User Guide

AUTO CREATE
SharePoint Folder

MTC
THE CRM SERVICES VALUE SOURCE

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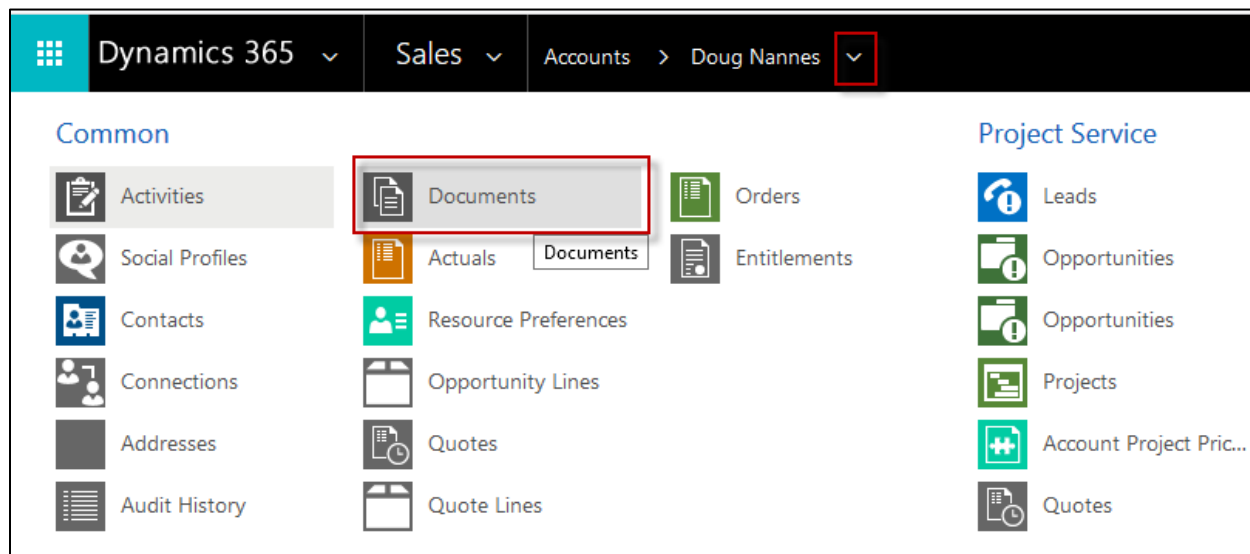
To explain you the standard CRM to SharePoint folder creation, we are taking a D365 instance that is fully integrated with SharePoint.

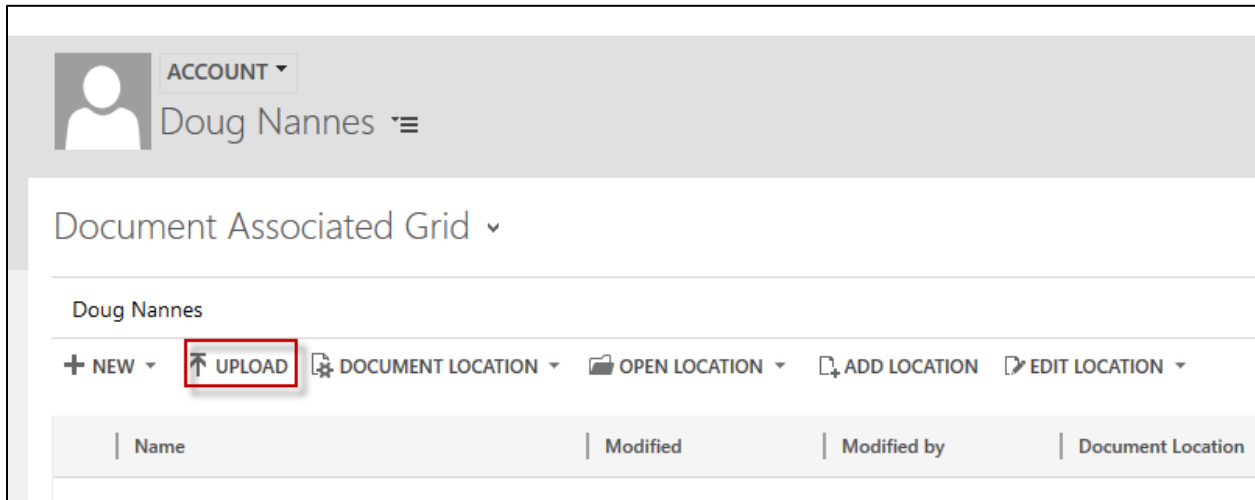Let's consider Account Entity and check how the CRM to SharePoint folder creation works.

