



Multi-File Uploader to SharePoint

User Guide

Solution Version: 365.092018.1.1

Document Version: 1.0

Table of Contents

Product Overview.....	3
Installation.....	3
Advantages & Benefits.....	3
Document Management Settings	4
Functionality	8
Uninstallation.....	14

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.

Installation

Visit <https://www.mtccrm.com/Products> and download Multi-File Uploader to SharePoint solution.

A zip file will be downloaded in your predefined folder path. Extract the contents of the zip file.

You will notice 2 zip files one is the core solution and the other is the licensing solution. Both must be imported in your CRM instance starting with licensing solution first.

Refer <https://www.mtccrm.com/PLI> for Product Free Trial Activation, Bundle Free Trial Activation, Product License Purchase, and Buy More License.

In case if you have any queries or need any installation assistance or demo, write to salesteam@mtccrm.com

Note: Only first time MTC solution users are required to import the licensing solution and undertake account registration, while others can simply start using the solution.

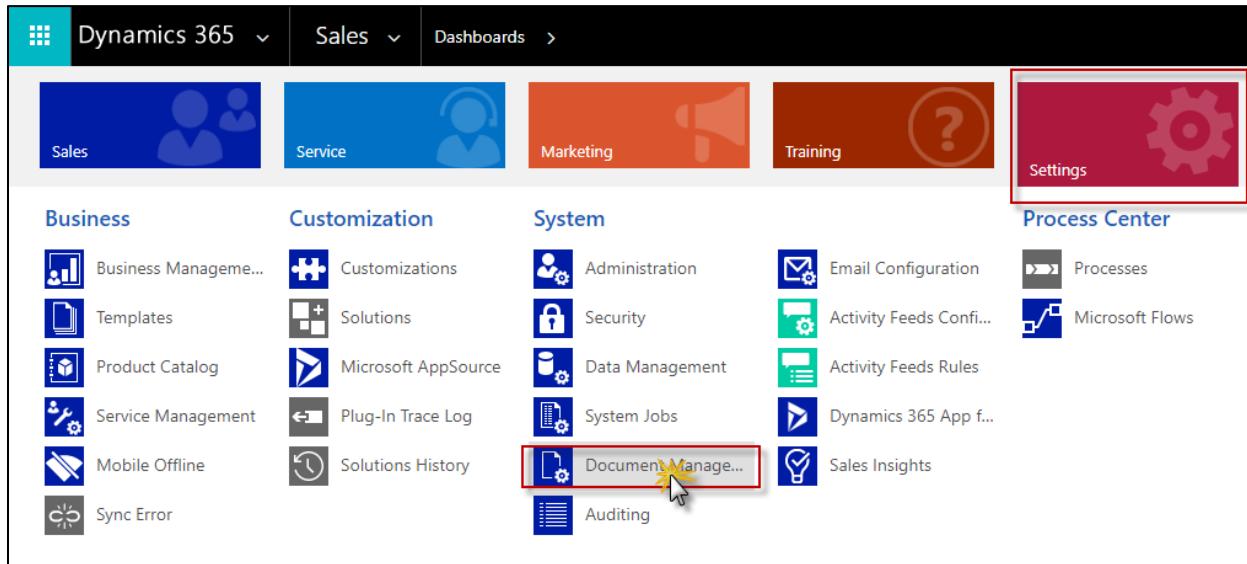
Advantages & Benefits

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

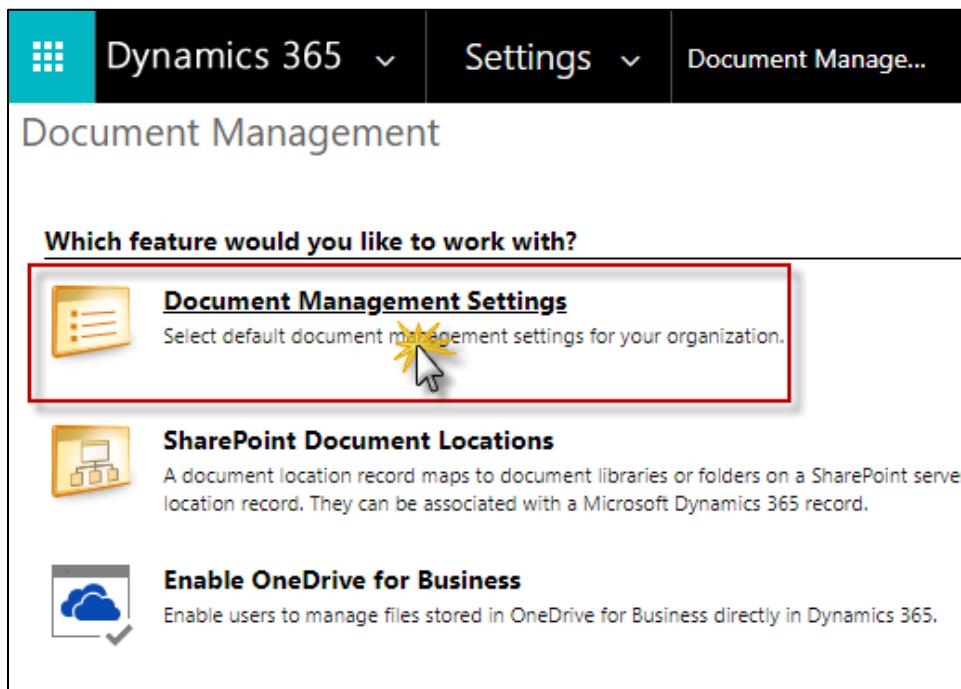
Multi-File Uploader to SharePoint works on all CRM entities in relationship with documents. It could be Account, Contact, Lead, etc. Firstly, document libraries for selected entities should be created in SharePoint location. Then by using Multi-File Uploader to SharePoint, you can map all documents added in selected entity to SharePoint.

