

Overview

The 'SharePoint Integration' provides functionality for you to be able to automatically upload documents to a SharePoint site when they are entered as a 'Note' within CRM.

Once uploaded to SharePoint, documents can be optionally deleted from CRM in order to optimise storage. Against the original note, a line of text will be displayed instead showing the document name and recording the fact that it has been uploaded to SharePoint.

Against the uploaded documents in SharePoint, you also have the ability to be able to record against it, details of fields from the CRM record. For example, if you are entering 'Notes' against an 'Account' record in CRM, you could choose to record their 'Account No' against the document. In addition, if this value is changed within CRM, then the value will also be automatically changed within SharePoint.

You also have the option of being able to automatically delete the document from SharePoint if the 'Note' is deleted within CRM.

SharePoint Settings in CRM

In order to be able to use this functionality, some setup needs to be completed within CRM.

Go to Settings > SharePoint Settings and create a new entry. The below Page will then be displayed:

SHAREPOINT SETTING : INFORMATION

SharePoint Site

General

Name *

SharePoint Site

1

SharePoint Site Url

https://ebecsp5.sharepoint.com

2

SharePoint User

admin@ebecsp5.onmicrosoft.com

3

SharePoint Password

4

Auto Delete SP Doc On Note

Yes

5

Auto Delete Attachment On I

No

6

Owner *

Admin User

7

SharePoint Sync Entities

8

Entity Logical Name ↑	Created On
account	1/11/2017 1:20 PM
msdyn_expense	1/11/2017 1:05 PM

1	Name	In this field, you should enter in a name for the SharePoint site you are going to use to store the documents.
2	SharePoint Site URL	In this field, you should enter in the web address for the SharePoint site you are going to use to store the documents.
3	SharePoint User	In this field, you should enter in the user ID you want to use to log into the SharePoint site you are going to use to store the documents.
4	SharePoint Password	In this field, you should enter in the password you want to use to log into the SharePoint site you are going to use to store the documents.
5	Auto Delete SP Doc on Note Delete	This field is used to control whether or not you would like the document on the SharePoint site to be deleted automatically when you delete the 'Note' from within CRM.
6	Auto Delete Attachment on Upload to SharePoint	<p>This field is used to control whether or not you would like to automatically delete the attachment within CRM once it has been uploaded to SharePoint.</p> <p>If you select 'Yes' in this field, then a line of text will be automatically entered against the 'Note' once the attachment has been deleted advising you that it has been uploaded to SharePoint.</p>
7	Owner	This field will automatically display the name of the user that created that record.
8	SharePoint Sync Entities	In this section, you should create a new entry for each different CRM entity that you want to upload 'Note' attachments for.

You should then save the changes made to this Page.

Once the entry is saved, you will need to click on each of the 'SharePoint Sync Entities' and open it up. The below Page will be displayed:

SHAREPOINT SYNC ENTITY : INFORMATION

account

General

Entity Account

SharePoint Setting SharePoint Site

Owner Admin User

SharePoint Metadata Columns

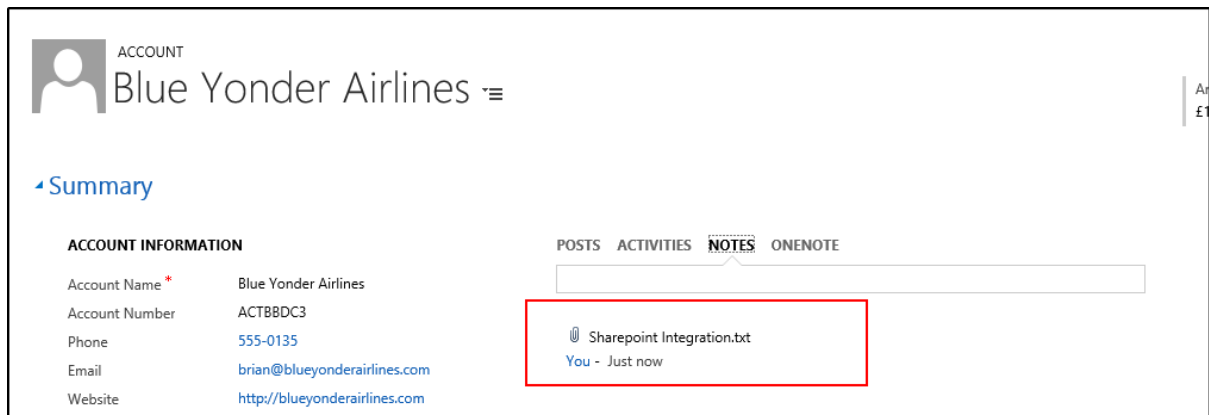
Attribute Logical Name	SharePoint Metadata Column Name	Created On
accountnumber	Account Number	1/24/2017 9:46 AM

You will not need to change most of the fields on this Page but you can choose to add in the metadata fields from the record if required by clicking on the '+' button and selecting the required field. This information will then be recorded against the documents that are uploaded to SharePoint.

Once setup, if the value in the field is changed within CRM, then the value will also be automatically changed within SharePoint.

Adding Notes to Records

Once all the setup has been completed, anytime a user enters in a 'Note' within CRM and adds an attachment, the document will be automatically uploaded into Sharepoint.



The screenshot shows the CRM interface for the 'Blue Yonder Airlines' account. The 'NOTES' tab is selected, and a new note titled 'Sharepoint Integration.txt' is being created by 'You' just now. The note is highlighted with a red box.

