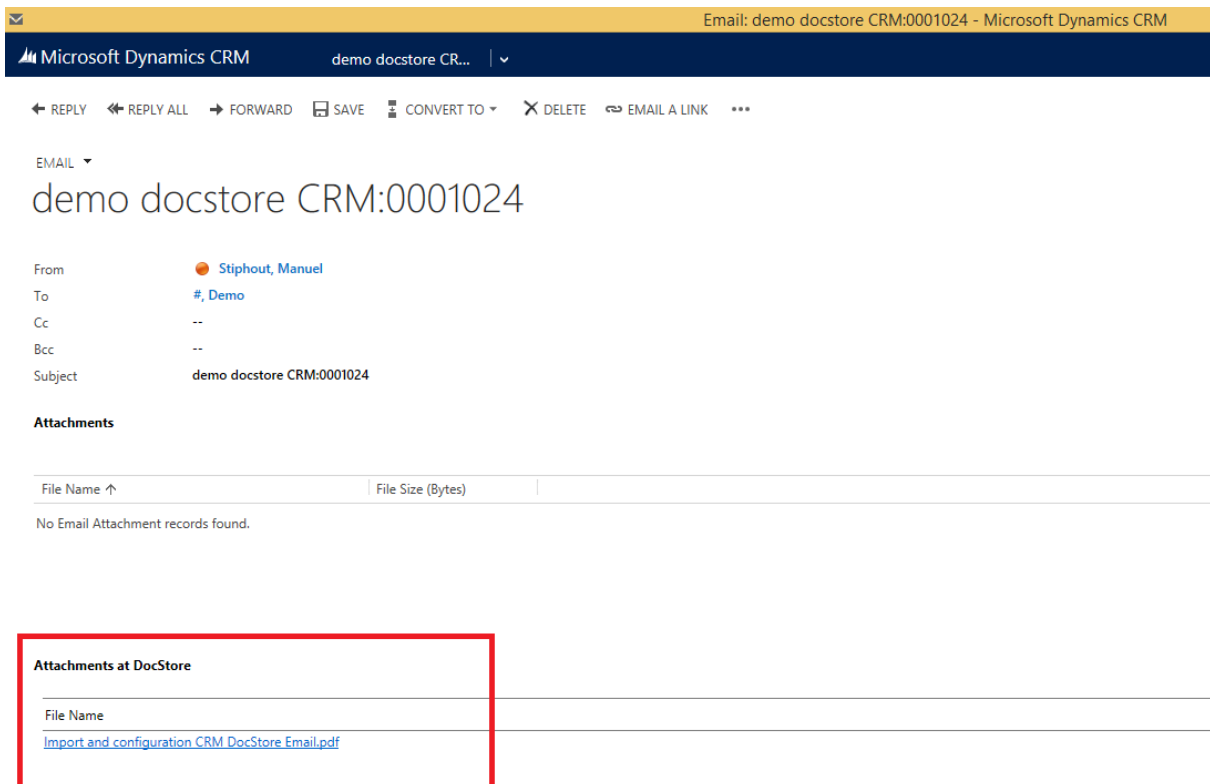
3 Use and Functionalities

After completing the configuration the DocStore will automatically capture email and note attachments from MSD once the email and note activities are created and closed in MSD.

3.1 Viewing and opening attachments

3.1.1 Via the Email form

On the email form in MSD are links available which the user can use to quickly access and open the Email attachments. Both e-mails created within MSD and created from Outlook (by tracking) are supported. Forwarding of e-mails with attachments is also supported.



The screenshot shows the Microsoft Dynamics CRM interface for an email record. The email is titled "demo docstore CRM:0001024" and is from "Stiphout, Manuel" to "#, Demo". The subject is "demo docstore CRM:0001024". Below the email details, there is a section for "Attachments". A table with columns "File Name" and "File Size (Bytes)" is shown, but it contains no records. Below this table, a red box highlights a section titled "Attachments at DocStore". This section contains a table with one row: "Import and configuration CRM DocStore Email.pdf".

File Name	File Size (Bytes)
No Email Attachment records found.	

Attachments at DocStore	
File Name	
Import and configuration CRM DocStore Email.pdf	

Figure 9: any attachment is accessible via a link on the email form

The attachments are also available from the related Documents section on the Email form.

