

Soluzione IT Services

www.solzit.com | 1-800-860-6531 | info@solzit.com

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://xxx.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.

Client Id:

Client Secret:

Title:

App Domain:

Example: "www.contoso.com"

Redirect URI:

Example: "https://www.contoso.com/default.aspx"

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.

Office 365 Admin

SharePoint admin center

site collections
infopath
user profiles
bcs
term store
records management
search
secure store
apps
sharing
settings
configure hybrid
device access

Create Cancel

App Id and Title
The app's identity and its title.

App Id:

Title:

App Domain:
Example: "www.contoso.com"

Redirect URL:
Example: "https://www.contoso.com/default.aspx"

App's Permission Request XML
The permission required by the app.

Permission Request XML:

Create Cancel

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.

Do you trust UIExperienceScanner?

Let it have full control of all site collections.

Let it share its permissions with other users.

Let it access basic information about the users of this site.



UIExperienceScanner

Trust It

Cancel

- 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

Home >

Contoso

+ Add ▾ ⚙️ Manage tenants 📄 What's new | 🖨️ Preview features | 👤 Got feedback? ▾

Overview Monitoring Properties Recommendations Tutorials

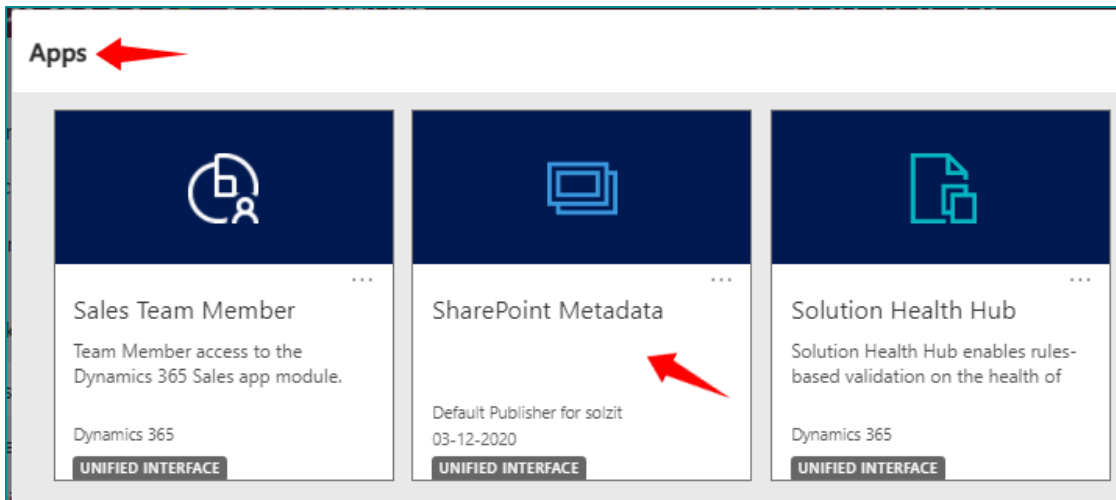
🔍 Search your tenant

Basic information

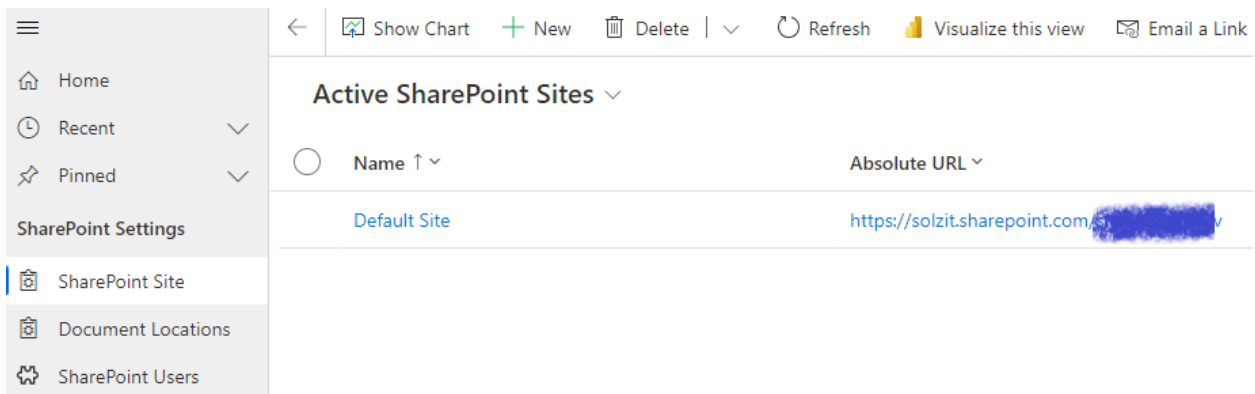
