

User Guide



Document Version: 1.0

Solution Version: 365.062017.3.1



Table of Contents

Product Overview.....	3
How to Install and Activate Attachment to SharePoint Solution?	4
Configuration Settings in Attachment to SharePoint Solution	8
Attachment to SharePoint Functionality	15

Product Overview

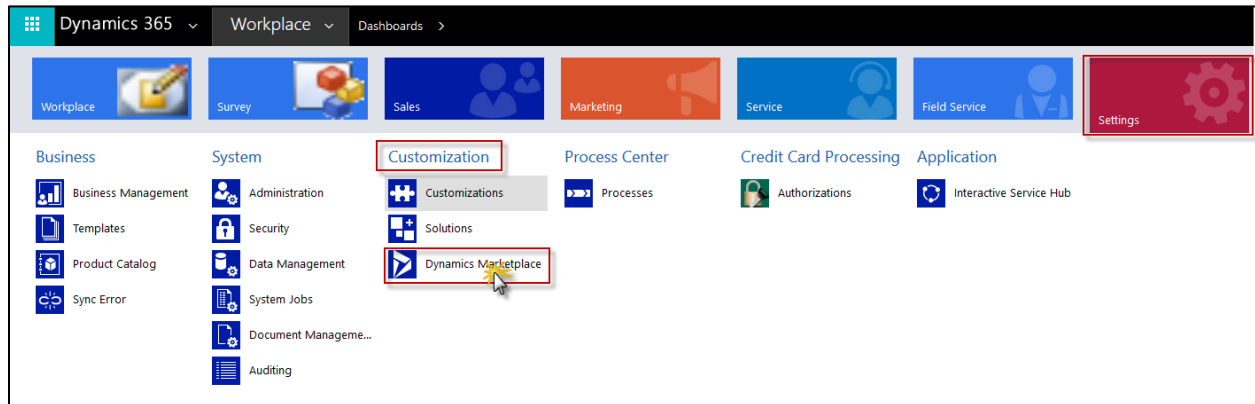
Attachment to SharePoint is a Microsoft Dynamics 365/CRM add-on solution that allows you to free up your CRM database by moving attachments to Notes and Emails to SharePoint and replace them with SharePoint path location. So, at any point of time if you need any attachments you can simply click on the associated SharePoint path location.

Additionally, the drag and drop files feature helps you to add attachments instantly saving lots of your time. All files can be seamlessly tracked in the Attachment to SharePoint Grid.

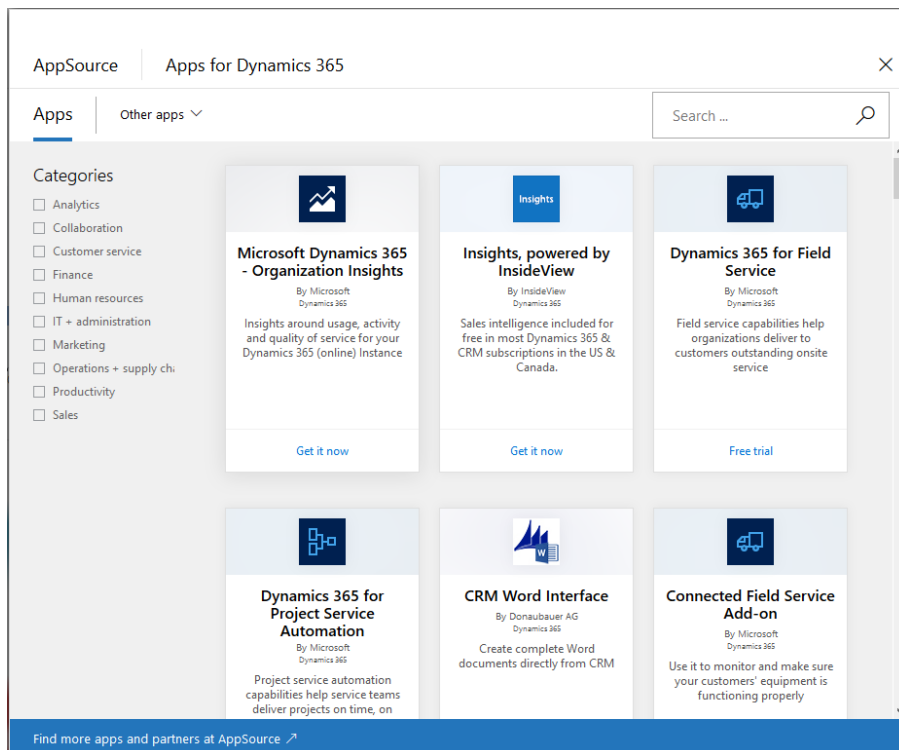
How to Install and Activate Attachment to SharePoint Solution?

To install MTC's Attachment to SharePoint solution from Microsoft AppSource on your D365 instance, please follow the below steps.

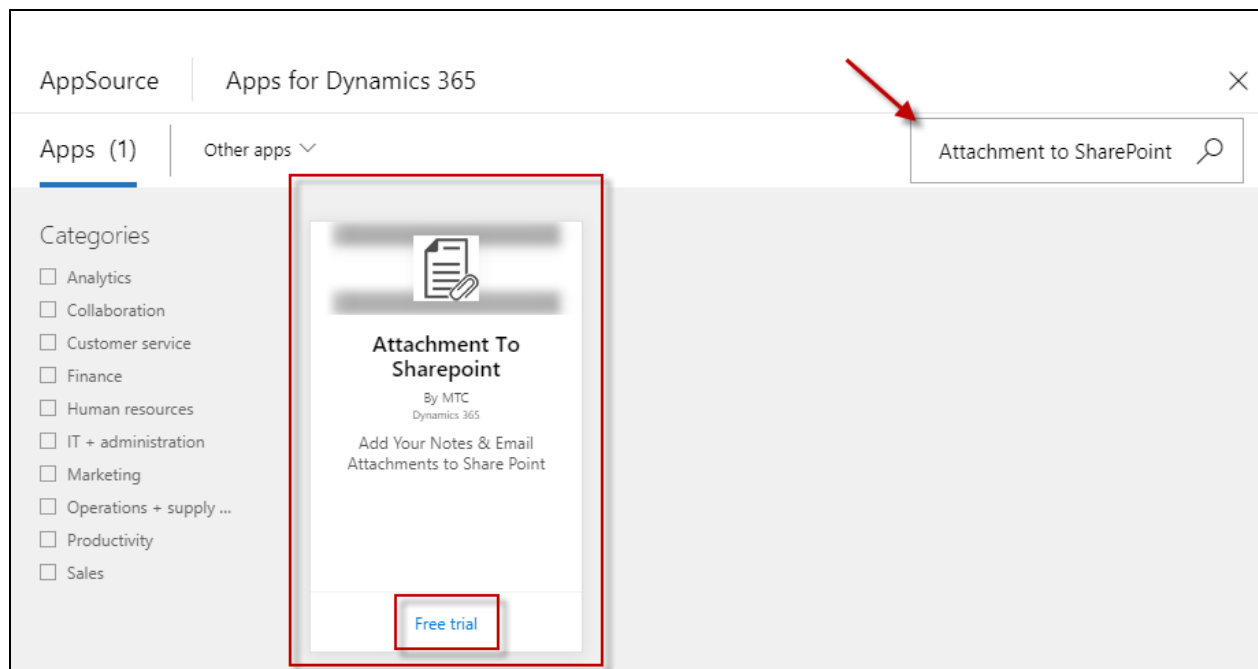
1. From your D365 instance, go to **Settings** and click on **Dynamics Marketplace** under **Customization**.



