



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.

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.

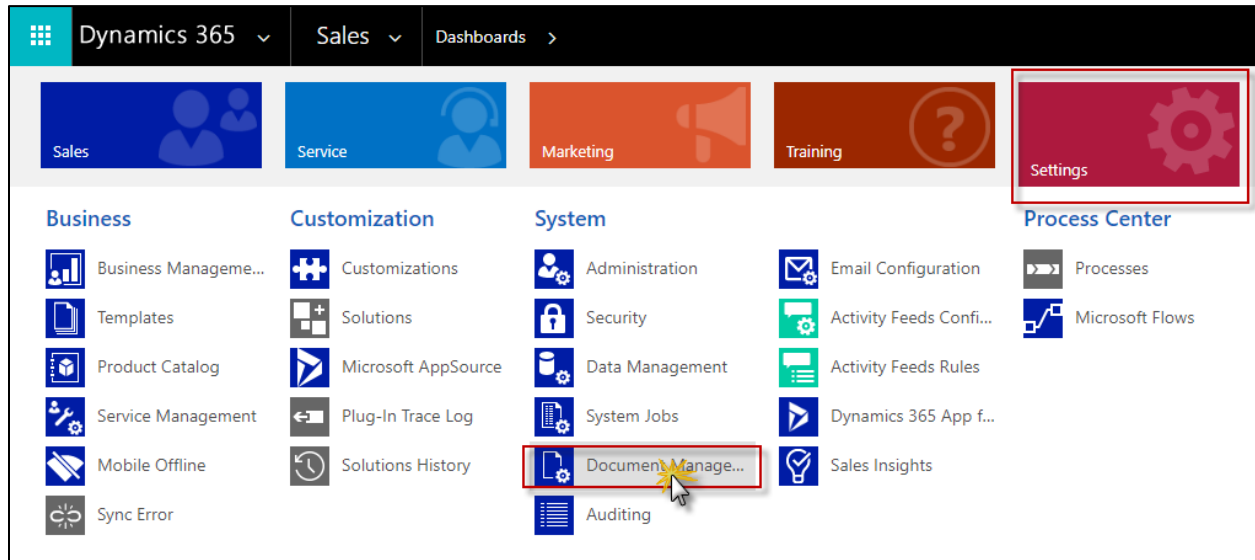
Advantages & Benefits

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

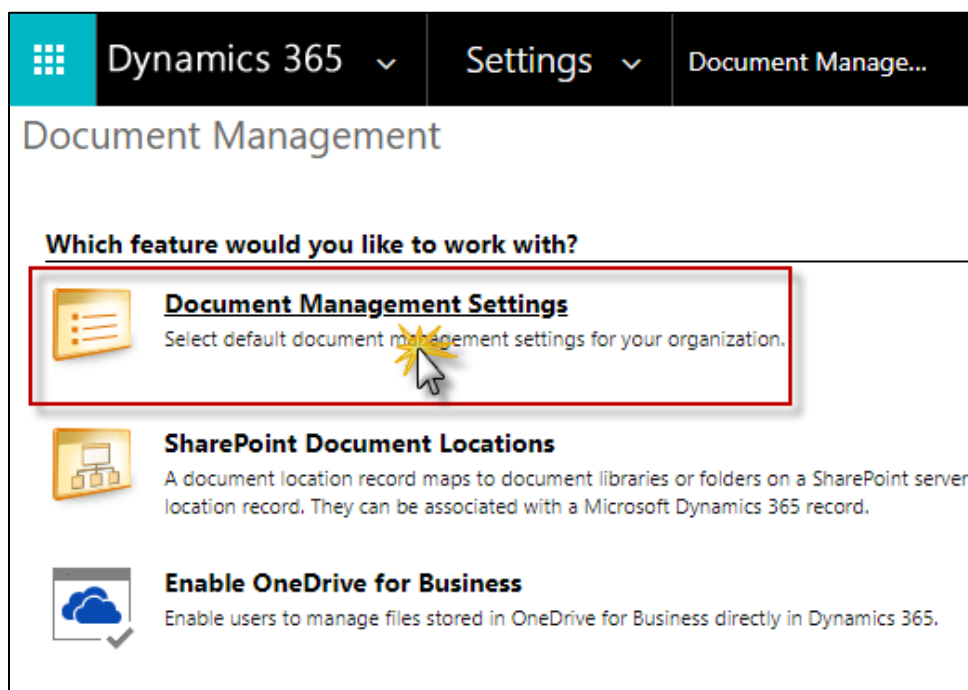
Multi-File Uploader to SharePoint works on all CRM entities in relationship with documents. It could be Account, Contact, Lead, etc. Firstly, document libraries for selected entities should be created in SharePoint location. Then by using Multi-File Uploader to SharePoint, you can map all documents added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

