

SharePoint Metadata Sync with Dynamics 365 Using Dataverse

The metadata sync tool synchronizes Sharepoint document data with data in Dynamics 365.

The integration is implemented using Dataverse—a cloud-based data storage used by business applications such as Dynamics 365.

Key features:

- Set up the tool in minutes
- Sync changes instantly
- Run the tool automatically 24/7
- Customize synchronization—select any object and any property
- Synchronize data for records created before the tool was set up in your environment

Benefits:

- Save time spent on data entry
- Avoid errors caused by manual data entry
- Centralize document management

ABC Corp. uses Dynamics 365 to manage invoices for their accounts and SharePoint to store actual invoices. Here is an example of how the metadata sync tool could improve the way these applications share metadata and simplify ABC Corp's daily routine.

Image 1. Here is a record for an invoice in ABC Corp's Dynamics 365 with information on the invoice date, payment method, etc.

The screenshot shows a Dynamics 365 interface for an invoice record. The title bar includes navigation and action icons such as Save, Save & Close, New, Deactivate, Delete, Refresh, Check Access, Flow, Word Templates, and Share. The main content area displays the following details:

Account	United Gas and Oil Ltd	Order amount (USD)	125,000.00
Product	GenWatt Diesel 10kW	Payment method	Direct debit
Invoice date	12/2/2023	Invoice sent	Yes
Invoice due date	12/17/2023	Invoice status	Not paid

Below the details is a table listing documents stored in SharePoint:

Name	Path	Modified	Modified by	Created On SharePoint
United Gas and Oil Ltd - payment.docx	United Gas and Oil Ltd 12-2-202...	12/7/2023 4:43 PM	D365ServiceConnector...	12/7/2023 4:43 PM

Image 2. Here is What the SharePoint folder linked to the record currently looks like (It lacks essential metadata from the Dynamics 365 record).

The screenshot shows a SharePoint interface with a dark red header. The breadcrumb path is 'Invoice > United Gas and Oil Ltd 12-2-2023_7DD13C6D0695EE11BE376045BD8959F5'. Below the breadcrumb is a table with columns for Name, Modified, and Modified By. A single document is listed: 'United Gas and Oil Ltd - payment.docx', modified '30 minutes ago' by 'D365ServiceConnectorDei'. The interface includes a search bar, navigation tabs (Home, Documents, Pages, Transactions, etc.), and a toolbar with options like New, Upload, Edit in grid view, Share, Copy link, Sync, Add shortcut to OneDrive, Download, Export to Excel, Automate, and All Documents.

Name	Modified	Modified By	+ Add column
United Gas and Oil Ltd - payment.docx	30 minutes ago	D365ServiceConnectorDei	

Image 3. Currently, the choice of columns is limited to the default SharePoint document properties.

The screenshot shows a SharePoint document library interface. At the top, there is a search bar and navigation icons. Below that, a breadcrumb trail reads "Invoice > United Gas and Oil Ltd 12-2-2023_7DD13C6D0695EE11BE376045BD8959F5". The main area displays a document list with the following columns: Name, Modified, and Modified By. A single document is listed: "United Gas and Oil Ltd - payment.docx", modified "4 minutes ago" by "D365ServiceConnectorDei".

An "Edit view columns" panel is open on the right side of the screen. It contains a list of document properties with checkboxes to select or deselect them. The selected properties are Type, Name, Modified, and Modified By. Other available properties include Compliance Asset Id, Description, ID, Content Type, Created, Created By, Check In Comment, File Size, Item Child Count, Folder Child Count, Label setting, Retention label, Retention label Applied, Label applied by, Item is a Record, Like count, and Sensitivity.

Name	Modified	Modified By
United Gas and Oil Ltd - payment.docx	4 minutes ago	D365ServiceConnectorDei

- Type
- Name
- Modified
- Modified By
- Compliance Asset Id
- Description
- ID
- Content Type
- Created
- Created By
- Check In Comment
- File Size
- Item Child Count
- Folder Child Count
- Label setting
- Retention label
- Retention label Applied
- Label applied by
- Item is a Record
- Like count
- Sensitivity

Image 4. The ABC Corp. administrator installs the metadata sync tool so that the metadata appears in SharePoint. First, the admin selects the Dataverse table to be synced with SharePoint.