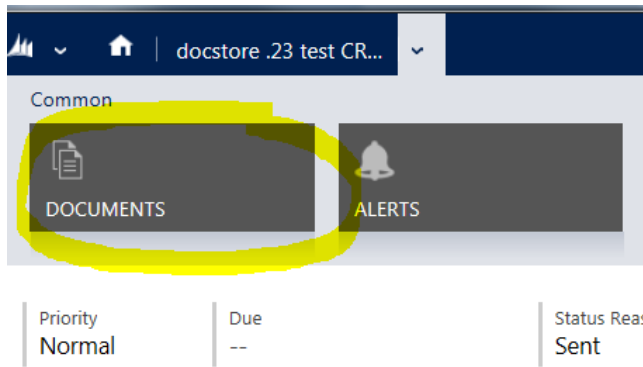


Figure 10: the Documents section on the Email Form

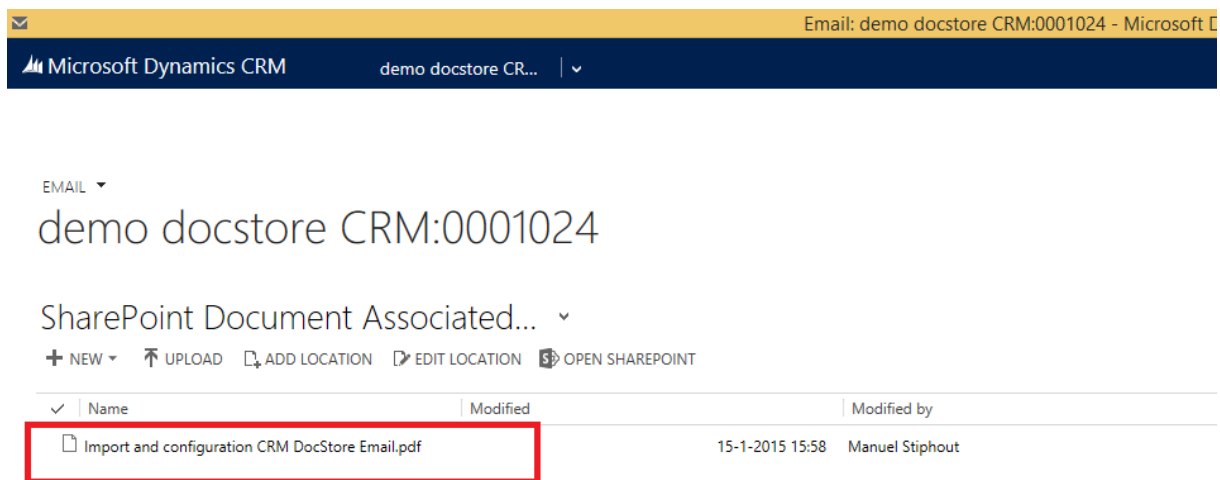
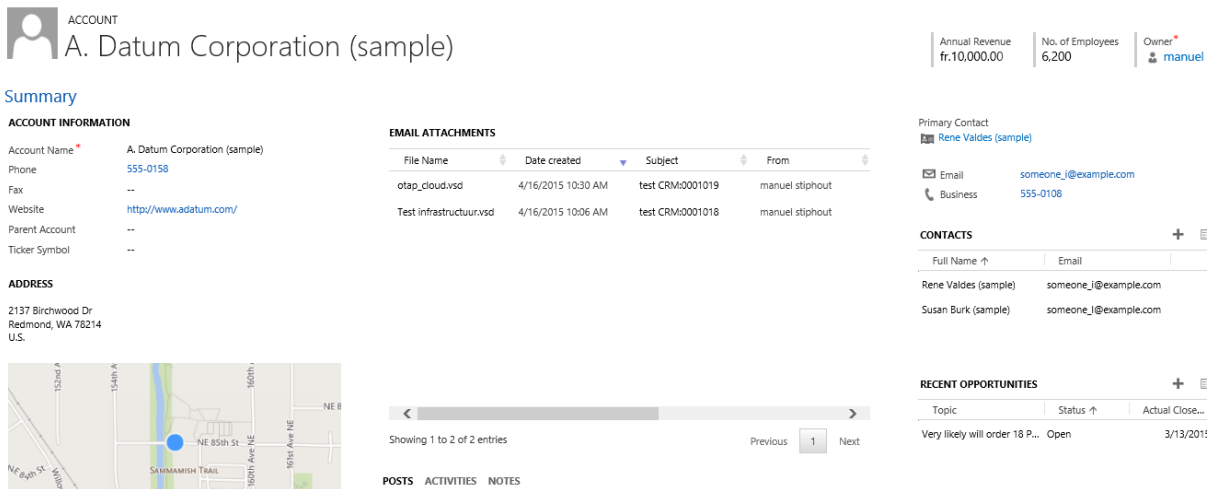


Figure 11: attachments are visible in the standard related Documents section

3.1.2 Via the rollup view

If the rollup view is configured (see 4.1) the user will be able to view and open e-mail attachments from the entity form view. In the following the rollup view is available on the account form. The rollup view consists of the main (related) fields from the email (attachments).



ACCOUNT
A. Datum Corporation (sample)

Summary

ACCOUNT INFORMATION

Account Name: A. Datum Corporation (sample)
Phone: 555-0158
Fax: --
Website: <http://www.adatum.com/>
Parent Account: --
Ticker Symbol: --

ADDRESS

2137 Birchwood Dr
Redmond, WA 98014
U.S.

EMAIL ATTACHMENTS

File Name	Date created	Subject	From
otap_cloud.vsd	4/16/2015 10:30 AM	test CRM0001019	manuel stiphout
Test infrastructuur.vsd	4/16/2015 10:06 AM	test CRM0001018	manuel stiphout

CONTACTS

Full Name	Email
Rene Valdes (sample)	someone_j@example.com
Susan Burk (sample)	someone_j@example.com

RECENT OPPORTUNITIES

Topic	Status	Actual Close...
Very likely will order 18 P...	Open	3/13/201...