Document Management Settings

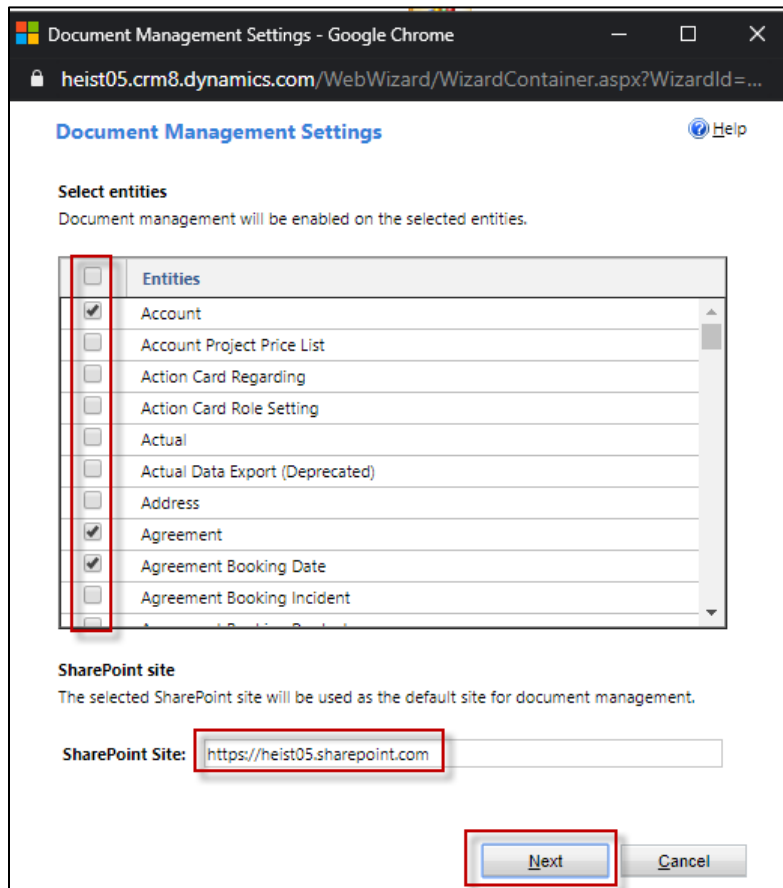
Go to CRM → Sales → Settings → Document Management



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

Help

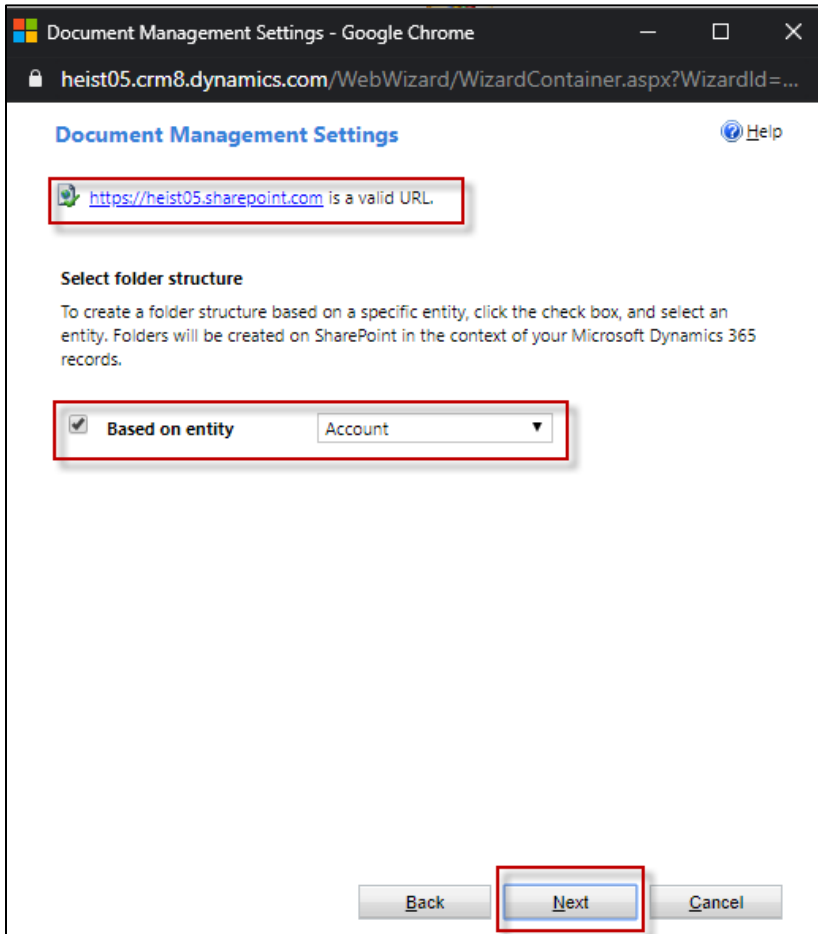
Select entities
Document management will be enabled on the selected entities.