The screenshot shows the Dynamics 365 Brimit Metadata Manager interface. The top navigation bar includes 'Dynamics 365', 'Brimit Metadata Manager', a search bar, and a 'Try the new look' toggle. The left sidebar contains navigation options: Home, Recent, Pinned, Metadata Manager, and Metadata page. The main content area displays a table of entities under the heading 'All Entities Selected Entities (0)'. A message above the table says 'Click on entity to select necessary fields.' The table has three columns: 'Display Name', 'Logical Name', and 'Link to Sharepoint'. The 'Invoice' row is highlighted and has a checkmark in the first column.

Display Name	Logical Name	Link to Sharepoint
Account	account	https://brimit3dev.sharepoint.com/sites/Crm
Brimit Invoice	brm_brimitinvoice	https://brimit3dev.sharepoint.com/sites/Crm
Candidate	brm_candidate	https://brimit3dev.sharepoint.com/sites/Crm
Debit Transaction	brm_transaction	https://brimit3dev.sharepoint.com/sites/Crm
<input checked="" type="checkbox"/> Invoice	brm_invoice	https://brimit3dev.sharepoint.com/sites/Crm
Lead	lead	https://brimit3dev.sharepoint.com/sites/Crm
Master Agreement	brm_masteragreement	https://brimit3dev.sharepoint.com/sites/Crm
Opportunity	opportunity	https://brimit3dev.sharepoint.com/sites/Crm
Playbook activity	msdyn_playbookactivity	https://brimit3dev.sharepoint.com/sites/Crm
Project Agreement	brm_projectagreement	https://brimit3dev.sharepoint.com/sites/Crm
Vacancy	brm_vacancy	https://brimit3dev.sharepoint.com/sites/Crm
Website	mspp_website	https://brimit3dev.sharepoint.com/sites/Crm

Image 5. Then, the admin selects the Dataverse table fields to be synced with SharePoint. These are the fields that the invoice record in Dynamics 365 has.

The screenshot shows the Dynamics 365 Metadata Manager interface. In the left pane, the 'Invoice' entity is selected under the 'All Entities' tab. The main pane displays the 'Invoice's fields' dialog, which allows selecting fields to synchronize with SharePoint. The dialog contains a table with the following data:

Display Name	Field Name	Attribute Type
<input checked="" type="checkbox"/> Account	brm_account	Lookup
<input checked="" type="checkbox"/> Invoice date	brm_invoicedate	DateTime
<input checked="" type="checkbox"/> Invoice due date	brm_invoiceduedate	DateTime
Invoice	brm_invoiceid	Uniqueidentifier
<input checked="" type="checkbox"/> Invoice sent	brm_invoicesent	Picklist
<input checked="" type="checkbox"/> Invoice status	brm_invoicestatus	Picklist
Name	brm_name	String
<input checked="" type="checkbox"/> Order amount (USD)	brm_orderamount	Decimal
<input checked="" type="checkbox"/> Payment method	brm_paymentmethod	Picklist
<input checked="" type="checkbox"/> Product	brm_product	String
Created By	createdby	Lookup
Created On	createdon	DateTime
Created By (Delegate)	createdonbehalby	Lookup
Import Sequence Number	importsequencenumber	Integer
Modified By	modifiedby	Lookup
Modified On	modifiedon	DateTime

At the bottom of the dialog, there are 'Ok' and 'Cancel' buttons. The 'Ok' button is highlighted in blue.

Image 6. Upon the completion of the synchronization, the list of columns available in SharePoint has been populated with new ones from Dataverse. The admin can select the new columns for the document view.

