



Multi-File **Uploader** to **SharePoint**

User Guide

Solution Version: 365.092018.1.1

Document Version: 1.0



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Product Overview

MTC has built Multi-File Uploader to SharePoint to make life easy for CRM Users by allowing them to upload multiple files directly to SharePoint at one go unlike the OOB functionality where each file must be individually uploaded to SharePoint. As a result, CRM Users can become more productive while saving time in performing odd tasks.

Advantages & Benefits

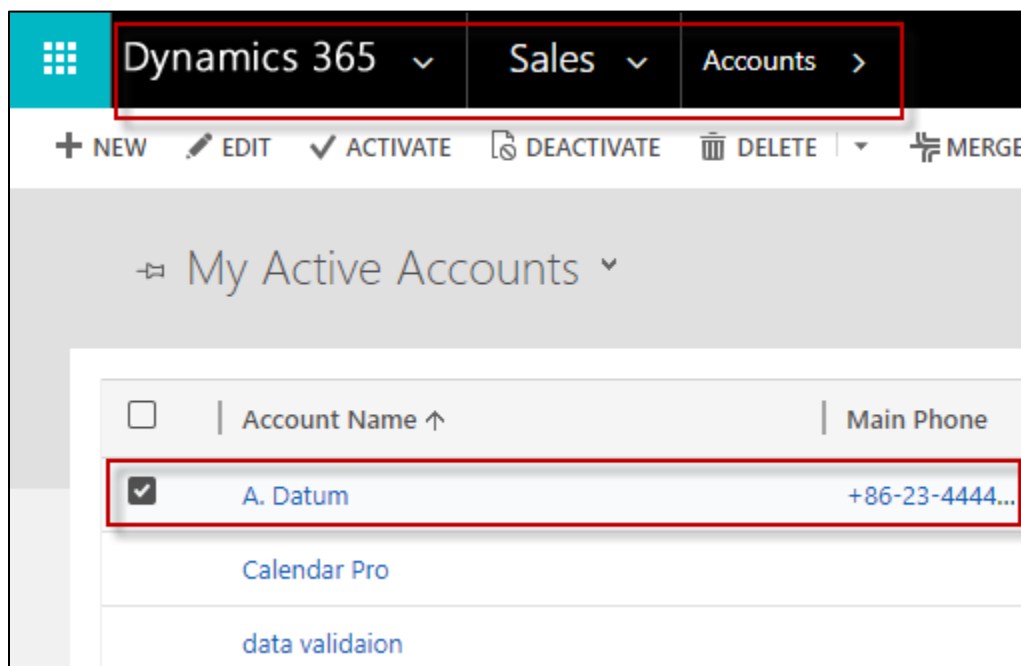
- Multiple File Upload at one go
- No backend configuration required
- Applicable on all CRM standard entities
- Saves time & energy
- Easy-to-use
- Cost-effective

Functionality

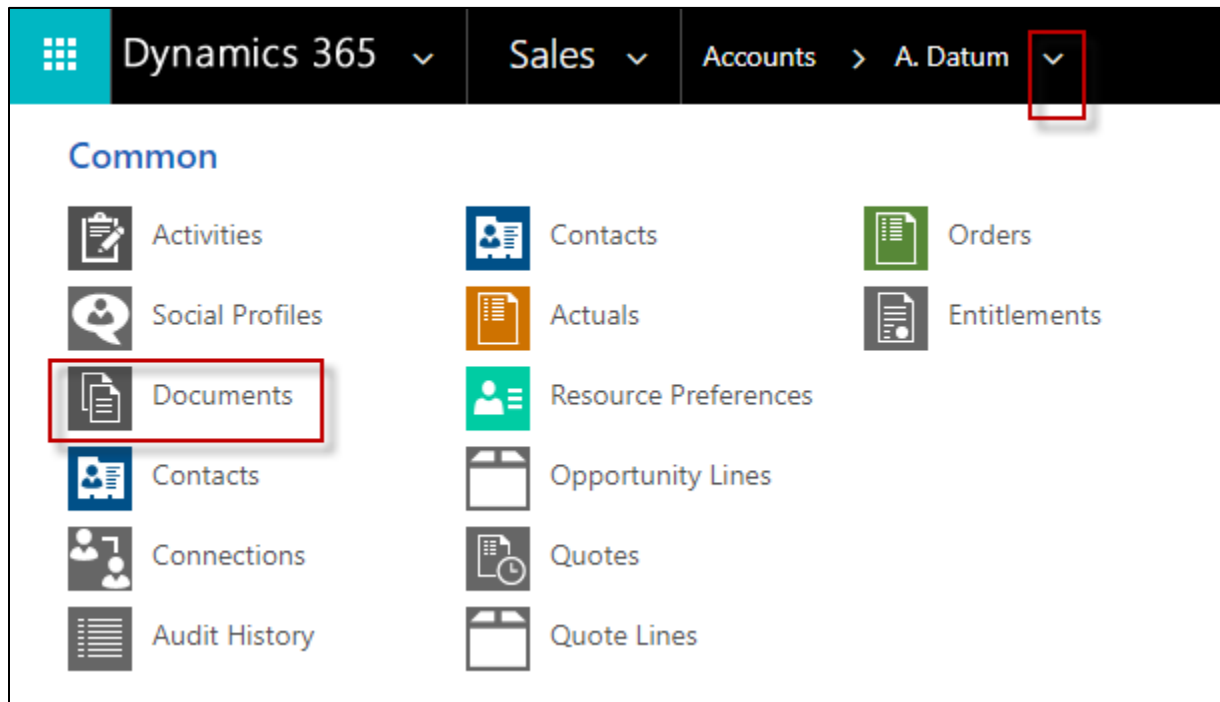
Multi-File Uploader to SharePoint works on all CRM entities in relationship with documents. It could be Account, Contact, Lead, etc. You need not perform any complex configuration to use this solution. Just navigate to the entity of your choice and perform the below steps.

