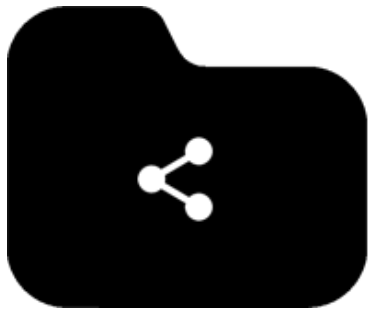


User Guide



AUTO CREATE **SharePoint Folder**

Document Version: 1.0

Solution Version: 365_082018_1_0_managed





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Product Overview

Auto Create SharePoint Folder for Microsoft Dynamics 365/CRM is built for easily locating the CRM entity record folders created automatically in SharePoint site whenever a corresponding entity record is created in CRM, without having to visit the Document Grid in CRM. Another major advantage of Auto Create SharePoint Folder is that a CRM user can create a custom folder of his choice unlike the OOB folder creation which has guid appended as the suffix to the primary key (i.e., primarykey_guid) which often becomes difficult to associate with. The entire combination will save time and smoothen the process of creating automatic CRM entity record folders in SharePoint site.

Auto Create SharePoint Functionality

To understand Auto Create SharePoint Functionality clearly, let us first understand how the standard CRM to SharePoint folder creation works.

Before that you are required to integrate SharePoint with your D365 instance. Refer this link to learn how to integrate SharePoint with D365 -

<https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/set-up-dynamics-365-online-to-use-sharepoint-online>

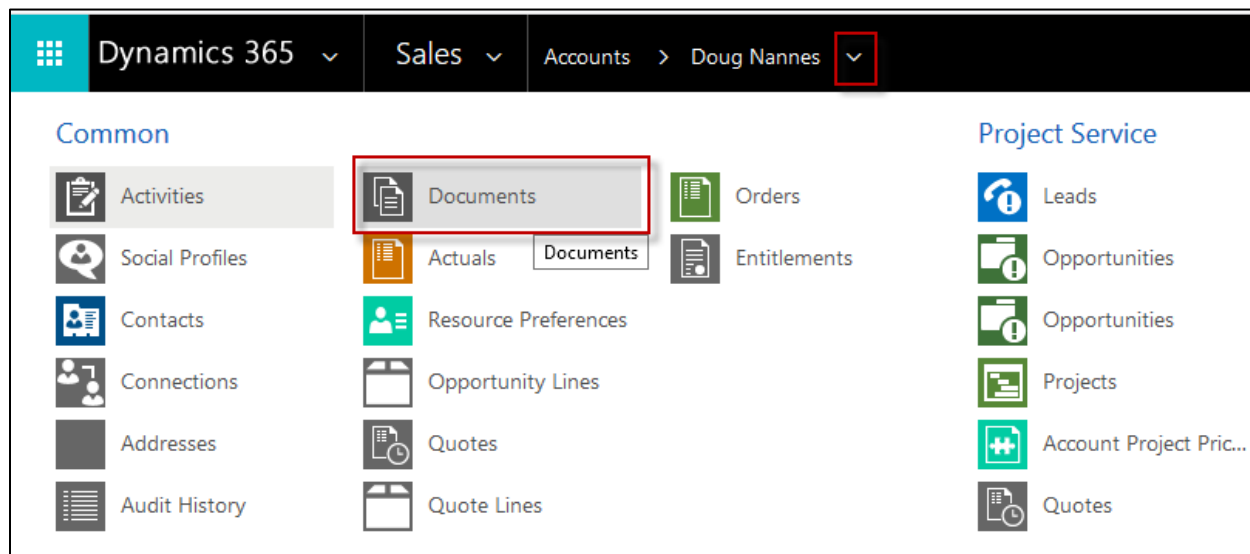
To explain you the standard CRM to SharePoint folder creation, we are taking a D365 instance that is fully integrated with SharePoint.

Let's consider Account Entity and check how the CRM to SharePoint folder creation works.

