

SharePoint Attachment Extractor and Metadata Manager
for
Microsoft Dynamics 365 CRM

Release Guide

Date	Version	Author Information
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Overview

Microsoft SharePoint Server is a collaboration and content management application that simplifies how people store, find, and share information. It helps people to collaborate effectively by having secure access to documents and information that they require to make business decisions.

Off late SharePoint integration enables document management capabilities in Microsoft Dynamics 365 CRM. Despite many evolutionary features still there are lot of scenarios Where Dynamics 365 CRM users face in their day to day life which cannot be achieved by native OOB Dynamics CRM SharePoint integration. Some of the features which are still missing in the Out of box integration are as below

- ❖ Managing Sharepoint Metadata from within the Dynamics CRM application.
- ❖ Multiple File upload at one go.
- ❖ Automatically moving attachments from Notes (annotation) entity to Sharepoint.
- ❖ Implementation of CRM security on Sharepoint point attachment section.
- ❖ Seamless Sharepoint attachment from within CRM entity forms.

SharePoint Attachment Extractor and Metadata Manager for Microsoft Dynamics 365 CRM

Tool developed by **XrmForYou** is designed to achieve all the above functionalities for Dynamics CRM – SharePoint integration.

System Requirements

- Microsoft Dynamics 365 CRM (Online & On-Premise)
- Sharepoint (Online & On-Premise)

Prerequisite:

Target Dynamics 365/CRM environment must be enabled with native OOB SharePoint Integration to use our **SharePoint Attachment Extractor and Metadata Manager for Microsoft Dynamics 365 CRM** solutions.

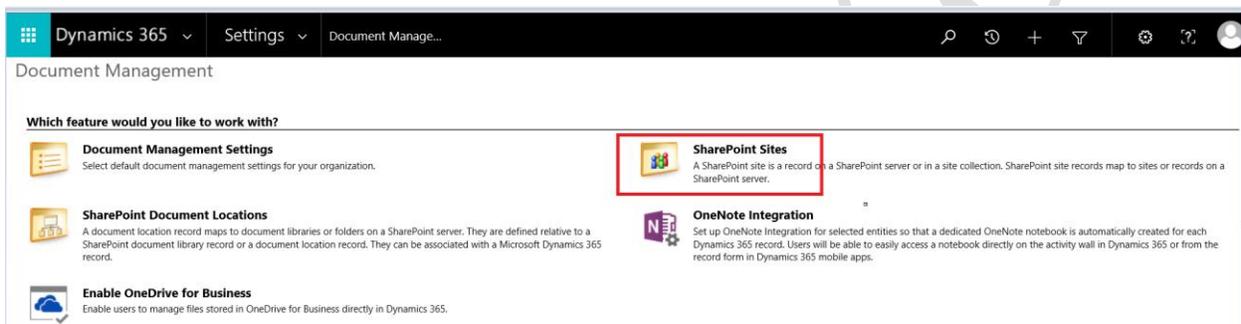
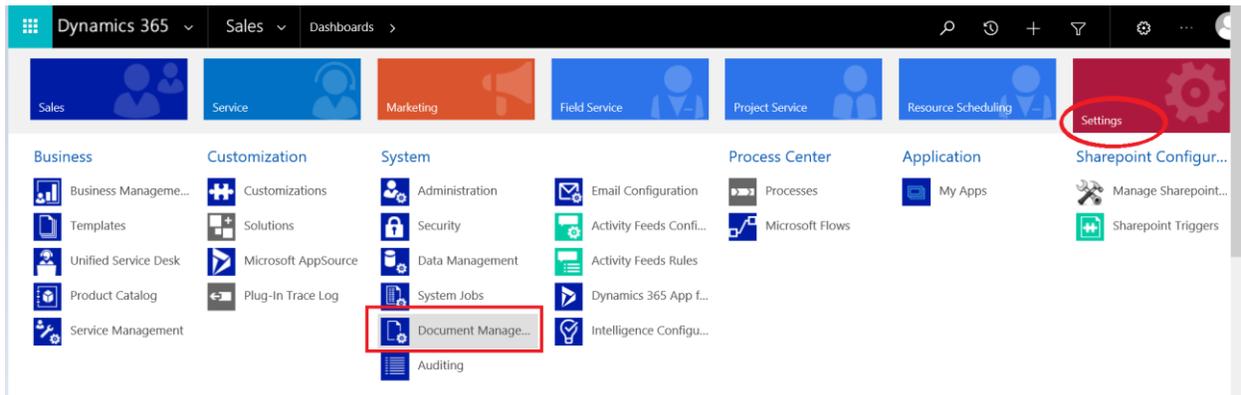
Key Features