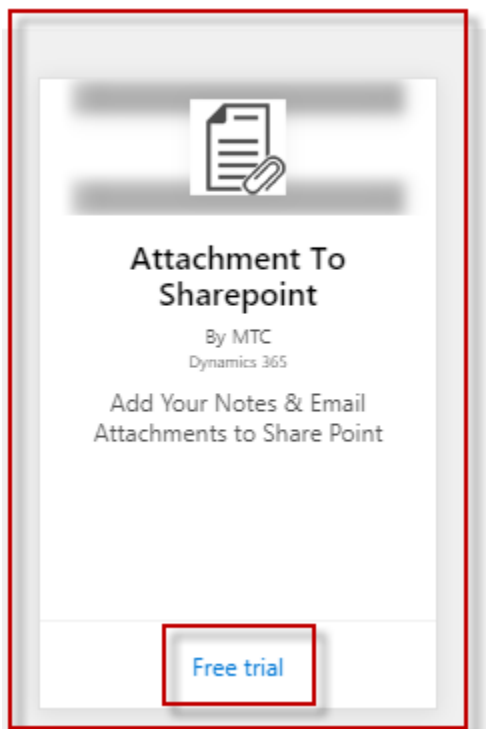
2. Apps for Dynamics 365 window box pops up as shown below.



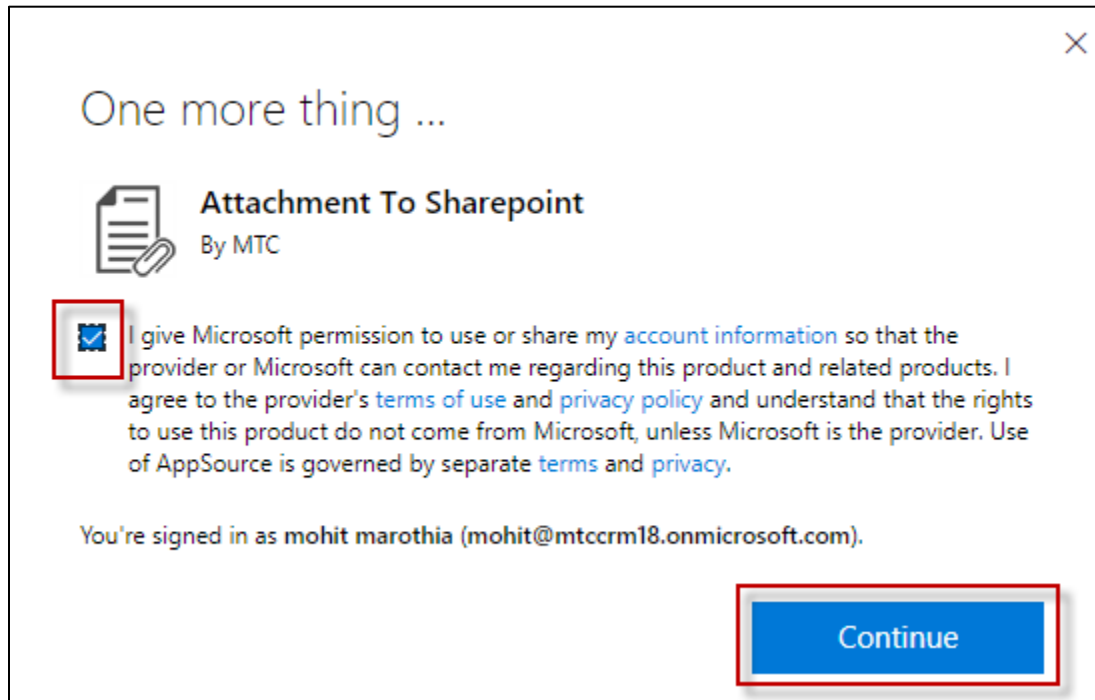
3. Enter MTC's Attachment to SharePoint product name in the search box and click on the SEARCH icon.



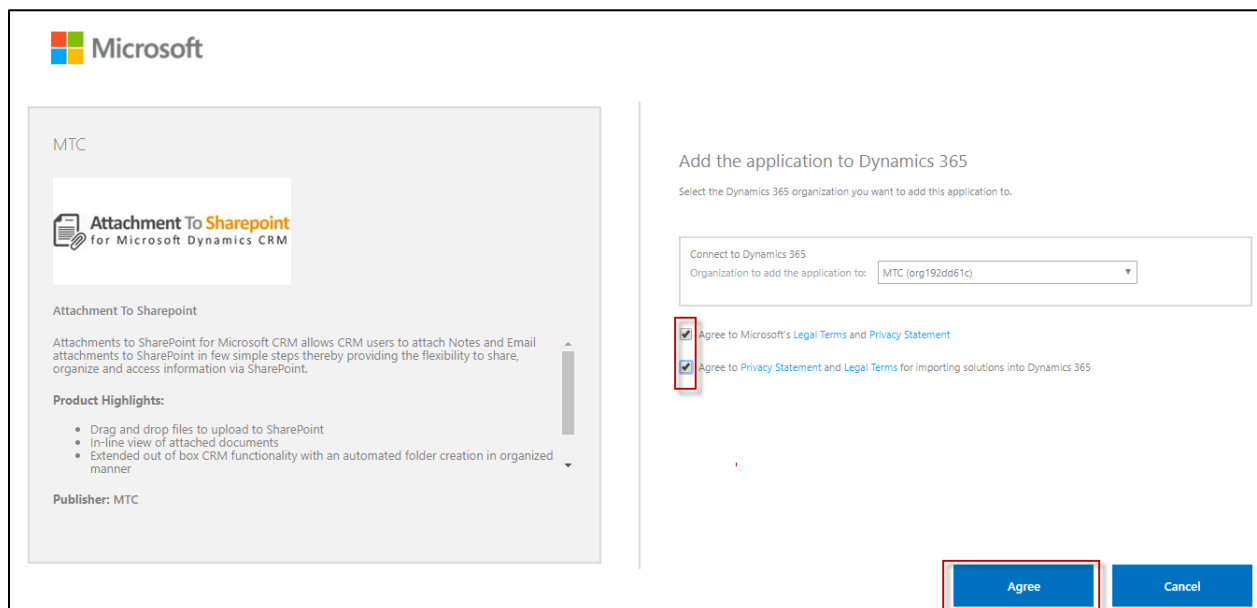
4. All relevant search results would be displayed.
5. Choose **Attachment to SharePoint by MTC** and click on **Free trial** to initiate a 15 day free product evaluation.



