
# SharePoint Metadata Capture add-on for Dynamics 365 CRM

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# Step-by-step guide

Follow the steps below to set-up the SharePoint Metadata Capture Add-On for Dynamics 365 CRM

# Pre-requisite

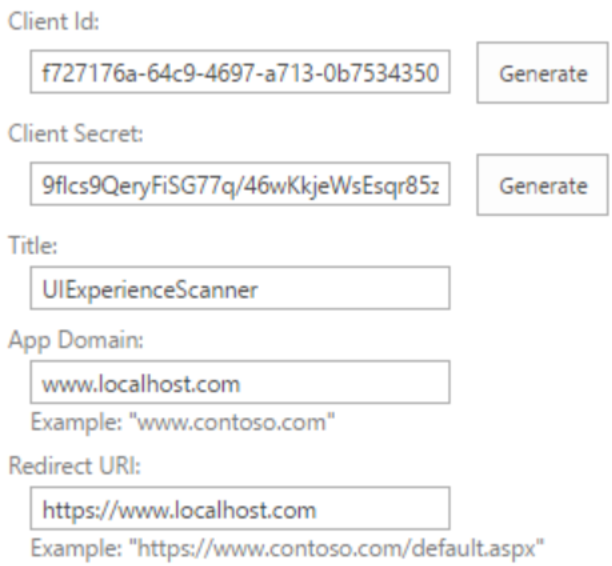
Before configuring SharePoint Metadata Capture:

- Ensure SharePoint Metadata Capture Add-On is installed, and trial/ paid subscription is activated.
- Ensure that SharePoint server-side integration is enabled, and Document Management configuration is complete.
- Metadata Columns are already configured in SharePoint site.
- You will need system administrative privileges to perform the configuration.

# Step-1

Follow the below steps to set up app-principals for SharePoint. The solution will use this to establish connection between Dynamics 365 CRM and SharePoint

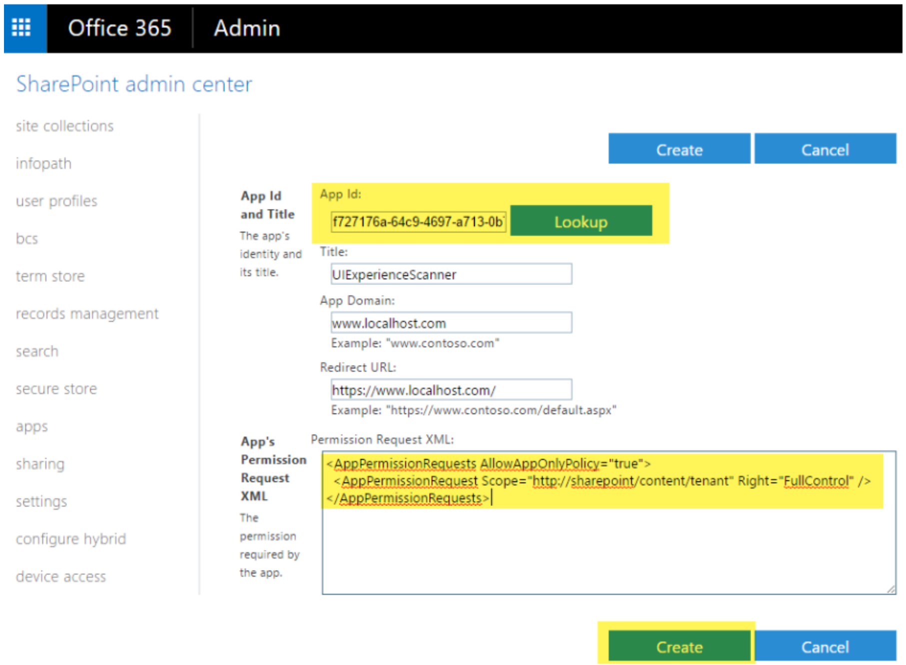
- Navigate to a site in your tenant (e.g. https://xxxxx.sharepoint.com) and then call the appregnew.aspx page (e.g. https://xxxxx.sharepoint.com/_layouts/15/appregnew.aspx). or for site collection level
  https://xxxx.sharepoint.com/sites/<sitename>/_layouts/15/appregnew.aspx
  Replace xxxx with your SharePoint tenant name and <sitename> with your site collection name.
- Click on the Generate button to generate a client id and client secret and fill the remaining information.




Important!

- Store the retrieved information (client id and client secret) since you'll need this in the next step!

- Next step is granting permissions to the newly created principal. You can reach this site via https://XXXXX-admin.sharepoint.com/_layouts/15/appinv.aspx (this provides access at the tenant level) or if you want to provide access at the site collection level then https:// XXXXX.sharepoint.com/sites/<sitename>/_layouts/appinv.aspx
- Once the page is loaded add your client id and click look up.
- To grant permissions, you'll need to provide the permission XML that describes the needed permissions.