For your basic understanding, let's consider a sample Account record (e.g., **A. Datum**).

Go to Sales → Account → Account Record.

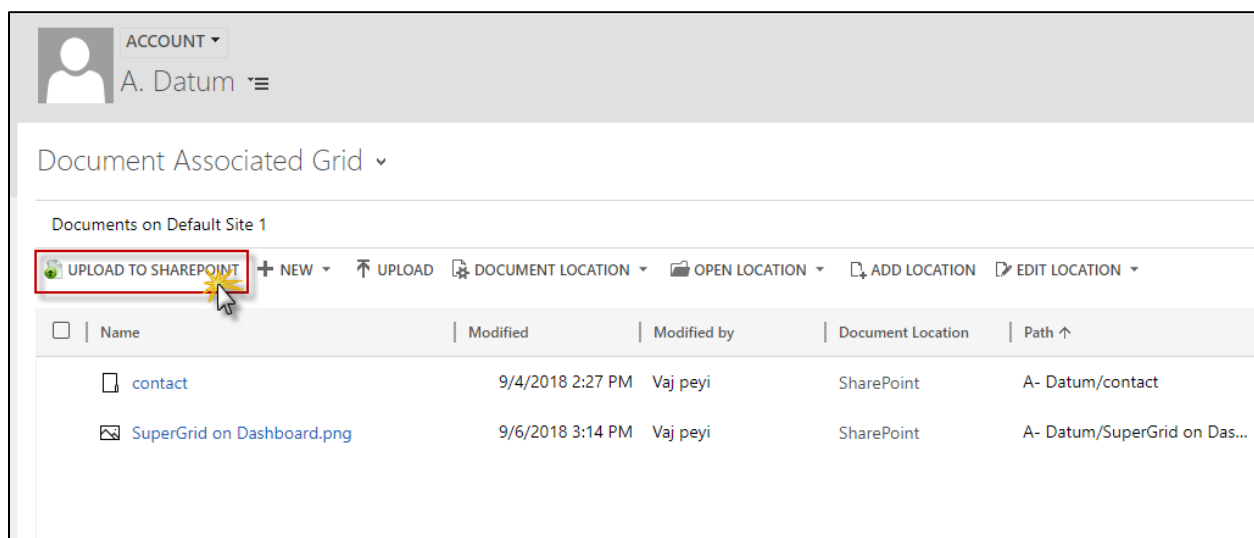


From the sitemap, click the down arrow just beside the Account Record.