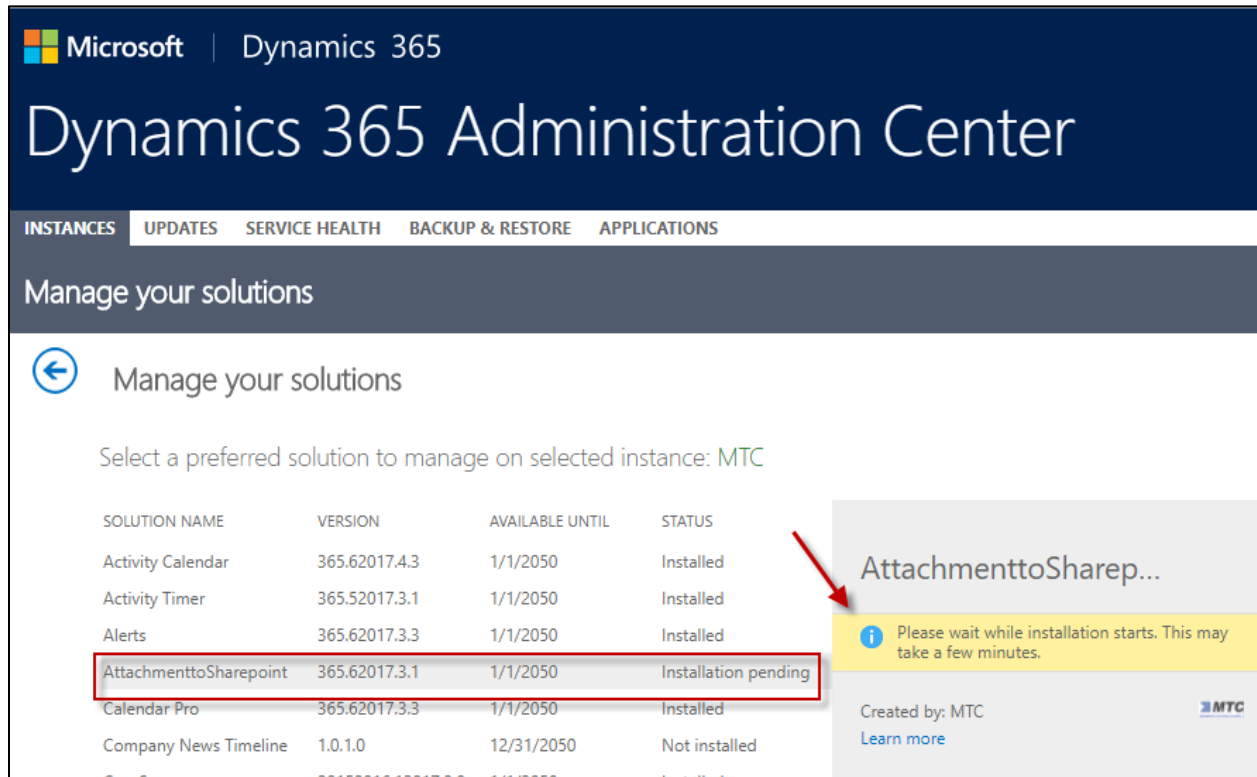
6. A Microsoft permission window pops up as shown below. Read and check the box and then click on Continue button.



7. Add the application to Dynamics 365 page opens in another tab along with the product details. The page automatically picks the Organization Name of your D365 instance from which you are trying to install the product. Check both the boxes as shown below and click on Agree button.



8. You will be directed to Dynamics 365 Administration Center where you can track the product installation status.



Microsoft | Dynamics 365

Dynamics 365 Administration Center

INSTANCES | UPDATES | SERVICE HEALTH | BACKUP & RESTORE | APPLICATIONS

Manage your solutions

← Manage your solutions

Select a preferred solution to manage on selected instance: MTC

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Activity Calendar	365.62017.4.3	1/1/2050	Installed
Activity Timer	365.52017.3.1	1/1/2050	Installed
Alerts	365.62017.3.3	1/1/2050	Installed
AttachmenttoSharepoint	365.62017.3.1	1/1/2050	Installation pending
Calendar Pro	365.62017.3.3	1/1/2050	Installed
Company News Timeline	1.0.1.0	12/31/2050	Not installed

AttachmenttoSharep...

Please wait while installation starts. This may take a few minutes.

Created by: MTC

[Learn more](#)

9. After the status reads **Installed**, go back to your D365 Solutions Page under Settings and activate trial license following the instructions listed in this URL:

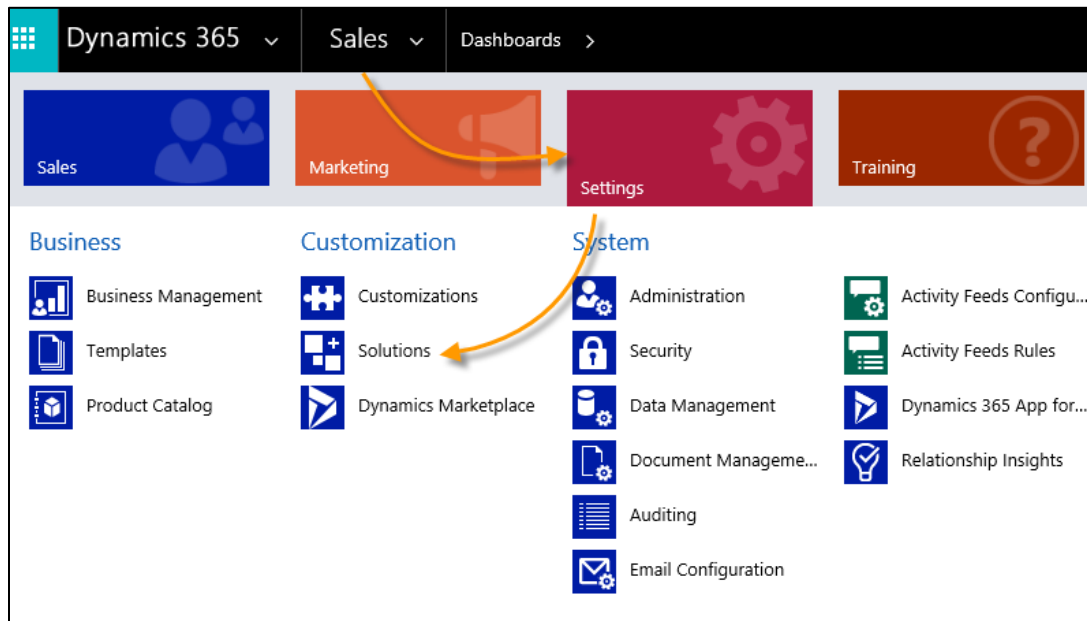
<https://www.mtccrm.com/PLI>

Alternatively, for installing MTC Products from Microsoft AppSource - [click here](#) and follow the above process listed from step 5.