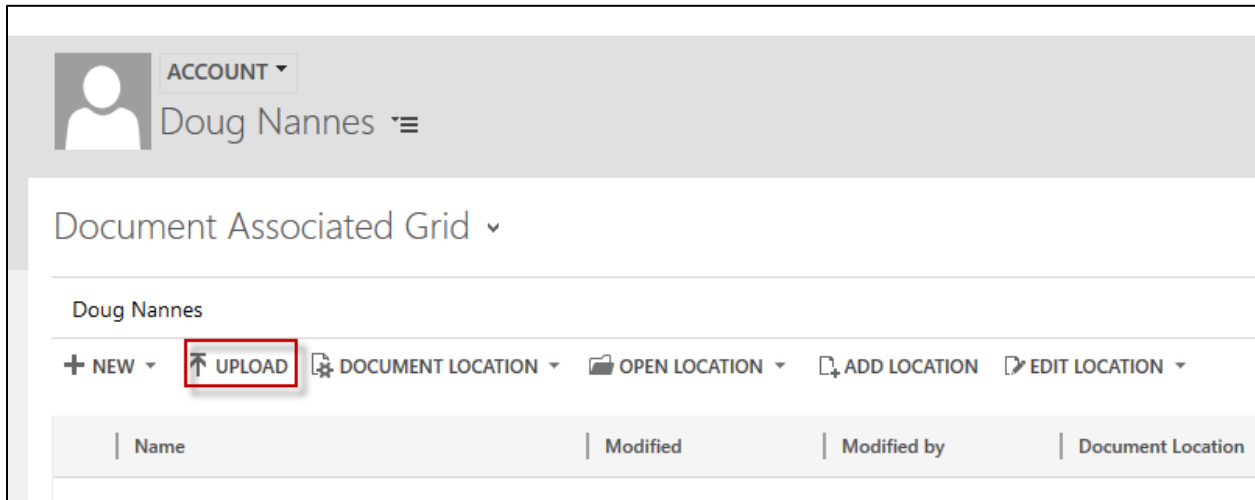
Go to CRM → Accounts.

Create a sample account (E.g., Doug Nannes).

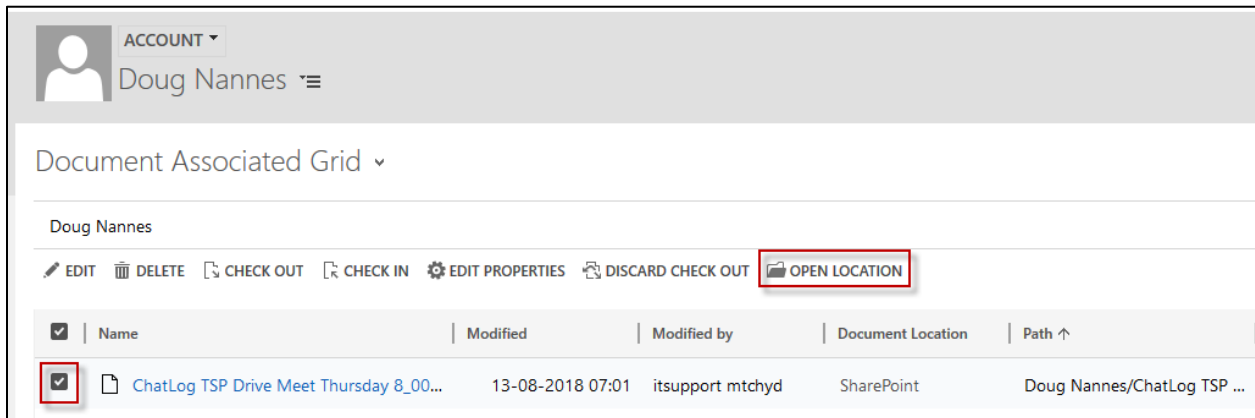
On the Nav bar, click down arrow next to the account name and then click Documents.