Document Management Settings

Go to CRM → Sales → Settings → Document Management



Click Document Management. Then click Document Management Settings.



Document Management Settings window pops up. Select the desired entities and enter the SharePoint Site that is linked to your CRM as shown below. Click Next.

Document Management Settings - Google Chrome
heist05.crm8.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=...

Document Management Settings

Select entities
Document management will be enabled on the selected entities.

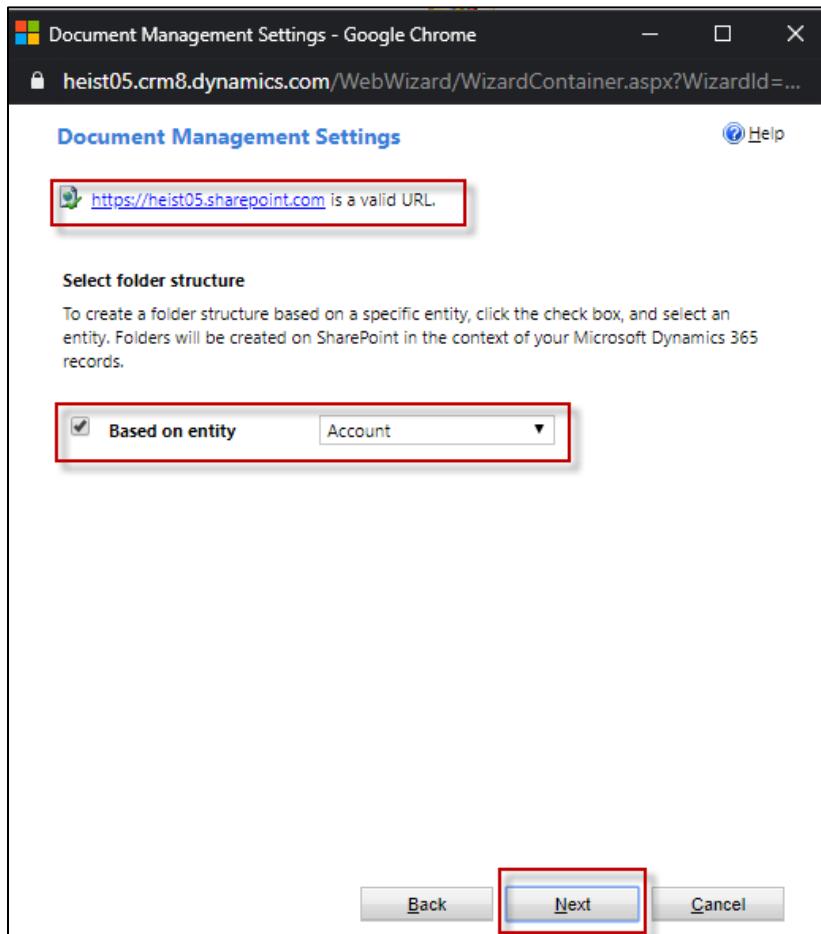
	Entities
<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	Account Project Price List
<input type="checkbox"/>	Action Card Regarding
<input type="checkbox"/>	Action Card Role Setting
<input type="checkbox"/>	Actual
<input type="checkbox"/>	Actual Data Export (Deprecated)
<input type="checkbox"/>	Address
<input checked="" type="checkbox"/>	Agreement
<input checked="" type="checkbox"/>	Agreement Booking Date
<input type="checkbox"/>	Agreement Booking Incident

SharePoint site
The selected SharePoint site will be used as the default site for document management.

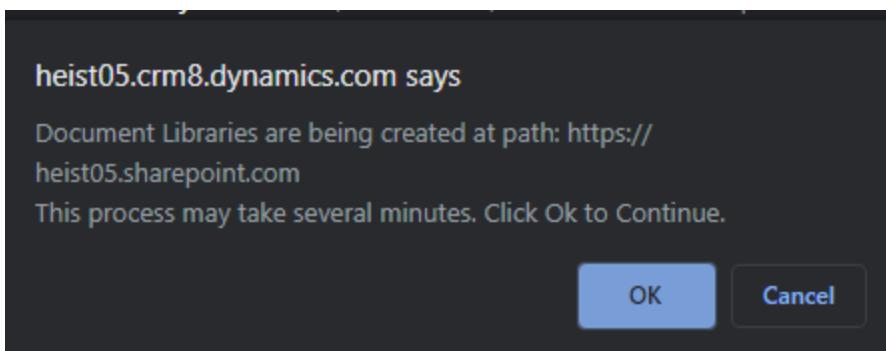
SharePoint Site:

Next **Cancel**

The system validates the SharePoint URL provided and shows the result. You should also select the folder structure for the chosen entity and click Next.



Document libraries are created at the selected SharePoint Site as shown below.



Document Management Settings - Google Chrome

heist05.crm8.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=...

