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Manual Solution Installation

For manual Dynamics Documents and Activities Preview solution installation, Go to Settings -> Solutions -> Press Import button.

SharePoint Integration

To use the solution, you need to have active SharePoint license.

SharePoint License

1. To check user’s SharePoint license, go to https://office.com and Sign In.
2. Go to Admin Center
3. Open **Users -> Active Users** and select a User

4. Click **Edit** next to **Product Licenses**

5. Ensure that SharePoint license is active for the user
6. Go back to office Home Page at https://Office.com and open your SharePoint site

7. **Copy** the SharePoint site **address** – you will need it for Dynamics 365 to the Sharepoint connection.

**SharePoint configuration**

*If you already have configured Dynamics 365 to SharePoint connection – you may skip these steps.*

1. Go to **Settings -> Documents Management**

2. Open **SharePoint Sites**
3. Click **New** to add SharePoint site. Popup window will be opened (popup windows must be allowed in your browser).

4. Type in any name to the name filed

5. Copy SharePoint site name into **Absolute URL** filed

6. Click **Save and Close**

7. To **Validate** SharePoint site – select a site and click **Validate** on the ribbon
8. Go back to **Settings -> Documents Management**

9. Click on **Documents Management Settings** and select entities for which you want to enable Documents Management and proceed – the system will create folders for these entities on the SharePoint site.

*Currently Dynamica Documents and Activities Preview solution works on the following entities: account, contact, lead, opportunity, invoice, case, order, quote*
Solution Configuration

When Dynamics 365 and SharePoint connection is properly configurated – you have to provide the Dynamics Documents and Activities Preview solution with SharePoint site URL and credentials.

To do this:

1. Go to Settings -> Solutions
2. Find Dynamics Documents and Activities Preview solution in the solutions list and open its configuration page (click on solution name or double-click on empty area in the solution row).
3. Enter SharePoint site URL and credentials into the configuration form and click Save

Note: it may take some time to process the request. The window may become unresponsive for this period of time. Please wait for please wait until the operation is completed (the page will be updated).

Now the configuration is done and the application is ready to use.
How to Use the Solution

To launch the **Dynamica Documents and Activities Preview** solution:

1. Open a record you want to preview Documents and Activities for.

   *Currently Dynamica Documents and Activities Preview solution supports the following entities: account, contact, lead, opportunity, invoice, case, order, quote*

2. Find **Vault** button on the ribbon to launch the solution. The solution will be opened in a new window.
3. The Solution requires some time to synchronize with SharePoint and show up documents. Until then – documents section may be empty.

4. On the upper-right corner, you can see a notification that you have to be logged in your SharePoint in order to preview documents. It is just a reminder. If you are logged in SharePoint – just ignore and close it.

5. When synchronization is finished – documents and activities related to this record will show up in the documents section.

6. Click on the document or activity you want to preview – the preview will be shown in the preview section.
7. There are several options available through the solution menu including: **Download a Copy** of the Document and **Print to PDF**

8. For Office documents (Word, Excel etc) there is also a **Full-screen** option available: it opens a document in a browser through Office on-line
Documents management

To manage documents of the record:

1. Click on the arrow to the right of the record name in the navigation menu.
2. Select Documents option to open documents grid for this record.
Documents option is not shown in the record

If you’ve configured Dynamics 365 to SharePoint connection, enabled Documents management for some records but still can’t see Documents option in these records – you will have to enable it in form configuration. Follow the steps below:

1. Open **Form** configuration using the button on the ribbon (sometimes can be hidden under **More Commands**). The Form configuration page will be opened in a new window.
2. Click on **Navigation**

3. Find **Documents** in the **Relationship explorer** column to the right and **Drag’n’Drop** it to the left column

4. Save and Publish changes

5. Go back to your record, refresh the page and open menu from navigation bar again. The **Documents** option now should be there
How to Hide Preview Records Form the Activities List

To show previews the solution creates Preview Records for the record documents and activities. If you want to hide this records from your Activities list – click on the filter and uncheck Preview Entities checkbox. The records will be hidden.

Restrictions

Entities types: currently Dynamica Documents and Activities Preview solution works on the following entities: account, contact, lead, opportunity, invoice, case, order, quote

Supported file types: the solution was tested on Office 2016 documents, PDF and Activities. Compatibility with other documents types including old Office formats like .doc and .xls

SharePoint Sing-In: if you are not signed in SharePoint – you will be redirected to SharePoint Sing In page. After Signing In – you will not be redirected back to Documents Preview solution and will have to go back to your record and open the Solution again.

Resolutions: the solution may have issues displaying on some resolutions and screen sizes.