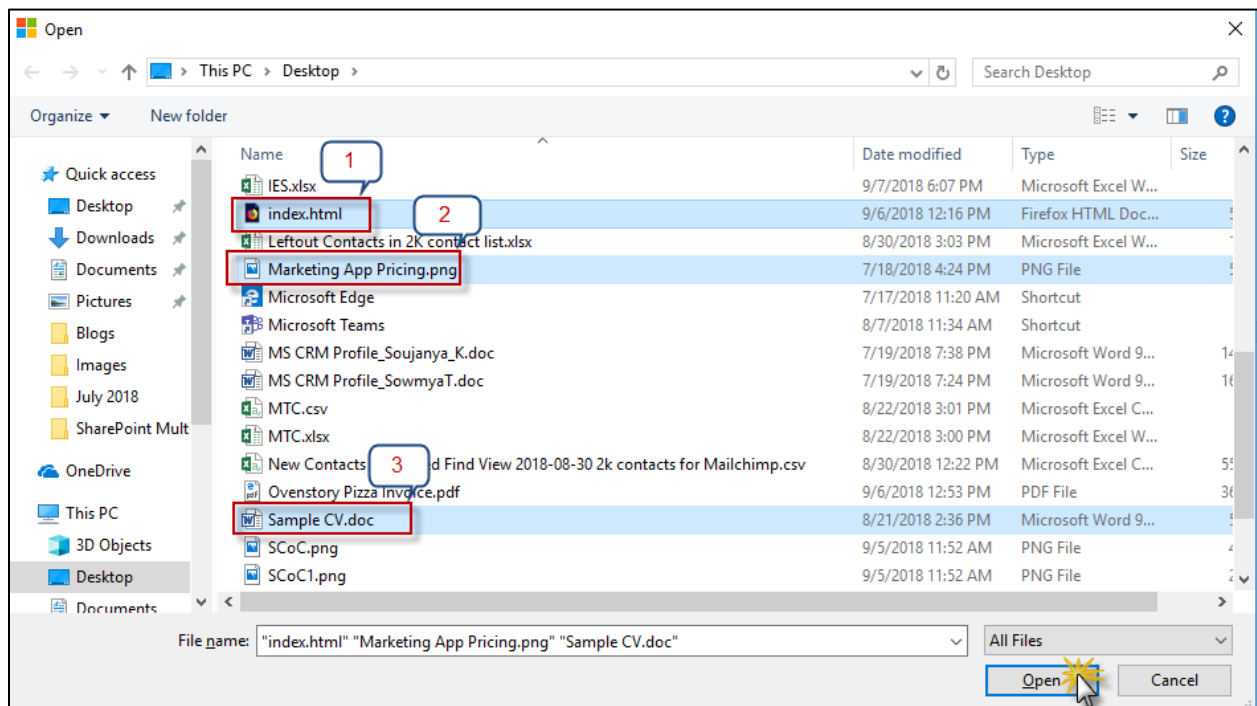
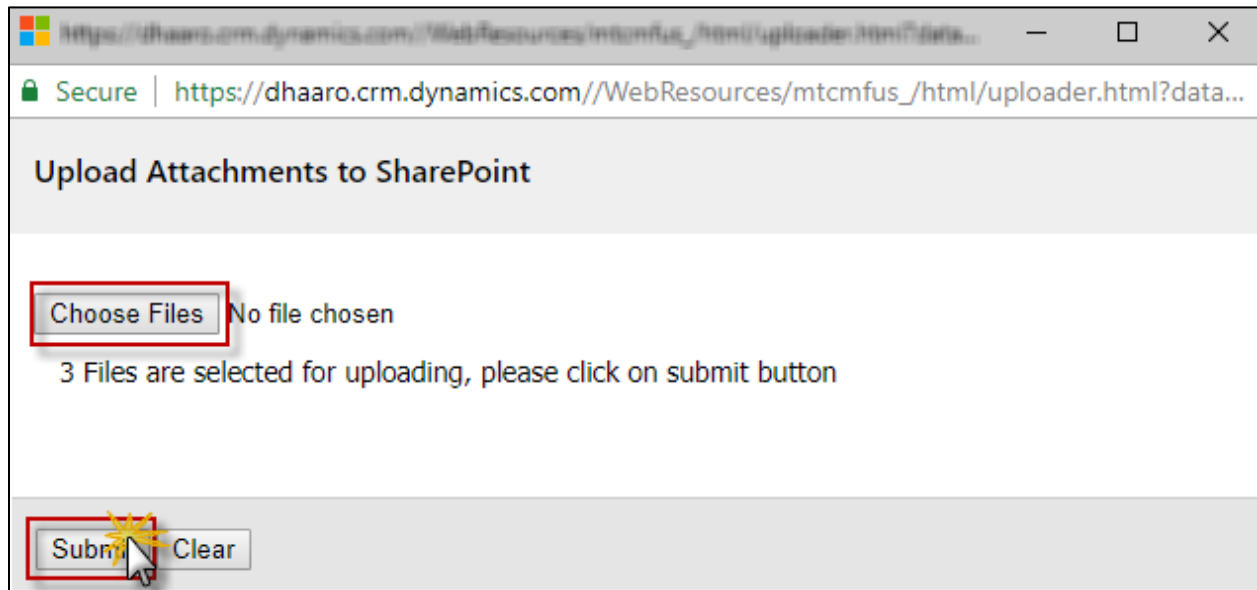


Click on **Documents**.