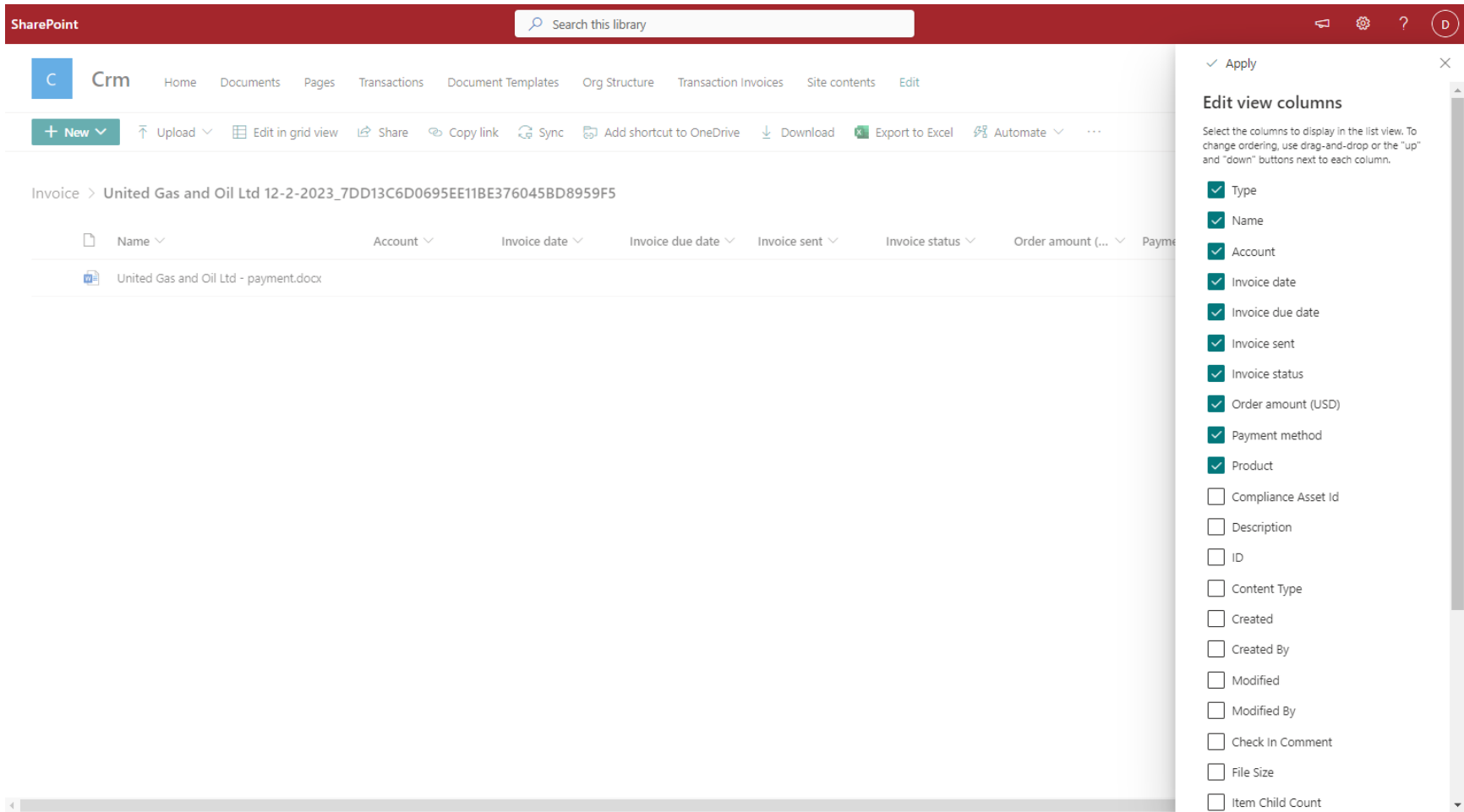


Image 7. Now, the SharePoint document has the same properties as the Dynamics 365 invoice record and the same data within those properties.

The screenshot shows a SharePoint document library interface. At the top, there is a search bar and navigation icons. Below that, a breadcrumb trail reads "Invoice > United Gas and Oil Ltd 12-2-2023_7DD13C6D0695EE11BE376045BD8959F5". A table of documents is displayed with the following columns: Name, Account, Invoice date, Invoice due date, Invoice sent, Invoice status, Order amount (...), Payment method, and Product. Two rows of data are visible, both representing invoices from "United Gas and Oil Ltd" with an amount of 125,000 and a status of "Not paid".

Name	Account	Invoice date	Invoice due date	Invoice sent	Invoice status	Order amount (...)	Payment method	Product
United Gas and Oil Ltd - payment 2.docx	United Gas and Oil Ltd	12/2/2023 12:00 AM	12/17/2023 12:00 AM	Yes	Not paid	125,000	Direct debit	GenWatt Diesel 10KW
United Gas and Oil Ltd - payment.docx	United Gas and Oil Ltd	12/2/2023 12:00 AM	12/17/2023 12:00 AM	Yes	Not paid	125,000	Direct debit	GenWatt Diesel 10KW

Whenever a new document is created for this or any other record, the Dynamics 365 data will be attached to the document. To update the data for the invoices that were uploaded to SharePoint before the synchronization, the admin just needs to go to the Dataverse settings page and click on the Update All Previous Entries button.