<input type="checkbox"/>	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

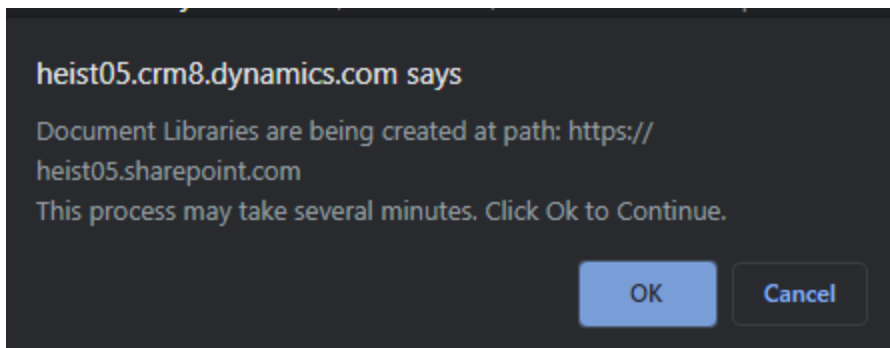
SharePoint site
The selected SharePoint site will be used as the default site for document management.

SharePoint Site:

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...	

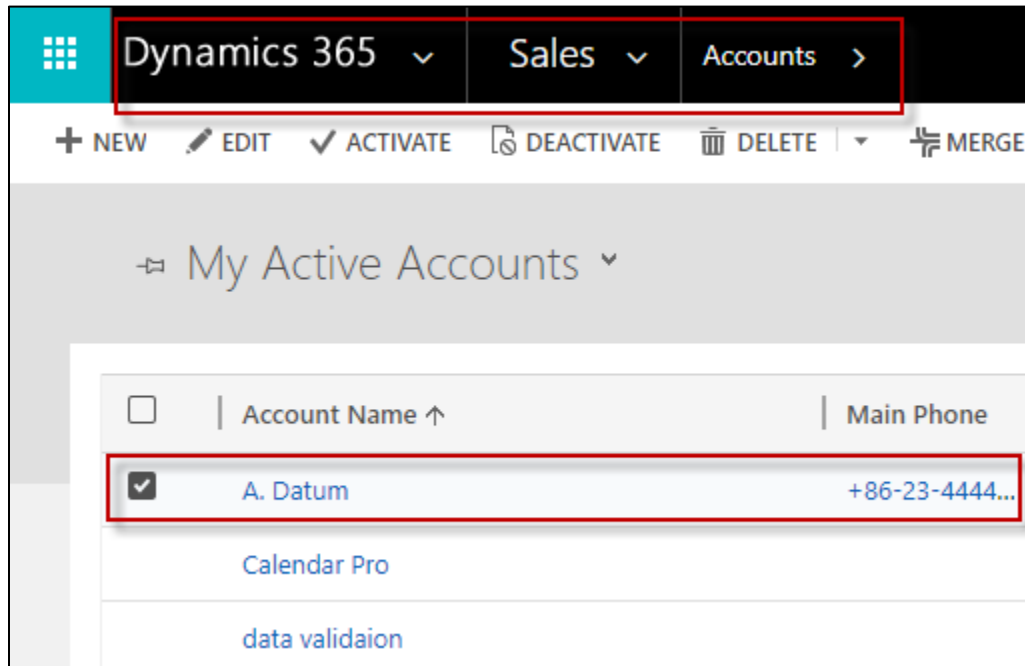
Back Finish Cancel

Click Finish.

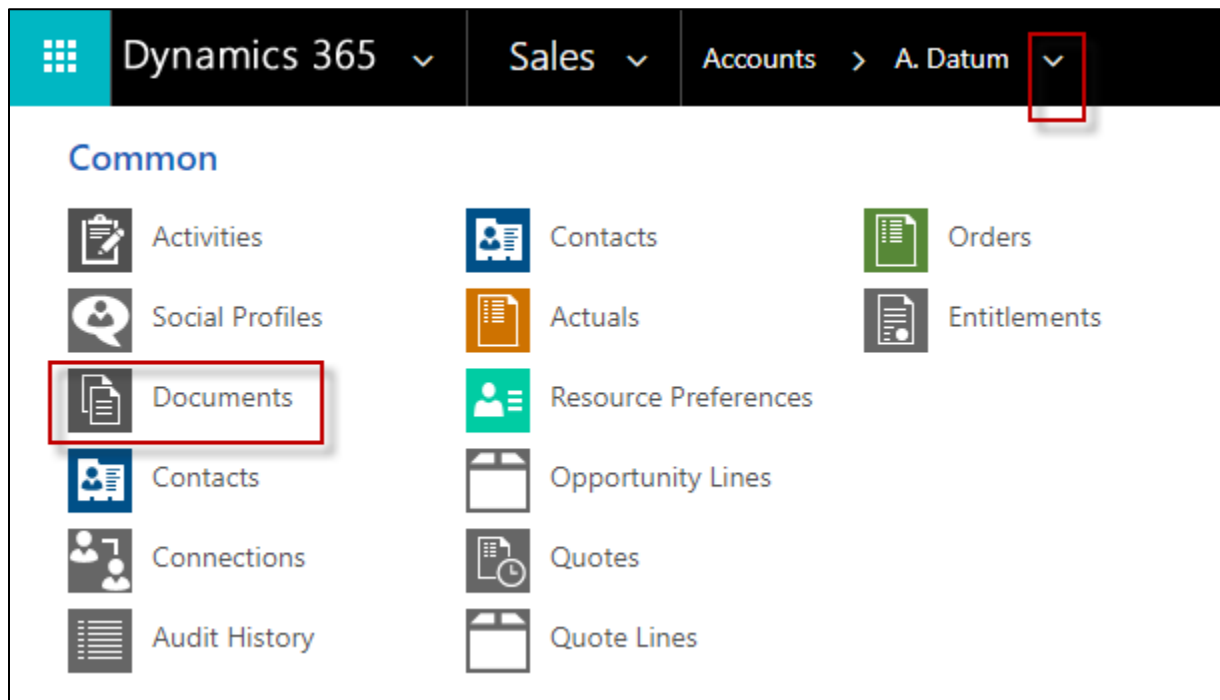
Functionality

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

Go to Sales→Account → Account Record.