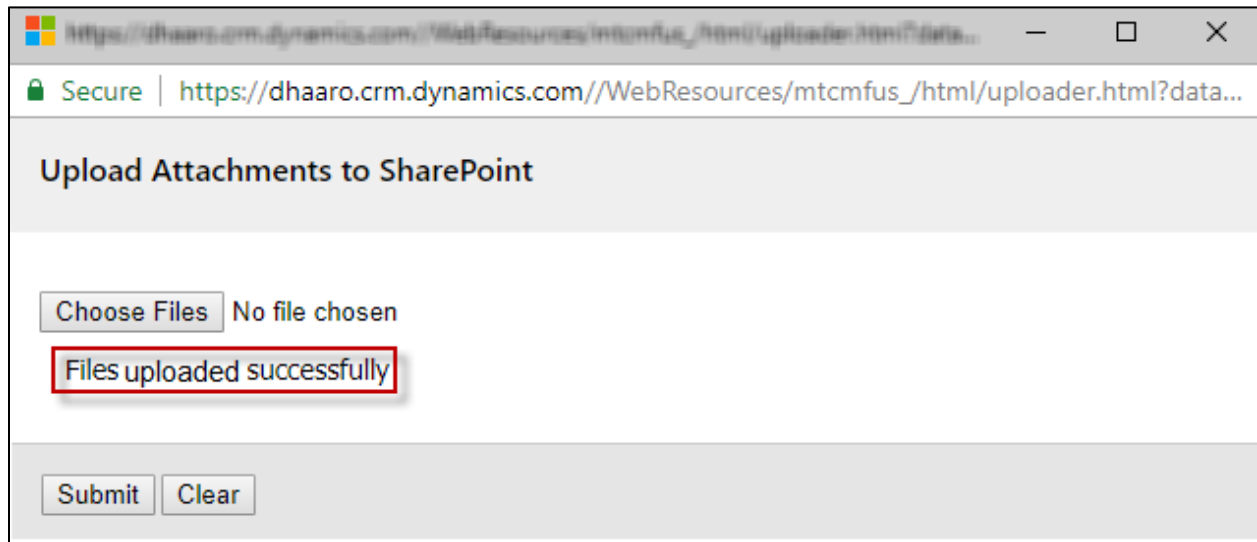
You will be directed to **Document Associated Grid**. In here you will notice **UPLOAD TO SHAREPOINT** button on the ribbon.



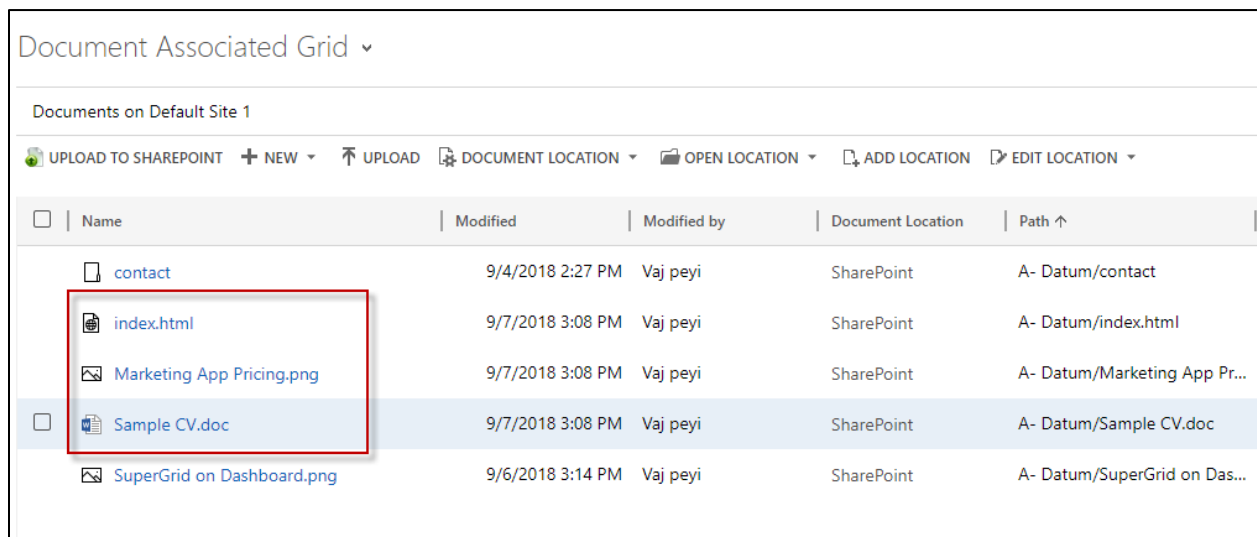
Click it and browse the files you want to directly upload to SharePoint. You can select multiple files unlike the OOB functionality which allows you to select only one file at a time.