Sample Permission XML that gives full control to site and read rights on metadata taxonomy

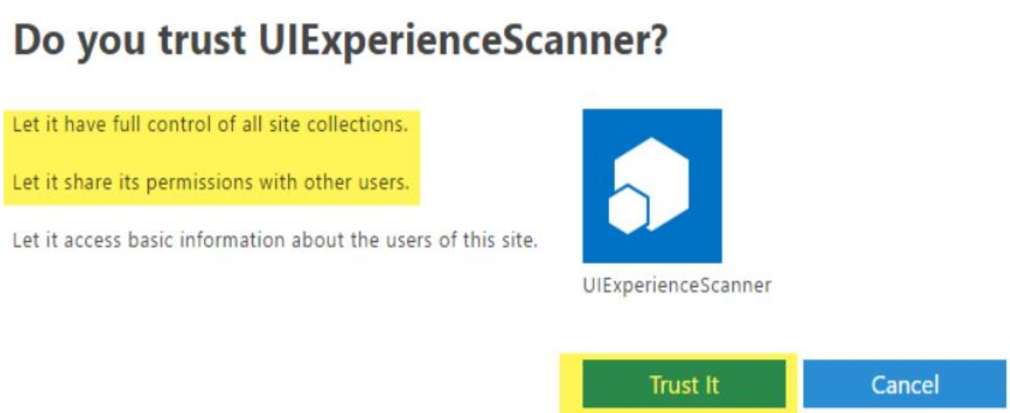
<AppPermissionRequests AllowAppOnlyPolicy="true">

<AppPermissionRequest Scope="http://sharepoint/content/sitecollection" Right="FullControl" />

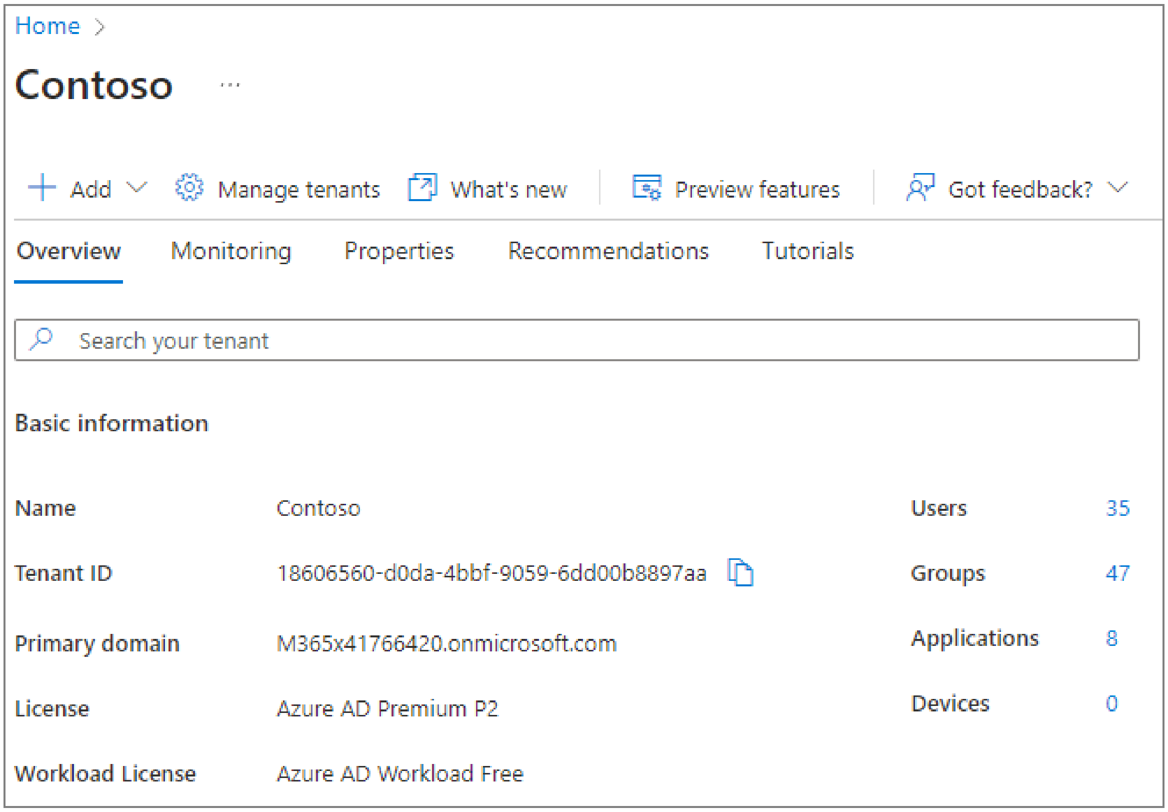
<AppPermissionRequest Scope="http://sharepoint/taxonomy" Right="Read" />

</AppPermissionRequests>

- When you click on Create you'll be presented with a permission consent dialog. Press Trust It to grant the permissions.