Name	Contoso	Users	35
Tenant ID	18606560-d0da-4bbf-9059-6dd00b8897aa 📄	Groups	47
Primary domain	M365x41766420.onmicrosoft.com	Applications	8
License	Azure AD Premium P2	Devices	0
Workload License	Azure AD Workload Free		

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.

Metadata Configuration

Client Id

*

875fe93e-7e7c-455e

Client Secret

*

w+k6F8xl168l9jELDtdqcM5p9

Tenant Id

*

f7845e74-4ace

Date Format

+

dd-MM-yyyy

Max File Size (MB)

10.00

- Save and close the record.

Step-3

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

Home

Recent

Pinned

SharePoint Settings

SharePoint Site

Document Locations

SharePoint Users

Metadata Management

Metadata Attributes

Archive Settings

Attachment Archives

Configuration

Category - Saved

SharePoint Metadata Attribute

General Related

Entity

*

Account (account)

Display Name

*

Category

Internal Name

*

_Category

Data Type

*

Text

Is Required?

*

☒ Yes

Is Editable?

*

☐ No

Auto Populate Metadata column

Auto Populate?

☒ Yes

Field Type

*

Text

Field Name

*

- 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

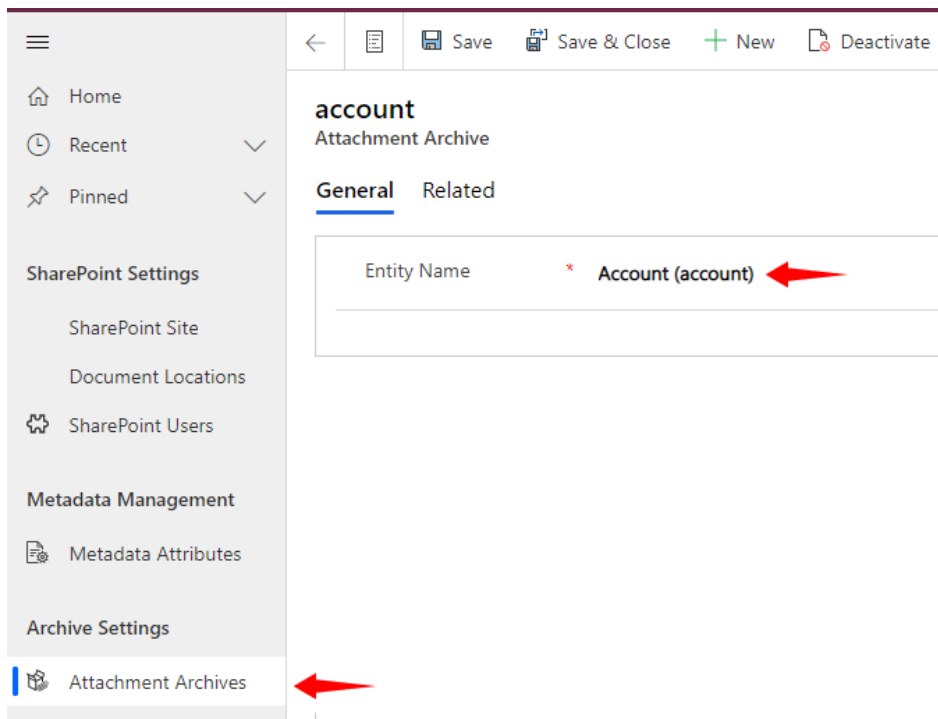
- **Is Required:** This indicates if the metadata column is mandatory or not.
- **Is Editable:** This indicates if the metadata column is readonly or editable
- **Master Data:** If the Metadata Type is optionset then provide values separated by pipe " | " sign. For example, Private | Public.
- **Entity 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.