Document Management Settings

Document Library Creation Status

To be created:	38
Newly created:	0
Failed:	0
Already existing:	38

Creation Details

Entities	Document Library	Status	Failure Reason
Account	https://heist05.sharepoint.com/acco...	Already e...	
Agreement	https://heist05.sharepoint.com/msd...	Already e...	
Agreement B...	https://heist05.sharepoint.com/msd...	Already e...	
Agreement B...	https://heist05.sharepoint.com/msd...	Already e...	
Agreement In...	https://heist05.sharepoint.com/msd...	Already e...	
Agreement In...	https://heist05.sharepoint.com/msd...	Already e...	
Article	https://heist05.sharepoint.com/kbar...	Already e...	
Booking Time...	https://heist05.sharepoint.com/msd...	Already e...	
Category	https://heist05.sharepoint.com/cate...	Already e...	
Expense	https://heist05.sharepoint.com/msd...	Already e...	

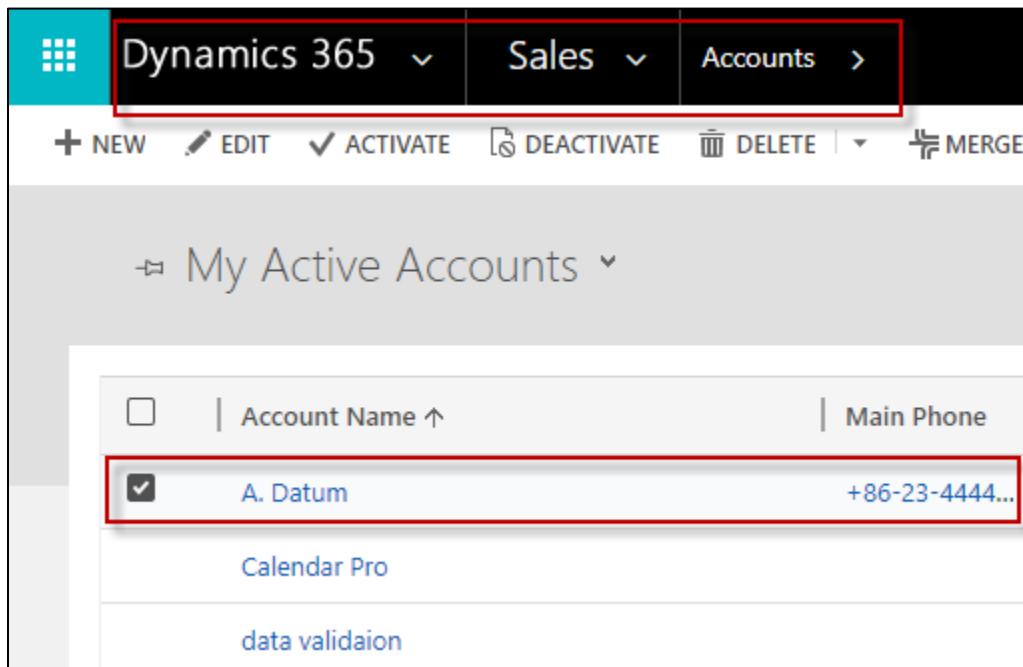
Back **Finish** **Cancel**

Click Finish.

Functionality

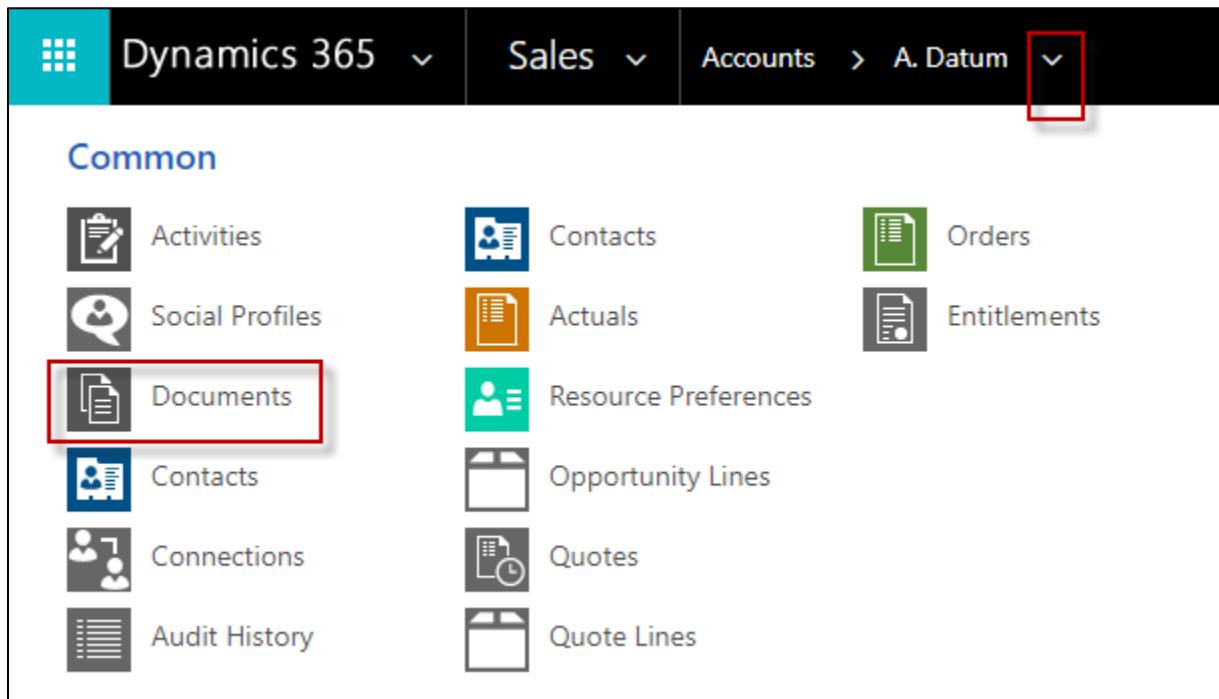
For your basic understanding, let's consider a sample Account record (e.g., A. Datum).