SharePoint Attachment Extractor and Metadata Manager allows to easily configure and manage Sharepoint metadata for attachments from within Dynamics 365 CRM by providing the below key features.

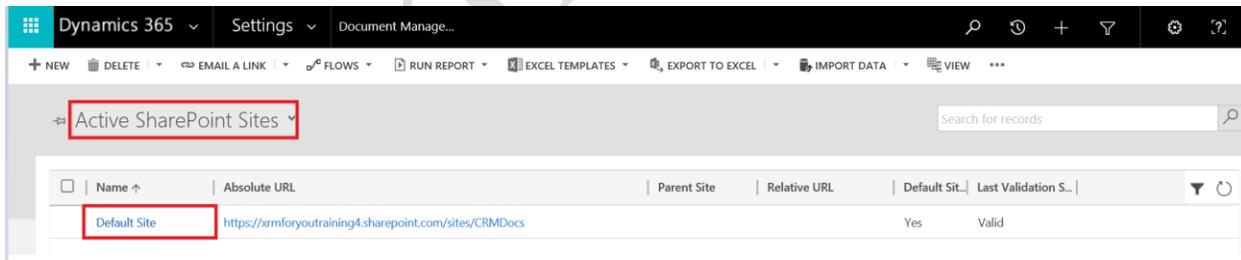
- Can create and manage entity or file based metadata in Sharepoint to manage your document management capability efficiently
- The tool works based on the security model of CRM and access to files in our custom document attachment section is based on the User's access level in CRM.
- Attachments can be automatically moved to Sharepoint from Notes entity from CRM based on User's configuration.
- The Tool will dynamically insert a Sharepoint document attachment section on the entity forms and system administrators can choose to configure the entity forms to display our Sharepoint document attachment section.
- Can Upload multiple files (Max up to 5 files).
- Can upload files by drag and drop
- Option to control the type of files allowed to upload (based on file extension) and the max file size to upload.

Installation Instructions

1. Login into your Microsoft Dynamics 365 CRM application with a user having System Administrator role (also Deployment Administrators for On Premise).
2. Import the "***XrmForYou.SharePointIntegrator***" solution into your CRM application and publish it.
3. Once the solution is imported successfully, Please navigate to
SETTINGS >> Document Management >> Sharepoint Sites



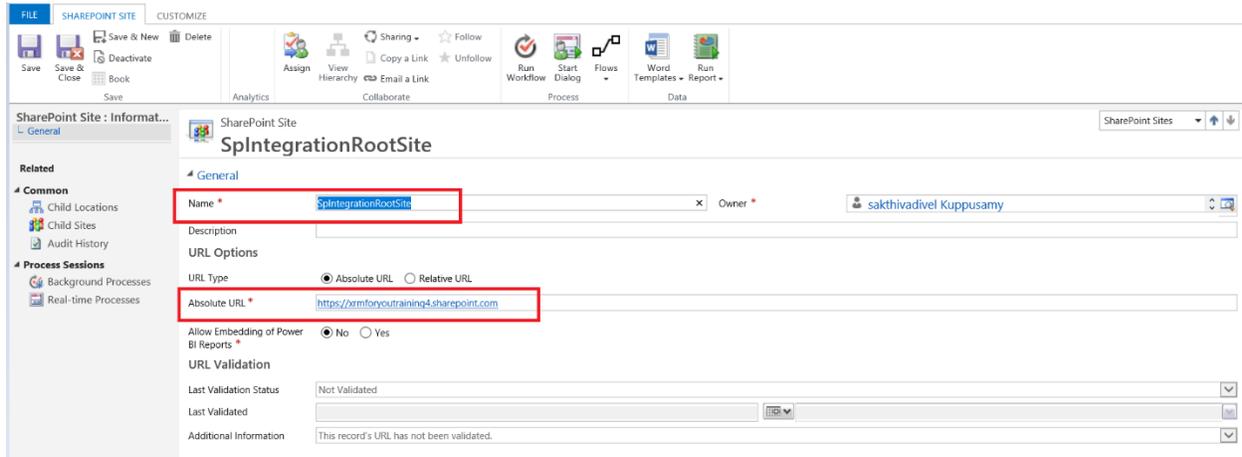
4. Make sure to see only one record named as “**Default Site**” in the Sharepoint Sites.