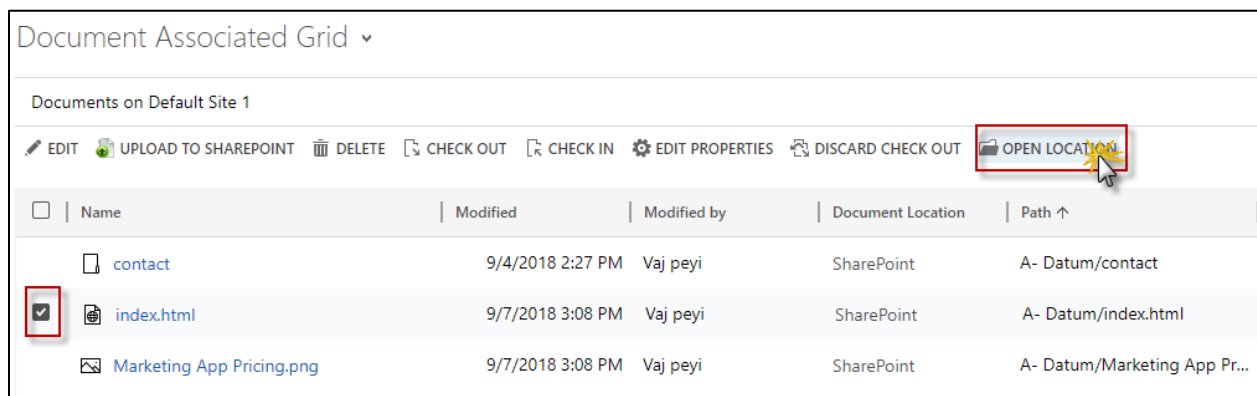
Files will be successfully uploaded. Click Submit.