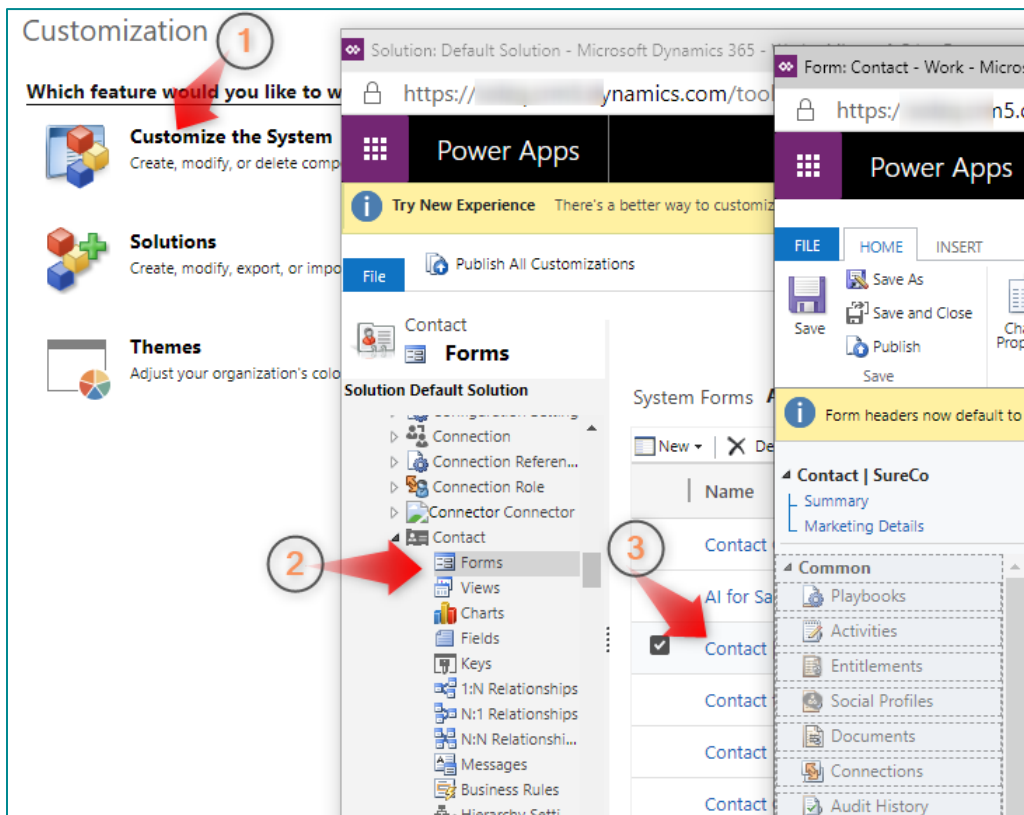
The screenshot displays the 'Attachment Archives' configuration page in SharePoint. The left-hand navigation pane is visible, with 'Attachment Archives' selected at the bottom. The main content area is titled 'account Attachment Archive' and has two tabs: 'General' (active) and 'Related'. Under the 'General' tab, there is a form with a single field labeled 'Entity Name' which contains the text 'Account (account)'. A red arrow points to this field. At the top of the form, there are buttons for 'Save', 'Save & Close', '+ New', and 'Deactivate'. A red arrow also points to the 'Save' button.

- 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.