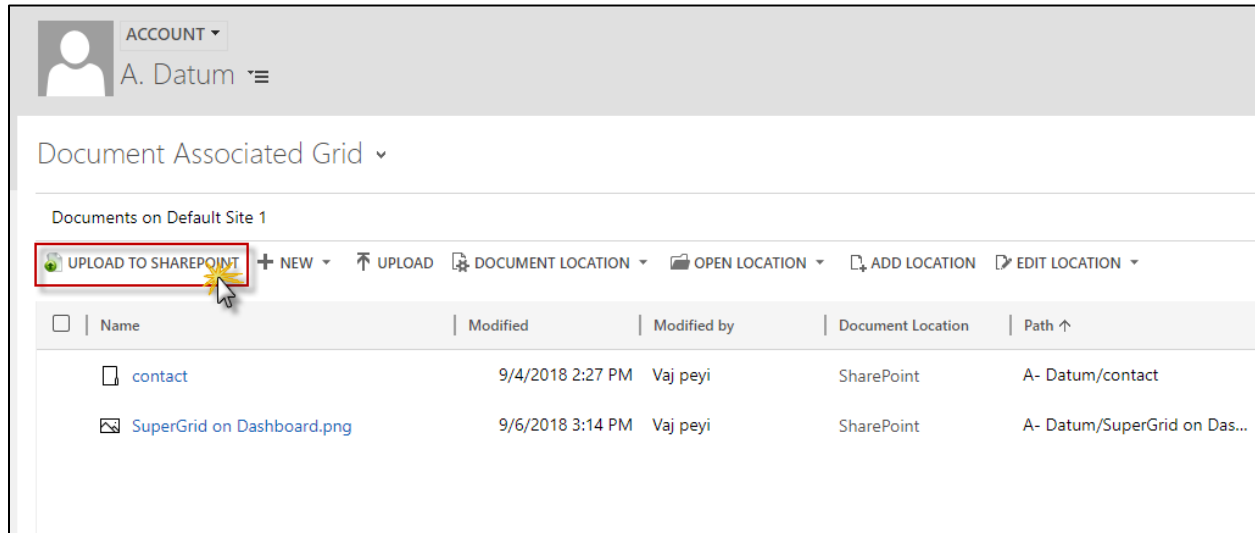


From the sitemap, click the down arrow just beside the Account Record.

