Multi-File Uploader to SharePoint

User Guide

MTC

THE CRM SERVICES VALUE SOURCE

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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.

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.
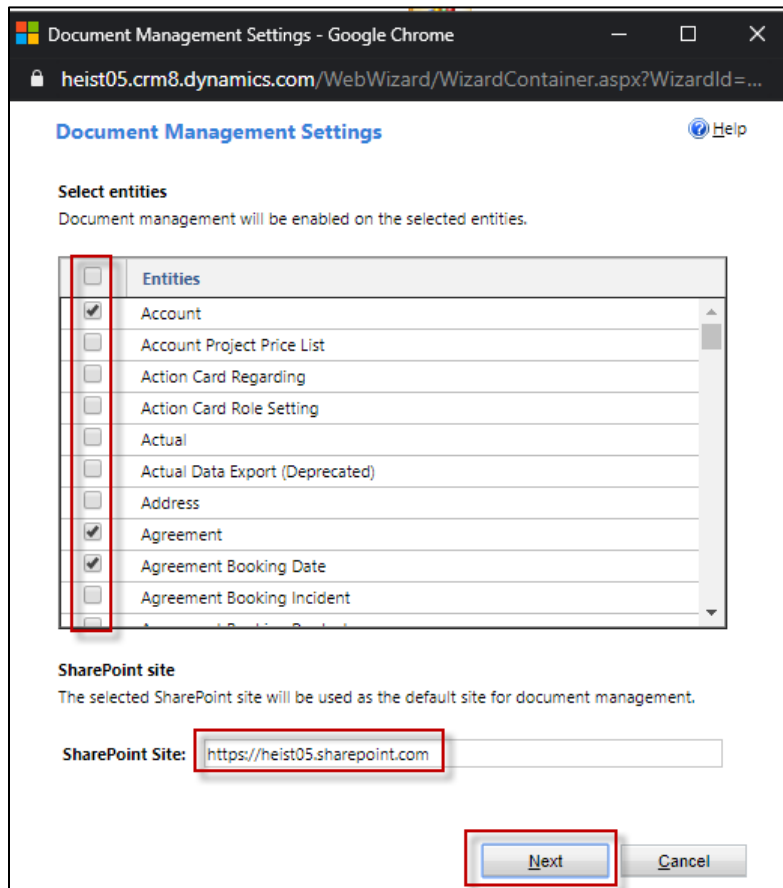
Document Management Settings