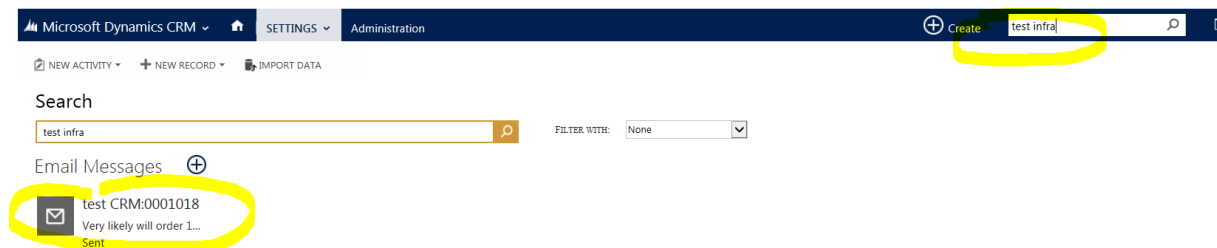
Figure 12: rollout view on account form to view and open attachments and related records

3.2 Searching attachments

3.2.1 Via multi-entity search in MSD

Via the multi-entity search the user can search for e-mail attachments by using the filename as search word. In the following example an email attachment with filename 'test infrastructuur.vsd'. The search word does not require minimum amount of characters but should contain an asterix (*) if the filename does not start with the letters inserted as search words.

Enter the search word in the search box en select magnifying glass. In the following example 'test infra' is entered.



Microsoft Dynamics CRM Administration

Search

test infra

Filter with: None

Email Messages


test CRM:0001018
Very likely will order 1...
Sent

Figure 13: email as search result from multi-entity search

The search result is an email. Open the email and the attachment file name is visible as a link.

EMAIL ▾

test CRM:0001018

From  manuel stiphout
To manuel@dotwoodcrm.nl
Cc --
Bcc --
Subject test CRM:0001018

Attachments at DocStore

File Name

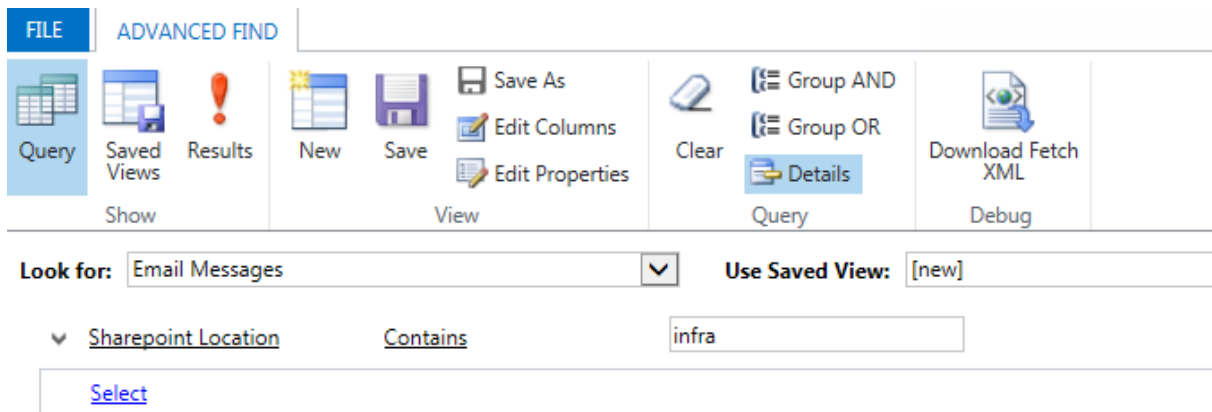
[Test infrastructuur.vsd](#)

Figure 14: open the search result email and the attachment is visible

3.2.2 Via Advanced Find

Alternatively, the user can use Advanced Find to find the e-mail/attachments.

- Use the field Sharepoint Location (which contains the file name)



FILE **ADVANCED FIND**

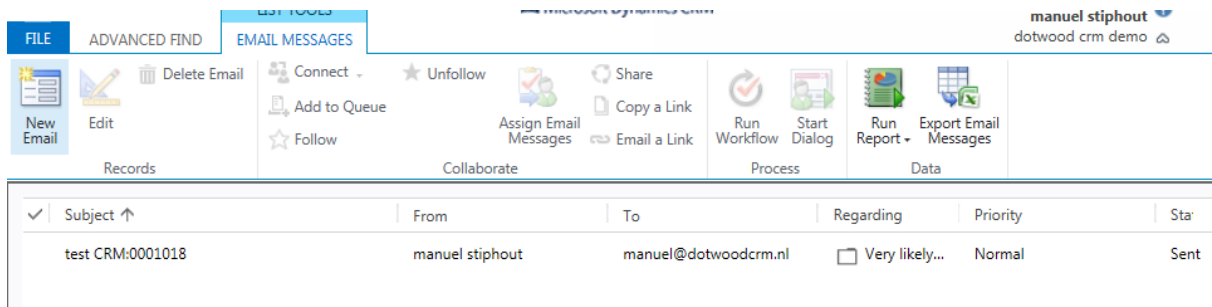
Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

Look for: Email Messages Use Saved View: [new]

▼ Sharepoint Location Contains infra

Select

Figure 15: use sharepoint location field to search on file name attachment in advanced find



FILE **ADVANCED FIND** **EMAIL MESSAGES**

New Email Edit Delete Email Connect Unfollow Share Assign Email Messages Copy a Link Run Workflow Start Dialog Run Report Export Email Messages

Records Collaborate Process Data

✓ Subject ↑	From	To	Regarding	Priority	Star
test CRM:0001018	manuel stiphout	manuel@dotwoodcrm.nl	<input type="checkbox"/> Very likely...	Normal	Sent

Figure 16: email search result advanced find

3.2.3 Via SharePoint

As e-mail attachments are saved in SharePoint the user can also search use SharePoint search functionality. These functions are available from both SharePoint views inside MSD and from forms inside SharePoint. This search functionality is configured within SharePoint.