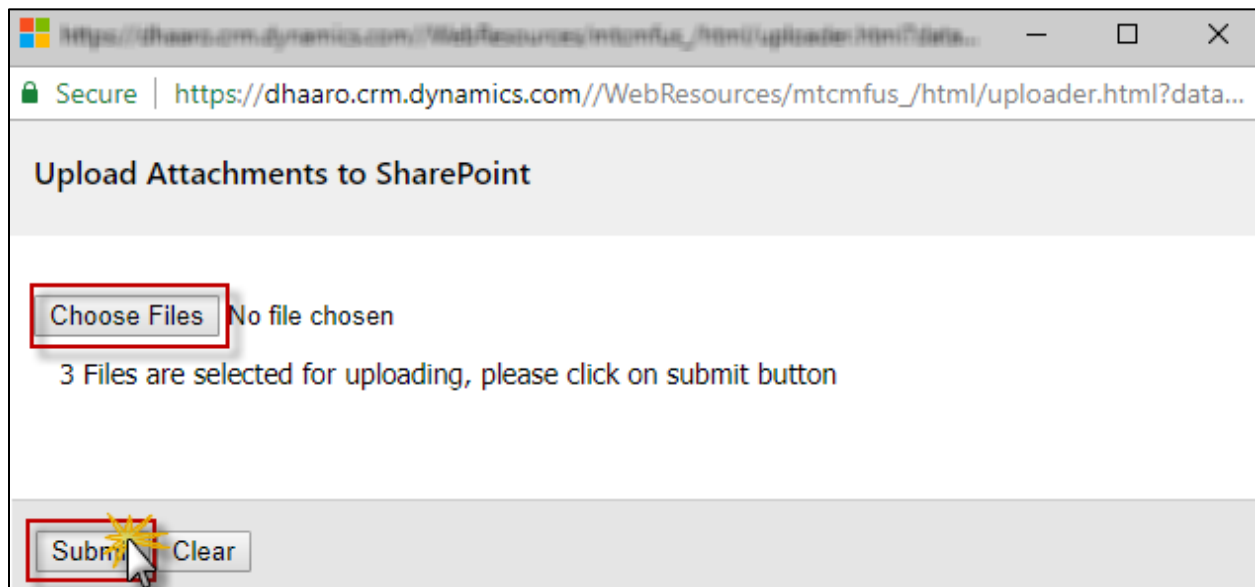


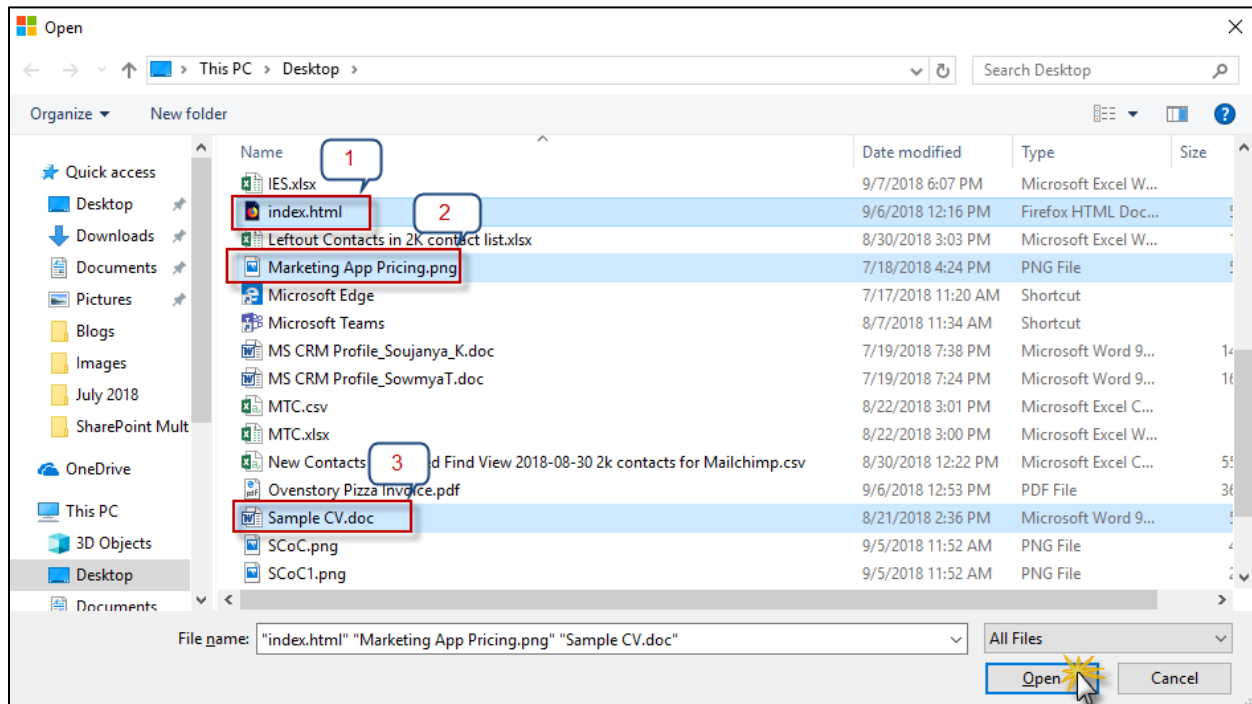
Click on **Documents**.

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

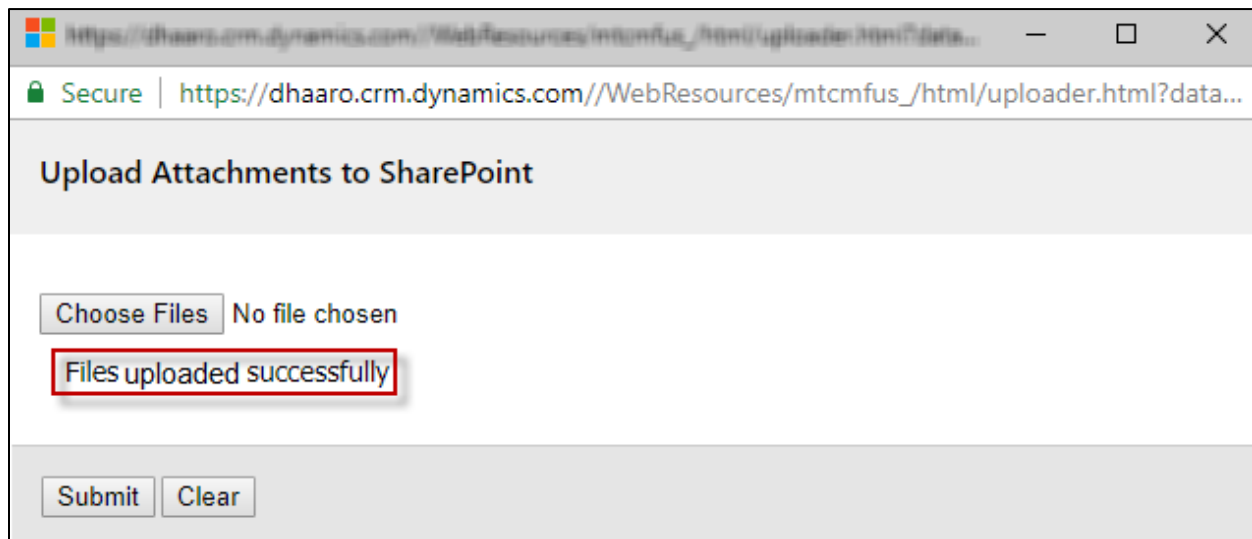


Click it and browse the files you want to directly upload to SharePoint. You can select multiple files unlike the OOB functionality which allows you to select only one file at a time.