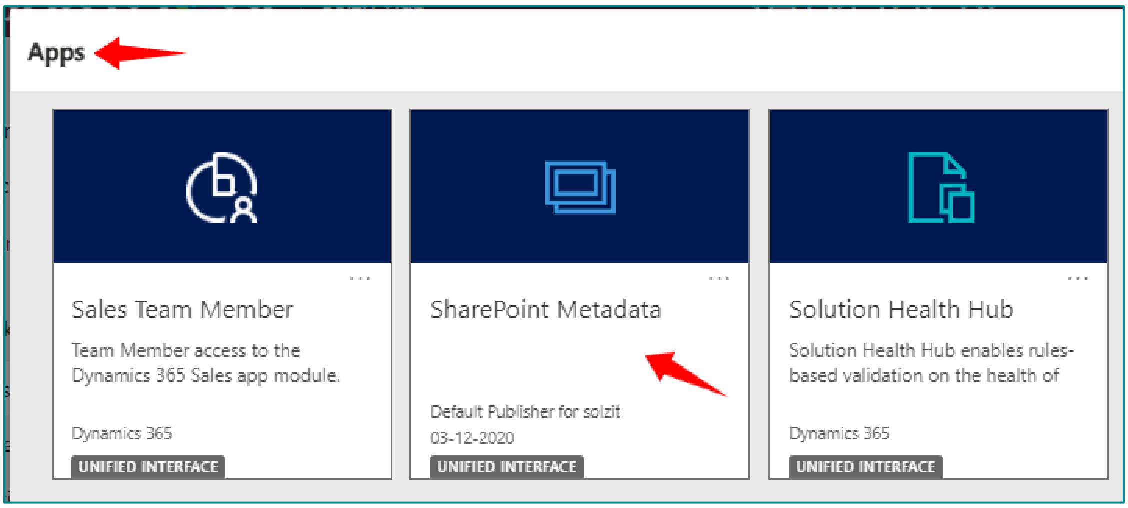


- Find your Microsoft 365 tenant ID. This can be found in the Azure AD admin center.
- Go to the Overview page and your tenant ID can be found in the **Tenant ID** box on the Basic Information

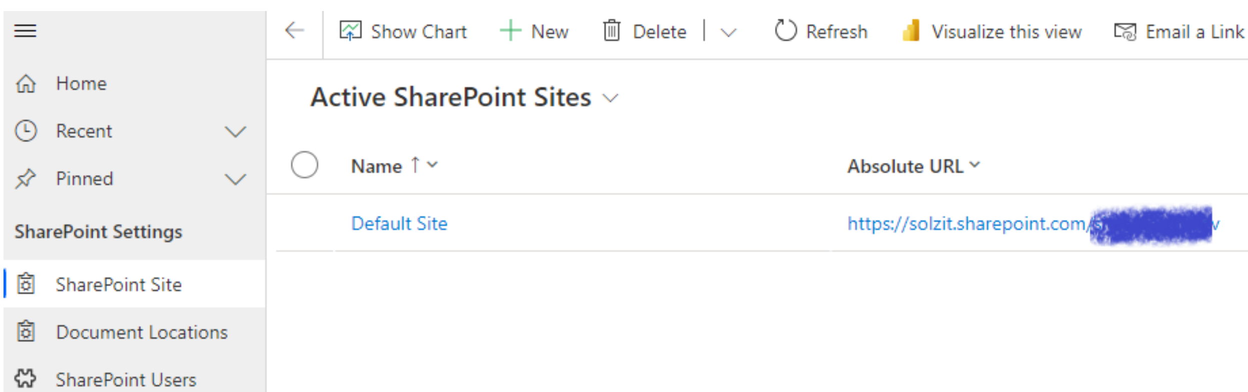


# Step-2

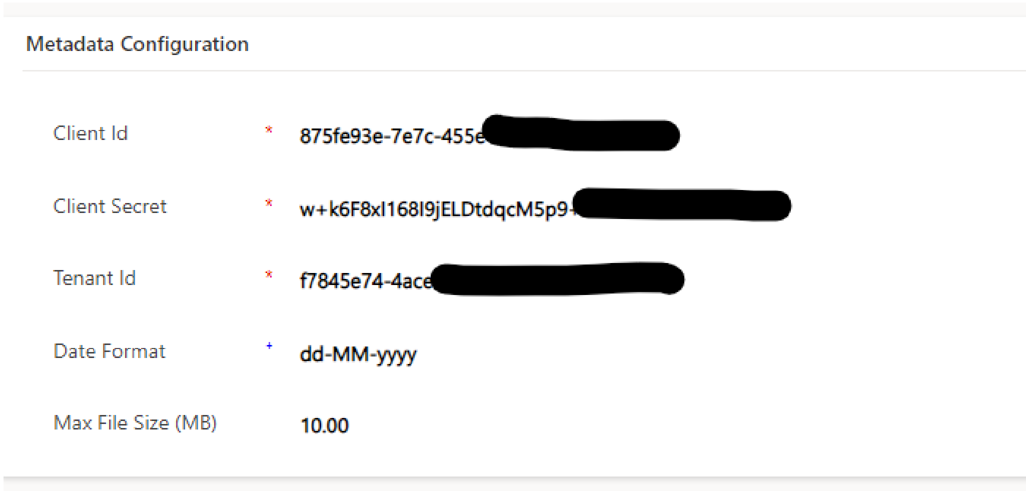
- Login to Dynamics 365 CRM and from the Apps go to SharePoint Metadata App




- Navigate to **SharePoint Settings** >> **SharePoint Site**.
- System should display the SharePoint site in the grid. If not, then try changing the view to "Active SharePoint Sites". Open the record by clicking on the same.