Configuration Settings in Attachment to SharePoint Solution

To start using Attachment to SharePoint solution, you are required to do some basic configuration settings inside your D365 as explained below.

1. Go to **Settings** → **Solutions**.



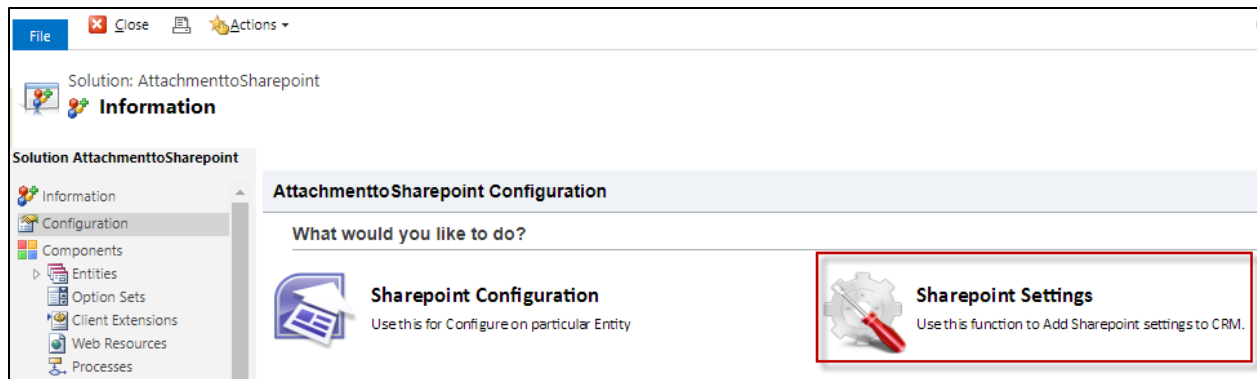
2. All the solutions installed in your D365 will show up. Click on Attachment to SharePoint Solution.

All Solutions ▾

New | X Delete | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations | Export Translations | Publish All Customizations

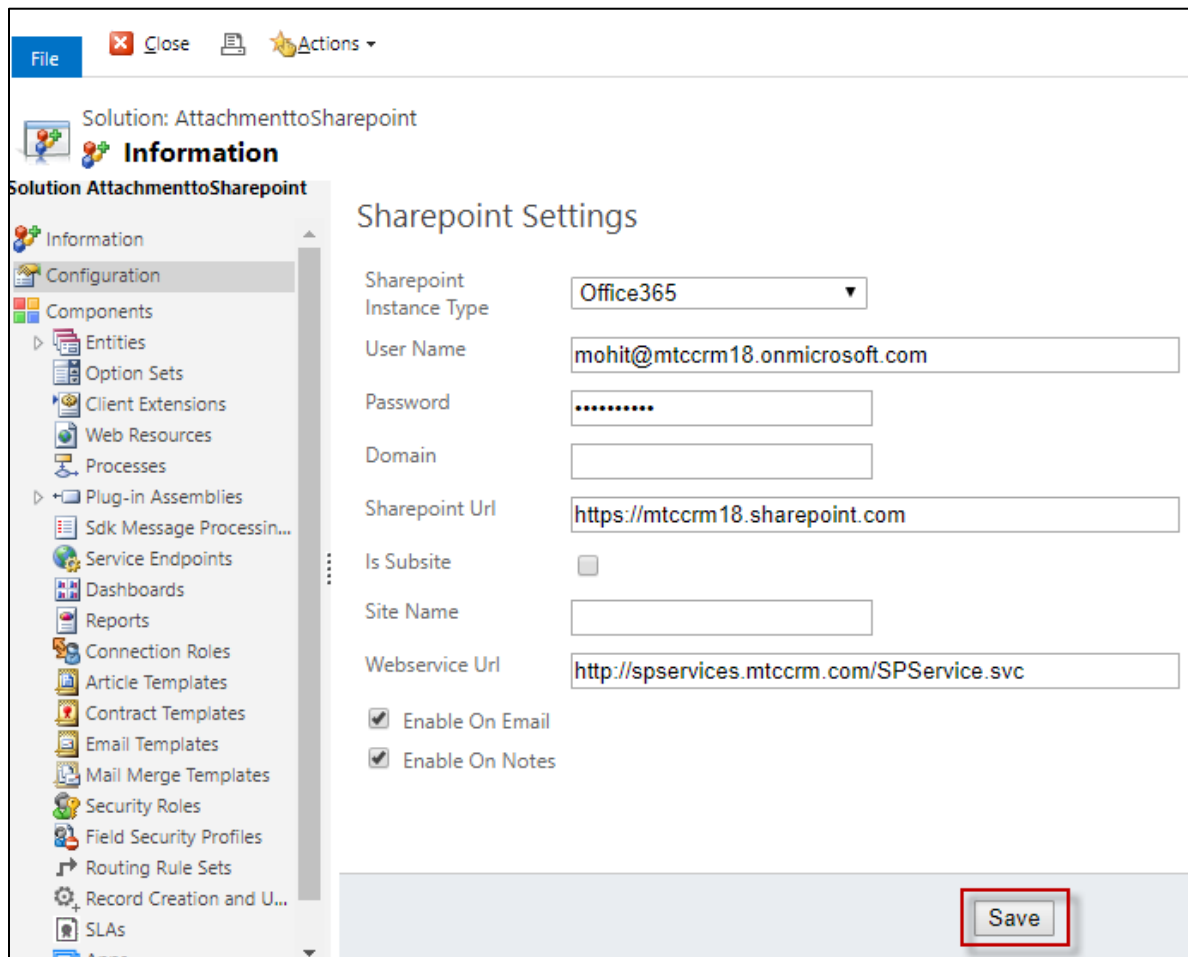
Name	Display Name	Version	Installed On ↓	Package Type	Publisher	Description
dsautonumber	Dotsquares Auto Number ...	1.0	8/14/2017	Managed	Dotsquares Ltd.	This solution was created by the Dotsquares in the Micros...
GroupCalendar	Group Calendar	365.062017....	8/10/2017	Managed	Management Technology Consulting	MTC's Group Calendar Solution
MTC_AutoNumber	MTC AutoNumber	365.062017....	8/9/2017	Managed	Management Technology Consulting	Auto numbering facility for any of the Entities like Accoun...
DocumentSignature	DocumentSignature	201516.062...	8/9/2017	Managed	Management Technology Consultanc...	Document Sign for Microsoft Dynamics CRM with service...
EPDF	E-PDF	365.072017....	8/9/2017	Managed	Management Technology Consultanc...	This CRM add-in to Microsoft's Dynamics CRM 2011 and ...
MultipleFileAttachmentUp...	MultipleFileAttachmentUp...	365.062017....	8/9/2017	Managed	Management Technology Consulting	
CalendarUIPro	Calendar Pro	365.062017....	8/9/2017	Managed	Management Technology Consulting	It Displays Records In The Calendar Format And We Have ...
MTC_CreditCardProcessing...	MTC Credit Card Processing...	2016.12201...	8/9/2017	Managed	Management Technology Consultanc...	MTC's Solution for Credit Card Processing settings.
AttachmentToSharepoint	AttachmentToSharepoint	365.062017....	8/9/2017	Managed	Management Technology Consulting	
ActivityTimer	Activity Timer	365.052017....	8/9/2017	Managed	Management Technology Consultanc...	
ActivityCalendar	Activity Calendar	365.062017....	8/9/2017	Managed	Management Technology Consulting	
Alerts	Alerts	365.062017....	8/9/2017	Managed	Management Technology Consulting	MTC's Solution for Alerts