Files will be successfully uploaded. Click Submit.







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

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 ↑
	contact	9/4/2018 2:27 PM	Vaj peyi	SharePoint	A- Datum/contact
	index.html	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/index.html
	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
	SuperGrid on Dashboard.png	9/6/2018 3:14 PM	Vaj peyi	SharePoint	A- Datum/SuperGrid on Das...

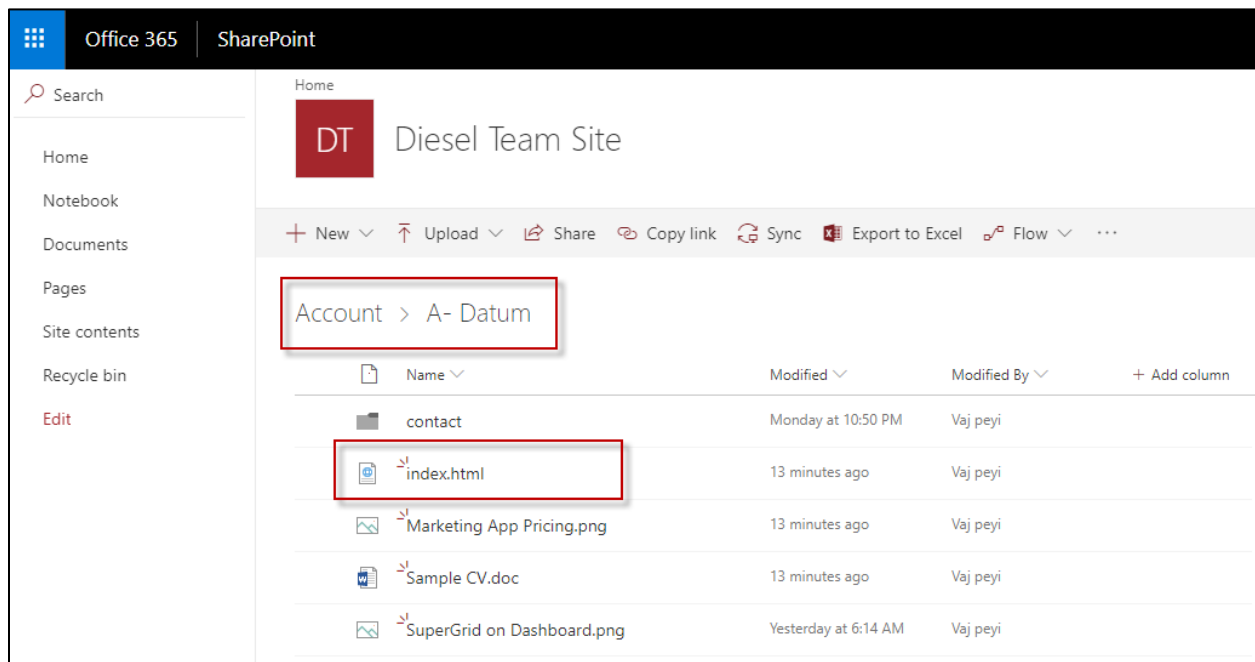
Select any of the uploaded file and click OPEN LOCATION to see the file in SharePoint site.

Document Associated Grid ▾

Documents on Default Site 1

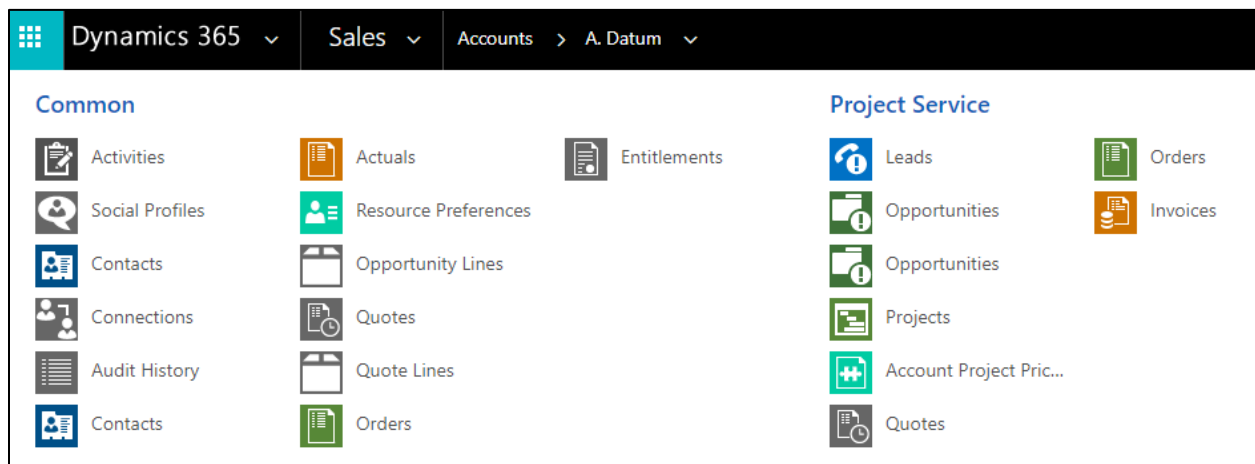
 EDIT
  UPLOAD TO SHAREPOINT
  DELETE
  CHECK OUT
  CHECK IN
  EDIT PROPERTIES
  DISCARD CHECK OUT
  OPEN LOCATION