Go to CRM→Accounts.

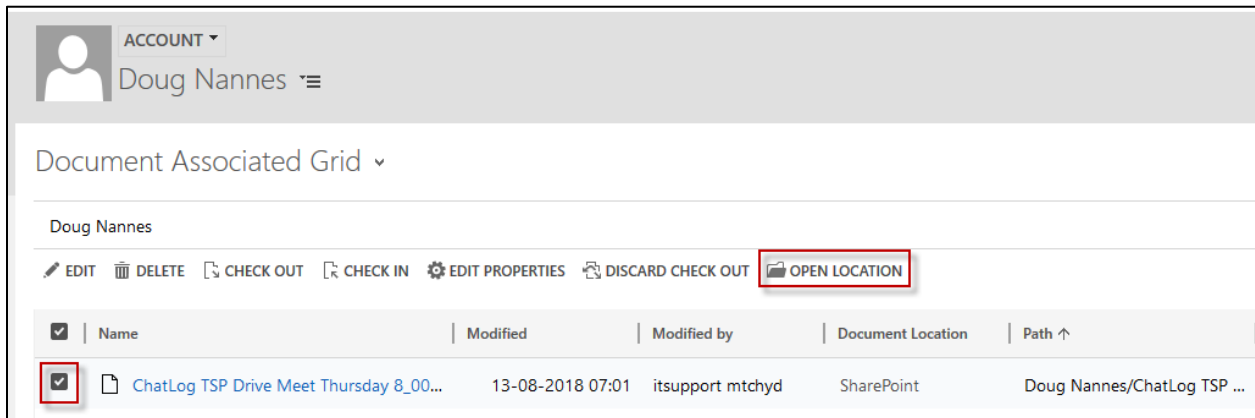Create a sample account (E.g., Doug Nannes).

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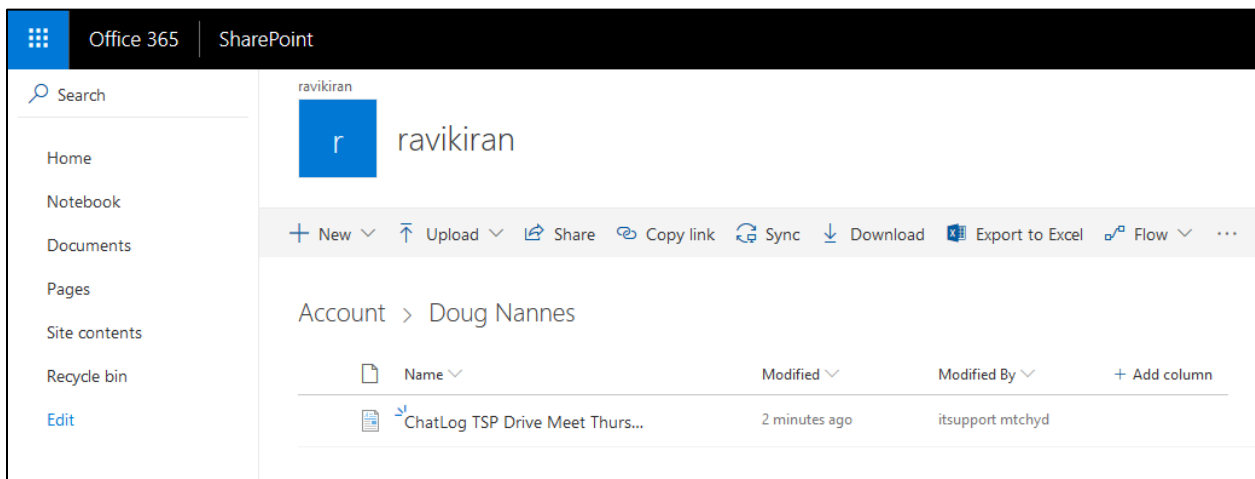

You will notice that it is empty. Click **Upload** and browse to a document to upload to the new folder in your SharePoint site.