5. Now create a new record in the Sharepoint sites with name as “SpIntegrationRootSite” and with absolute Url as the root site Url (* .com).

For Example: If Microsoft Dynamics 365 CRM – Sharepoint integration is enabled with the subsite level of sharepoint (<https://xrmtrimea.sharepoint.com/CrmDocs>)

Here **Root Site** : <https://xrmtrimea.sharepoint.com> and **Sub site** : [CrmDocs](https://xrmtrimea.sharepoint.com/CrmDocs)



SharePoint Site : Informat...
 General

SharePoint Site
 SplIntegrationRootSite

Name * Owner *

Description

URL Options

URL Type Absolute URL Relative URL

Absolute URL *

Allow Embedding of Power BI Reports * No Yes

URL Validation

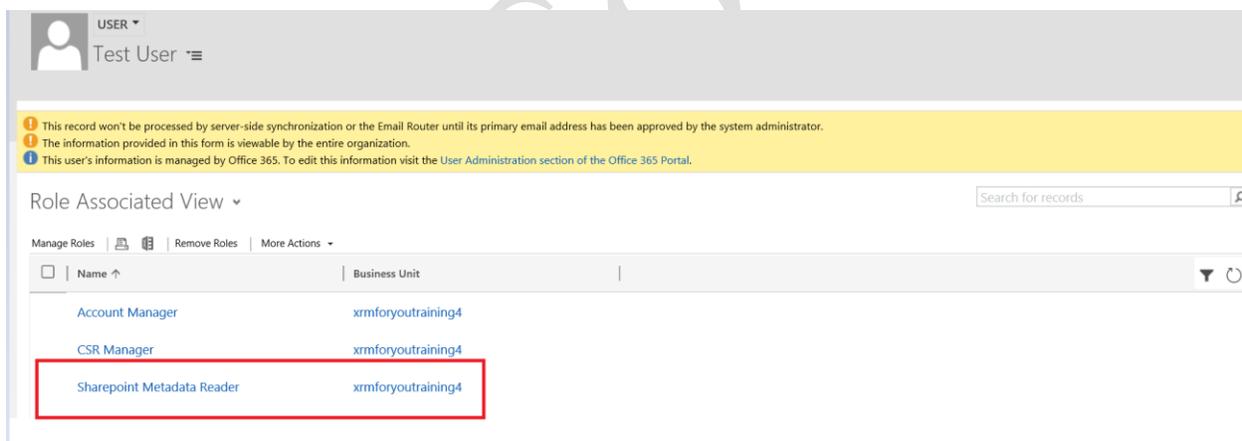
Last Validation Status

Last Validated

Additional Information

Setting Security Role to Users

The “Sharepoint Metadata Reader” security role (which comes with the tool) should be assigned to all the users who want to use Sharepoint integration through our tool.



USER ▾
 Test User ≡

This record won't be processed by server-side synchronization or the Email Router until its primary email address has been approved by the system administrator.
 The information provided in this form is viewable by the entire organization.
 This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.