3. Attachment to SharePoint Configuration window pops up. Click on **SharePoint Settings**.

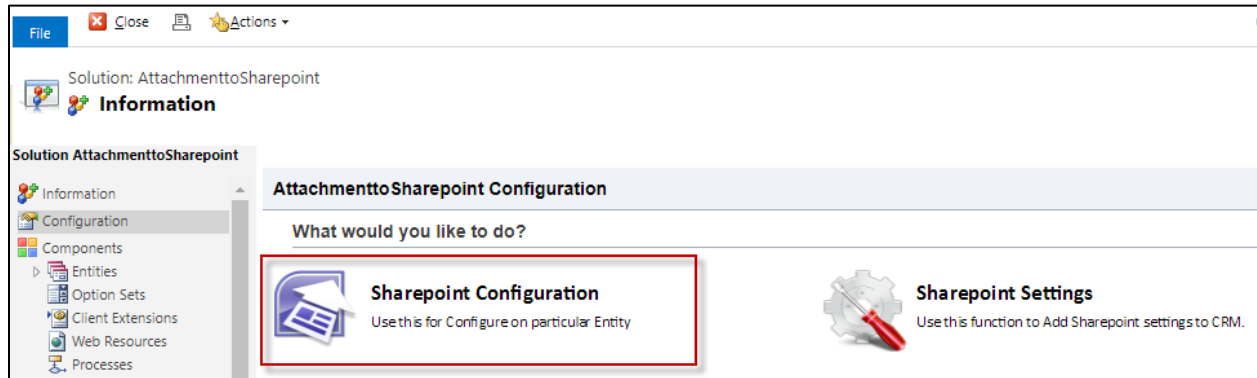


4. You will be directed to SharePoint Settings page. Fill in the fields such as SharePoint Instance Type, User Name, Password, Domain, SharePoint URL, Site Name (if any), Webservice URL. Click on check boxes Enable on Email and Enable on Notes. Click on **Save**.

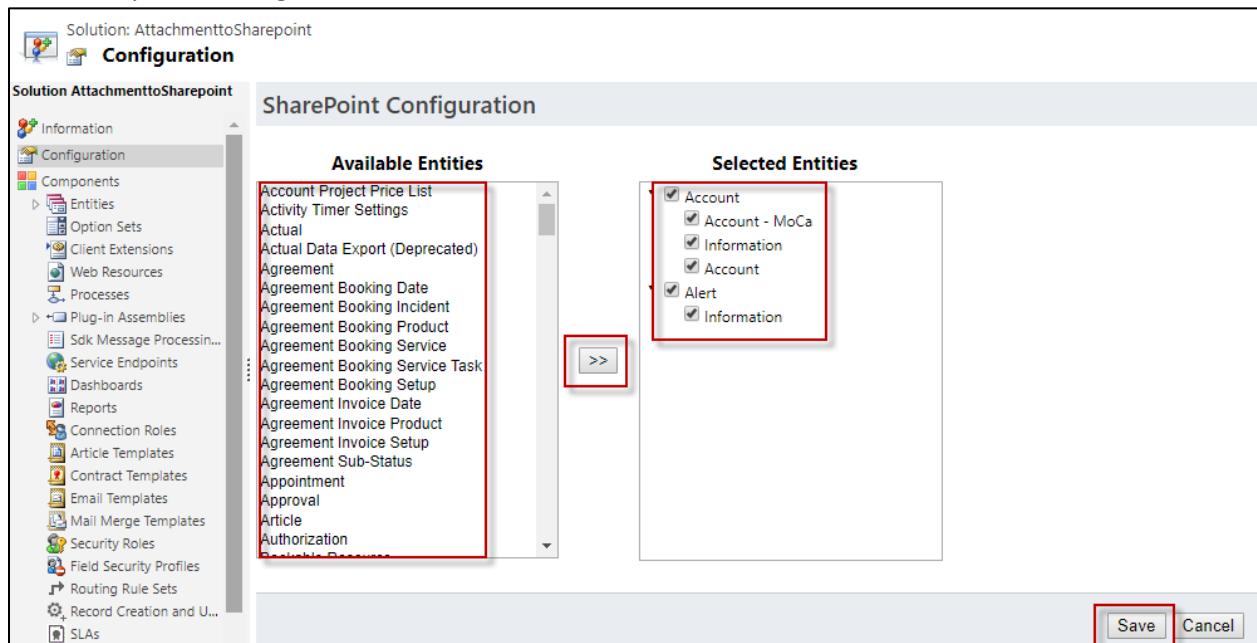
*Note: Click on the checkbox "Is Subsite" only when the site has a subsite in which you create entity folders and move the attachments. Mention the subsite in the **Site Name** field and the same has be updated in the SharePoint URL provided.*