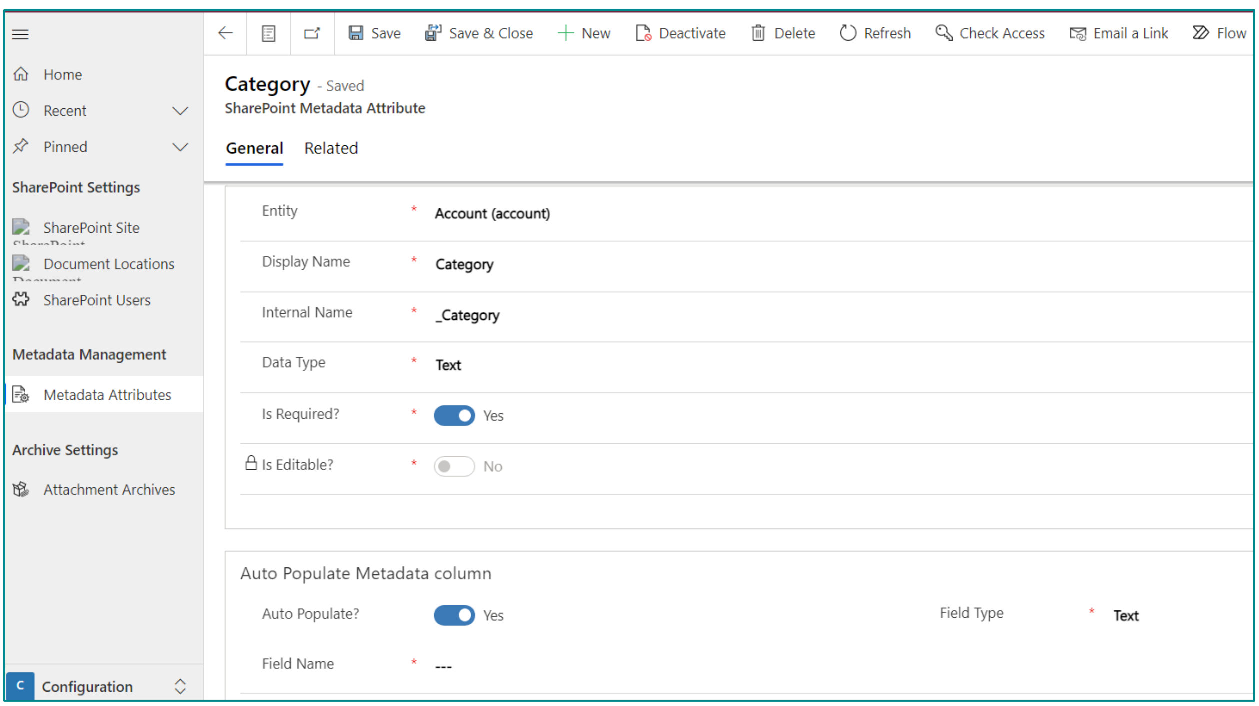

- Change the form to SharePoint Metadata Configuration
- Enter the details in "Metadata Configuration" i.e.,
  - **Client Id**: From the SharePoint App principal registration step.
  - **Client Secret:** From the SharePoint App principal registration step.
  - **Tenant Id**: From Azure AD step before.
  - **Date Format**: Date format as supported by SharePoint, and
  - **Max File Size** (MB): Max File Size in MB that will be allowed for upload. If this field is empty, then default maximum file size is 5MB.




- Save and close the record.

# Step-3

- To configure SharePoint Metadata Attributes in Dynamics CRM. Navigate to **Metadata Management** -> **Metadata Attributes**




- Click on "+ New" to create a new record. Fill the details:
    - **Entity**: Define entity in which you want to create an attribute.