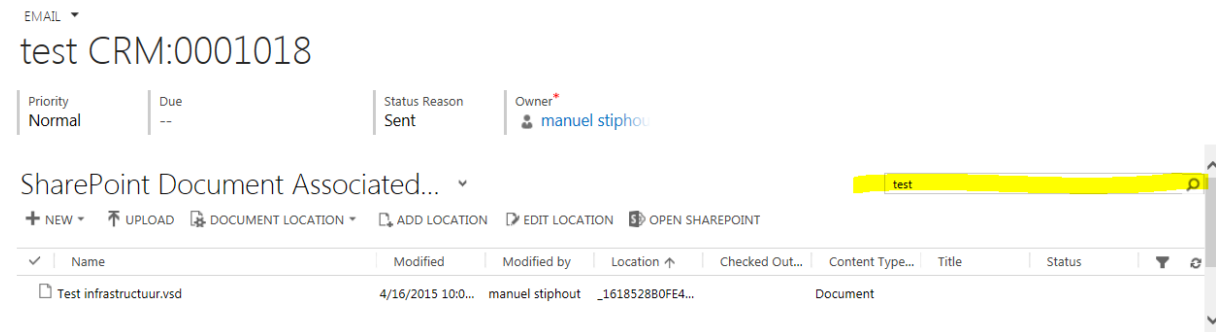


Figure 17: search function Document view in MSD

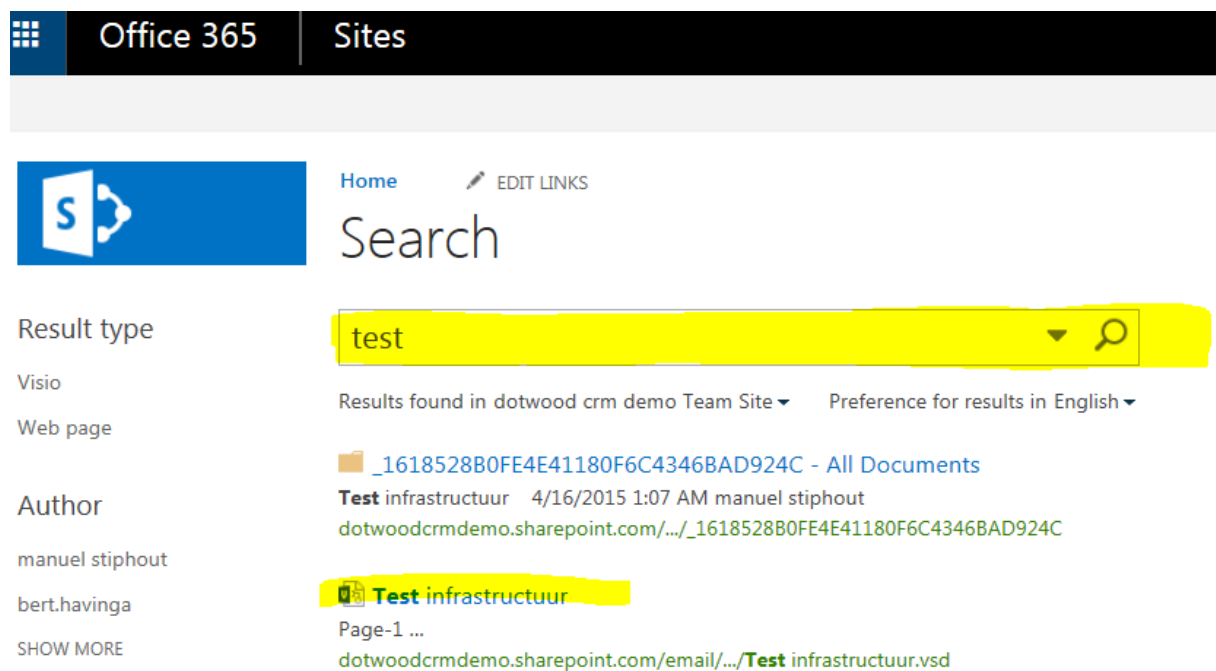


Figure 18: search results in SharePoint

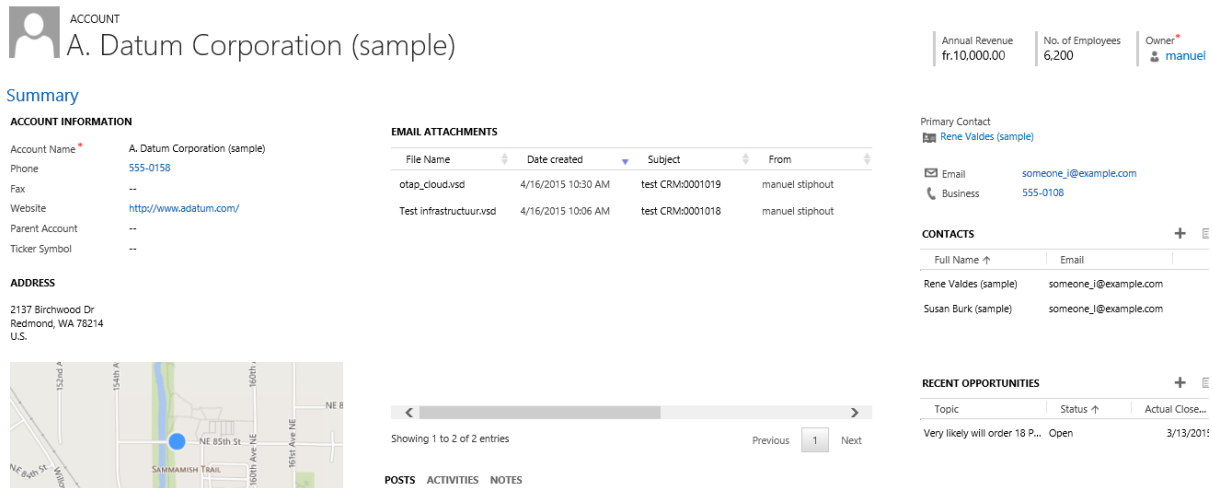
4 Customization Options (administrators only)

DocStore can be customized to add rollup views and SharePoint field mappings. Please note this requires technical skills and therefore it is recommended to contact support at DotWood MSD or your MSD partner for assistance.

4.1 Configuring rollup view

The rollup view provides the ability to view email attachments of underlying records. In the following example the rollup view is added to the account form. The user can view email

attachments of emails which relates to the account but also which relate to underlying records such as the opportunity. The following shows the rollup view of email attachments of emails which relate to both the account and the underlying opportunity.



ACCOUNT
A. Datum Corporation (sample)

Annual Revenue: fr.10,000.00 | No. of Employees: 6,200 | Owner: manuel

Summary

ACCOUNT INFORMATION