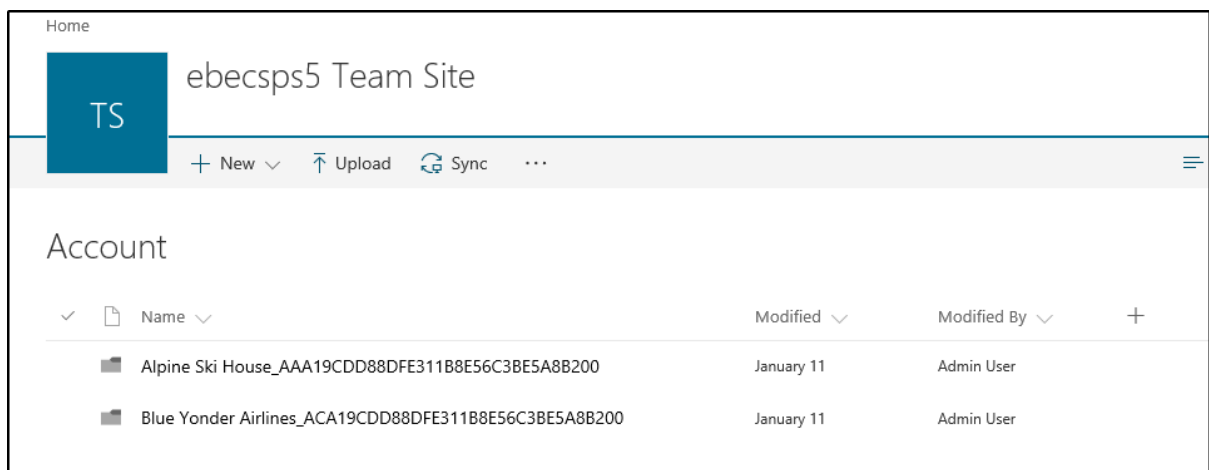
ACCOUNT INFORMATION

Field	Value
Account Name *	Blue Yonder Airlines
Account Number	ACT8BDC3
Phone	555-0135
Email	brian@blueyonderairlines.com
Website	http://blueyonderairlines.com

NOTES

Subject	Created By	Created On
Sharepoint Integration.txt	You	Just now

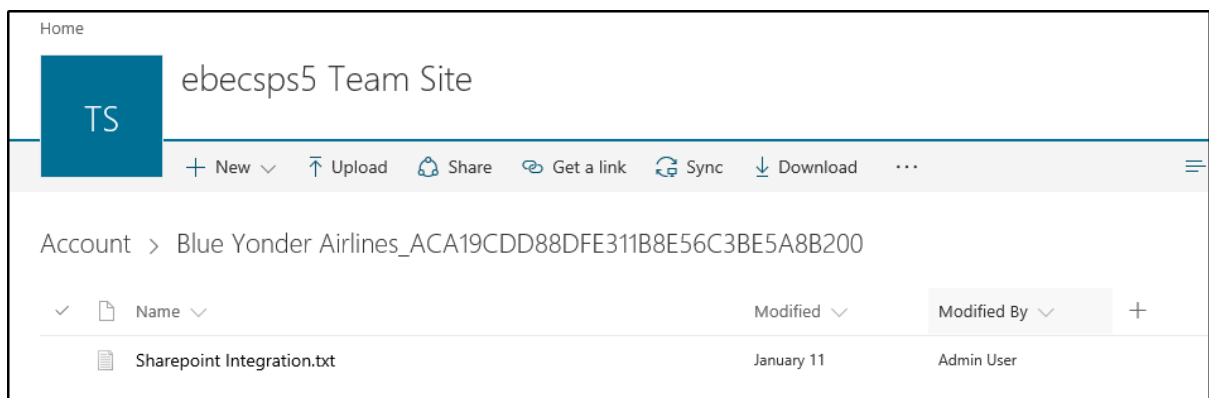
A folder will be automatically created for that record:



The screenshot shows the 'ebecsps5 Team Site' in SharePoint. The 'Account' folder is selected, and it contains two subfolders: 'Alpine Ski House_AAA19CDD88DFE311B8E56C3BE5A8B200' and 'Blue Yonder Airlines_ACA19CDD88DFE311B8E56C3BE5A8B200'.

Name	Modified	Modified By
Alpine Ski House_AAA19CDD88DFE311B8E56C3BE5A8B200	January 11	Admin User
Blue Yonder Airlines_ACA19CDD88DFE311B8E56C3BE5A8B200	January 11	Admin User

When opening the folder, the document will be automatically created within it:



The screenshot shows the 'ebecsps5 Team Site' in SharePoint. The 'Blue Yonder Airlines_ACA19CDD88DFE311B8E56C3BE5A8B200' folder is selected, and it contains a document titled 'Sharepoint Integration.txt'.

Name	Modified	Modified By
Sharepoint Integration.txt	January 11	Admin User

Against the document, if you have setup any metadata fields for synchronisation, then you can show the columns in order to see that information.

Home ebecsp5 Team Site

TS

+ New Upload Share Get a link Sync ... All Documents* ⓘ

8

Modified	Modified By	Email	Account Number	Account Rating
14 minutes ago	Admin User	vlauriant@adatum.com	AF3HN2S4	Default Value

If you have set 'Yes' in the 'Auto Delete Attachment on Upload to SharePoint', then the attachment will be replaced with a message advising you that this has happened.

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS ...

ACCOUNT Blue Yonder Airlines

Summary

ACCOUNT INFORMATION

Account Name *	Blue Yonder Airlines
Account Number	ACT88DC3
Phone	555-0135
Email	brian@blueyonderairlines.com
Website	http://blueyonderairlines.com
Parent Account	--

POSTS ACTIVITIES NOTES ONENOTE

Enter a note

**** Sharepoint Integration.txt uploaded to SharePoint ****

Admin User - Today 15:37:46