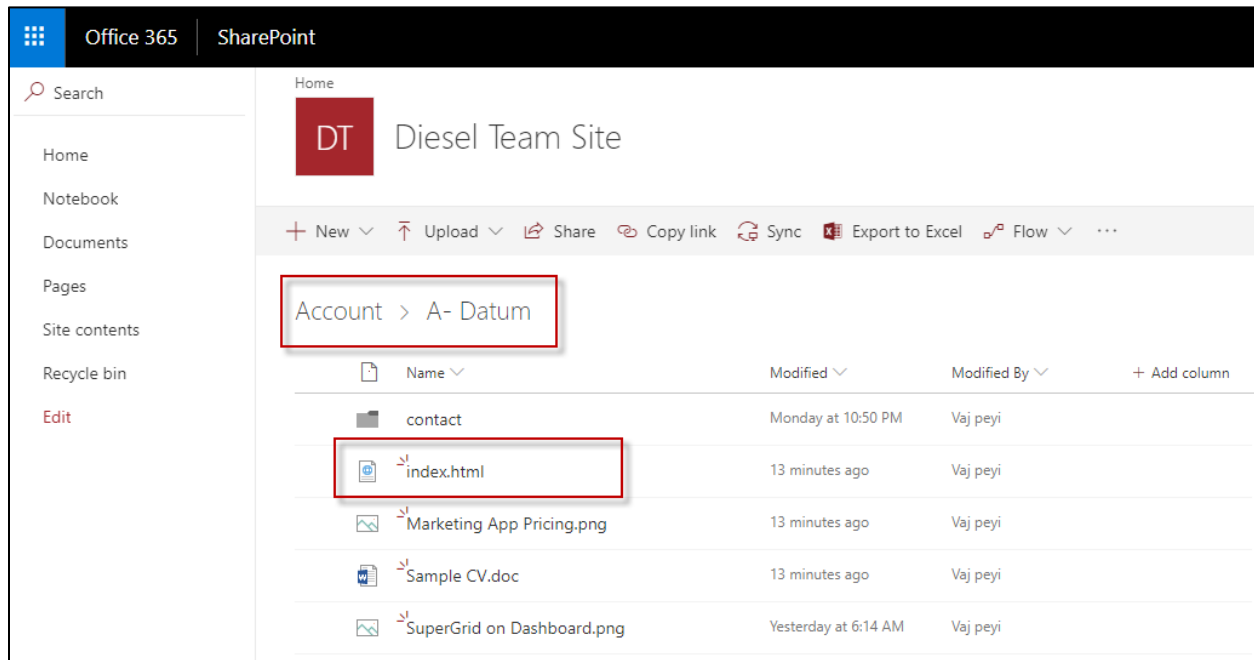


You will notice that the files uploaded to the SharePoint in the document grid.



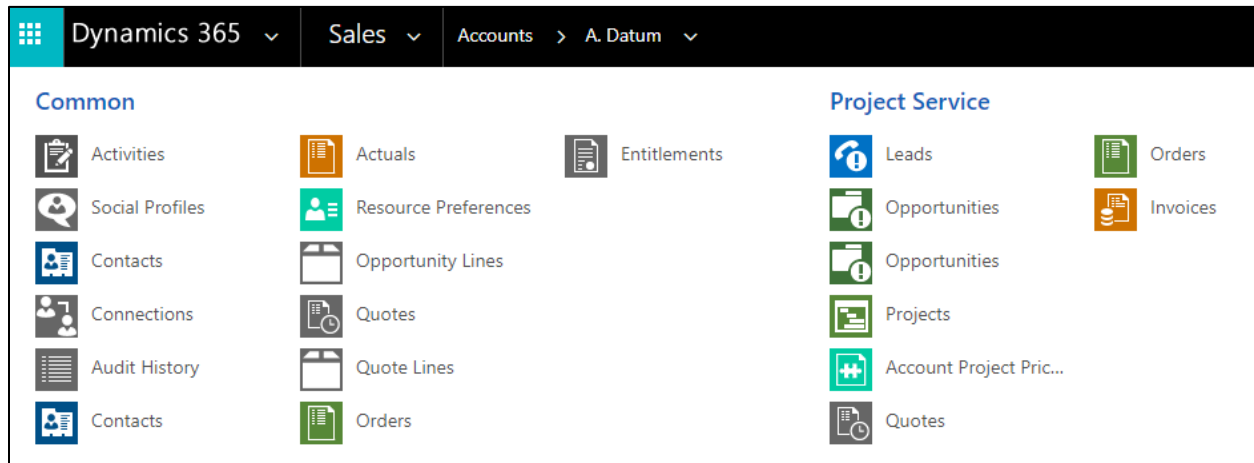
Select any of the uploaded file and click OPEN LOCATION to see the file in SharePoint site.





This way you can upload multiple files to SharePoint directly without having to worry about maximum file-size upload limitation of 50 MB and uploading files one at a time.

In case if you didn't spot Documents section after clicking the down arrow beside Account Record, then please follow the below process.