Account Name	A. Datum Corporation (sample)
Phone	555-0158
Fax	--
Website	http://www.adatum.com/
Parent Account	--
Ticker Symbol	--

ADDRESS

2137 Birchwood Dr
Redmond, WA 78214
U.S.

EMAIL ATTACHMENTS

File Name	Date created	Subject	From
otap_cloud.vsd	4/16/2015 10:30 AM	test CRM0001019	manuel.stiphout
Test infrastructure.vsd	4/16/2015 10:06 AM	test CRM0001018	manuel.stiphout

Primary Contact
Rene Valdes (sample)

Email: someone_j@example.com
Business: 555-0108

CONTACTS

Full Name	Email
Rene Valdes (sample)	someone_j@example.com
Susan Burk (sample)	someone_j@example.com

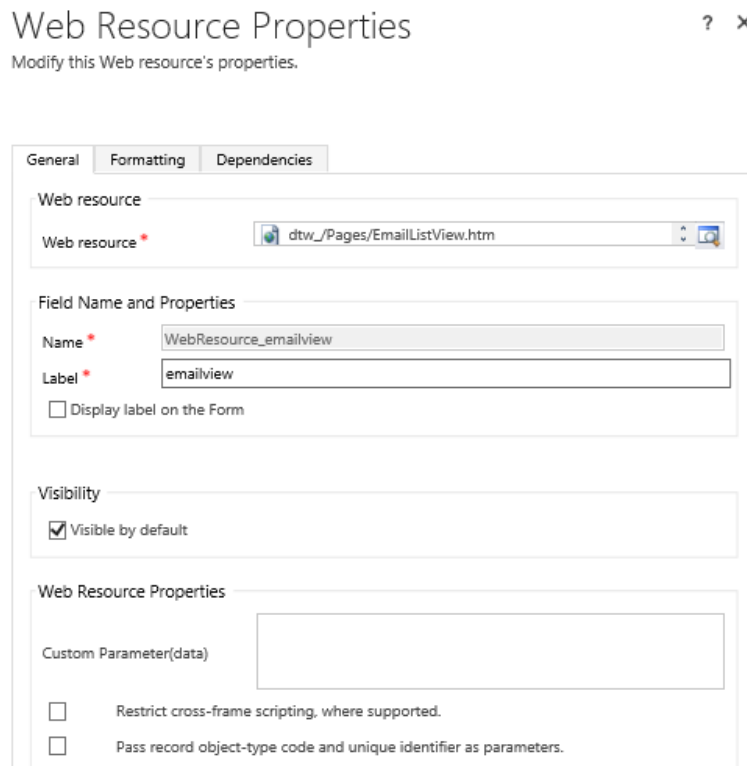
RECENT OPPORTUNITIES

Topic	Status	Actual Close...
Very likely will order 18 P...	Open	3/13/2011

Figure 19: the rollup view on an account record form

The rollup view can be added as a Web Resource. In the form designer select under Insert tab the Web Resource. Look up the Web Resource called dtw_/Pages/EmailListView.htm

The following shows the recommended settings for the Web Resource.



Web Resource Properties

Modify this Web resource's properties.