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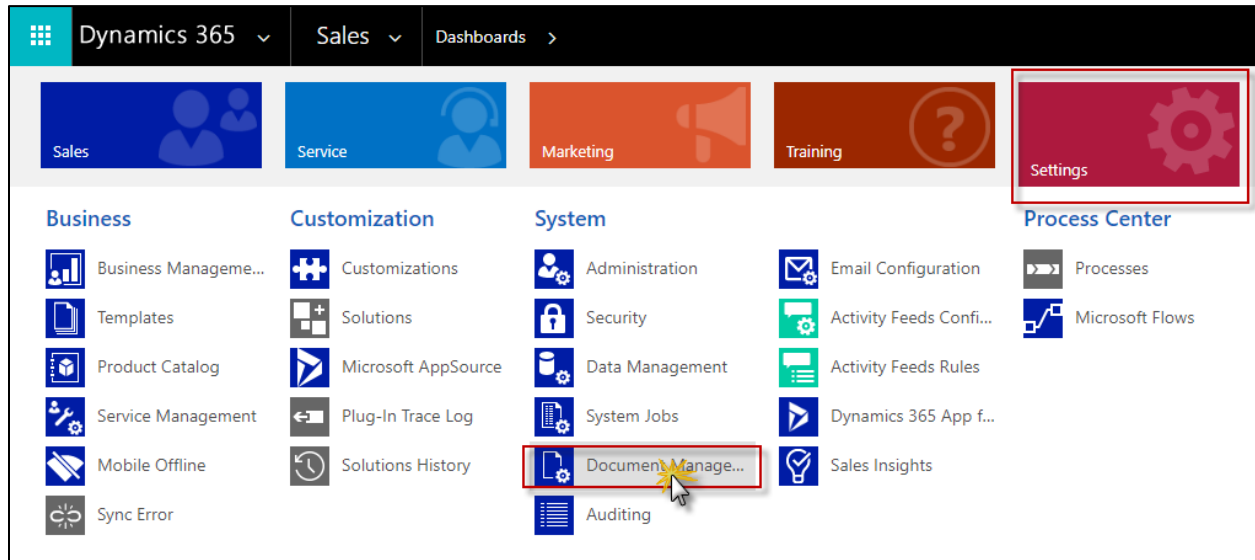
Click Document Management. Then click Document Management Settings.
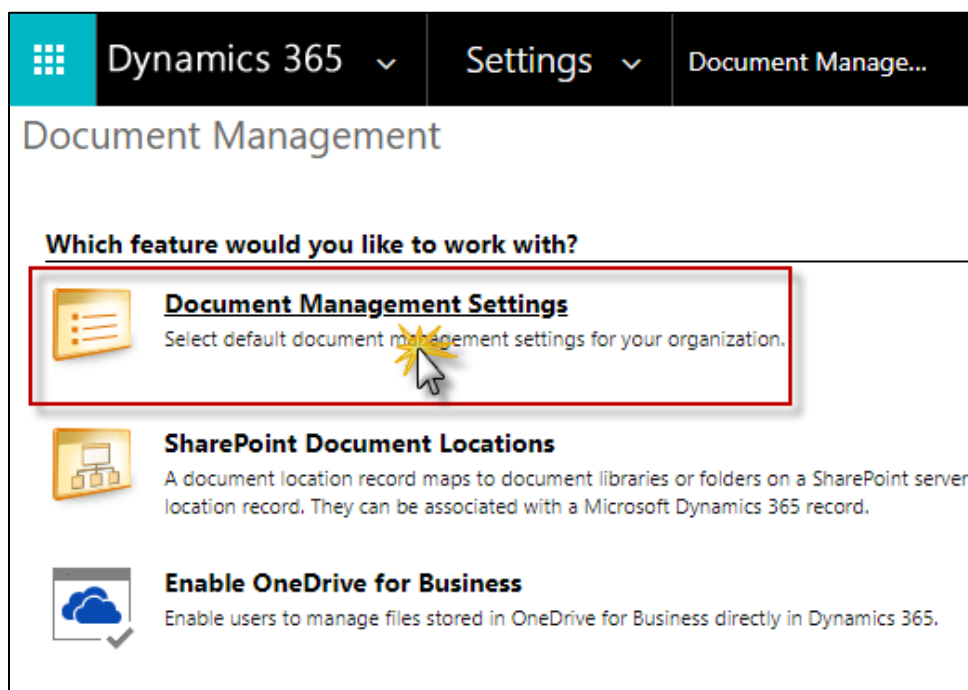
Document Management Settings window pops up. Select the desired entities and enter the SharePoint Site that is linked to your CRM as shown below. Click Next.

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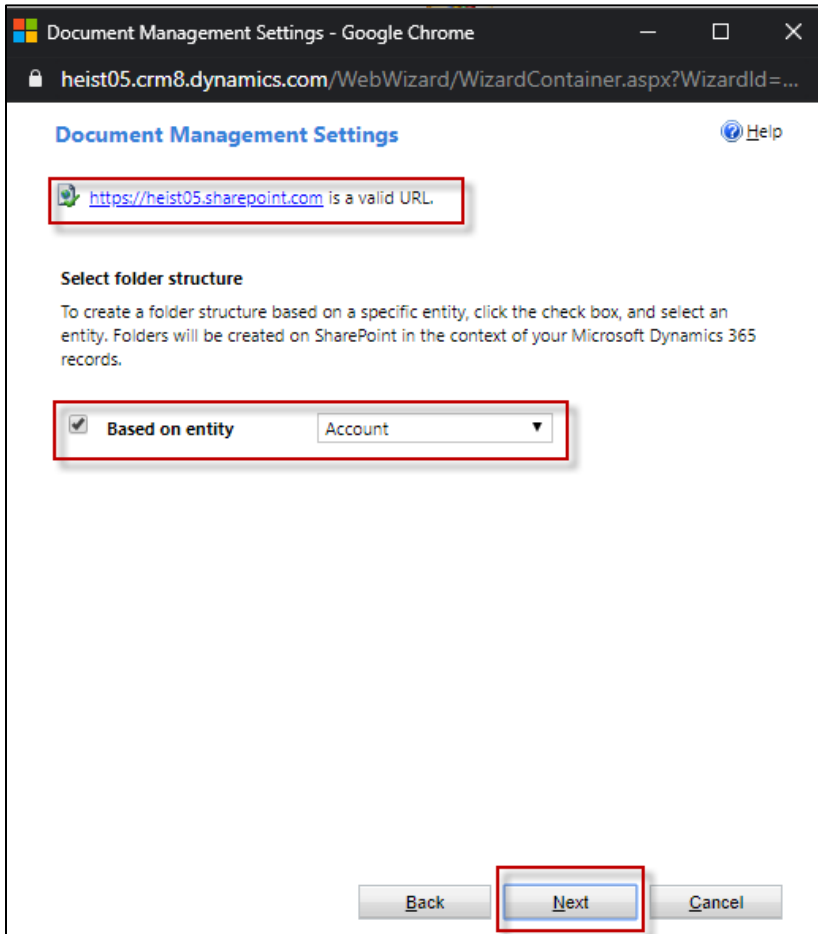
Document libraries are created at the selected SharePoint Site as shown below.