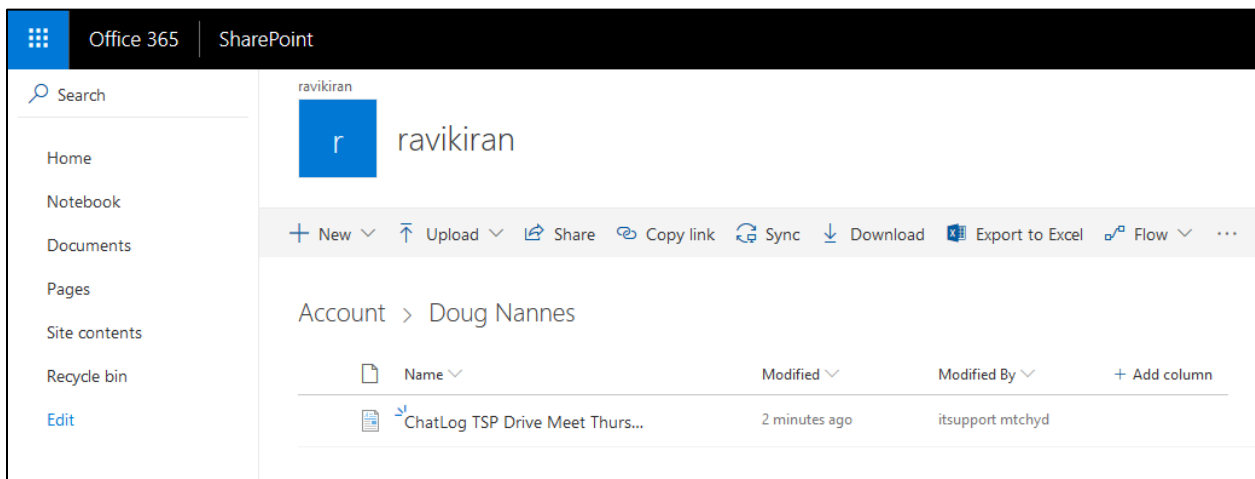
You will notice that it is empty. Click **Upload** and browse to a document to upload to the new folder in your SharePoint site.



Select the file you've just uploaded and click OPEN LOCATION.



You will be directed to the exact SharePoint location where this file has been created.

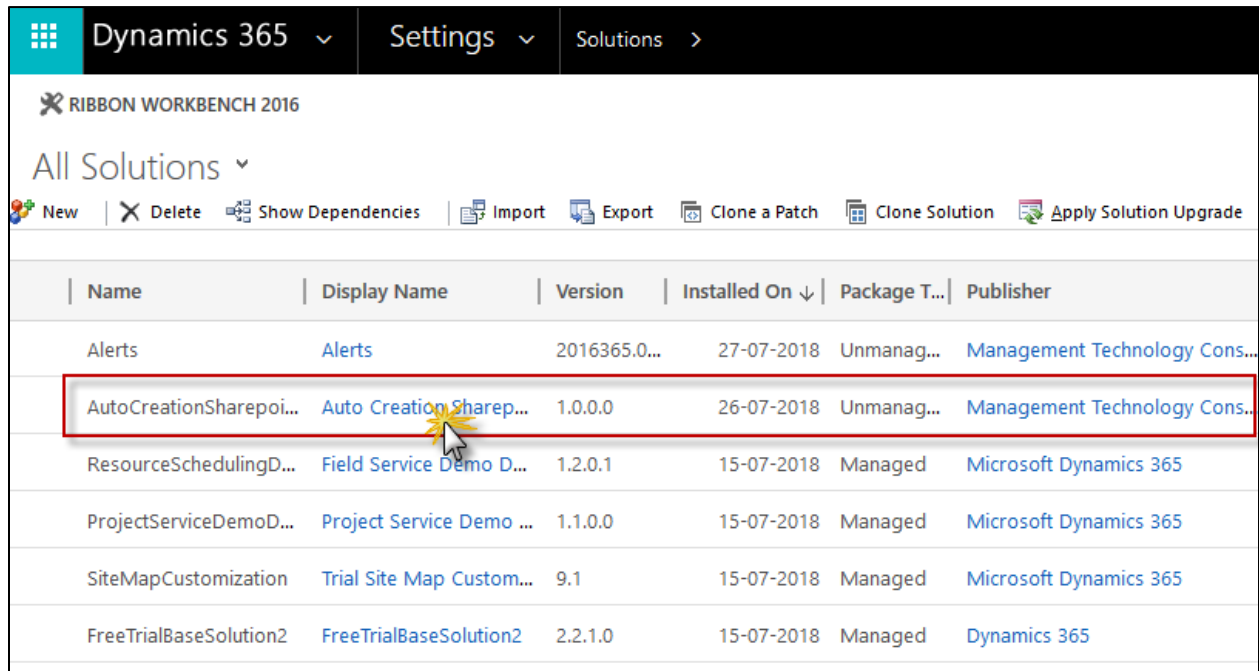


This is the standard process that you need to follow to locate the new folder and its contents in SharePoint which is bit complicated and uninspiring as you need to visit the Document Grid

every time for locating a new folder and its contents created in SharePoint. If you try to locate the file directly in the SharePoint site without visiting the Document Grid in CRM, you will not be able to locate the new folder and its contents. To overcome this pain, MTC has built Auto Create SharePoint Folder using which you can easily locate the new folder and its contents without having to visit the Document Grid. Let's see how.