General | Formatting | Dependencies

Web resource

Web resource: dtw_/Pages/EmailListView.htm

Field Name and Properties

Name: WebResource_emailview
Label: emailview
☐ Display label on the Form

Visibility

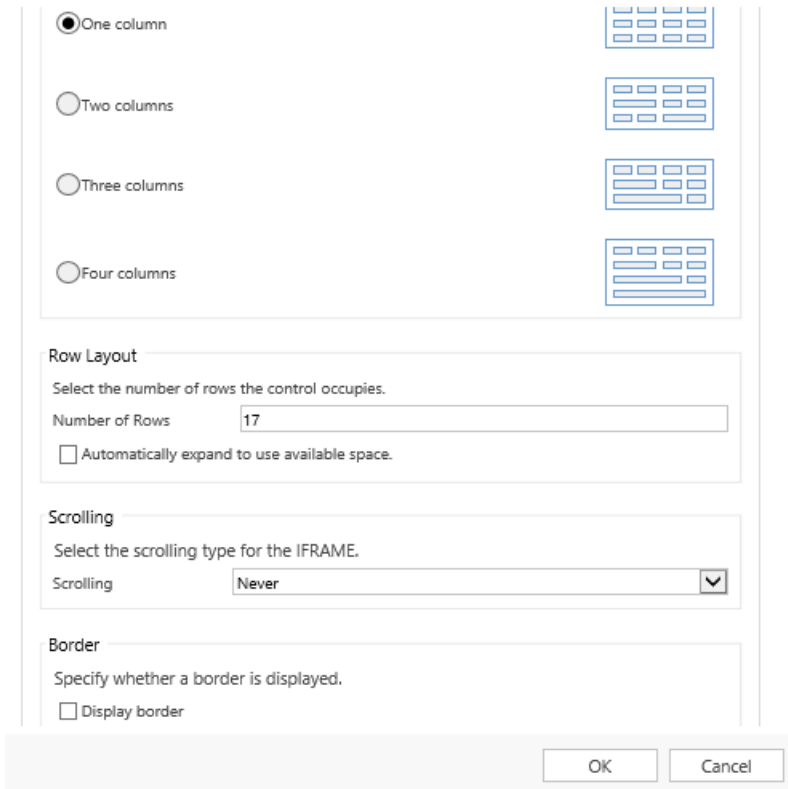
☒ Visible by default

Web Resource Properties

Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.
☐ Pass record object-type code and unique identifier as parameters.

Figuur 1: web resource properties rollup view tab general



Figuur 2: web resource properties rollup view tab formatting

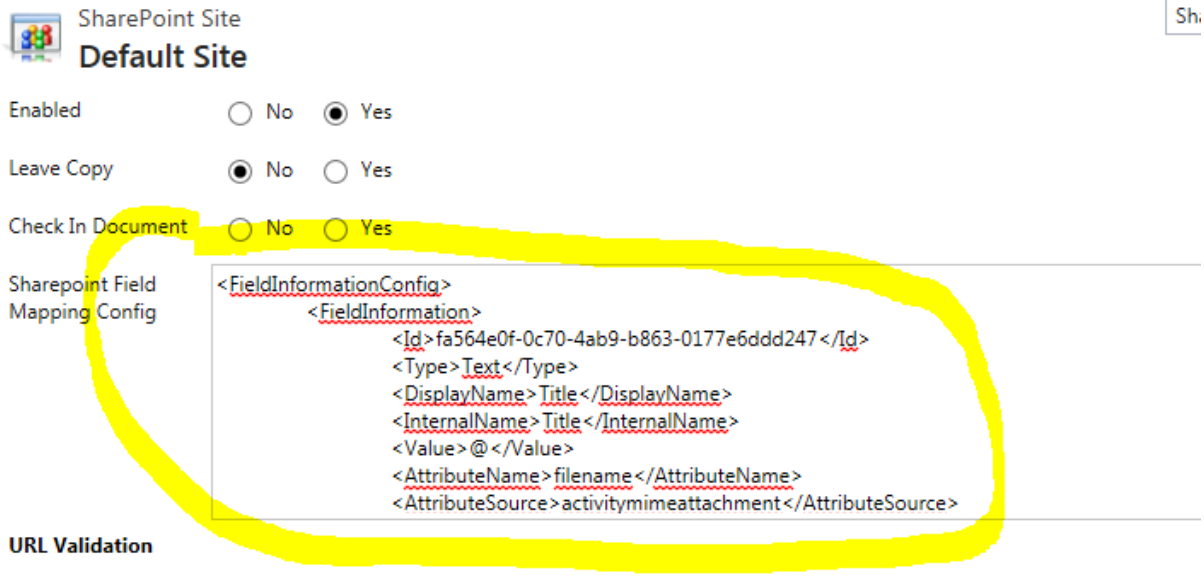
By default the web resource is only available on account, opportunity, salesorder and incident entities. Please contact your partner for assistance in case of further required entities.

4.2 Configuring SharePoint field mapping

By default the DocStore populates some standard metadata fields in SharePoint when transferred such as created on, created by and filename. Within the DocStore settings the field 'SharePoint Mapping Field Config' allows additional fields to be configured in XML format. The following is an example XML which populates the standard field 'Title' in SharePoint with the filename.

```
<FieldInformationConfig>
  <FieldInformation>
    <Id>fa564e0f-0c70-4ab9-b863-0177e6ddd247</Id>
    <Type>Text</Type>
    <DisplayName>Title</DisplayName>
    <InternalName>Title</InternalName>
    <Value>@</Value>
    <AttributeName>filename</AttributeName>
    <AttributeSource>activitymimeattachment</AttributeSource>
    <Format></Format>
  </FieldInformation>
</FieldInformationConfig>
```

- Write or paste the XML configuration text into the SharePoint Mapping field on the DocStore settings area.