Role Associated View ▾

Manage Roles

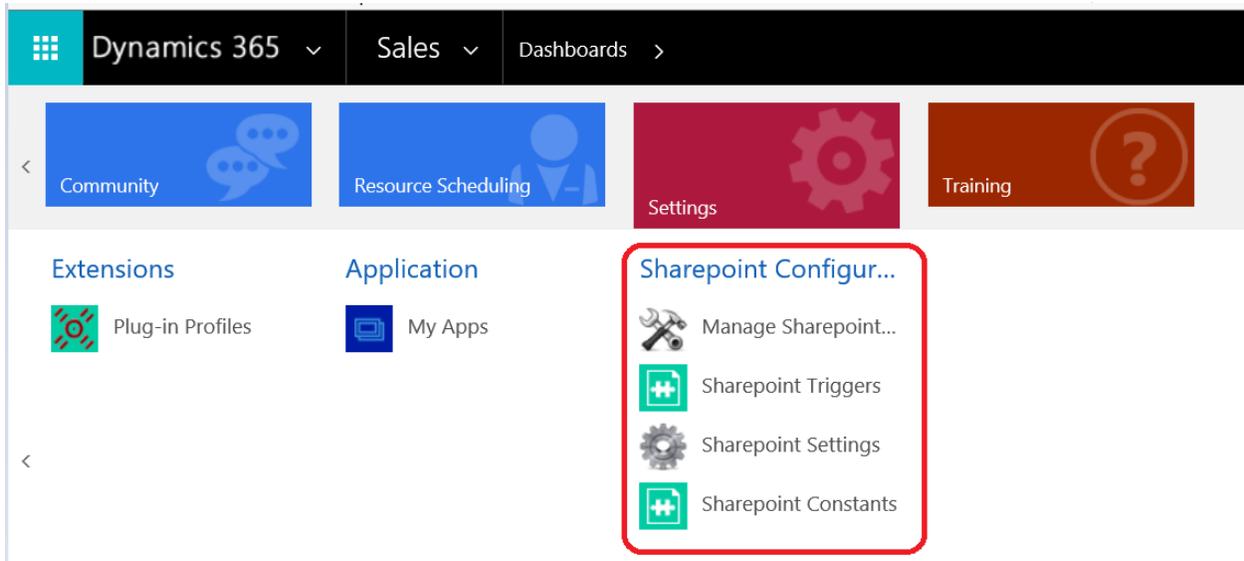
Name ↑	Business Unit
Account Manager	xrmforyourtraining4
CSR Manager	xrmforyourtraining4
Sharepoint Metadata Reader	xrmforyourtraining4

Note:

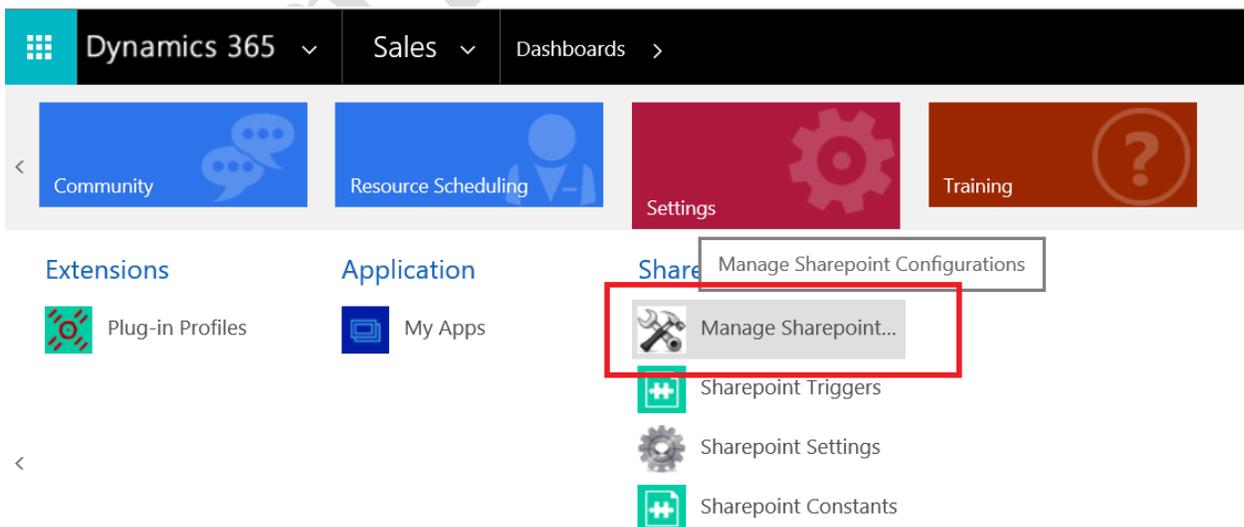
- ❖ The **SharePoint Attachment Extractor and Metadata** works based on the security model of CRM and access to files in **Sharepoint document attachment section** is based on the User's access level for the record in CRM.