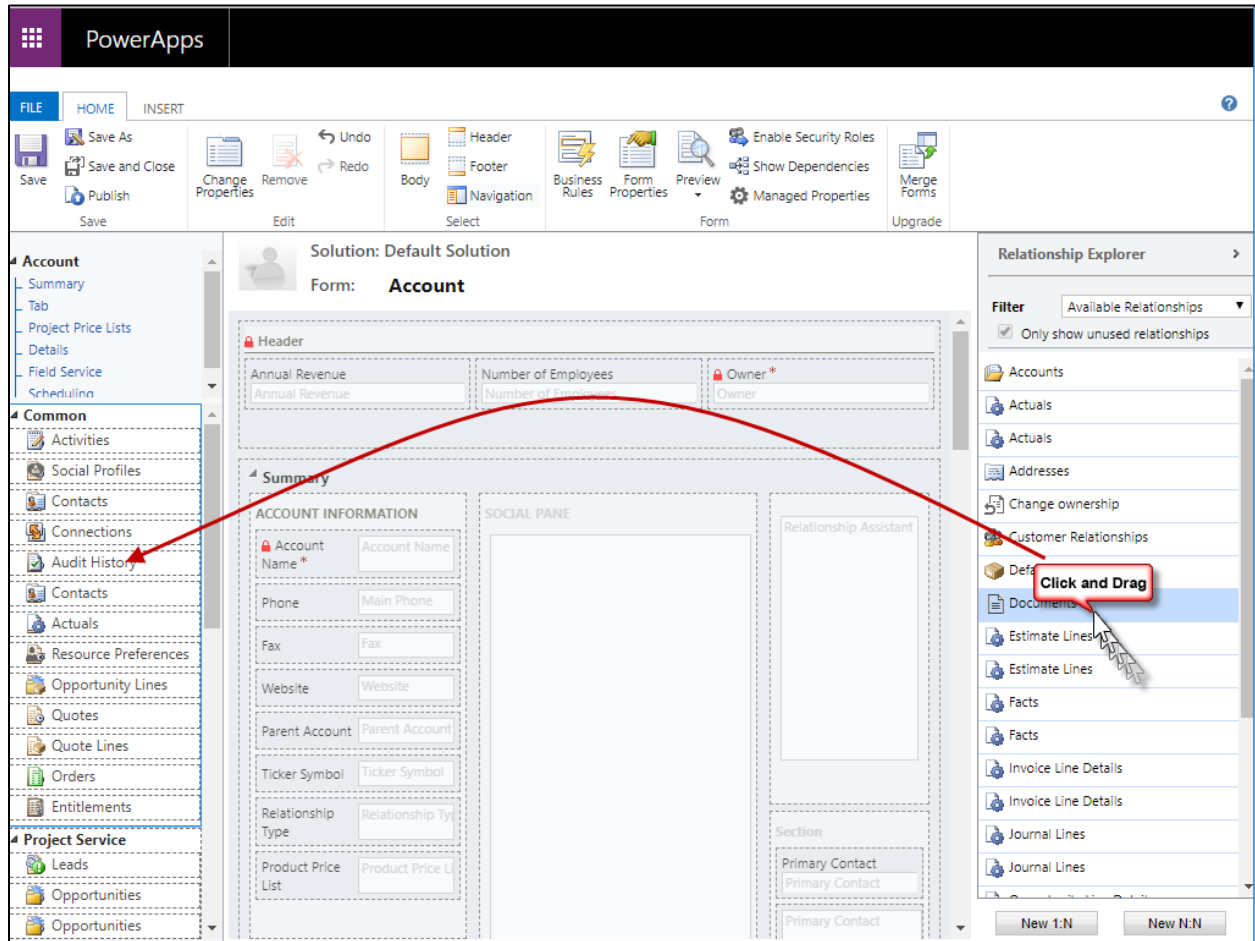


In the above image, you don't see Documents by default.

Click **FORM** present on the ribbon. The Account form window opens.

On the extreme left column, you can see Common section under which Documents is not present by default. To add Documents to this column, click on Navigation, select the

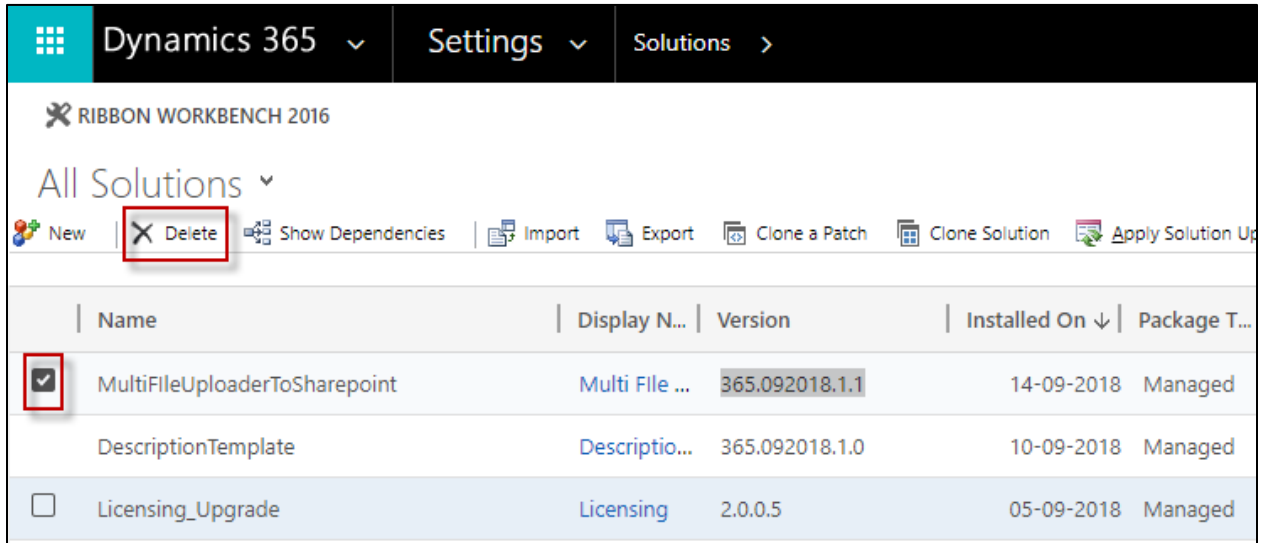
Documents attribute from the extreme right column to drag and drop to Common section.
Once done, Save and Publish to see the Documents.