Configuration Settings

Go to Settings→Solutions. Click Auto Create SharePoint Folder solution.




Name	Display Name	Version	Installed On	Package T...	Publisher
Alerts	Alerts	2016365.0...	27-07-2018	Unmanag...	Management Technology Cons...
AutoCreationSharepoi...	Auto Creation Sharep...	1.0.0.0	26-07-2018	Unmanag...	Management Technology Cons...
ResourceSchedulingD...	Field Service Demo D...	1.2.0.1	15-07-2018	Managed	Microsoft Dynamics 365
ProjectServiceDemoD...	Project Service Demo ...	1.1.0.0	15-07-2018	Managed	Microsoft Dynamics 365
SiteMapCustomization	Trial Site Map Custom...	9.1	15-07-2018	Managed	Microsoft Dynamics 365
FreeTrialBaseSolution2	FreeTrialBaseSolution2	2.2.1.0	15-07-2018	Managed	Dynamics 365


From the Configuration Window, click SharePoint Settings and provide the CRM instance type, Username and Password. Click Save.



Auto Share Point Configuration



Auto Creation of SP Location
This menu editor function allows you to Add Auto Share Point Location Button in the best desired locations .

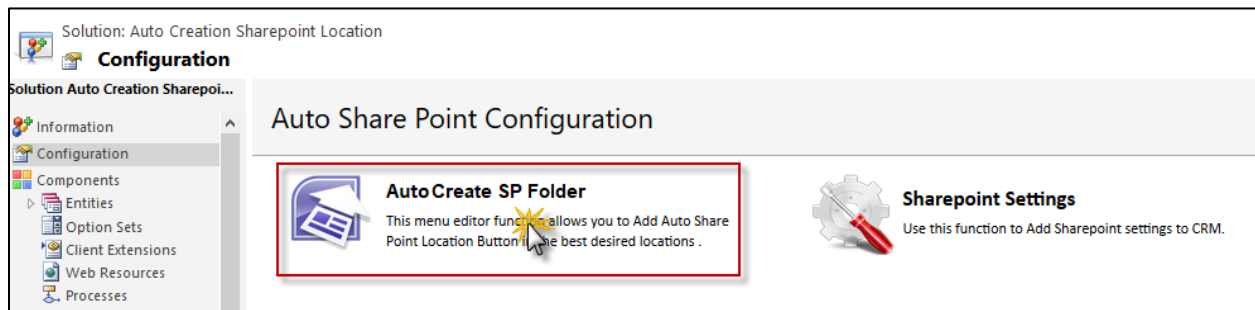


Sharepoint Settings
Use this function to Add Sharepoint settings to CRM.

Sharepoint Settings

Sharepoint Instance Type	<input type="text" value="Online"/>
User Name	<input type="text" value="itsupport@mtchyd.onmicrosoft.com"/>
Password	<input type="password"/>
<input type="button" value="Save"/>	

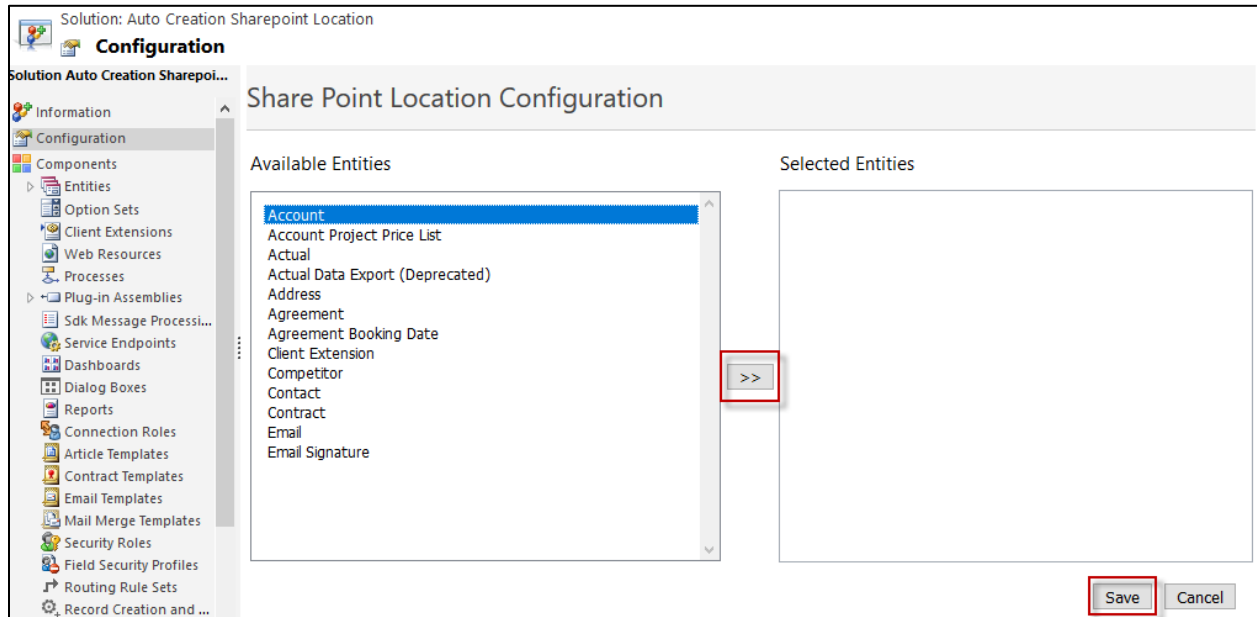
Now, go back to the Configuration Window, click Auto Create SP Folder.