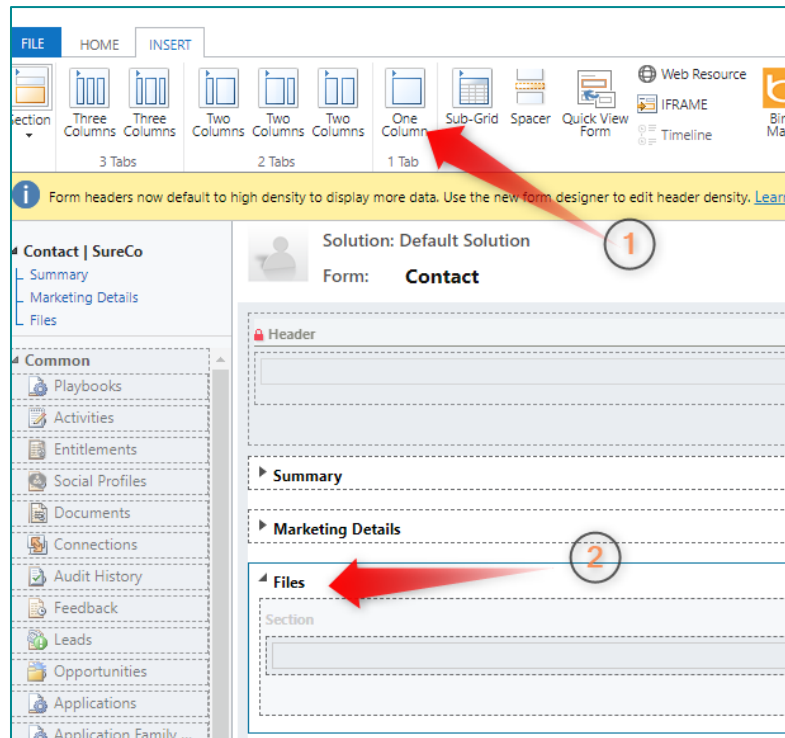
Step-5

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

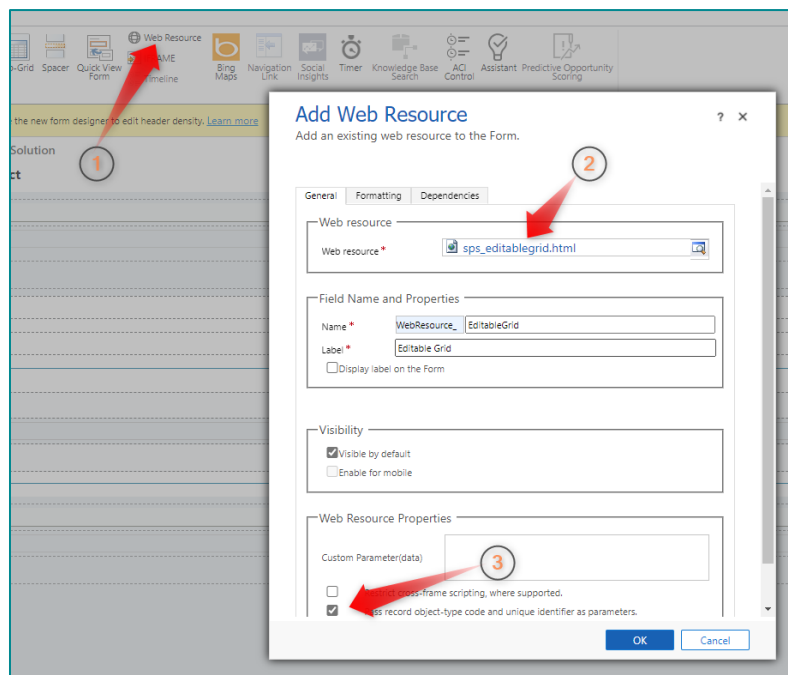
- Go to Settings->Customization and click customize the system.
- Customize the form of the entity where you want to show the document metadata grid. You can customize the form directly from the customization tab or via any solution.
- Open the desired form for customization.



- 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.