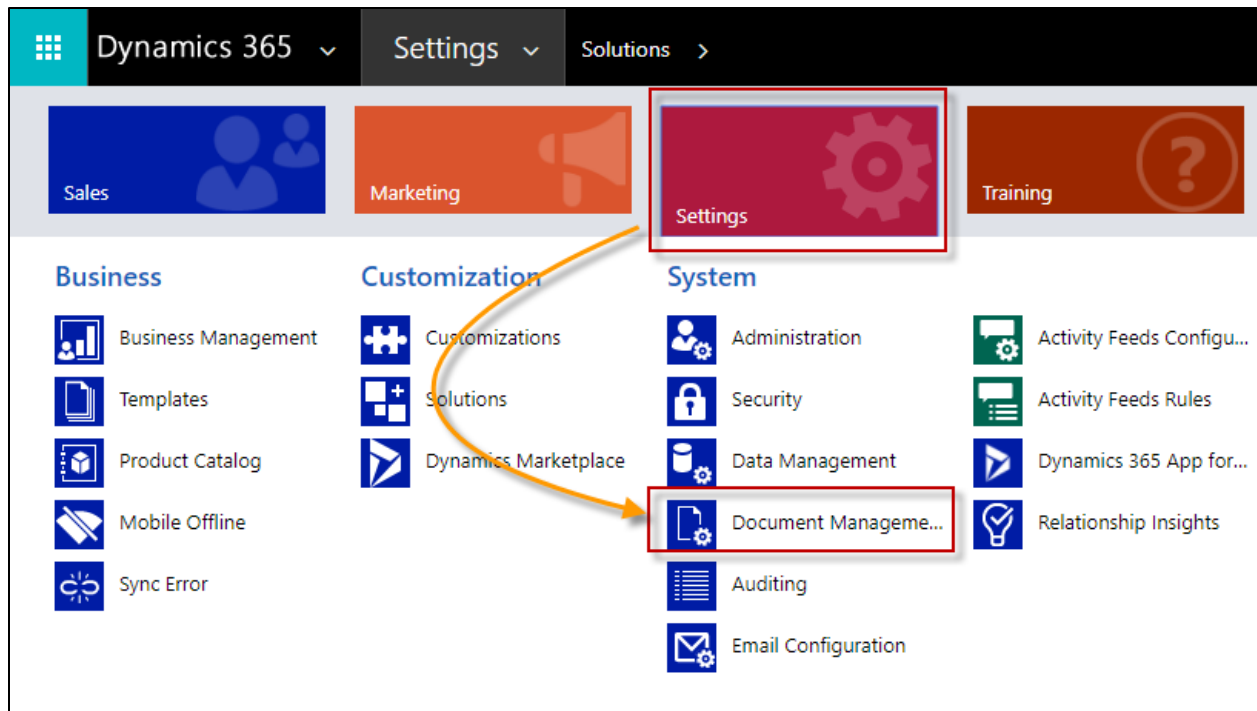
5. Your SharePoint settings will be saved.
6. Now go back to the configuration page and click on **SharePoint Configuration**.



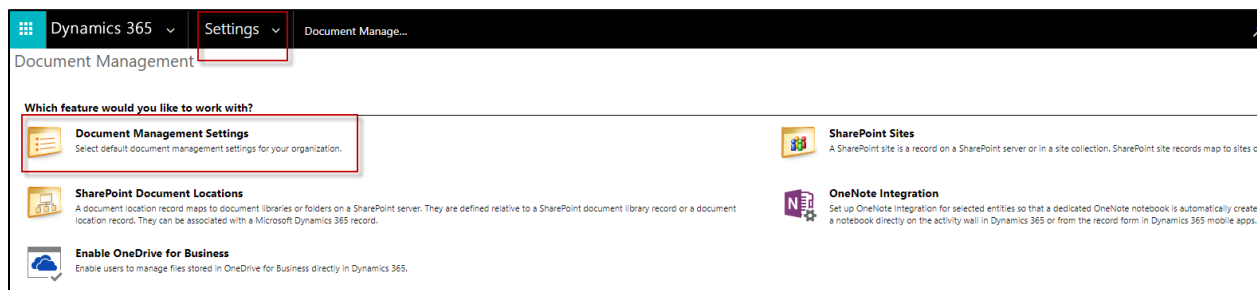
7. You will be directed to SharePoint Configuration page. On the left hand pane, you will see the list of all available entities on which you can configure Attachment to SharePoint solution. On the right hand pane, you can see all the selected entities on which Attachment to SharePoint solution has already been configured.



8. Now go to Settings and click on **Document Management** under **System** menu.



9. Document Management window opens up. Now click on **Document Management Settings**.



10. Document Management Settings window pops up. You need to select the entities listed so that Document Management will be enabled on these entities. Also, a **SharePoint site** has to be entered which will be used as default site for document management. Finally, click on **Next button**.

Document Management Settings [Help](#)

Select entities
Document management will be enabled on the selected entities.

<input type="checkbox"/>	Entities
<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	Account Project Price List
<input type="checkbox"/>	Activity Calendar Settings
<input type="checkbox"/>	Activity Timer Settings
<input checked="" type="checkbox"/>	Actual
<input type="checkbox"/>	Actual Data Export (Deprecated)
<input checked="" type="checkbox"/>	Address
<input type="checkbox"/>	Advanced Similarity Rule
<input checked="" type="checkbox"/>	Agreement
<input checked="" type="checkbox"/>	Agreement Booking Date
<input type="checkbox"/>	...


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

SharePoint Site:

11. The SharePoint URL validation happens. Click on checkbox that says Based on entity and select the entity for creating a folder structure. Click on **Next** to continue.

Document Management Settings

[Help](#)

 <https://mtccrm18.sharepoint.com> is a valid URL.

Select folder structure

To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.

☒ **Based on entity** Account ▼

Automatically create folders

Folders will be automatically created on the SharePoint site.

☒ **Automatically create folder**

Back Next Cancel

12. Document libraries will then be created at the mentioned SharePoint URL path. You can also see the Document Library Creation Status. Click on Finish button.

Document Management Settings Help

Document Library Creation Status

To be created: 41

Newly created: 0

Failed: 0

Already existing: 41

Creation Details

Entities	Document Library	Status	Failure Reason
Account	https://mtccrm18.sharepoint.com/a...	Already e...	
Actual	https://mtccrm18.sharepoint.com/...	Already e...	
Address	https://mtccrm18.sharepoint.com/c...	Already e...	
Agreement	https://mtccrm18.sharepoint.com/...	Already e...	
Agreement B...	https://mtccrm18.sharepoint.com/...	Already e...	
Agreement B...	https://mtccrm18.sharepoint.com/...	Already e...	
Agreement In...	https://mtccrm18.sharepoint.com/...	Already e...	
Agreement In...	https://mtccrm18.sharepoint.com/...	Already e...	
Article	https://mtccrm18.sharepoint.com/k...	Already e...	
Booking Time...	https://mtccrm18.sharepoint.com/...	Already e...	