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.
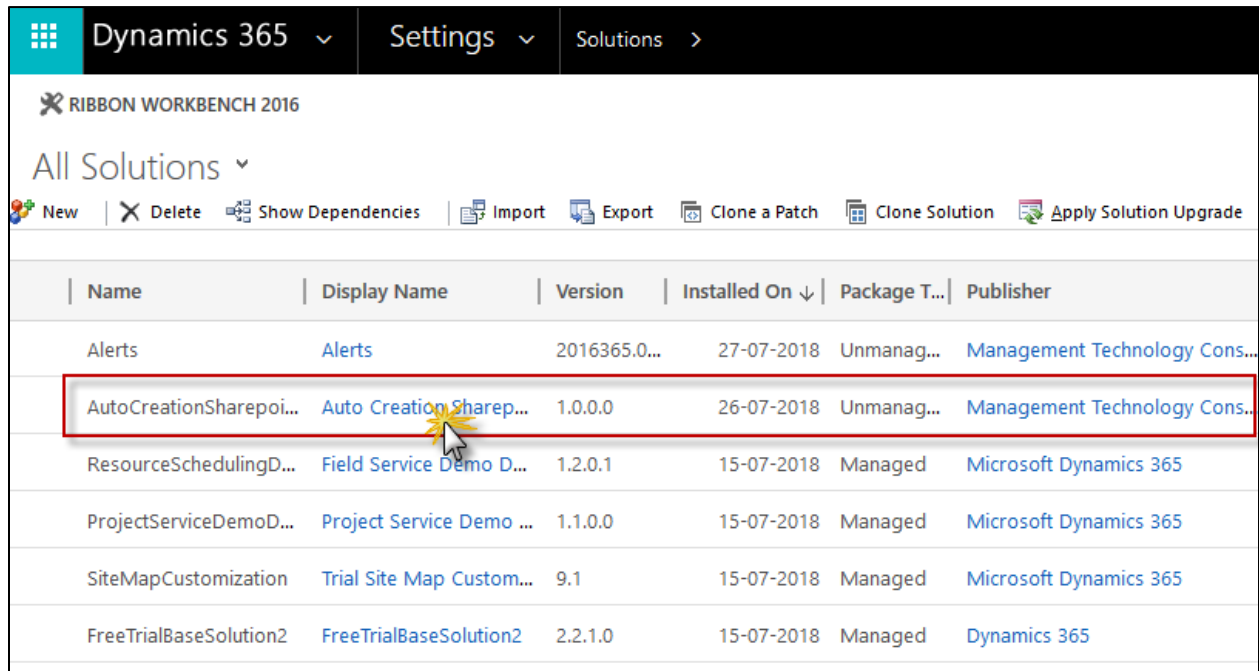

This is the standard process that you need to follow to locate the new folder and its contents in SharePoint which is bit complicated and uninspiring as you need to visit the Document Grid

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.

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

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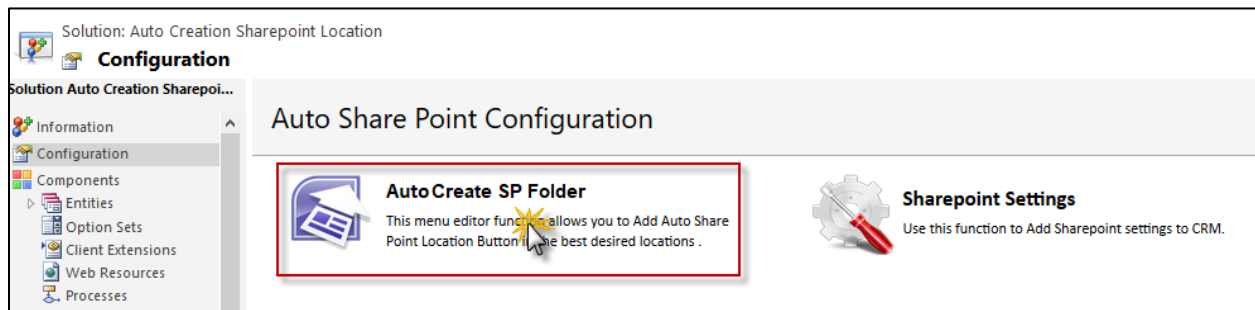

You will be directed to the Configuration Page that has two panes namely Available Entities and Selected Entities.