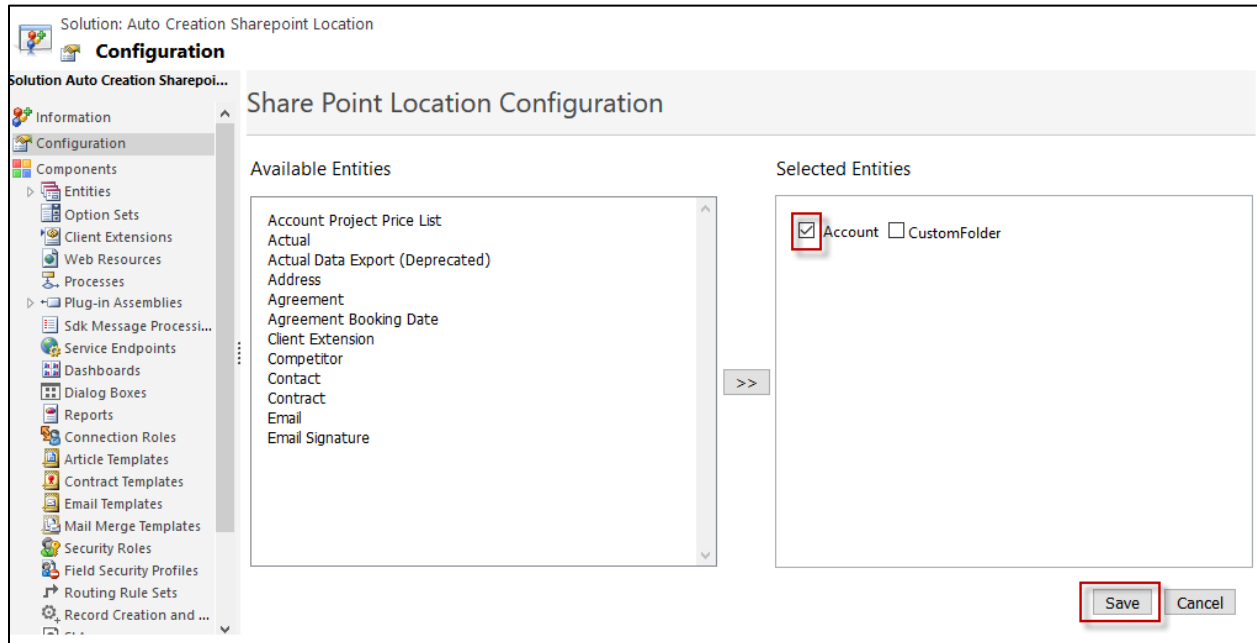
You will be directed to the Configuration Page that has two panes namely Available Entities and Selected Entities.

Under Available Entities, you will see all the entities on which you can run this functionality. After an entity is selected and double arrow >> is clicked, that entity will be migrated to Selected Entities. By this, you will be able to track the entities on which you are running this functionality.

Select Account from Available Entities and click double arrow >>.



Account entity will be migrated to Selected Entities. Tick the check box before Account and click Save.



Go to CRM → Accounts.