SharePoint Site Shi

Default Site

Enabled ☐ No ☒ Yes

Leave Copy ☒ No ☐ Yes

Check In Document ☐ No ☐ Yes

Sharepoint Field Mapping Config

```
<FieldInformationConfig>
  <FieldInformation>
    <Id>fa564e0f-0c70-4ab9-b863-0177e6ddd247</Id>
    <Type>Text</Type>
    <DisplayName>Title</DisplayName>
    <InternalName>Title</InternalName>
    <Value>@</Value>
    <AttributeName>filename</AttributeName>
    <AttributeSource>activymimeattachment</AttributeSource>
  </FieldInformation>
</FieldInformationConfig>
```

URL Validation

Figure 20: sharepoint field mapping config field must contain the xml config

After saving and closing. In this example the Title field is populated with the filename without extension.

Please contact you MSD partner if you wish to further configure the mapping of SharePoint fields.

4.3 Configuring Folder Pattern Mapping

DocStore can be configured to use custom created Document Locations. This requires an XML configuration in the DocStore settings area. Functionality to create custom Document Locations must already be in place, if not, please consult with your Dynamics partner.

The following is a brief explanation which helps your Dynamics partner to configure:

If exists xml configuration string in field dtw_folderpatternconfig sharepointsite and entity has given logical name

b) logic will be applied to entities different from email

c) mimeattachments are copied to resulting sharepoint locations

Logic replaces file path of attachment to sharepoint based on rule described

To understand how replacement works here is link <https://regex101.com/r/TASRp7/2>

Below is an example configuration in which a custom work order entity has the incident entity as parent. Attachments from work order are placed in a custom document location,

specifically in the folders 'internal' and 'repair company' which are present in the document location of the parent incident record.

```
<entitylist>
```

```
  <entity name='new_workorder'>
```

```
    <folder>
```

```
      <expression>(.)-(\d+)</expression>
```

```
      <replacement>incident/$1/$1-$2/internal</replacement>
```

```
      <attributeName>new_name</attributeName>
```

```
    </folder>
```

```
    <folder>
```

```
      <expression>(.)-(\d+)</expression>
```

```
      <replacement>incident/$1/$1-$2/repaircompany</replacement>
```

```
      <attributeName>new_name</attributeName>
```

```
    </folder>
```

```
  </entity>
```

```
</entitylist>
```

5 DocStore Migration Tool

A migration tool is available to migrate existing attachments to SharePoint via the following URL:

<https://ics.blob.core.windows.net/clickonceinstall/publish.htm>

Before running the tool make sure you have DocStore solution configured (explained in 2).

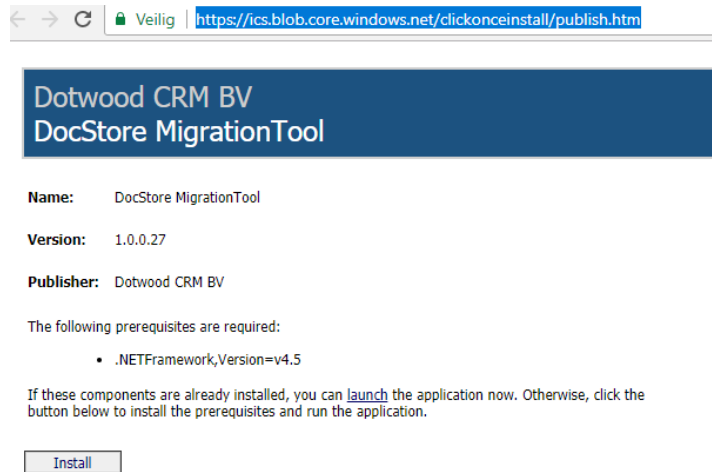


Figure 21: locating the migration tool file for download

Select Install, Save and Run the file

Select Run anyway

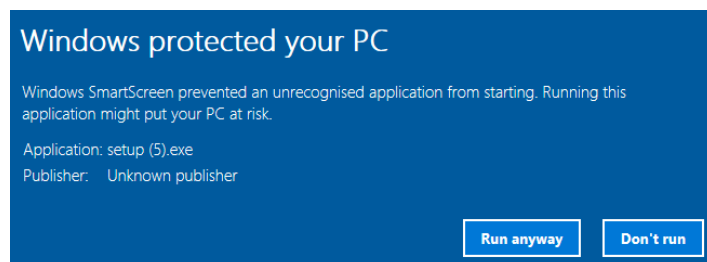


Figure 22: running the file

Select Login to MSD



connection

CREATE NEW CONNECTION

Login to CRM



This is the **DocStore Migration Tool** which is designed to work in conjunction with the **DocStore Email** (DSE) product. With this tool you can connect with your CRM and migrate your existing E-mail attachments from CRM to SharePoint.

Please note that the following must be implemented before starting migration:


- The SharePoint integration must be activated and configured
- The DSE solution must be imported and configured. These settings are found in the (default) SharePoint Site within the Document Management area.