<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
	Marketing App Pricing.png	9/7/2018 3:08 PM	Vaj peyi	SharePoint	A- Datum/Marketing App Pr...



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.

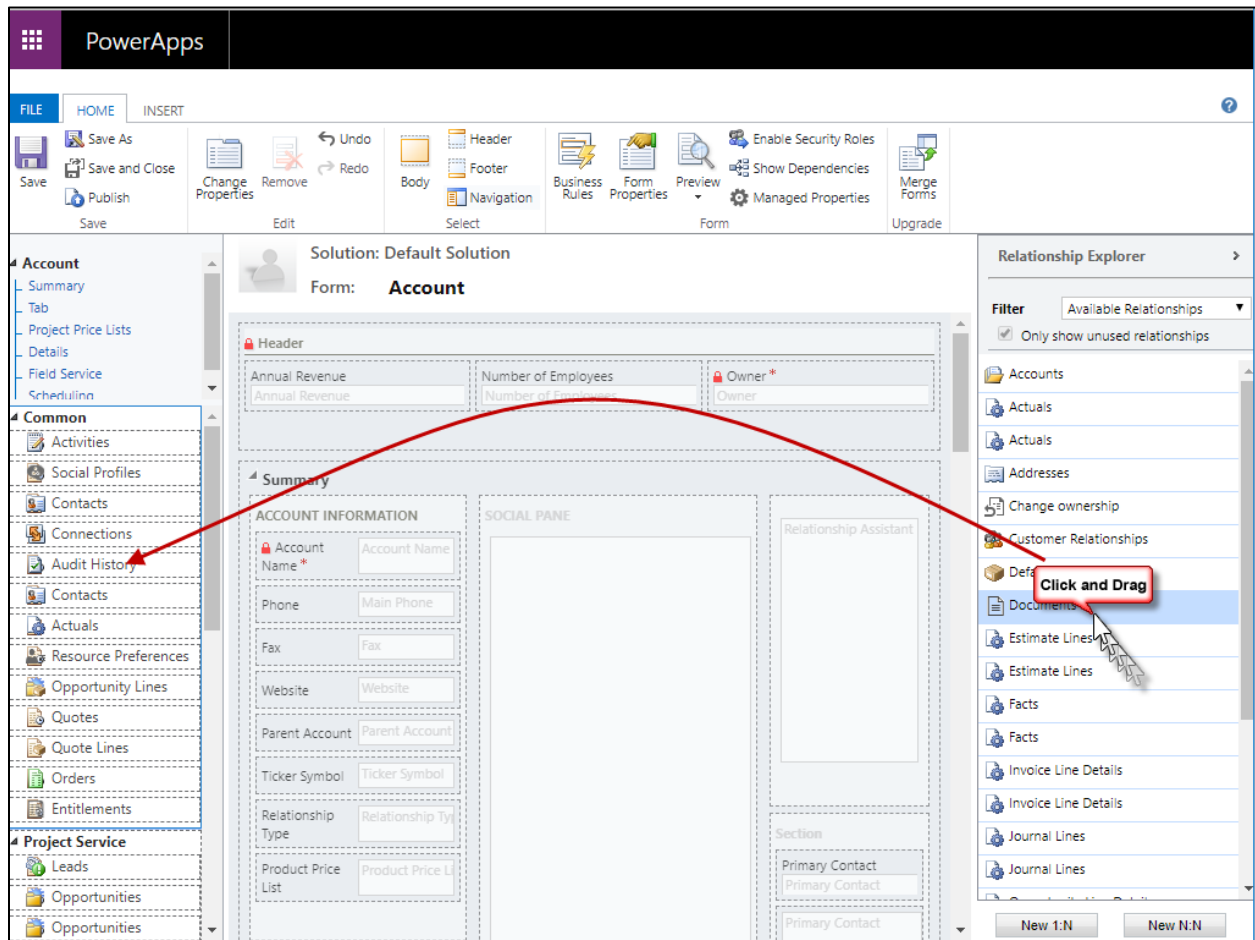


In the above image, you don't see Documents by default.