Click Finish.

Functionality

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

Go to Sales→Account → Account Record.
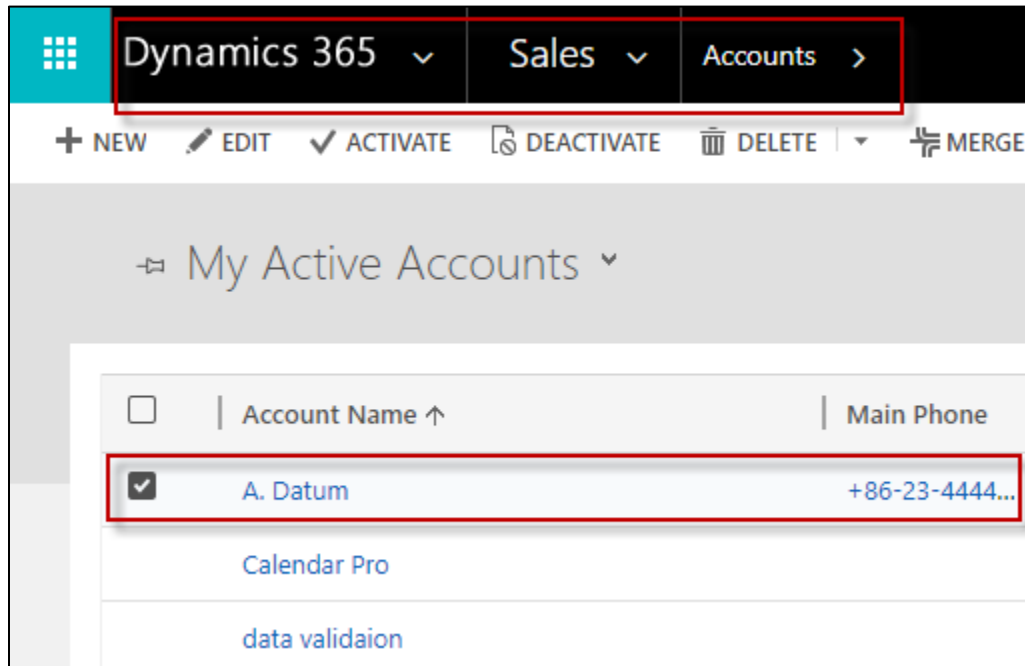
From the sitemap, click the down arrow just beside the Account Record.
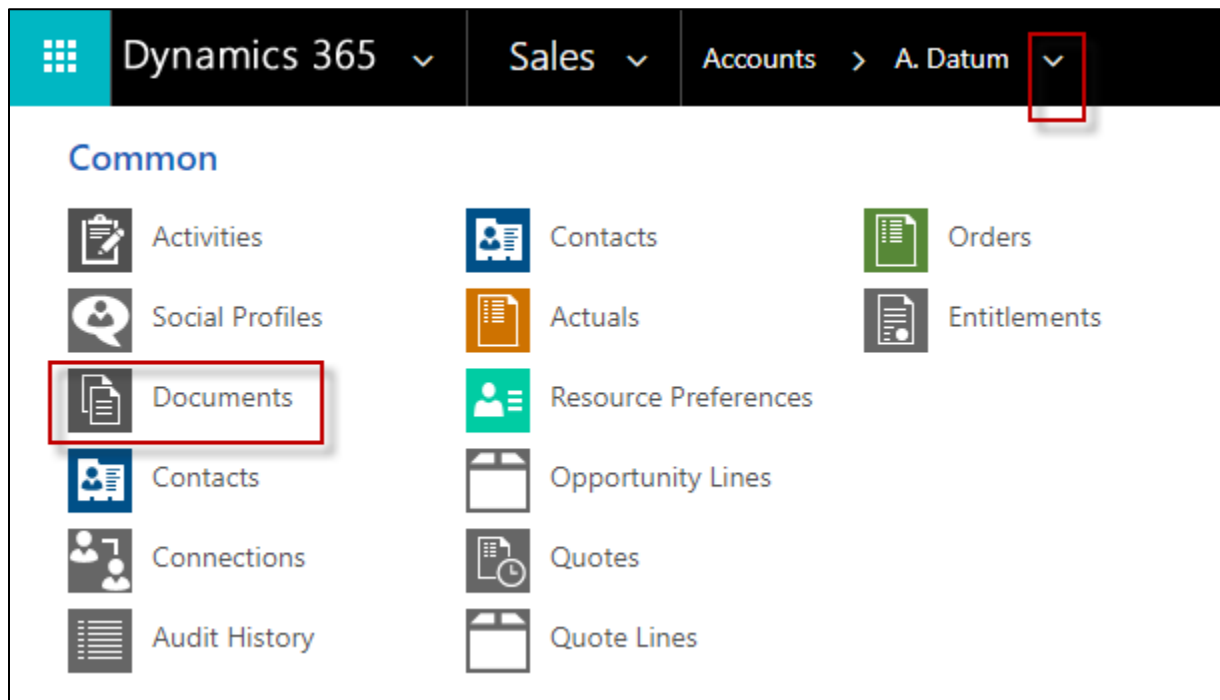
Click on **Documents**.