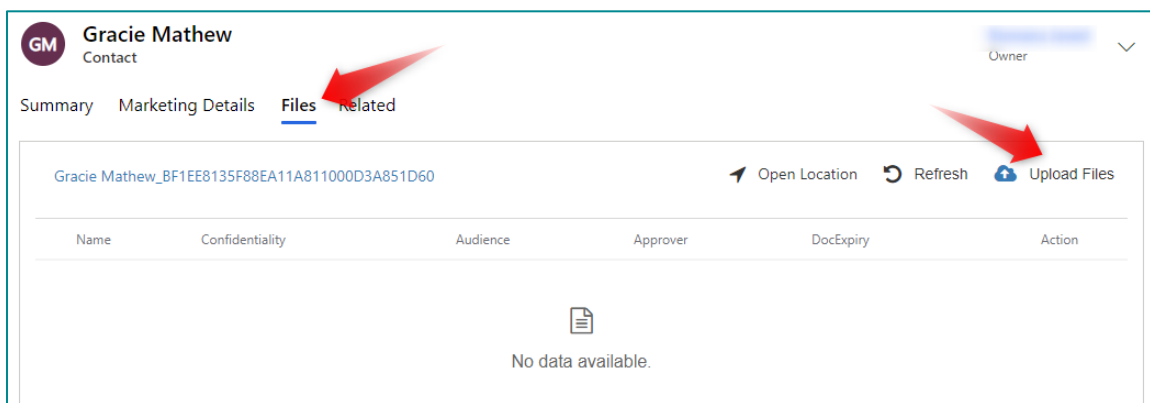


- Click “Ok” button on the Add Web Resource screen.
- Click “Save” to save the form customization.
- Click “Publish” to publish the form.
- Repeat all the steps in “Step 4” for each form where you want editable SharePoint metadata grid.

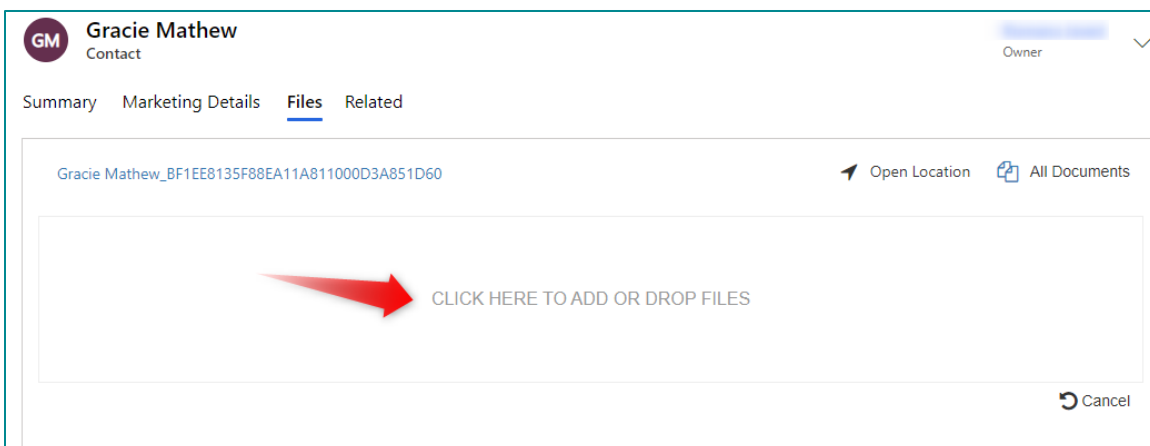
Step-6

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.

Gracie Mathew
Contact

Summary Marketing Details **Files** Related

Gracie Mathew_BF1EE8135F88EA11A811000D3A851D60

Open Location All Documents

Astro ... 0.9 MB REMOVE FILE

Produ ... 1.9 MB REMOVE FILE

Fund ... 0.5 MB REMOVE FILE

Name	Confidentiality	Audience	Approver	DocExpiry	Action
Astro Product Note HS.docx	--Select--	--Select--	--Select--	mm/dd/yyyy	
Product Information - Term Protect.pdf	--Select--	--Select--	--Select--	mm/dd/yyyy	
Fund Factsheet Individual.pdf	--Select--	--Select--	--Select--	mm/dd/yyyy	

Cancel Upload Remove All

- 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.