- **Display Name**: This field contains the display name of metadata column that you want to showcase on CRM.
- **Internal Name**: This field contains the internal name of the metadata column available on SharePoint e.g. If you have a custom metadata column by name Document Type, then most likely the internal name is Document_x0020_Type.
- **Data Type:** Select the type of metadata column, currently the add-on supports the following types can be set: Modified By, Date, Managed Metadata, Number, Option Set, Person, Text and Yes/No. SharePoint to Dynamics CRM data type mapping is outlined in the below table.

| SharePoint Column Type | CRM Data Type |
|---|---|
| **Choice** | Option Set |
| **Date and Time** | Date |
| **Single Line of Text/ Multi Line of Text** | Text |
| **Number** | Number |
| **Yes/No** | Yes/No |
| **Managed Metadata** | Managed Metadata |
| **Person** | Person |
| **Person** | ModifiedBy |

- **Is Required**: This indicates if the metadata column is mandatory or not.
- **Is Editable**: This indicates if the metadata column is readonly or editable
- **Master Data:** If the Metadata Type is optionset then provide values separated by pipe " | " sign. For example, Private | Public.
- **Entity Document Location:** This is required when Data Type is Managed Metadata and depicts the location of document library in which the SharePoint managed term set metadata is configured.
- **ModifiedBy** is a special type created in Dynamics CE to record the user who created\ update the document or metadata. ModifiedBy needs to map to a custom metadata of type person in SharePoint.

- **Auto Populate Metadata Column:**
  - **Auto Populate:** This indicates if the field needs to be auto populated.
  - **Field Type:** This indicates the type of the field to be auto populated.
  - **Field Name:** This indicates the name of the field to be auto populated.

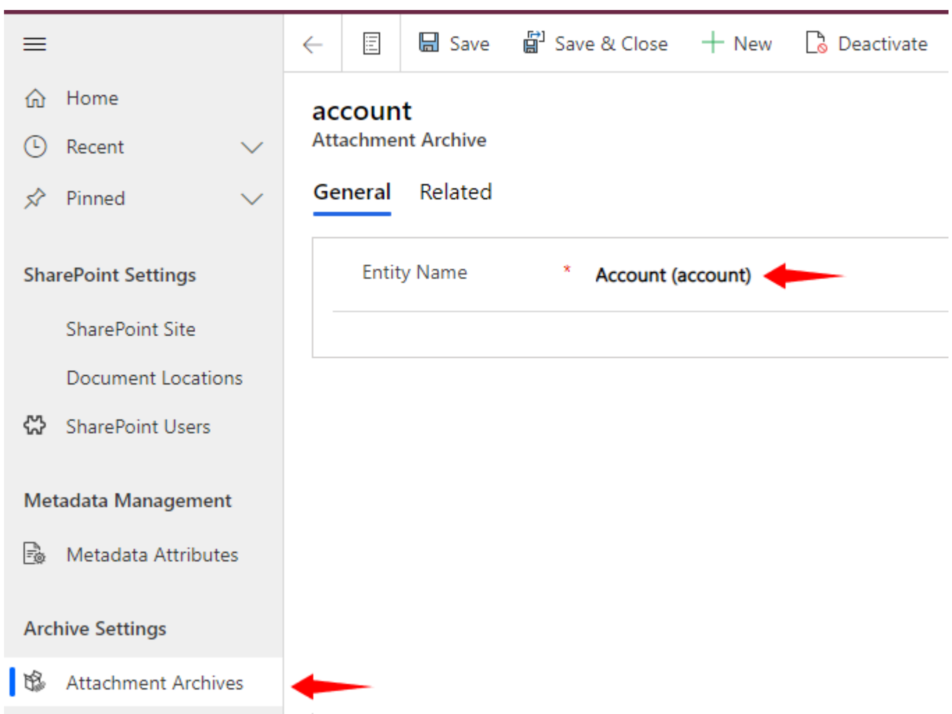
  (**Note**: If Auto Populate is selected as Yes then Is Editable becomes disabled.)

- Fill out all the details and click on 'Save'.
- Repeat this step 2 for as many metadata column you want to configure. You can configure different columns for different entities.

# Step-4

**(OPTIONAL)** Do this step only if you want to auto move attachment from Notes of an entity into SharePoint. Navigate to **Archive Settings** >> **Attachment Archives**

- Click on "+ New" to create a new record. Fill the details:
  - **Entity**: Define entity in which you want to copy notes into SharePoint.