You will be directed to **Document Associated Grid**. In here you will notice **UPLOAD TO SHAREPOINT** button on the ribbon.
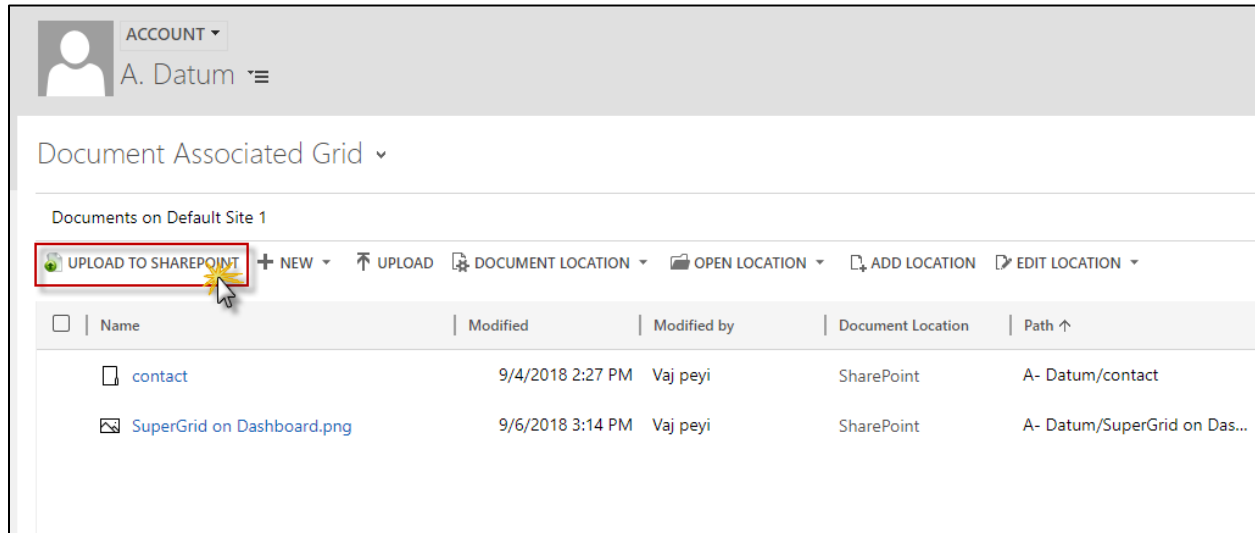
Click it and browse the files you want to directly upload to SharePoint. You can select multiple files unlike the OOB functionality which