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 >>.
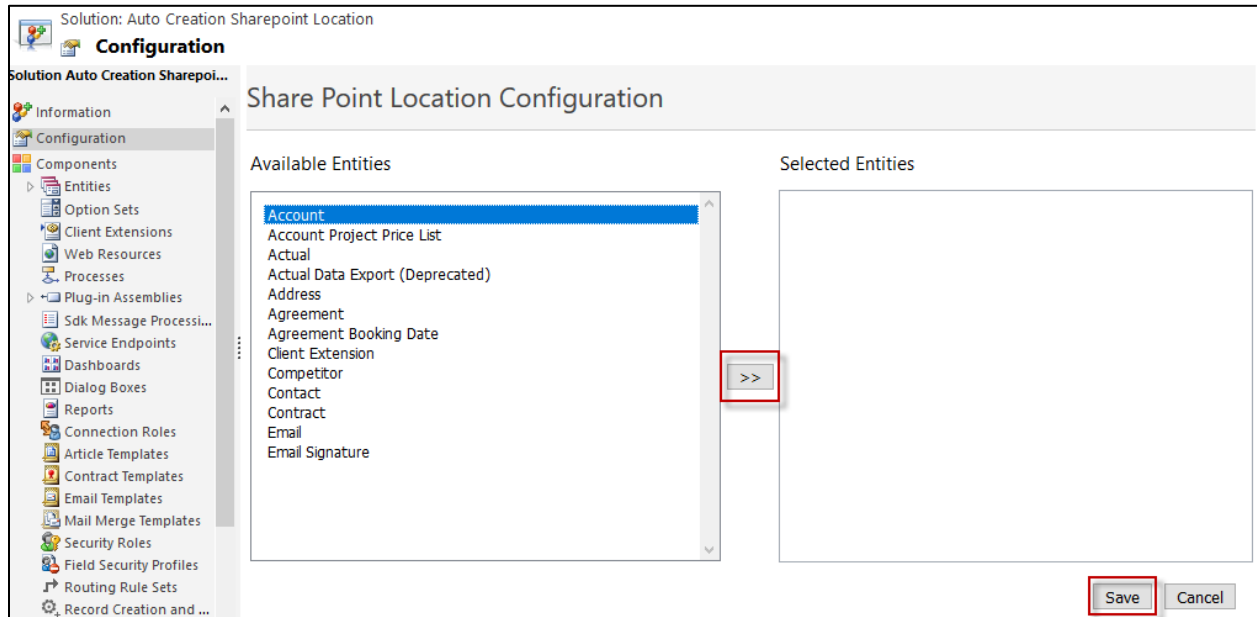
Account entity will be migrated to Selected Entities. Tick