Navigation

Once **SharePoint Attachment Extractor and Metadata Manager** is installed in CRM there will be a new menu item named **“Sharepoint Configurations”** available under **“SETTINGS”** area.



Manage Sharepoint Metadata Configurations page is where you configure and manage all the sharepoint metadata settings and also settings for Dynamics CRM entities which are enabled for the Sharepoint integration.



Manage Sharepoint Metadata Configurations Page

 NEW ACTIVITY ▾
  NEW RECORD ▾
  IMPORT DATA
  ADVANCED FIND

Register Sharepoint User

User Name: (*For on-premise environment please include domain name in user name)

Password: (*Re-type the password explicitly if you need to modify password.)

Manage Sharepoint Metadata Configurations

 NEW ACTIVITY ▾
  NEW RECORD ▾
  IMPORT DATA
  ADVANCED FIND

Register Sharepoint User

Manage Sharepoint Metadata Configurations

Select an Entity:

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM

* For Email entity, incoming email attachments will be processed by this setting.

Enable for Embedded View

Form(s) to show Embedded View

No entity selected or no form(s) available for entity.

Add/Edit Sharepoint Metadata

Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order

Configuration

Manage Sharepoint Metadata Configurations page helps to configure and manage all the sharepoint metadata settings.

This page consists of two main sections as below

- **Register Sharepoint User**
- **Manage Sharepoint Metadata Configurations**

Register Sharepoint User

System Administrators should register with a Sharepoint access credential (User Name and Password) which have elevated privilege to add or modify metadata (attributes) to Sharepoint site which is used for integration.

This registered credential will be used to create and update metadata (attributes) in sharepoint when you add Sharepoint metadata (attributes) from Dynamics CRM using the tool.

Note: The User Name and Password registered here will be encrypted and stored securely in Dynamics CRM so the credentials are secure.

Register Sharepoint User

User Name	<input type="text" value="test@crm4u2016.onmicrosoft.com"/>	(*For on-premise environment please include domain name in user name)	
Password	<input type="password" value="*****"/>	(*Passwords will be encrypted and stored securely in CRM)	

Manage Sharepoint Metadata Configurations

This section has the options to configure and manage the settings for Dynamics CRM entities which are enabled for the Sharepoint integration and the related Sharepoint metadata.

1. Select an entity from the “**Select an Entity**” dropdown for which you want to configure the settings.

Note: Only the entities which are enabled for native OOB Sharepoint integration in CRM will be available in the “Select an Entity” dropdown.

Manage Sharepoint Metadata Configurations

Select an Entity: Choose...

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM

* For Email entity, incoming email attachments will be processed by this setting.

Enable for Embedded View

Form(s) to show Embedded View

No entity selected or no form(s) available for entity.

Add/Edit Sharepoint Metadata

Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order

For Example: If you see in the above screenshot only the four entities “**Account**”, “**Contact**”, “**Opportunity** and “**Lead**” are available since these are the four entities which are enabled for native OOB Sharepoint integration in this Dynamics 365 CRM environment.

Manage Entity Settings

Once an entity is selected, below are the different settings available to configure.

Dynamics 365 Settings Manage Sharepoint...

NEW ACTIVITY NEW RECORD IMPORT DATA ADVANCED FIND

Register Sharepoint User

Manage Sharepoint Metadata Configurations

Select an Entity: Account

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM

* For Email entity, incoming email attachments will be processed by this setting.

Enable for Embedded View

Form(s) to show Embedded View

Account for Interactive experience
 Account - Mobile
 Sales Insights
 Information
 Account

- i. **Move attachments to Sharepoint when uploaded in CRM:** This is the option to automatically move attachments from Dynamics 365 CRM to Sharepoint once the file is attached to the record in the “Notes” section of CRM.