Create a sample account (E.g., Richard)

ACCOUNT

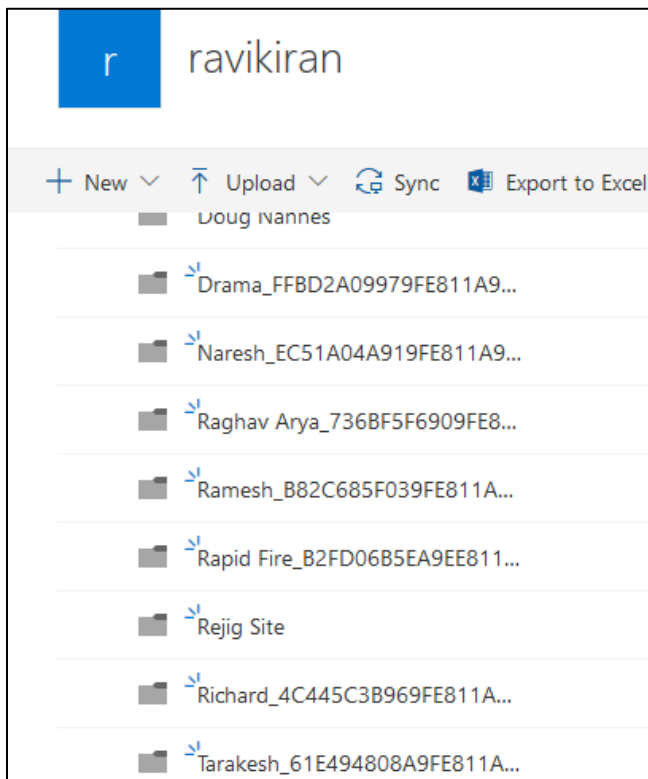
Richard

Summary

ACCOUNT INFORMATION

Account Name *	Richard
Phone	-----
Fax	-----

Go to the default SharePoint site location and you will notice that this record folder is created. Likewise, you can create as many records as you want in CRM and locate their corresponding folders in SharePoint location with ease.



You can notice that the folder created in SharePoint site is in the format primarykey_guid which is kind of unpleasant and not user-friendly. Auto Create SharePoint Folder allows you to create a custom folder that is easy to associate with.

Custom Folder Creation in SharePoint

To create custom folder in SharePoint, you are required to do the below configuration settings.

Go to CRM → Settings → Solutions.

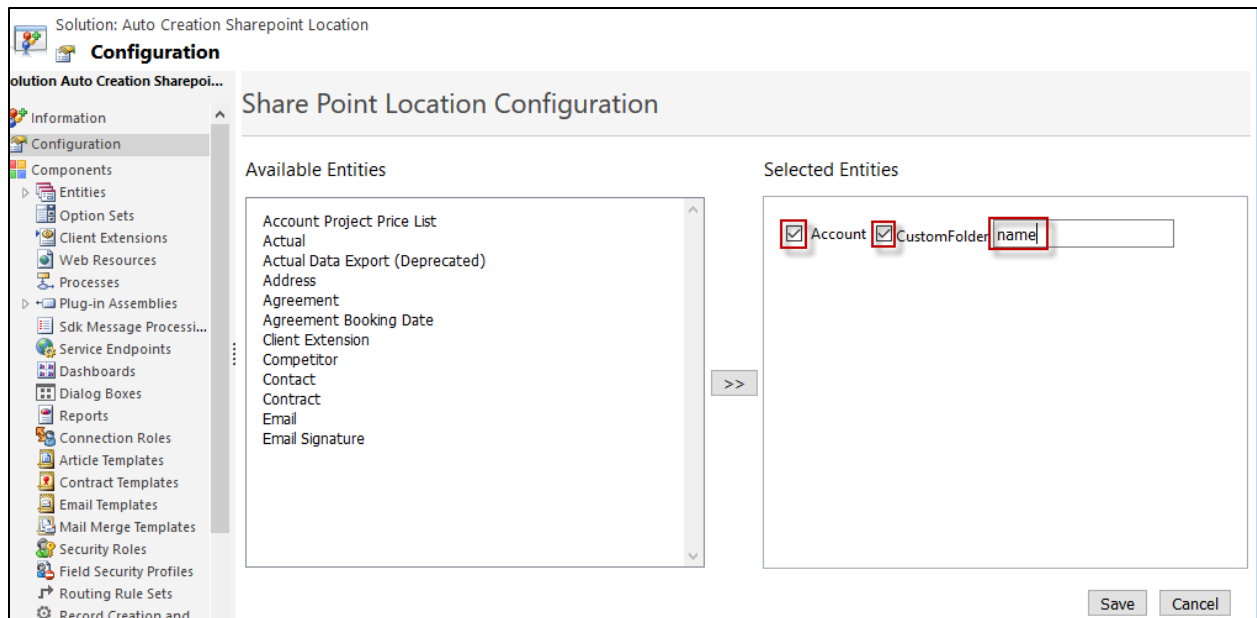
Click Auto Create SharePoint Folder.