Back
Finish
Cancel

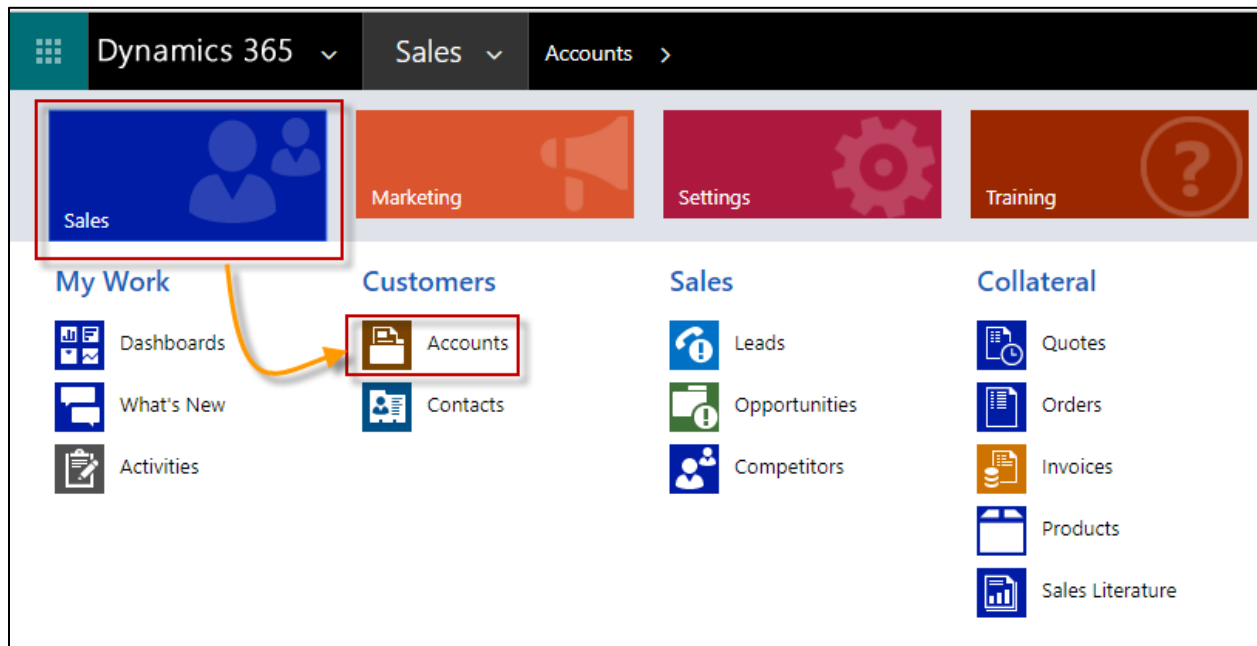
https://mtccrm18.sharepoint.com/account

13. You can now go ahead and start using the Attachment to SharePoint functionality.

Attachment to SharePoint Functionality

Considering that all the recommended Attachment to SharePoint configuration settings are being done, Let us check Attachment to SharePoint Functionality on Account entity

1. Go to Sales → Accounts.



2. From the list of Accounts available in your D365, select and open the Account on which you would like to perform Attachment to SharePoint functionality.

Dynamics 365 ▾ **Sales** ▾ **Accounts** >

NEWALERT VIEWALERT + NEW EDIT ✓ ACTIVATE DEACTIVATE DELETE MERGE GEO CODE ...


➔ **Active Accounts** ▾

✓	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
	A. Datum	+86-23-4444-01...	Guangzhou	Vincent Lauriant	vlauriant@adatum.com
	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
	Active Transport Inc.	465-555-0156	Bellevue	Roland Roybal	someone@example.com
	Adventure Works	+27-264-1234567	Johannesburg	Adrian Dumitrascu	Adrian@adventure-works...
	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
	Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook	Cathan@alpineskihouse.co...
	Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
	Alpine Ski Shop	138-555-0118	Seattle	Romeo Gooding	
✓	Bellows College	425-485-7548	Bothell		
	Bellows Hospital	425-644-7824	Seattle		
	Best For You Organics Company	425-556-9533	Bellevue		

3. You will notice SharePoint tab as shown below.

Dynamics 365 ▾ **Sales** ▾ **Accounts** > **Bellows College** >

NEWALERT VIEWALERT + NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE ...

 **ACCOUNT**
Bellows College ≡

SharePoint

Document Associated Grid ▾

+ NEW ↑ UPLOAD DOCUMENT LOCATION ADD LOCATION OPEN LOCATION EDIT LOCATION

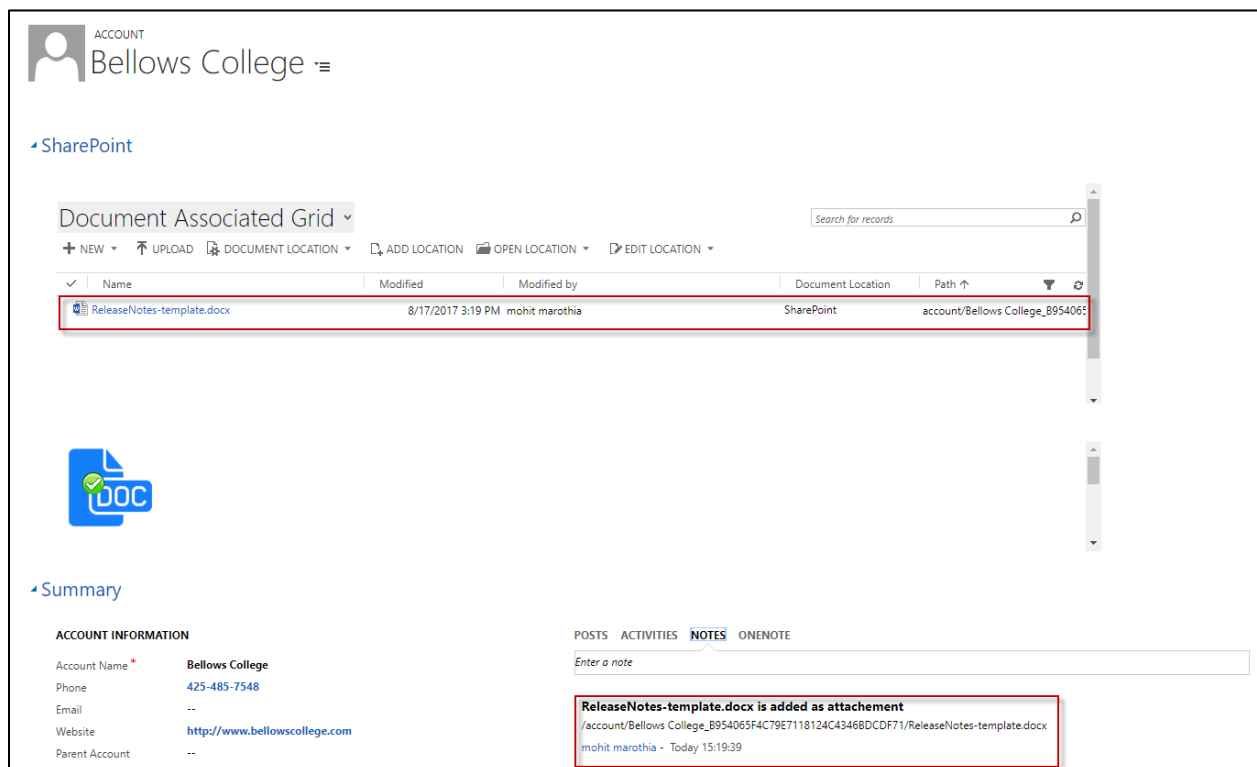
Name	Modified	Modified by	Document Location	Path ↑
No documents found at this location.				