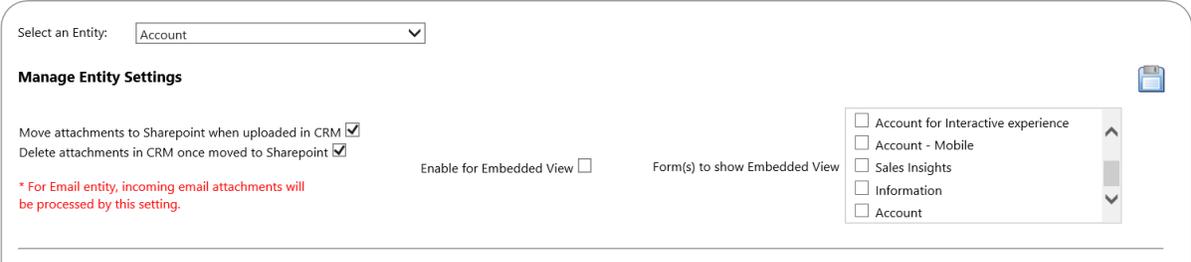
Note: This setting will also help to automatically move email attachments for incoming email from CRM to Sharepoint.

For Example: If this setting is enabled for “**Account**” entity then whenever an user attach an attachment for any account record in the notes section, then that attachment will be automatically move to Sharepoint and the file will be showed in the **Sharepoint document attachment section** on the form(s) of the entity.

Once the above setting is enabled then there will be another setting “**Delete attachments in CRM once moved to CRM**” available to configure.

- ii. **Delete attachments in CRM once moved to CRM:** This is the option to configure to automatically delete the attachments from Dynamics CRM once the file attachment is moved to sharepoint.

» Manage Sharepoint Metadata Configurations



iii. **Enable for Embedded View:**

This is the option to dynamically insert (embed) the Sharepoint document Attachment control into entity forms of the selected entity.

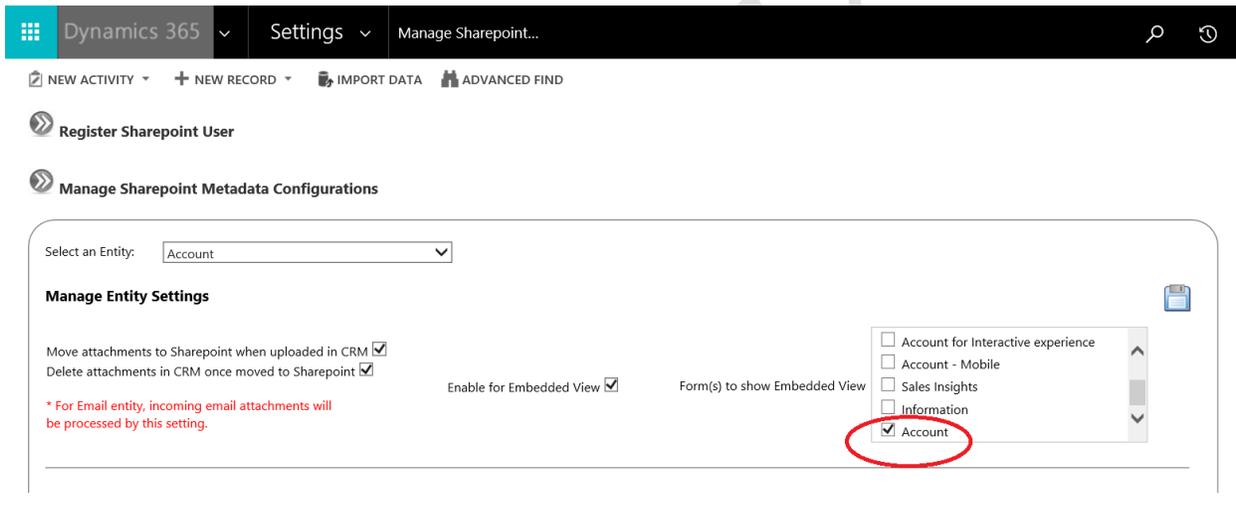
This setting works together along with the “**Form(s) to show Embedded View**”.

iv. Form(s) to show Embedded View:

This is the option to configure to which form of the selected entity, insert a Sharepoint document attachment section should be dynamically inserted and shown.