Go to Sales → Account → Account Record.



The screenshot shows the Dynamics 365 Sales Accounts screen. The top navigation bar is highlighted with a red box, showing 'Dynamics 365', 'Sales', and 'Accounts'. Below the navigation bar is a toolbar with buttons for NEW, EDIT, ACTIVATE, DEACTIVATE, DELETE, and MERGE. The main area is titled 'My Active Accounts' with a dropdown arrow. A table lists accounts, with the first row for 'A. Datum' selected and highlighted with a red box. The table columns are 'Account Name' and 'Main Phone'. The 'A. Datum' row shows 'A. Datum' in the first column and '+86-23-4444...' in the second column. Below the table, there are links for 'Calendar Pro' and 'data validation'.

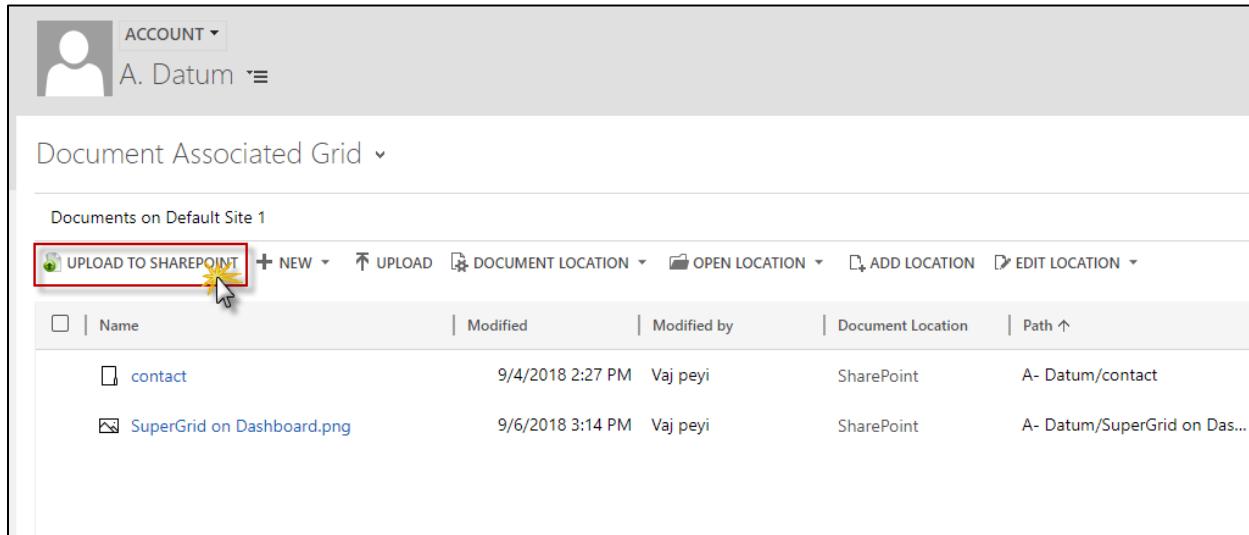
From the sitemap, click the down arrow just beside the Account Record.



The screenshot shows the Dynamics 365 Sales Accounts sitemap. The top navigation bar is identical to the previous screenshot. The main content area is titled 'Common' and contains a grid of 12 items. The 'Documents' item, which is highlighted with a red box, is located in the second row, first column. The other items are: Activities, Contacts, Orders, Social Profiles, Actuals, Entitlements, Documents, Resource Preferences, Opportunity Lines, Contacts, Connections, Quotes, Audit History, and Quote Lines.

Click on **Documents**.