the check box before Account and click Save.
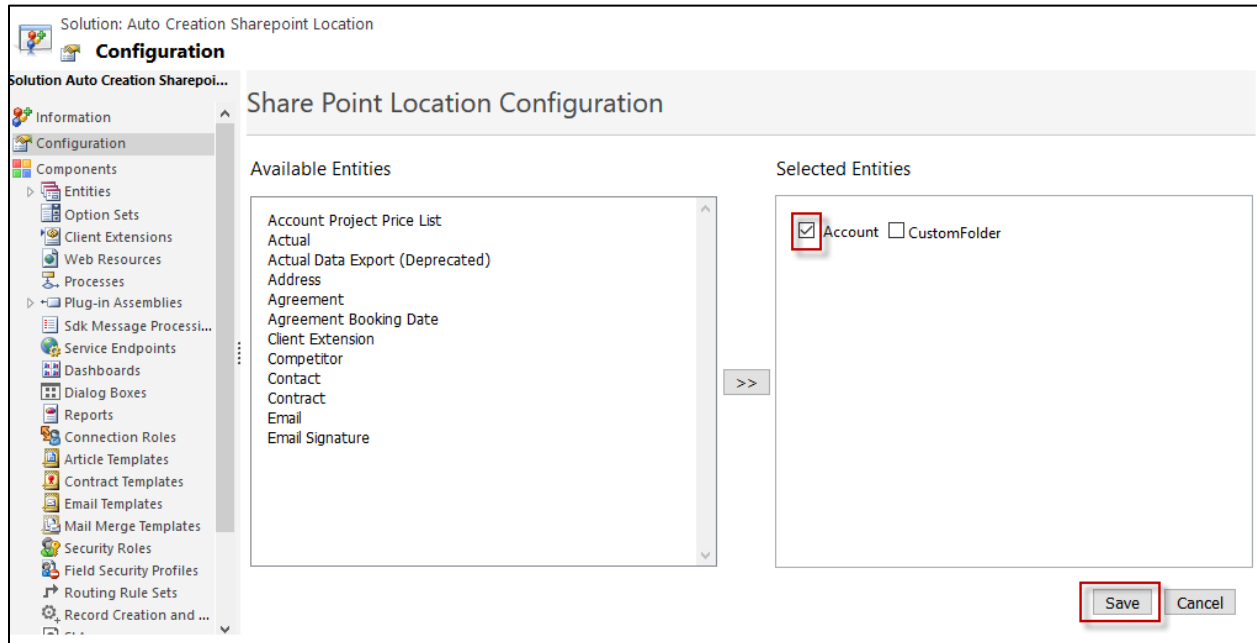
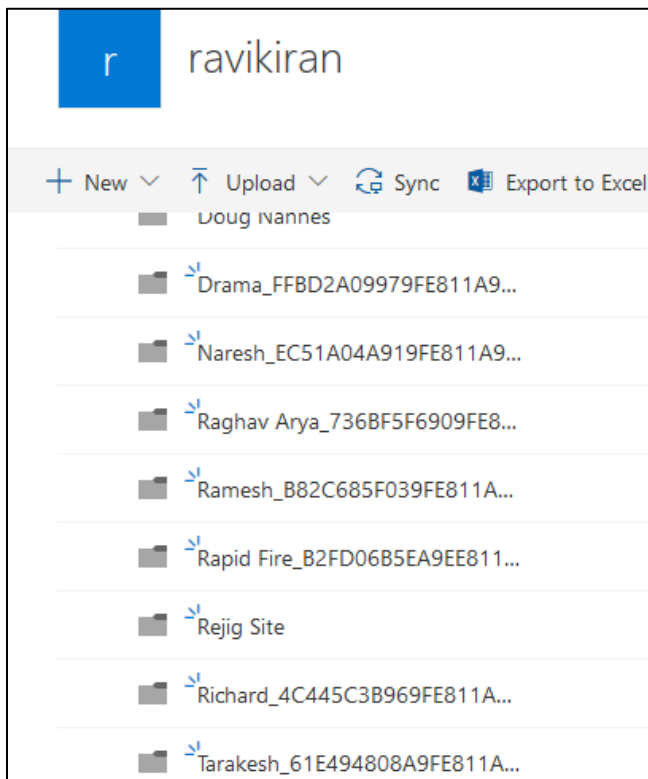Go to CRM→Accounts.