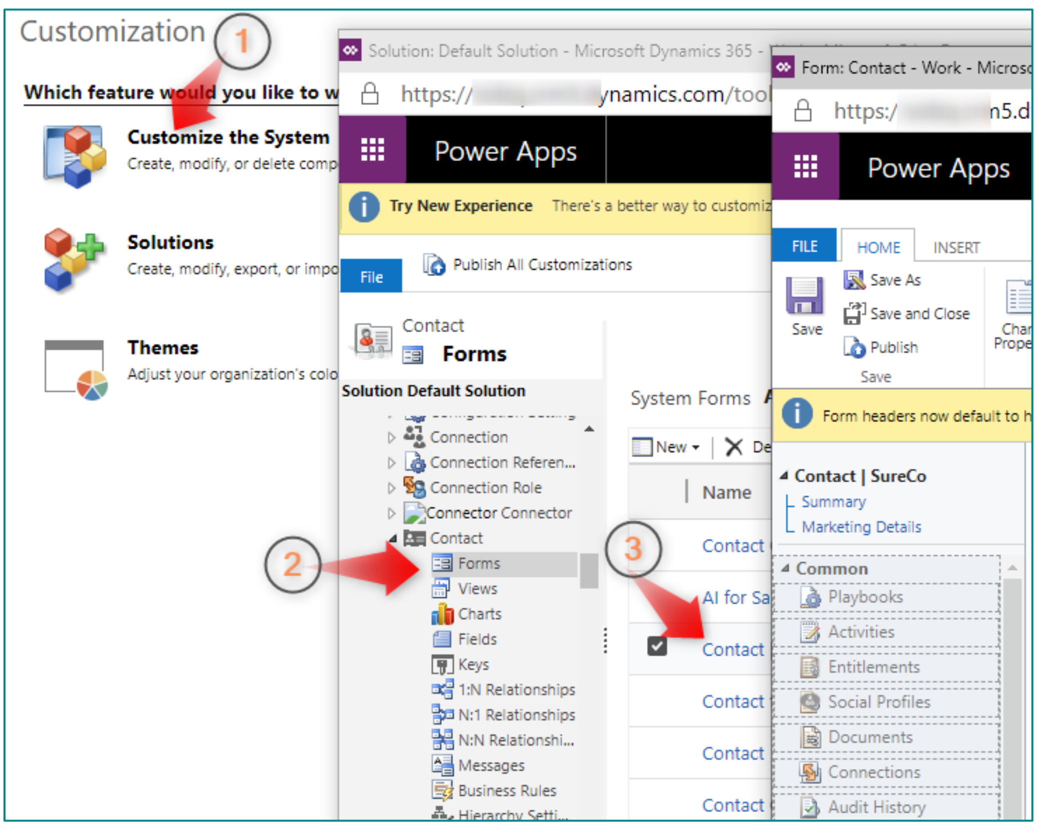


- Ensure that the entity has SharePoint document integration enabled. Now save the record.
- Repeat this step 4 for as many entities you want to copy notes into SharePoint.

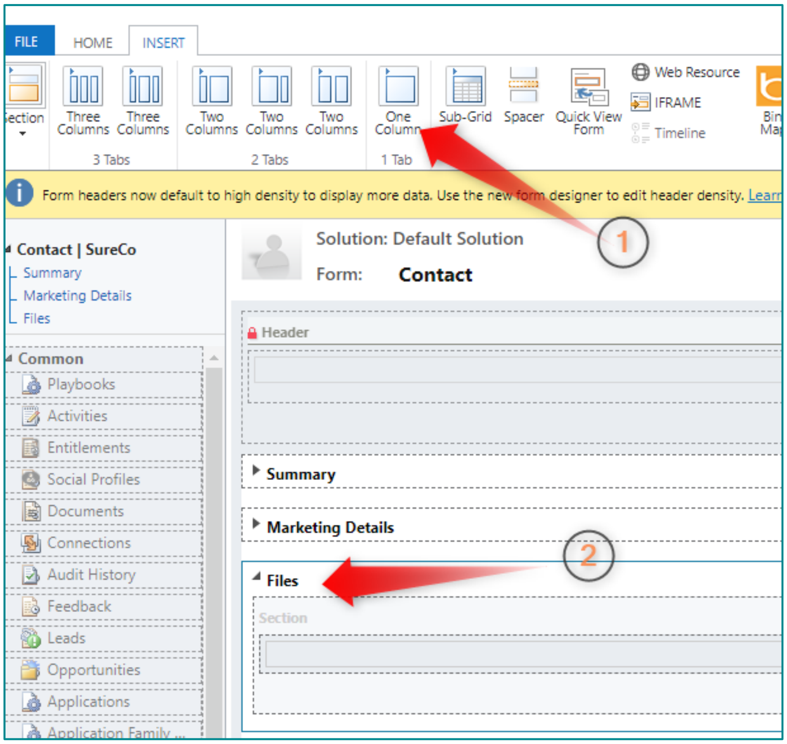
# Step-5

This section details how to configure the new SharePoint editable metadata grid view which displays the grid with metadata columns and allows inline editing.