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

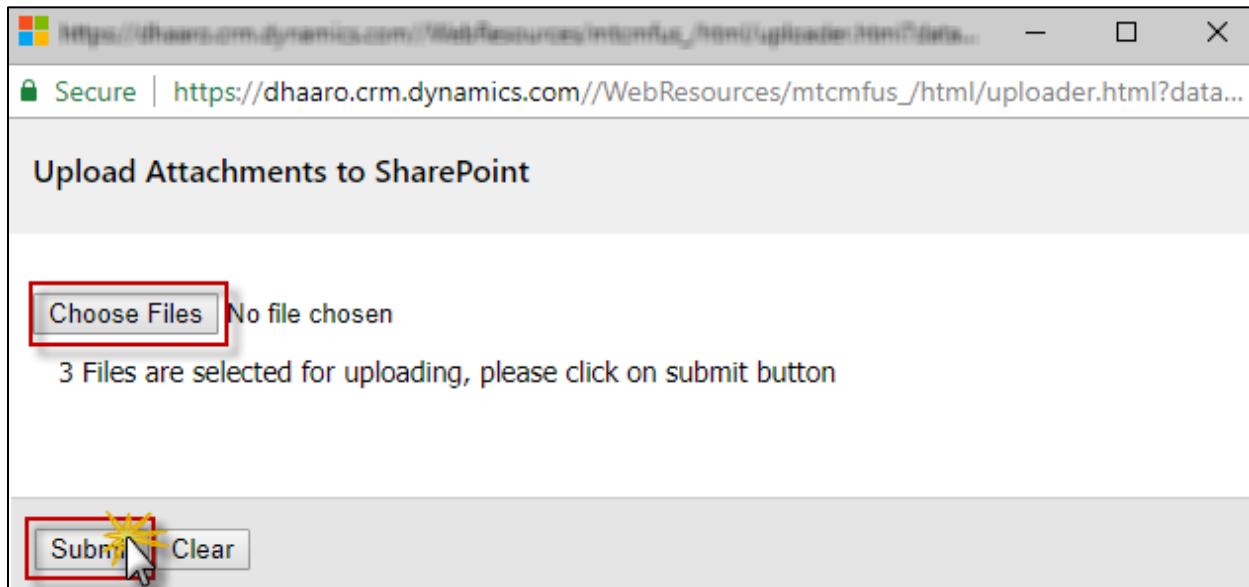


Document Associated Grid

Documents on Default Site 1

<input type="checkbox"/>	Name	Modified	Modified by	Document Location	Path ↑
<input type="checkbox"/>	contact	9/4/2018 2:27 PM	Vaj peyi	SharePoint	A- Datum/contact
<input type="checkbox"/>	SuperGrid on Dashboard.png	9/6/2018 3:14 PM	Vaj peyi	SharePoint	A- Datum/SuperGrid on Das...

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.



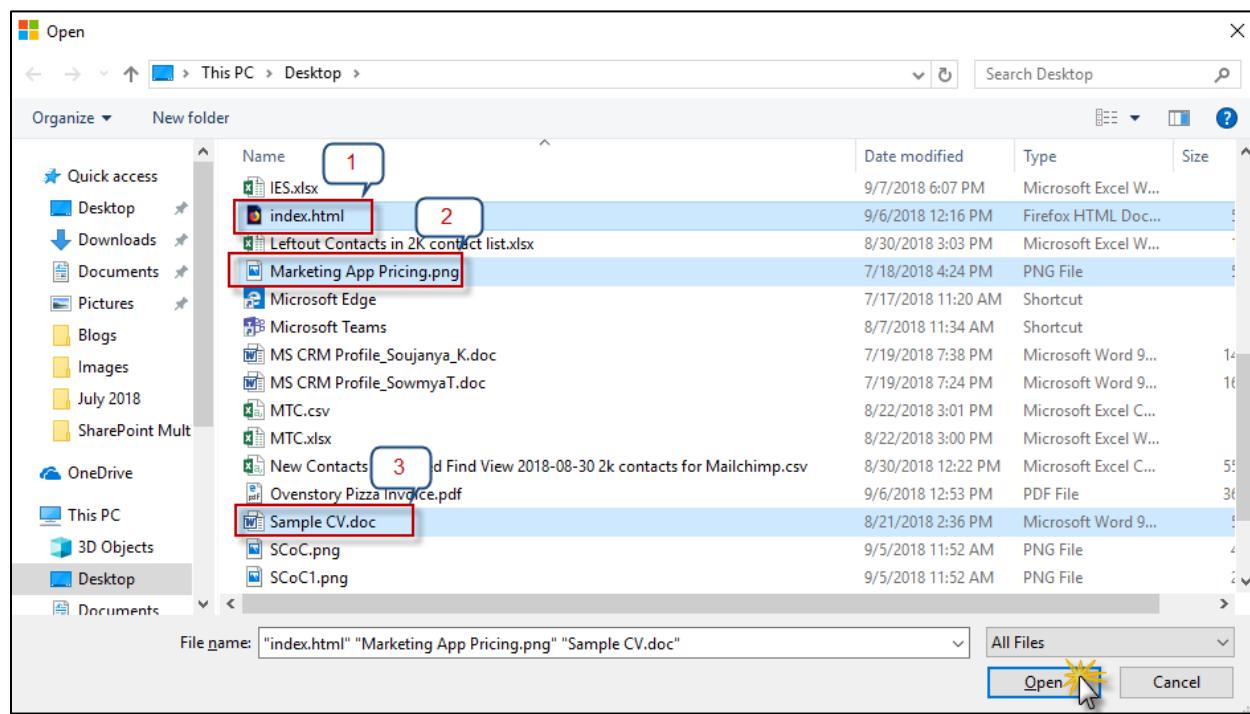
Secure | https://dhaar.crm.dynamics.com//WebResources/mtcmfus_/html/uploader.html?data...

