

AutoSave to SharePoint IP Overview

The 'AutoSave to SharePoint IP' provides functionality for you to be able to automatically upload documents to a SharePoint site when they are entered as a 'Note' within Dynamics 365.

Once uploaded to SharePoint, documents can be optionally deleted from Dynamics 365 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 Dynamics 365 record. For example, if you are entering 'Notes' against an 'Account' record in Dynamics 365, you could choose to record their 'Account No' against the document. In addition, if this value is changed within Dynamics 365, 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 Dynamics 365.

SharePoint Settings in Dynamics 365

In order to be able to use this functionality, the following needs to be configured within Dynamics 365.

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

The screenshot displays the 'SharePoint Site' configuration page in Dynamics 365. The page is divided into two main sections: 'General' and 'Related'. The 'General' section contains several settings, each with a red numbered callout (1-8):

- 1** Name: SharePoint Site
- 2** SharePoint Site Url: [Redacted]
- 3** SharePoint User: [Redacted]
- 4** SharePoint Password: [Redacted]
- 5** Auto Delete SP Doc On Note, Email and Appt Delete: Yes
- 6** Auto Delete Attachment On Upload To SP: No
- 7** Sync Email & Appointment Attachments: Yes
- 8** Owner: Pat Paxton

The 'Related' section shows a table of 'SharePoint Sync Entities' with 9 entities. The table has columns for 'Entity Logical Name' and 'Created On':

Entity Logical Name	Created On
account	26/09/2019 16:18
ebecssvy_conductedsurvey	06/06/2019 17:40

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 DYNAMICS 365.
6	Auto Delete Attachment on Upload to SharePoint	This field is used to control whether or not you would like to automatically delete the attachment within Dynamics 365 once it has been uploaded to SharePoint. 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.
7	Sync Email & Appointment Attachments	This field is used to control whether or not you would like to automatically sync Email & Appointment attachments to SharePoint.
8	Owner	This field will automatically display the name of the user that created that record.
9	SharePoint Sync Entities	In this section, you should create a new entry for each different Dynamics S 365 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:

The screenshot shows the Dynamics 365 user interface. At the top, the navigation bar includes 'Dynamics 365', 'Auto Save to SharePoint', and 'account'. Below the navigation bar is a ribbon with options: '+ New', 'Deactivate', 'Delete', 'Refresh', and 'Assign'. The main content area displays the configuration for a 'SHAREPOINT SYNC ENTITY' named 'account'. There are two tabs: 'General' (selected) and 'Related'. Under the 'General' tab, there are three fields: 'Entity' with a dropdown menu set to 'Account', 'SharePoint Setting' with a red asterisk and a link to 'Field Service SharePoint AutoSave to Sharepoi...', and 'Owner' with a red asterisk and a user icon for 'Pat Paxton'. On the left side, there is a navigation pane with options: 'Home', 'Recent', 'Pinned', and 'Configuration'. Under 'Configuration', there are three items: 'SharePoint Settings', 'SharePoint Sync Entit...', and 'SharePoint Email Att...'. The 'SharePoint Sync Entit...' item is currently selected.

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.

SHAREPOINT SYNC ENTITY
account

General Related

Entity Account

SharePoint Setting * [SharePoint Site](#)

Owner * Pat Paxton

Attribute Logical Name	SharePoint Metadata Column Name	Created On
accountclassificationcode	Classification	26/09/2019 16:18
accountnumber	Account Number	26/09/2019 16:18
primarycontactid	Primary Contact	26/09/2019 16:18

Once setup, if the value in the field is changed within Dynamics 365, 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 Dynamics 365 and adds an attachment, the document will be automatically uploaded into SharePoint.

Account: Account
eBECS Limited

Annual Revenue --- Number of Employees ---

Summary Details Related

ACCOUNT INFORMATION

Account Name * eBECS Limited

Account Number 212-4747

Phone 08455441441

Fax 08455441441

Website <https://www.ebes.com>

Parent Account ---

Timeline

Enter a note...

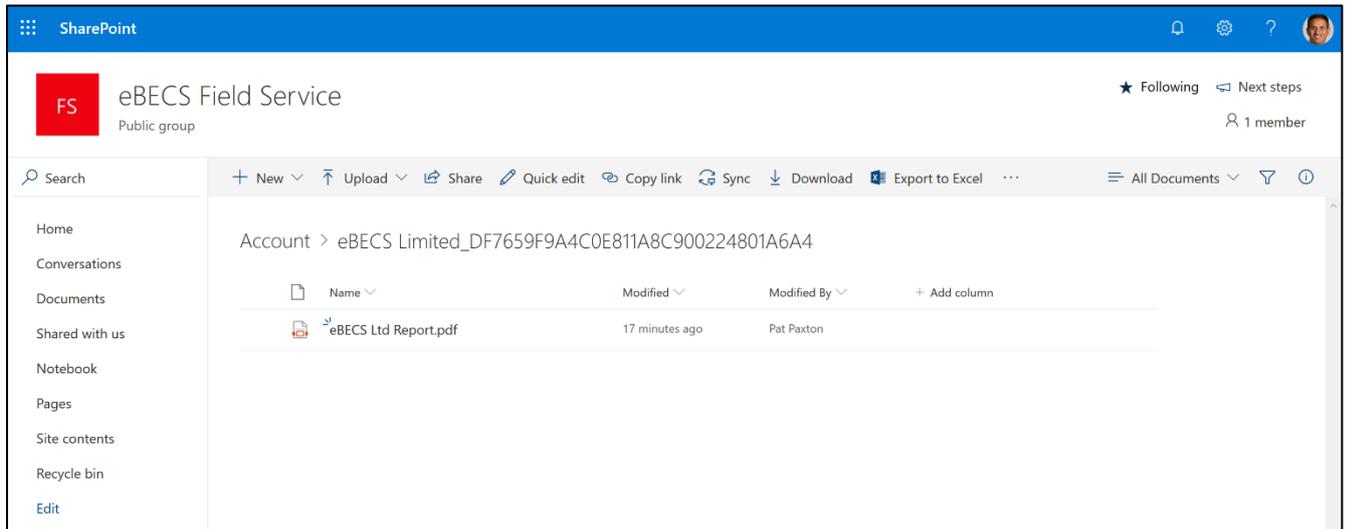
TODAY

Note modified by Pat Paxton - 14 Minutes ago

[eBECS Ltd Report.pdf](#)

Delete Edit note

A SharePoint folder will be automatically created for the Account record with the document that was automatically uploaded to SharePoint:



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

The screenshot shows a SharePoint document library interface for 'ebecps5 Team Site'. The top navigation bar includes 'Home', 'Share', and a 'TS' icon. Below the navigation bar, there are action buttons: '+ New', 'Upload', 'Share', 'Get a link', 'Sync', and 'All Documents*'. A table is displayed below, with a red box highlighting the 'Email' and 'Account Number' columns. The table has the following data:

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