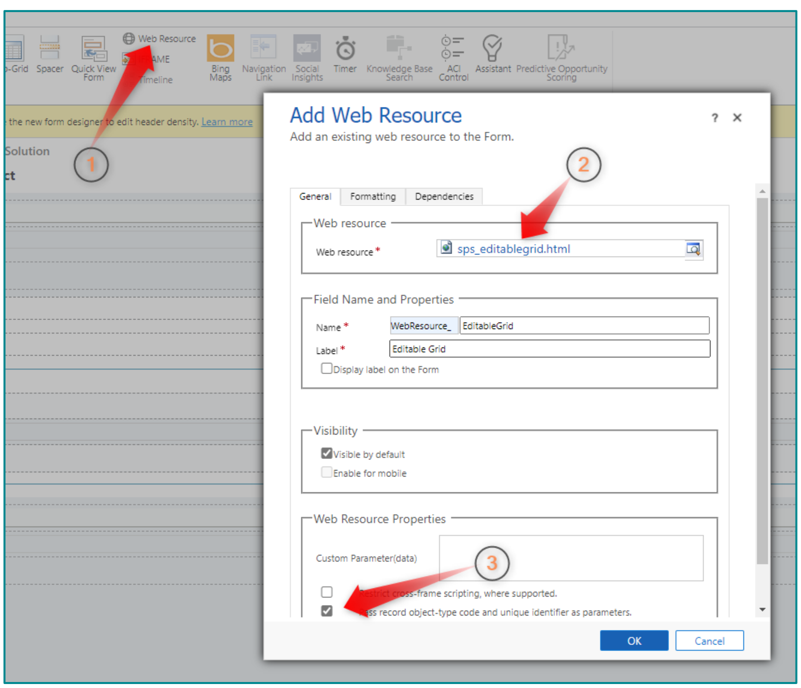
- Go to Settings->Customization and click customize the system.
- Customize the form of the entity where you want to show the document metadata grid. You can customize the form directly from the customization tab or via any solution.
- Open the desired form for customization.



- Add a new tab with one section and give the section a name says "Files"




- Insert a new web resource named "sps_editablegrid.html".
- Select "Pass record object-type code and unique identifier as parameters."
- In the formatting tab, select the "Number of Rows" as 20 and "uncheck" display border.

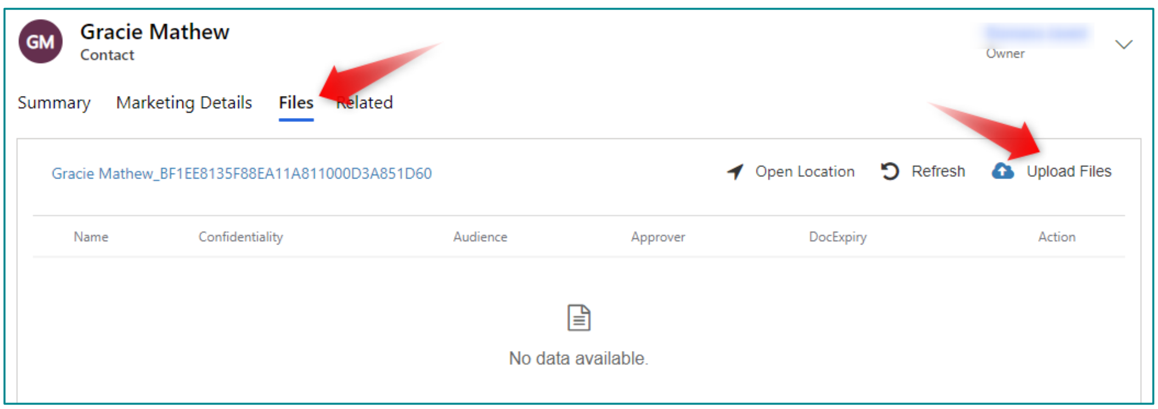


- Click "Ok" button on the Add Web Resource screen.
- Click "Save" to save the form customization.
- Click "Publish" to publish the form.
- Repeat all the steps in "Step 4" for each form where you want editable SharePoint metadata grid.

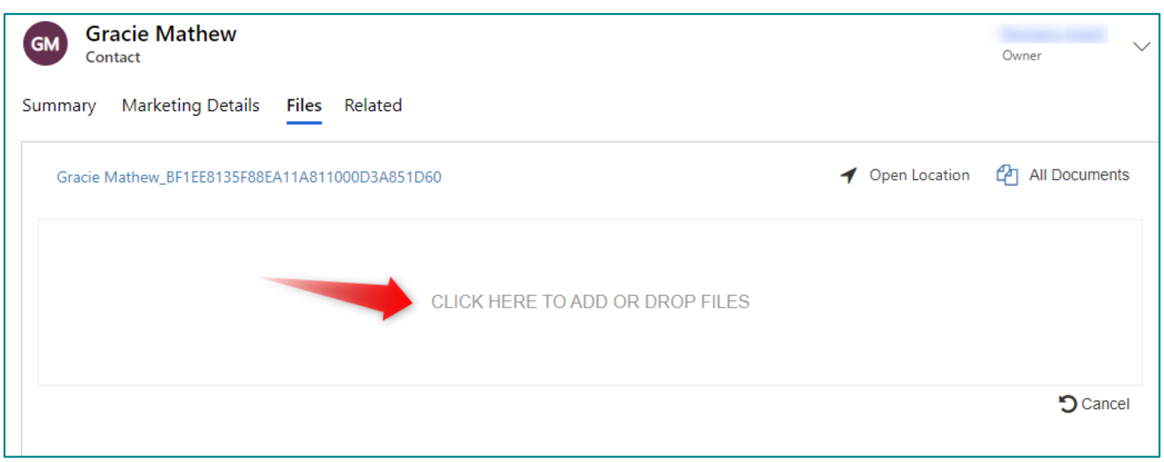
# Step-6

This section details how to upload documents into SharePoint using SharePoint Metadata Capture.