Upload Attachments to SharePoint

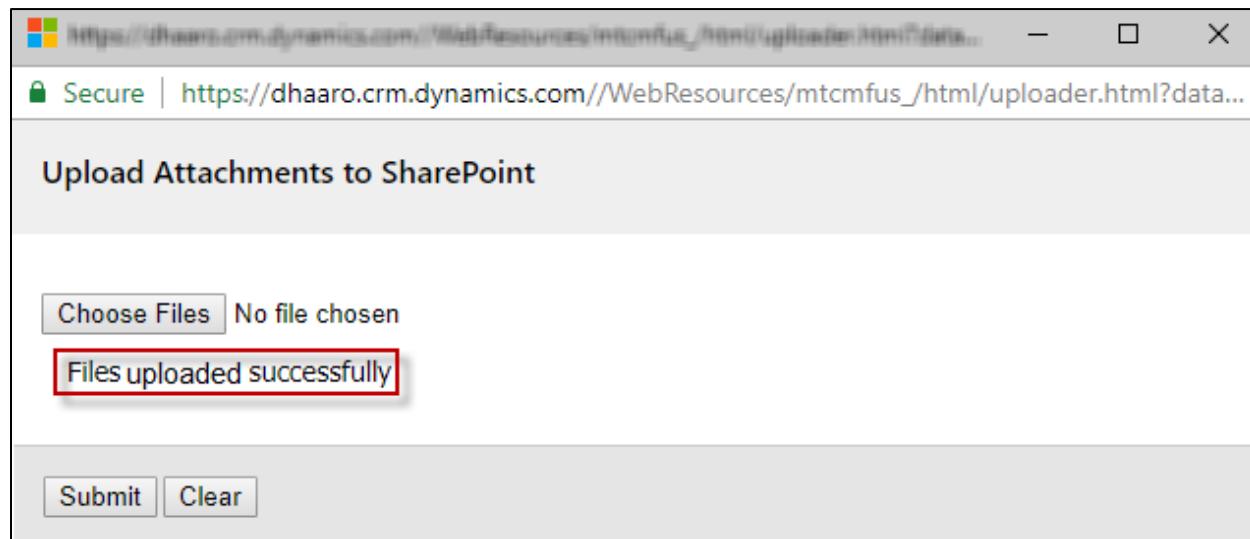
Choose Files No file chosen

3 Files are selected for uploading, please click on submit button

Submit **Clear**



Files will be successfully uploaded. Click Submit.



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

Document Associated Grid ▾

Documents on Default Site 1

UPLOAD TO SHAREPOINT + NEW ▾ UPLOAD DOCUMENT LOCATION ▾ OPEN LOCATION ▾ ADD LOCATION ▾ EDIT LOCATION ▾

<input type="checkbox"/>	Name	Modified	Modified by	Document Location	Path ↑
<input type="checkbox"/>	contact	9/4/2018 2:27 PM	Vaj peyi	SharePoint	A- Datum/contact
<input checked="" type="checkbox"/>	index.html	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/index.html
<input type="checkbox"/>	Marketing App Pricing.png	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/Marketing App Pr...
<input type="checkbox"/>	Sample CV.doc	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/Sample CV.doc
<input type="checkbox"/>	SuperGrid on Dashboard.png	9/6/2018 3:14 PM	Vaj peyi	SharePoint	A- Datum/SuperGrid on Das...

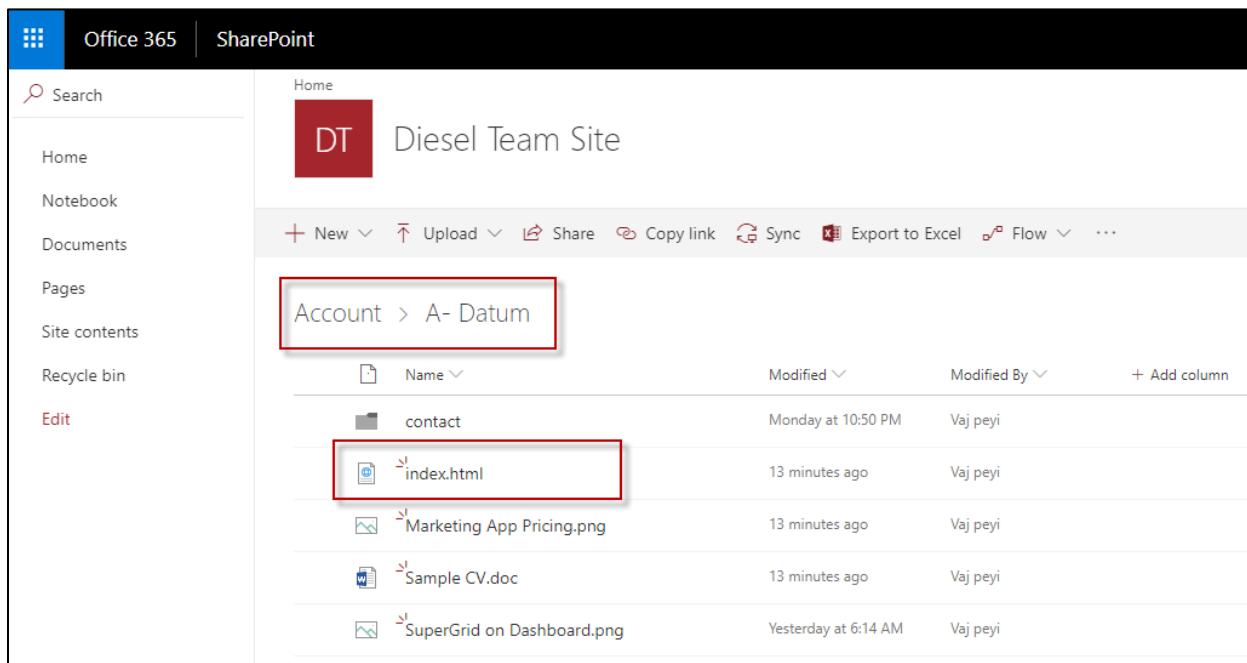
Select any of the uploaded file and click OPEN LOCATION to see the file in SharePoint site.