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

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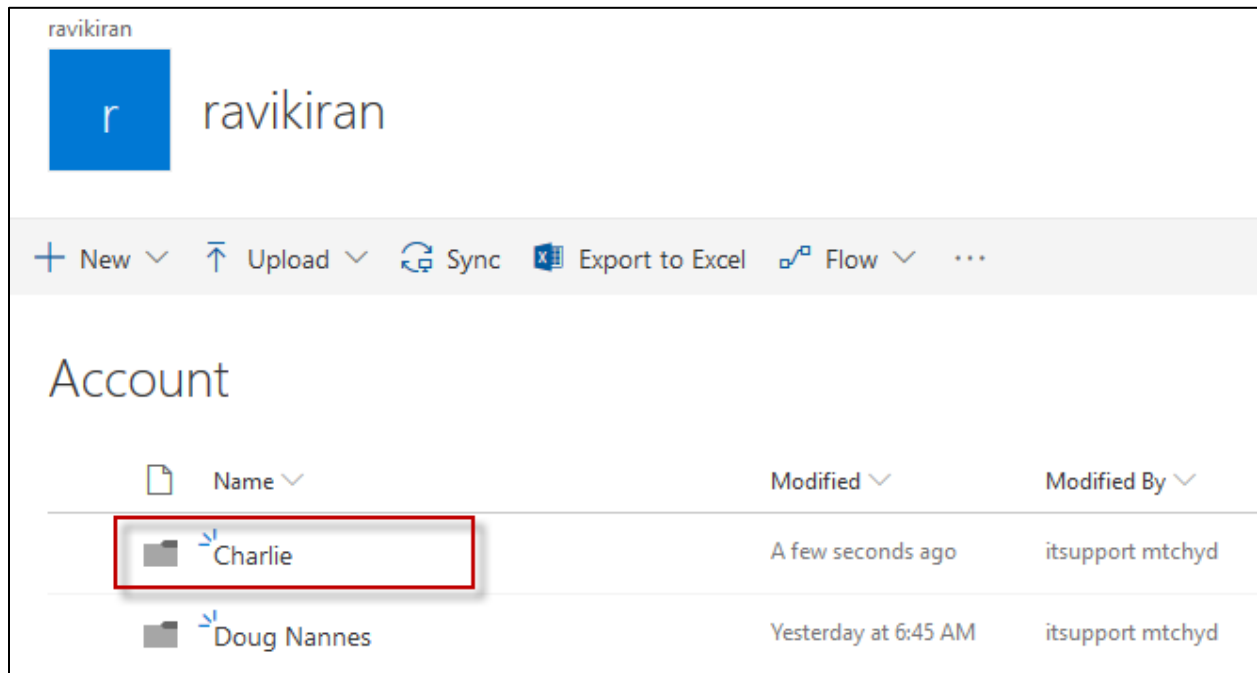
From the Available Entities pane, select Account entity and click double arrow >> to migrate it to the Selected Entities pane.

In the Select Entities pane, tick the check boxes before Account and Custom Folder and enter the logical name in the field. Click Save.
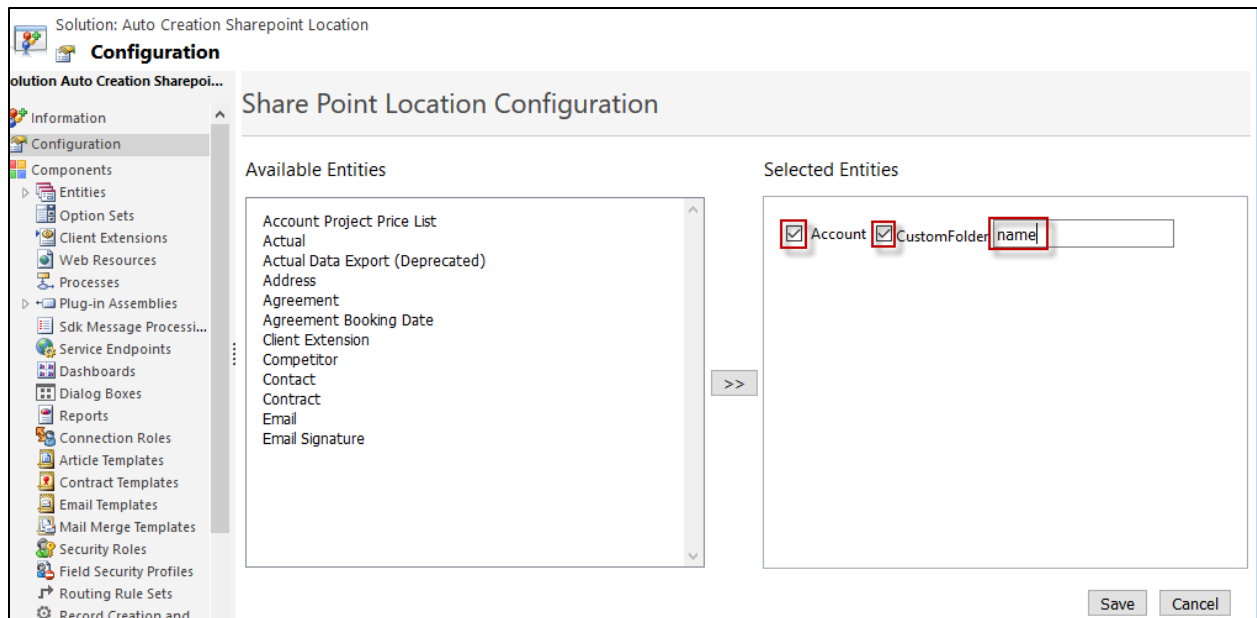
Go back to Accounts. Create a sample account (E.g. Charlie)