- Login to Dynamics 365 CRM using your credentials.
- Open the entity record for which you want to upload the documents. Open the "Files" tab which you created in the last step to access documents record.



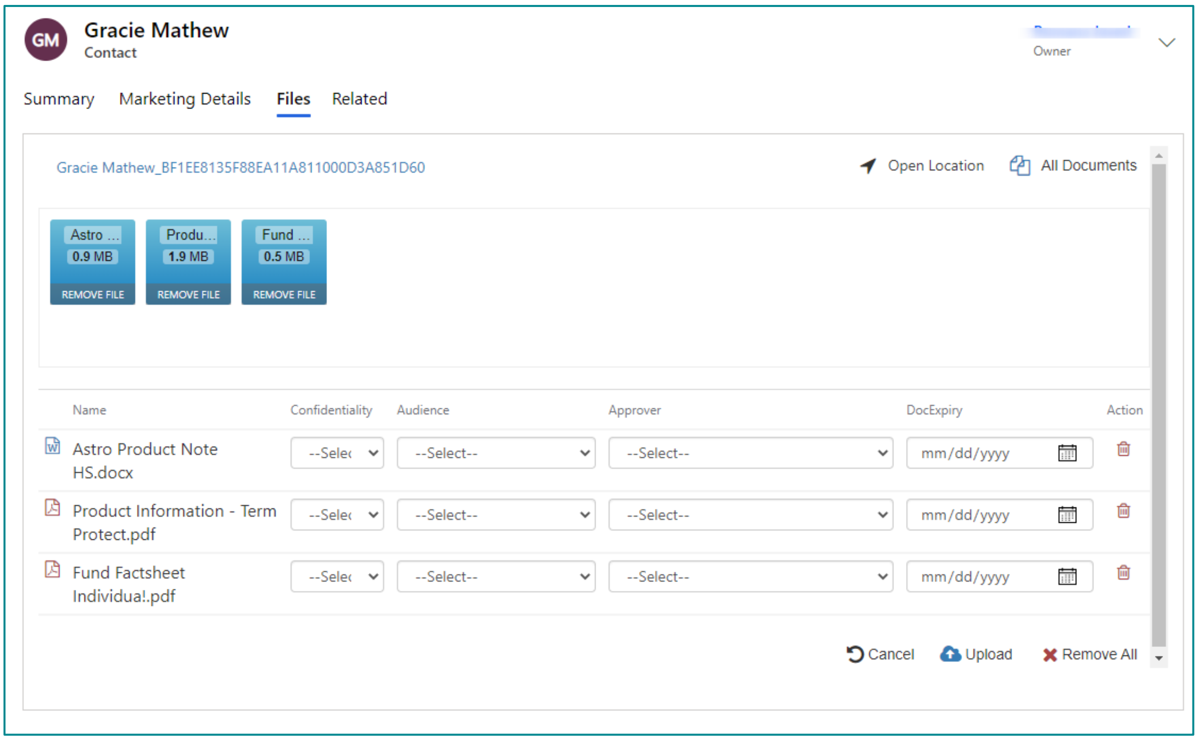

- Click on "Upload Files" button. This action will open a new page for uploading documents.



- To upload documents, use drag and drop feature. Before uploading the documents, you can set the appropriate metadata.

- In case of a Person Metadata type, the system displays the list of active SharePoint users in the dropdown list.
- In case of a Modified By Metadata type, the system will show the SharePoint user name who has last modified this file.

- Click on "Upload File" once you are ready to upload the document.




- After uploading the documents, system will display all the files in the list.
- The grid allows to edit SharePoint metadata. You can also delete the document from the grid, and it will be deleted from SharePoint as well.
- Click on Open Location to open the SharePoint document location directly from Dynamics 365 CRM. You should see the uploaded document(s) in the SharePoint site Location with all attribute values.
- Also, for each record once it is saved the Modified by Metadata type will show the person name who has added/updated the file.

# Security Roles

Two security roles are created when you import SharePoint Metadata Capture solution as depicted below.

| |
|---|
| SharePoint Metadata Capture Admin |
| SharePoint Metadata Capture Reader |

As an admin you need to assign users to appropriate security roles.

- **SharePoint Metadata Capture Reader:** Users belonging to this role will be able to upload the document and set the metadata for the document. They cannot create or configure metadata columns in Dynamics CRM.
- **SharePoint Metadata Capture Admin:** Apart from the roles of SharePoint Metadata Capture Reader, the users under this role will have the permission to create and modify the metadata column attributes settings in Dynamics CRM.

# Unsupported Scenarios

- SharePoint integration with Absolute URL
- SharePoint folder structure that is based on Entity.
- All SharePoint data type attributes may not be currently not supported.
- Document location and folder should pre-exist.

# Contact Us

Feel free to contact us on info@solzit.com or support@solzit.com if you face any issues or if you have any queries.