allows you to select only one file at a time.
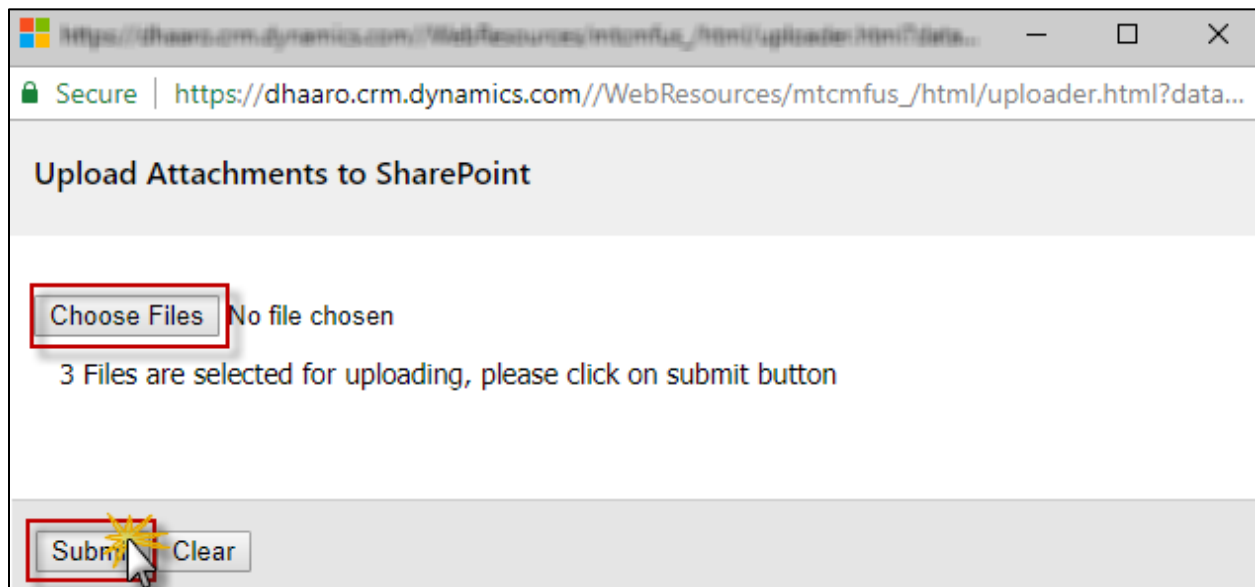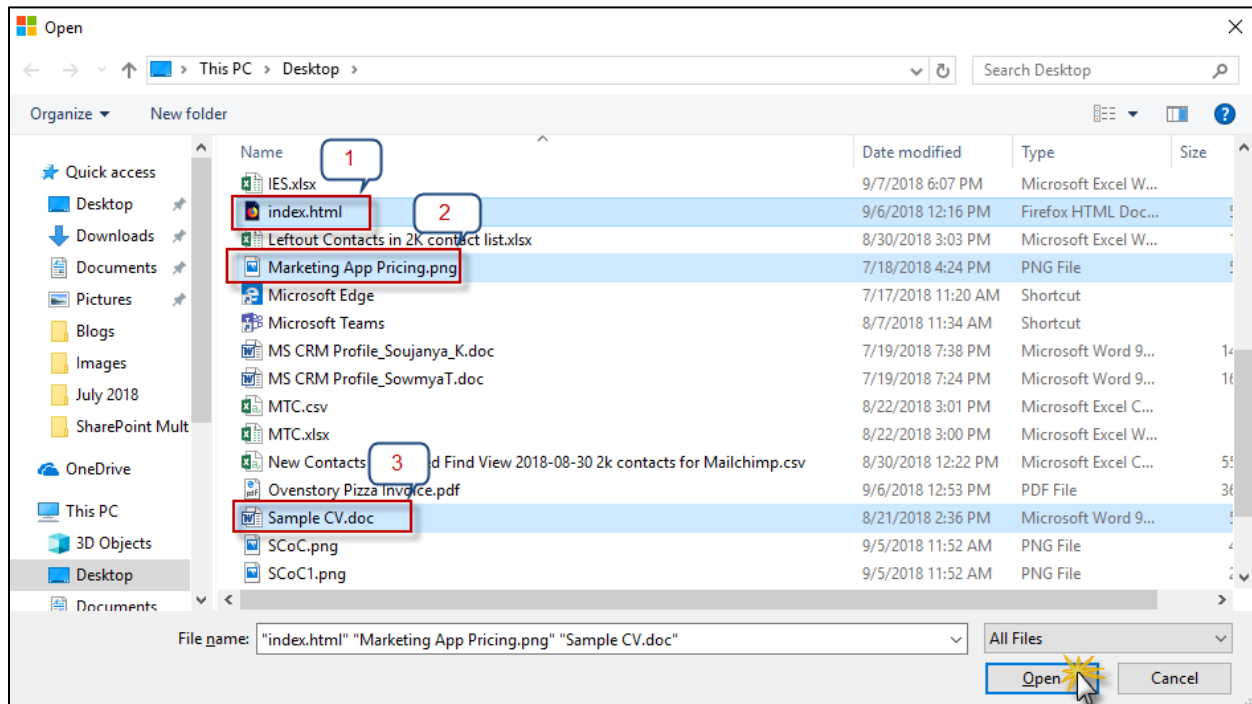
Files will be successfully uploaded. Click Submit.
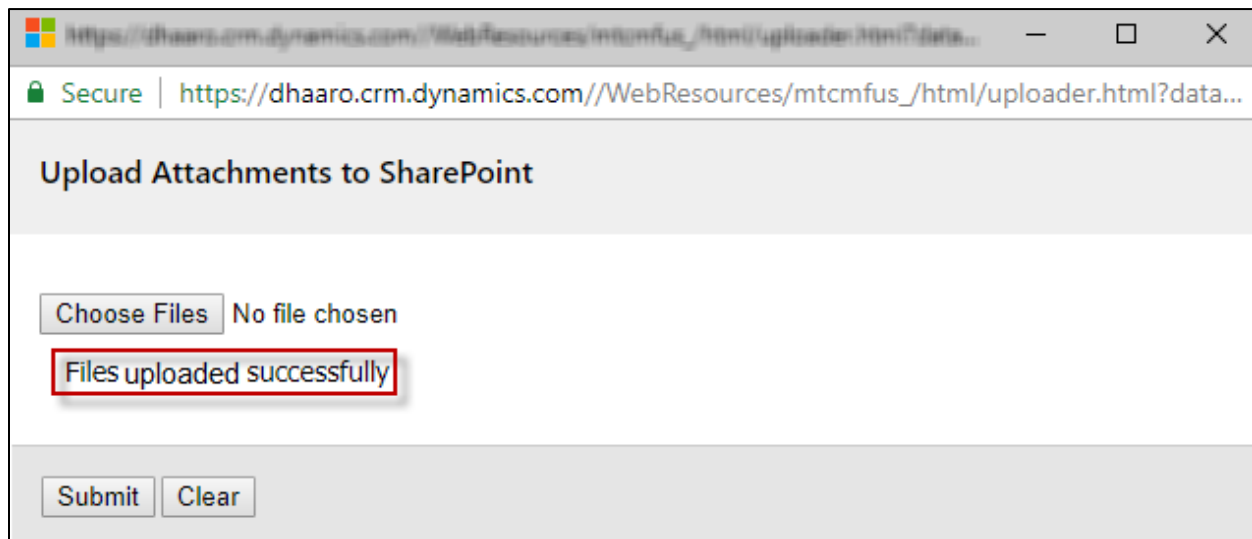
You will notice that the files uploaded to the SharePoint in the document grid.