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

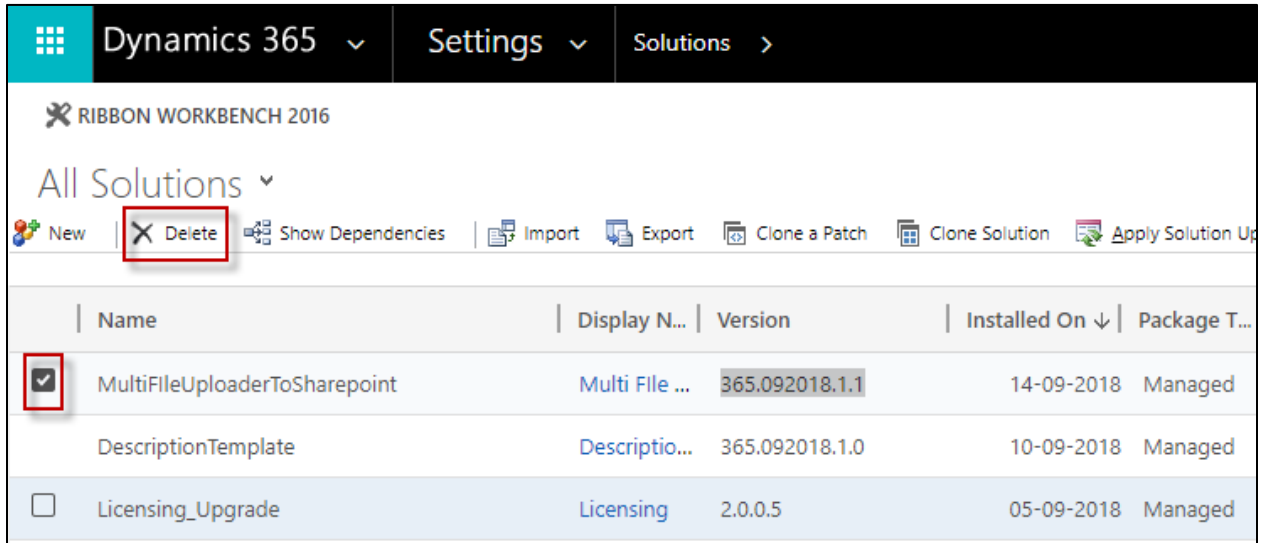
Documents attribute from the extreme right column to drag and drop to Common section.
Once done, Save and Publish to see the Documents.



Uninstallation

To uninstall the solution, go to Solutions Page.

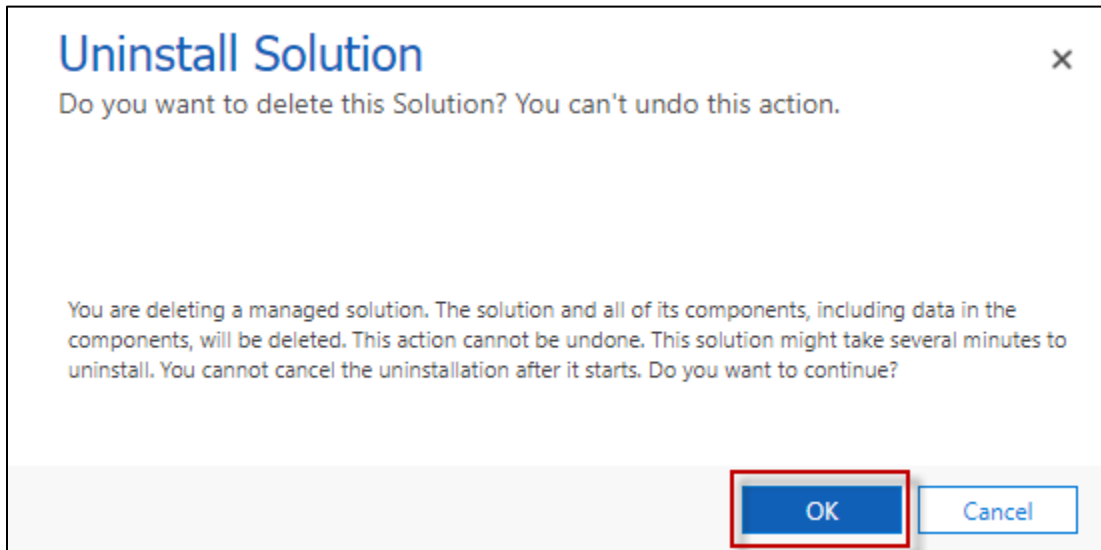
Select **Multi-File Uploader to SharePoint** solution and click **Delete**.



The screenshot shows the Dynamics 365 interface with the 'Solutions' tab selected. The 'All Solutions' dropdown is open, and the 'Delete' button is highlighted with a red box. Below the ribbon, a table lists installed solutions. The first row, 'MultiFileUploaderToSharepoint', is selected with a checkbox, and its 'Delete' button is also highlighted with a red box.

Name	Display Name	Version	Installed On	Package Type
<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.



The screenshot shows a dialog box titled 'Uninstall Solution'. The text inside asks for confirmation to delete the solution. The 'OK' button is highlighted with a red box.

Uninstall Solution

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

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?

OK Cancel