Drop files here to upload

4. Drag and drop files in the “Drop files here to upload” area.

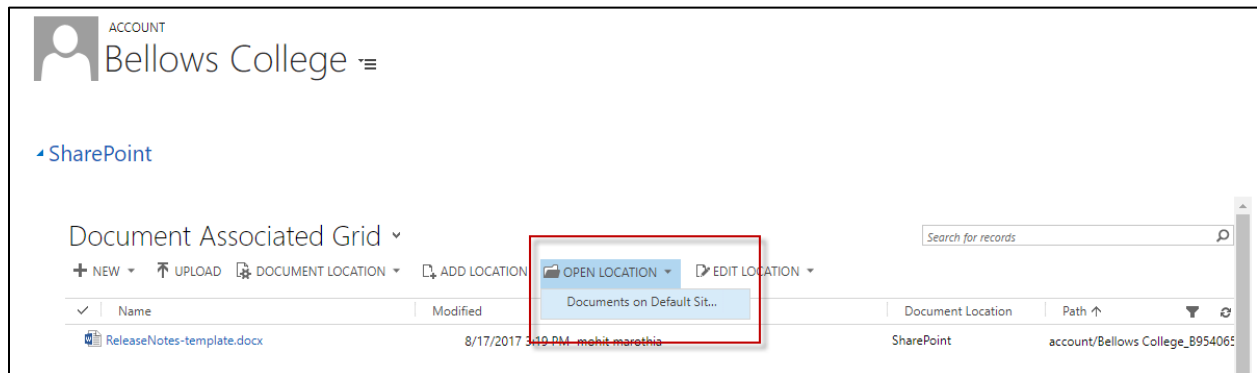


5. The files will be uploaded instantaneously. The same will be reflected in SharePoint Document Associated Grid and under NOTES as shown below.

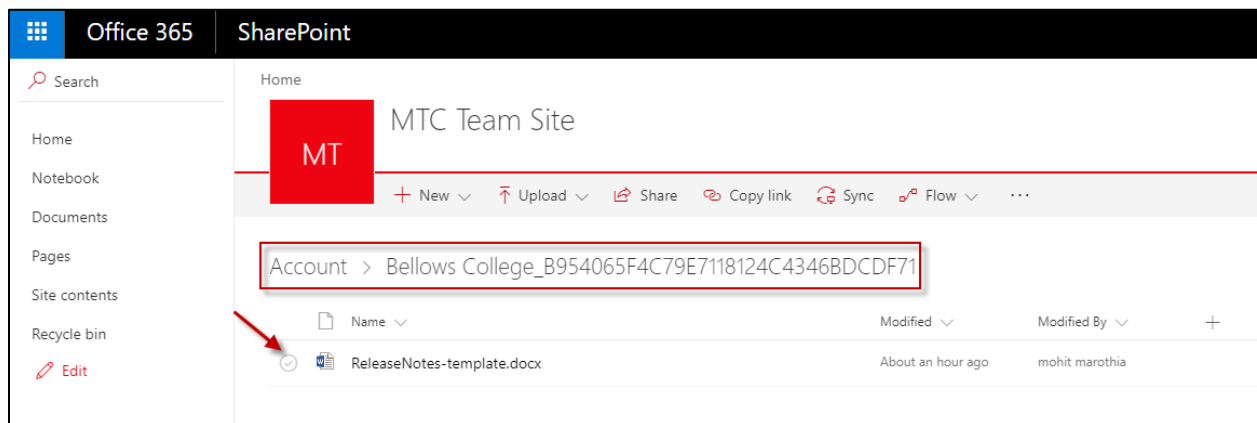


6. Notice that the attachment will no longer be seen as it would now be replaced with the SharePoint path location where it was moved.

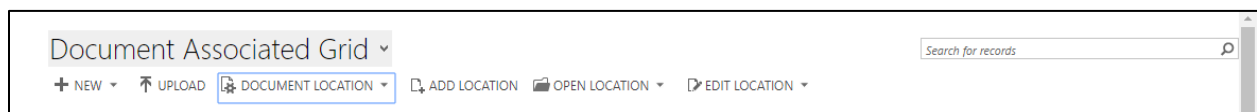
7. At any point of time you can visit the SharePoint path location of the attachments by simply clicking on OPEN LOCATION after selecting an attachment.



8. You will be redirected to SharePoint path location where you can see your attachments.



9. You can also perform the other functions using the different buttons on SharePoint tab.



- **+NEW** – Add Word, Excel, PowerPoint and One Note documents.
 - **UPLOAD** – Directly upload attachments using this button.
 - **DOCUMENT LOCATION** – Get path location of various files stored on different site locations.
 - **ADD LOCATION** – Add the site location where you want to store a particular set of documents.
 - **OPEN LOCATION** – Navigate to the SharePoint path location of that particular document using this button.
 - **EDIT LOCATION** – Edit the site location.
10. Note that all attachments to Notes and Email will be automatically uploaded to SharePoint path location and the same could be tracked on SharePoint tab (Only if you enabled it in the SharePoint Settings).

Therefore, it is a two-way:

- You can add files to “Drag files to upload” area and see them reflected under SharePoint tab and NOTES.
- You can add files to Notes and Email and see the same reflected under SharePoint tab and SharePoint path location.

POSTS
ACTIVITIES
NOTES
ONENOTE

Enter a note

MTC Product Security Roles Matrix

List of security roles for each MTC product. /account/Bellows College_B954065F4C79E7118124C4346BDCDF71/MTC Products Security Roles Matrix_New.xlsx

mohit marothia - Today 13:03:06

AppSource

Video Wrapper/account/Bellows College_B954065F4C79E7118124C4346BDCDF71/Alerts_Wrapper.png

mohit marothia - 18/08/2017 11:15:53

ReleaseNotes-template.docx is added as attachment

/account/Bellows College_B954065F4C79E7118124C4346BDCDF71/ReleaseNotes-template.docx

mohit marothia - 17/08/2017 15:19:39

SharePoint

Document Associated Grid

+ NEW
UPLOAD
ADD LOCATION

Name	Modified	Modified by	Document Location	Path
Alerts_Wrapper.png	8/18/2017 11:15 AM	mohit marothia	SharePoint	account/Bellows College_B954065
MTC Products Security Roles Matrix_New.xlsx	8/21/2017 1:03 PM	mohit marothia	SharePoint	account/Bellows College_B954065
ReleaseNotes-template.docx	8/17/2017 3:19 PM	mohit marothia	SharePoint	account/Bellows College_B954065