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.
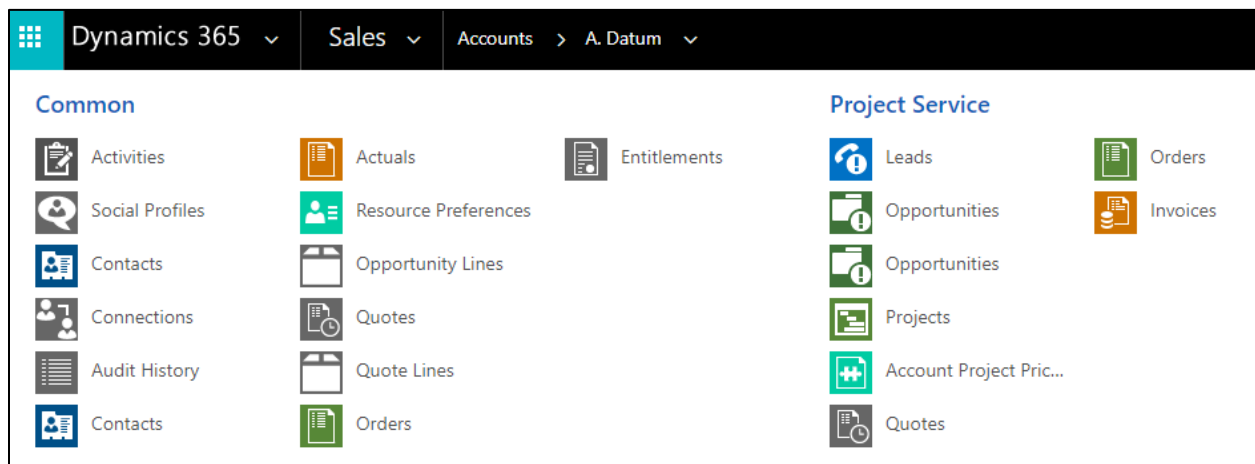