Document Associated Grid ▾

Documents on Default Site 1

EDIT UPLOAD TO SHAREPOINT DELETE CHECK OUT CHECK IN EDIT PROPERTIES DISCARD CHECK OUT OPEN LOCATION

<input type="checkbox"/>	Name	Modified	Modified by	Document Location	Path ↑
<input type="checkbox"/>	contact	9/4/2018 2:27 PM	Vaj peyi	SharePoint	A- Datum/contact
<input checked="" type="checkbox"/>	index.html	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/index.html
<input type="checkbox"/>	Marketing App Pricing.png	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/Marketing App Pr...

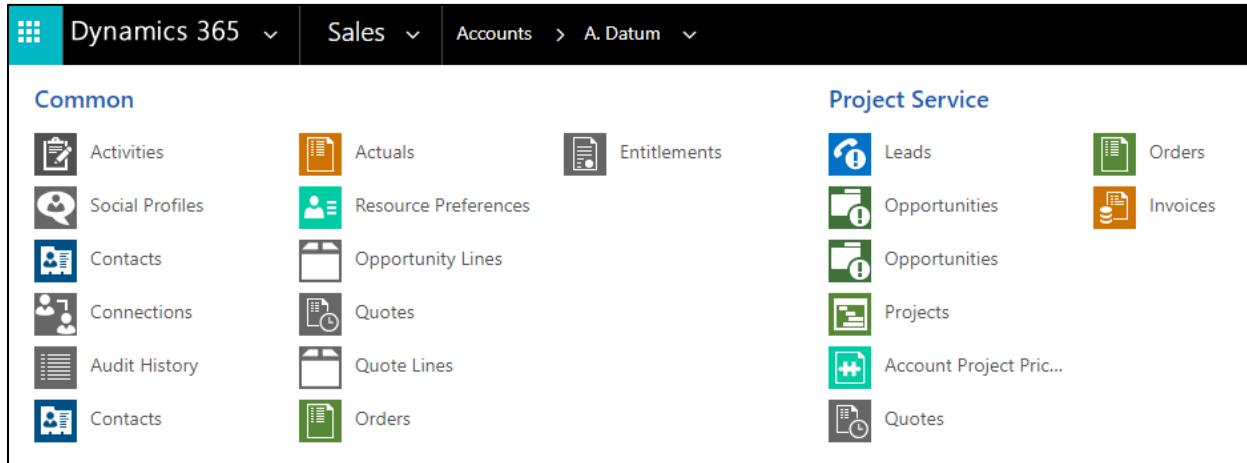


The screenshot shows the SharePoint Home page for the 'Diesel Team Site'. The left navigation bar includes 'Home', 'Notebook', 'Documents', 'Pages', 'Site contents', 'Recycle bin', and 'Edit'. The 'Edit' option is highlighted. The main content area shows a list of files under the 'Account > A- Datum' folder. The file 'index.html' is highlighted with a red box. The list includes:

	Name	Modified	Modified By
contact	Monday at 10:50 PM	Vaj peyi	
 index.html	13 minutes ago	Vaj peyi	
 Marketing App Pricing.png	13 minutes ago	Vaj peyi	
 Sample CV.doc	13 minutes ago	Vaj peyi	
 SuperGrid on Dashboard.png	Yesterday at 6:14 AM	Vaj peyi	

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.