This tool migrates attachments according above settings in your CRM. To proceed with migration please **Login** to your CRM then click on **Migration** tab.

Figure 23: first login to your MSD environment

Select Office365 in case of MSD Online

Enter credentials and select Login



Deployment Type: ☐ On-premises ☐ Online ☒ Office 365

Online Region:

User Name:

Password:

☐ Display list of available organizations

Login

Cancel

Figure 24: enter credentials and select O365 for MSD Online

Select the right organization/instance and select Login



Multiple CRM Organizations are available to you. Please choose the CRM Organization you would like to connect to.

CRM Region	Organization Name

Figure 25: select the organization/instance

Now select Migration tab

Migration Tool for DocStore Email

SUPPORT | HELP

connection migration



Choose operation

START ...

Settings

You can edit those settings through Default Sharepoint Site in your Dynamics CRM environment.

Sharepoint Site Url	https://dotwoodcrm.sharepoint.com
Sharepoint Username	service@dotwoodcrm.nl
Entity name:	email
Created on	Enter start date ... <input type="text"/> Enter end date ... <input type="text"/>
Regarding	
Enabled for entity	<input checked="" type="checkbox"/>
Leave a copy	<input type="checkbox"/>

Check

Execute

Events

Figure 26: select migration tab select your options

You have the option to migrate either email attachments or note attachments. Email is default selected. The DocStore settings are shown as configured in the Dynamics MSD environment.

Filters can be applied to select attachments created between a certain time frame and/or regarding specific entity.

Select Check if you wish to check first how many attachments are in the system to be migrated.

Select Execute to start migration of attachments. Please note that this process may take up much time. Migration process can be stopped at any time by closing the window. The tool can be rerun for any remaining attachment at any time.

6 APPENDIX I Enable Server Side SharePoint Integration

Document Management

Which feature would you like to work with?



Document Management Settings

Select default document management settings for your organization.



SharePoint Sites

A SharePoint site is a record on a SharePoint server or in a site collection. SharePoint site records map to sites or records on a SharePoint server.



Enable Server-Based SharePoint Integration

We recommend that you enable server-based SharePoint integration. Your current SharePoint integration relies on installing a list component on a sandbox solution in SharePoint. SharePoint will no longer be supporting the sandbox solution feature.



Manage Office Graph Integration

Enable Office Graph Integration and specify default settings for your organization.



Install List Component

Install List Component



SharePoint Document Locations

A document location record maps to document libraries or location record. They can be associated with a Microsoft D



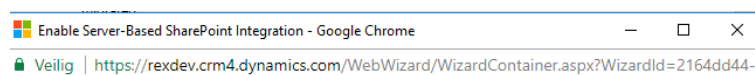
Enable OneDrive for Business

Enable users to manage files stored in OneDrive for Business



Manage Document Suggestions

Set up intelligent document suggestions.



Enable Server-Based SharePoint Integration

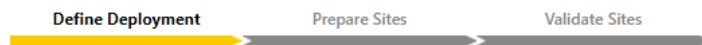
After you enable server-based SharePoint integration, you'll notice the following changes if you used the previous SharePoint integration:

- You can perform SharePoint actions in the Dynamics 365 command bar.
- SharePoint documents display in Microsoft Dynamics 365 lists.
- There's no list component installation required for the SharePoint site.

If you're already connected to SharePoint sites, all the sites must be valid for server-based SharePoint integration.



Enable Server-Based SharePoint Integration



Server-based SharePoint integration can connect to online or on-premises SharePoint sites. If multiple SharePoint sites are used, all sites must be of the same deployment type.

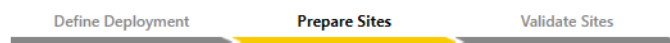
Select where your SharePoint sites are located:

- ☒ Online
- ☐ On-Premises

All SharePoint Online sites must be in the same tenant as Microsoft Dynamics 365.

[Back](#) [Next](#) [Cancel](#)

Enable Server-Based SharePoint Integration



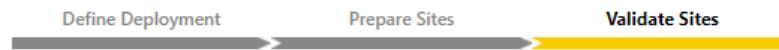
No additional setup requirements are required for connecting Dynamics 365 Online to SharePoint Online.

Enter the URL of the SharePoint site for use with server-based integration.

URL

[Back](#) [Next](#) [Cancel](#)

Enable Server-Based SharePoint Integration



Validation Status: **Complete**

Name	Absolute URL	Validation
Default Site	https://dotwoodcrm.sharepoint.com...	Valid

Validation Succeeded. Note that after you enable server-based SharePoint integration, you can't use, or enable, client-side integration, which relied on the discontinued sandbox solution.

[Back](#) [Enable](#) [Cancel](#)

Configure Server-Based SharePoint Integration

Congratulations!

Server-based SharePoint integration is now complete!

You've added a new SharePoint site URL, but you'll need to go to the [Document Management Settings Wizard](#) and enable the automatic folder generation for the site before you can view your documents in Dynamics 365.

☒ Open Document Management Settings Wizard

[Finish](#)

Configure Server-Based SharePoint Integration

Congratulations!

Server-based SharePoint integration is now complete!

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☒ Open Document Management Settings Wizard

Finish

Server-Based SharePoint Integration is enabled. Please proceed with Document Management Settings Wizard as described in 2.1.

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