In the above image, you don't see Documents by default.

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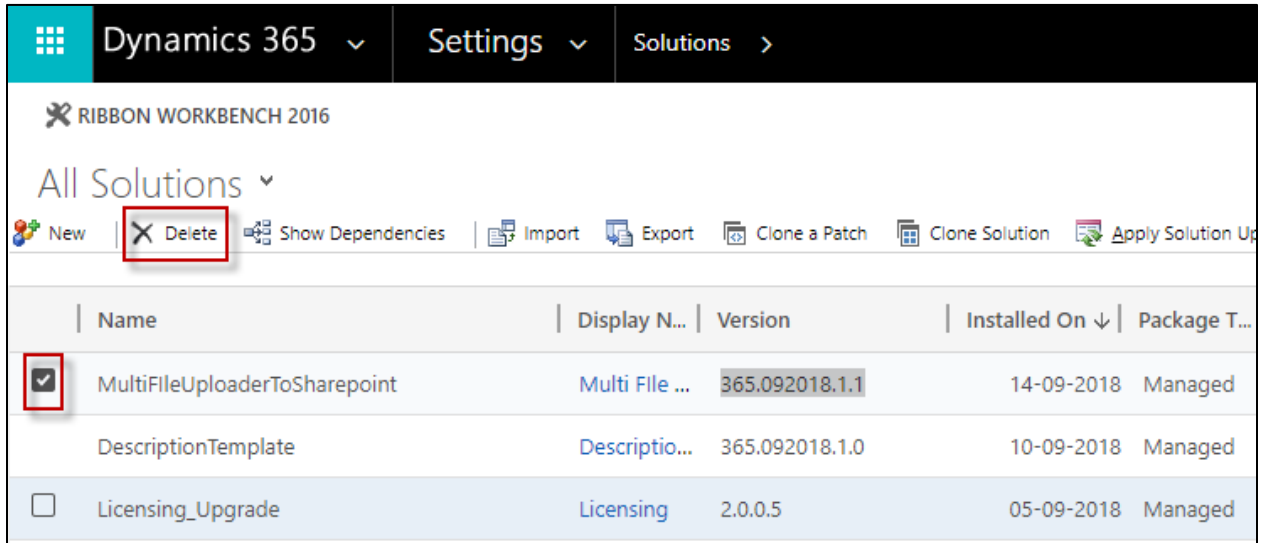
Documents attribute from the extreme right column to drag and drop to Common section.
Once done, Save and Publish to see the Documents.
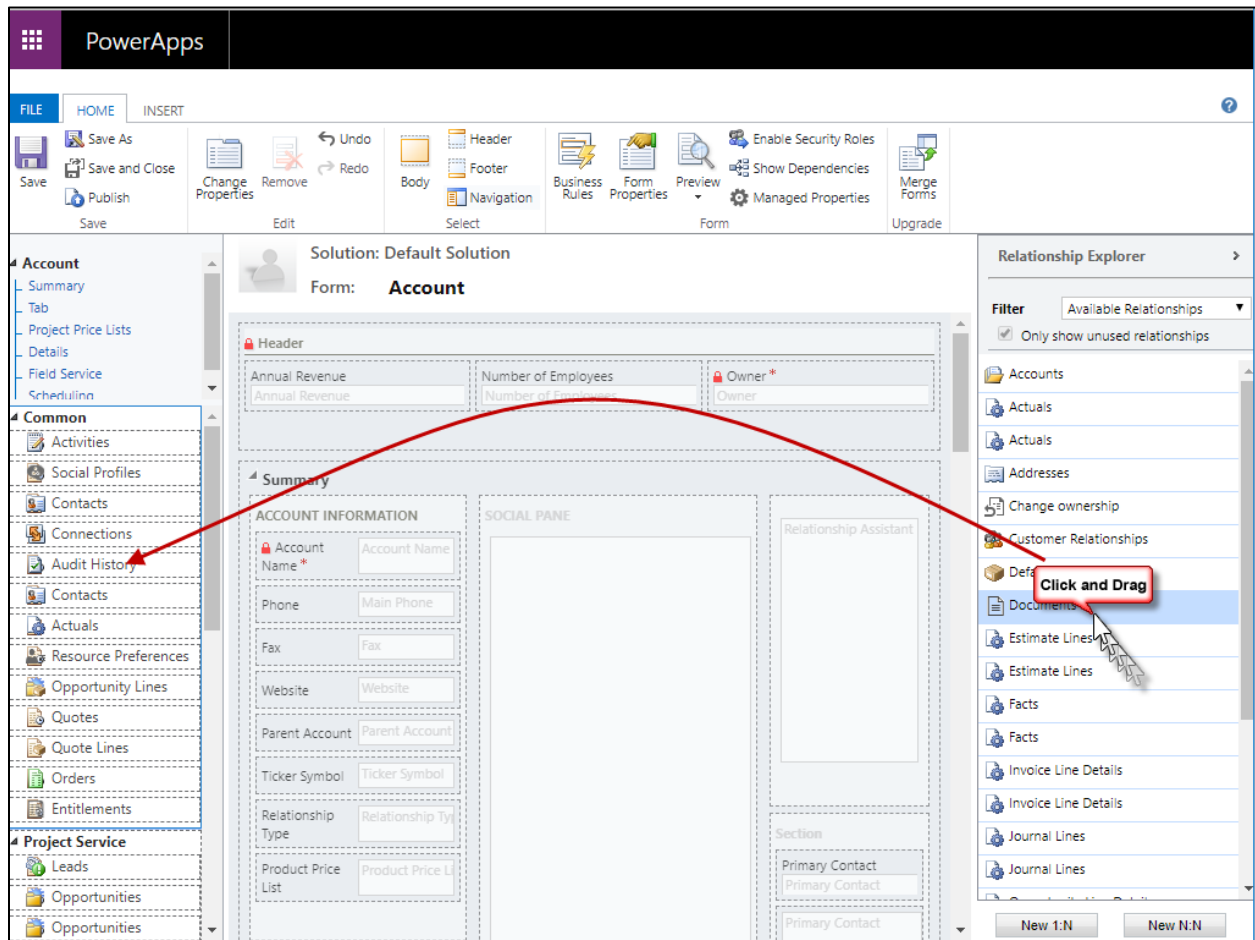
Uninstallation