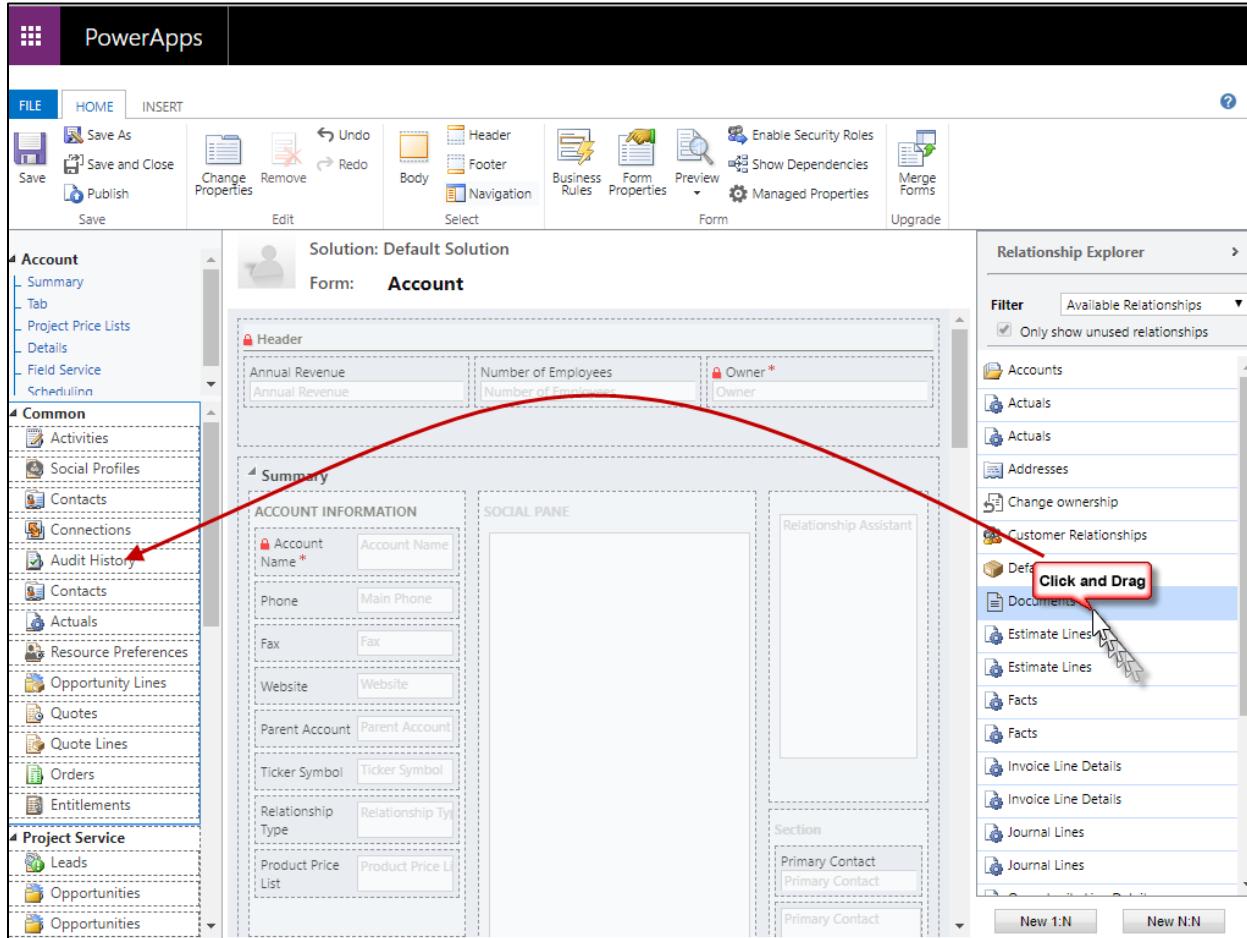
The screenshot shows the Dynamics 365 Sales Accounts page for 'A. Datum'. The top navigation bar includes 'Dynamics 365', 'Sales', 'Accounts > A. Datum'. The left sidebar under 'Common' includes: Activities, Social Profiles, Contacts, Connections, Audit History, and Contacts. The main content area shows a grid of project service entities: Actuals, Resource Preferences, Opportunity Lines, Quotes, Quote Lines, Orders, Opportunities, Projects, Account Project Pric..., and Quotes. The 'Documents' entity is not visible in this view.

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

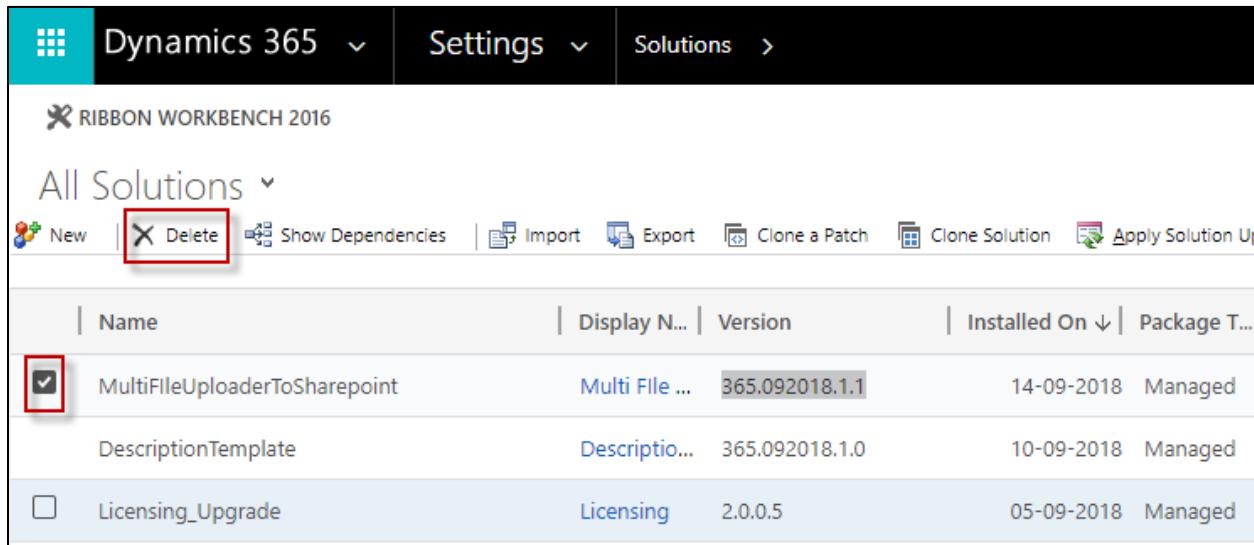
Documents attribute from the extreme right column to drag and drop to Common section.
Once done, Save and Publish to see the Documents.



Uninstallation

To uninstall the solution, go to Solutions Page.

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



The screenshot shows the 'All Solutions' page in the Dynamics 365 ribbon workbench. The 'MultiFileUploaderToSharepoint' solution is selected (indicated by a checked checkbox in the first column). The 'Delete' button in the top toolbar is highlighted with a red box. The table below lists the solutions with columns for Name, Display Name, Version, Installed On, and Package Type.

	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	Description...	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.