From the Configuration Window, click Auto Create SP Folder.

From the Select Entities pane, deselect Account entity and click Save.

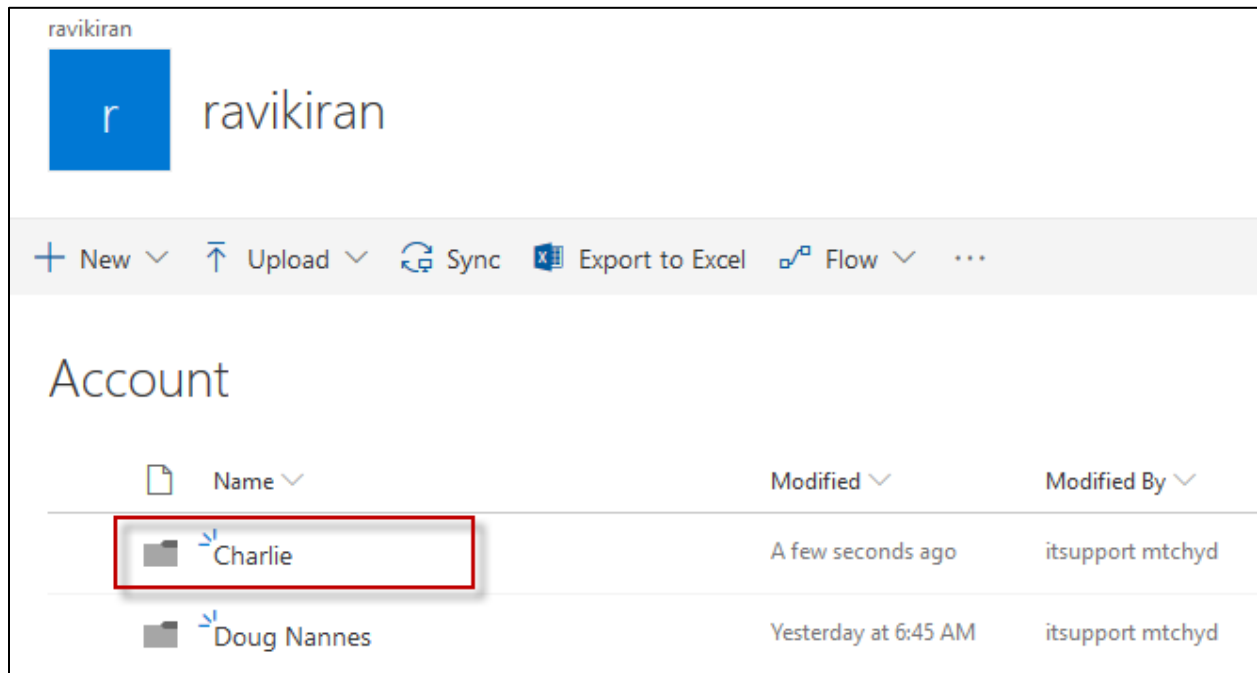
From the Available Entities pane, select Account entity and click double arrow >> to migrate it to the Selected Entities pane.

In the Select Entities pane, tick the check boxes before Account and Custom Folder and enter the logical name in the field. Click Save.






Go back to Accounts. Create a sample account (E.g. Charlie)

You will notice that an account record folder with name “Charlie” is created in SharePoint site without any suffix.








ravikiran

 ravikiran

+ New ▾ ↑ Upload ▾ ↻ Sync  Export to Excel  Flow ▾ ...