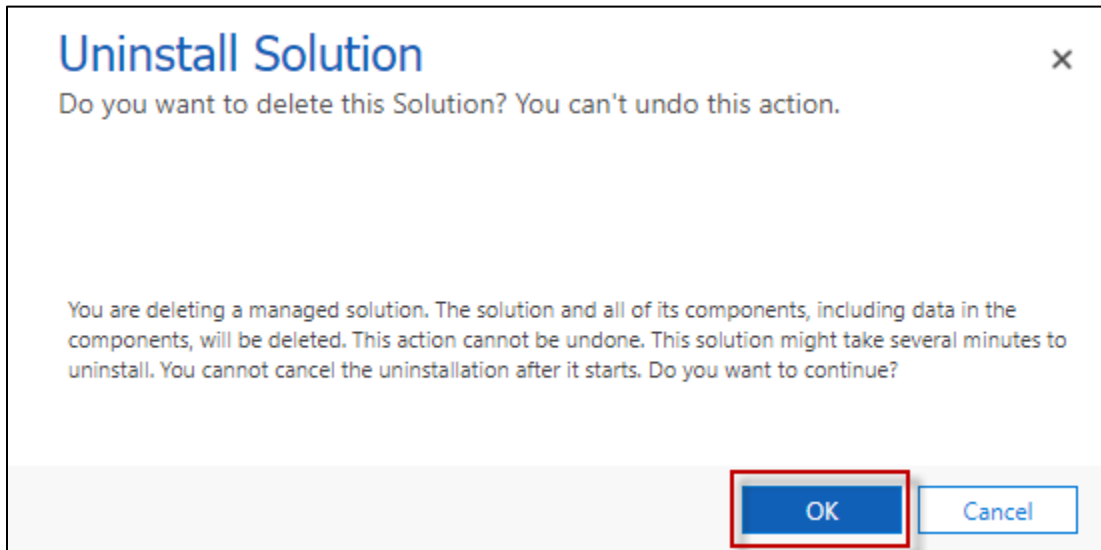To uninstall the solution, go to Solutions Page.

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

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