You will notice that an account record folder with name "Charlie" is created in SharePoint site without any suffix.
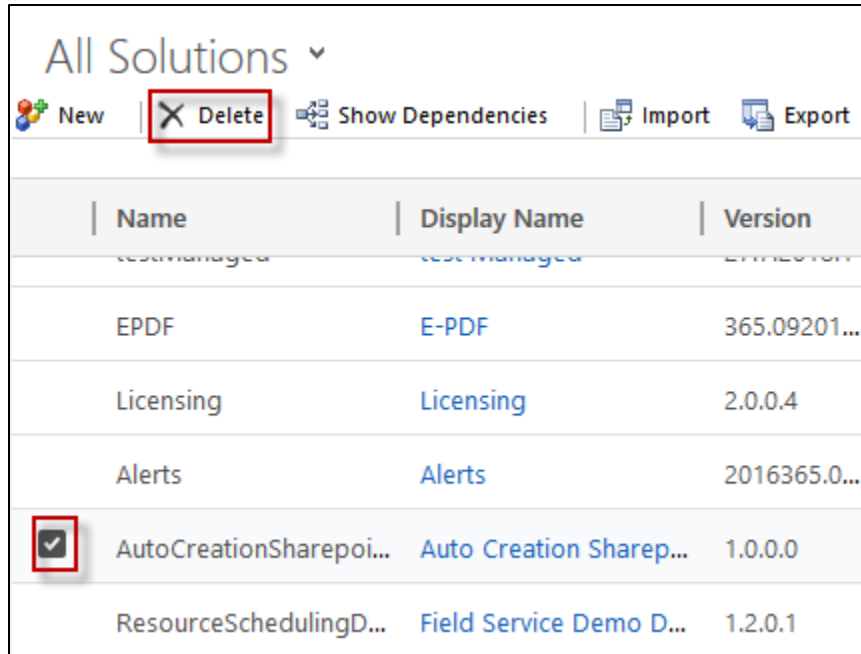
Likewise, you can run Auto Create SharePoint Folder on other entities of your choice and locate the folder and its contents in SharePoint easily and in your desired format.

How to Uninstall Auto Create SharePoint Folder?

Go to CRM→Settings→ Solutions.

Select Auto Create SharePoint Folder and click Delete.

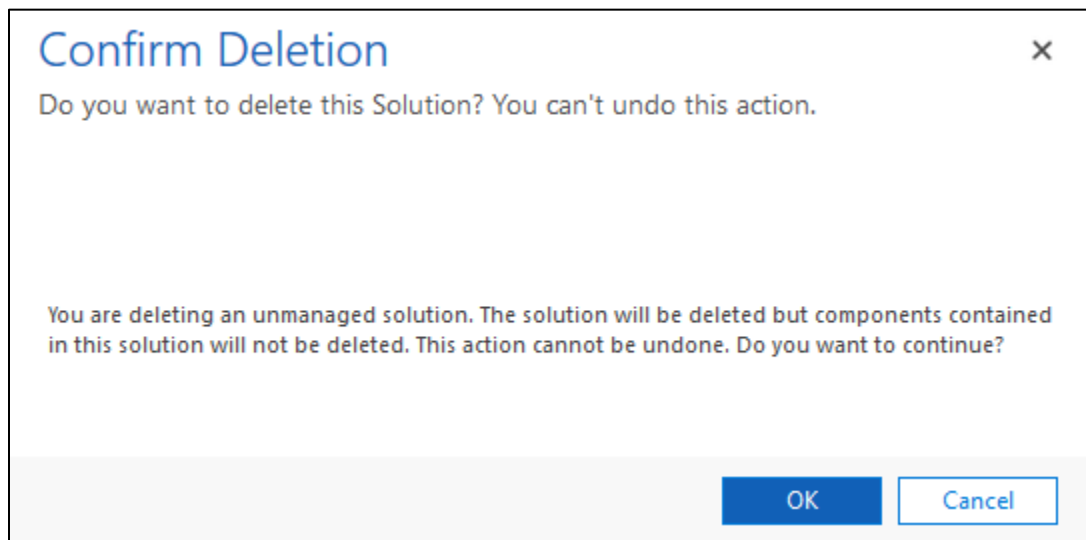Confirm the deletion by clicking OK. The solution will be uninstalled from your CRM instance.