Uninstallation

To uninstall the solution, go to Solutions Page.

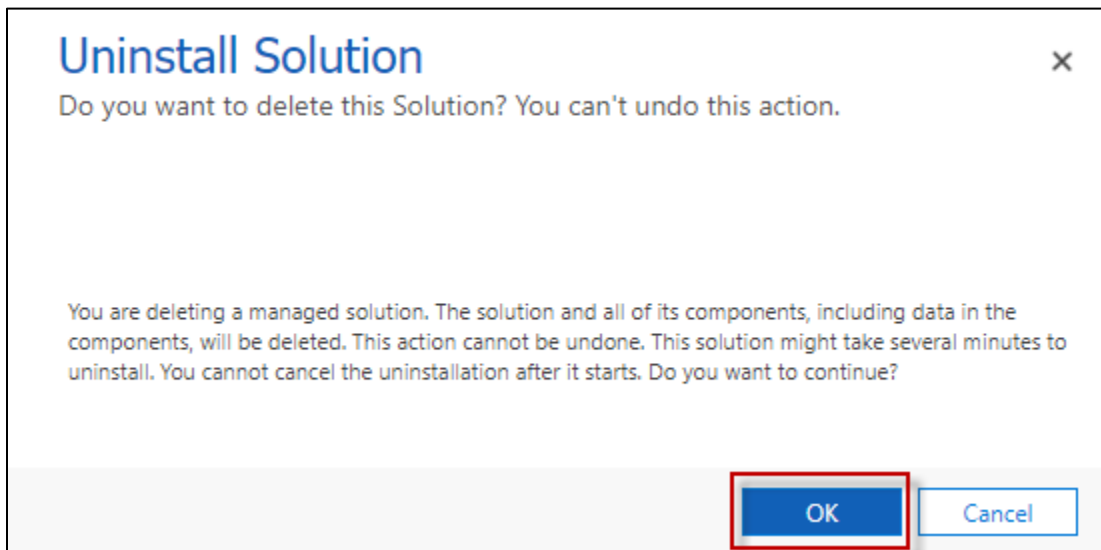
Select **Multi-File Uploader to SharePoint** solution and click **Delete**.



The screenshot shows the Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation is the 'RIBBON WORKBENCH 2016' and the 'All Solutions' dropdown. The ribbon contains buttons for 'New', 'Delete' (highlighted with a red box), 'Show Dependencies', 'Import', 'Export', 'Clone a Patch', 'Clone Solution', and 'Apply Solution Up'. Below the ribbon is a table of solutions:

Name	Display N...	Version	Installed On ↓	Package T...
<input checked="" type="checkbox"/> MultiFileUploaderToSharepoint	Multi File ...	365.092018.1.1	14-09-2018	Managed
<input type="checkbox"/> DescriptionTemplate	Descriptio...	365.092018.1.0	10-09-2018	Managed
<input type="checkbox"/> Licensing_Upgrade	Licensing	2.0.0.5	05-09-2018	Managed

An alert will be prompted asking for your confirmation. Click Ok.



The screenshot shows a dialog box titled 'Uninstall Solution' with a close button (X) in the top right corner. The main text reads: 'Do you want to delete this Solution? You can't undo this action.' Below this, a warning message states: 'You are deleting a managed solution. The solution and all of its components, including data in the components, will be deleted. This action cannot be undone. This solution might take several minutes to uninstall. You cannot cancel the uninstallation after it starts. Do you want to continue?' At the bottom of the dialog, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.