Account

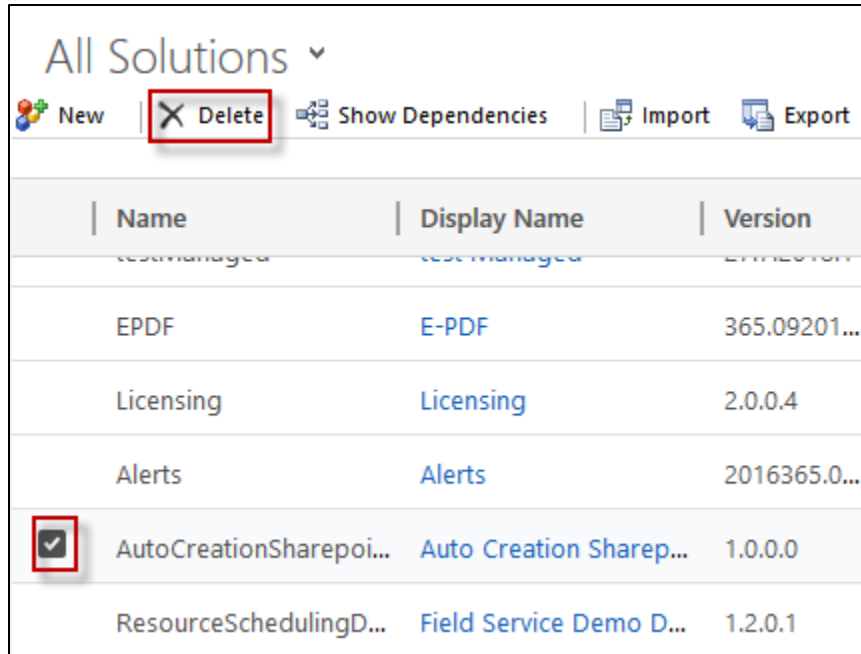
 Name ▾	Modified ▾	Modified By ▾
  Charlie	A few seconds ago	itsupport mtchyd
  Doug Nannes	Yesterday at 6:45 AM	itsupport mtchyd

Likewise, you can run Auto Create SharePoint Folder on other entities of your choice and locate the folder and its contents in SharePoint easily and in your desired format.






How to Uninstall Auto Create SharePoint Folder?

Go to CRM→Settings→ Solutions.

Select Auto Create SharePoint Folder and click Delete.

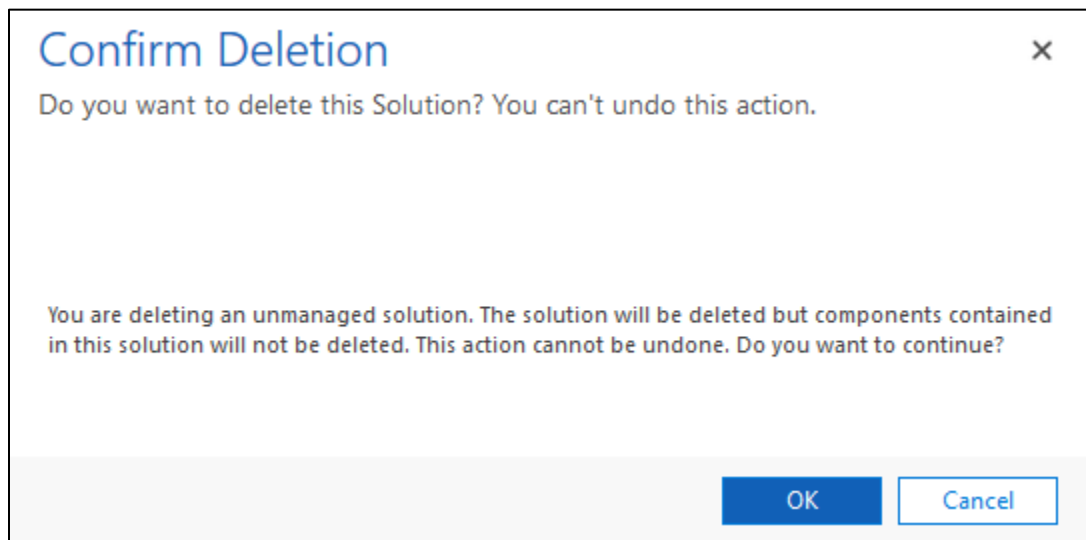


All Solutions ▾

 New |  Delete |  Show Dependencies |  Import |  Export

Name	Display Name	Version
testmanaged	test managed	1.0.0.0
EPDF	E-PDF	365.09201...
Licensing	Licensing	2.0.0.4
Alerts	Alerts	2016365.0...
<input checked="" type="checkbox"/>	AutoCreationSharepoi...	Auto Creation Sharep... 1.0.0.0
	ResourceSchedulingD...	Field Service Demo D... 1.2.0.1

Confirm the deletion by clicking OK. The solution will be uninstalled from your CRM instance.



Confirm Deletion ×

Do you want to delete this Solution? You can't undo this action.

You are deleting an unmanaged solution. The solution will be deleted but components contained in this solution will not be deleted. This action cannot be undone. Do you want to continue?