This setting will only list all the available main forms of the selected entity and not any other forms of the entity like Mobile forms, Quick Create forms or Quick view forms.

Once a specific form is selected in this setting then the **“Sharepoint attachment” section** will only be available on the selected form of the entity.

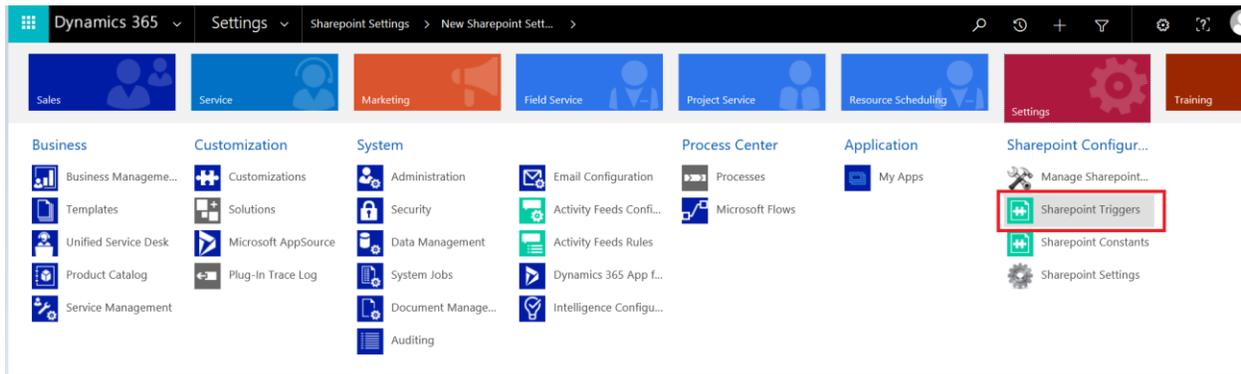
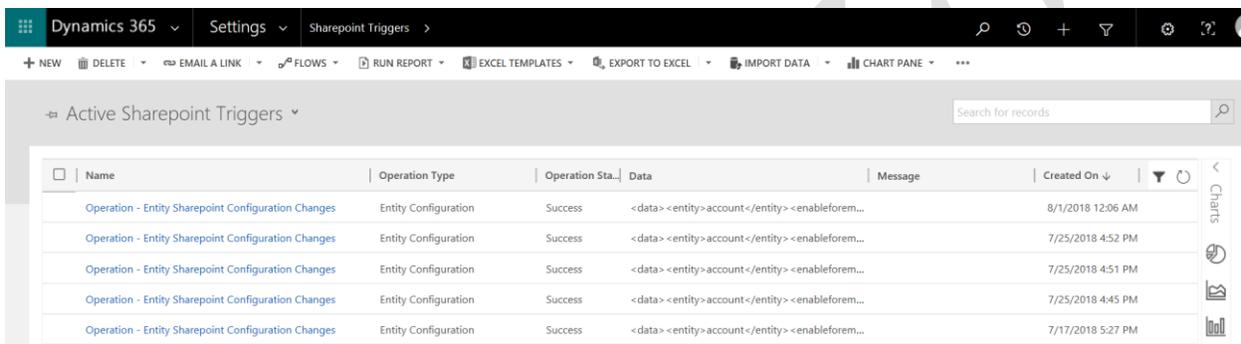


The screenshot shows the Dynamics 365 Settings page for 'Manage Sharepoint...'. The 'Manage Entity Settings' section is visible for the 'Account' entity. The 'Form(s) to show Embedded View' list includes 'Account' which is selected and circled in red. Other options in the list include 'Account for Interactive experience', 'Account - Mobile', 'Sales Insights', and 'Information'. The 'Enable for Embedded View' checkbox is also checked.

Please click on the **“Save”**  button to save the above settings.

Track the success of “Enable for Embedded View” operation in Sharepoint Triggers Entity

Users can verify if the Sharepoint Document attachment control is successfully inserted into the above selected entity form(s) by checking the status of the operation in Sharepoint triggers entity.

The screenshot shows the 'Active Sharepoint Triggers' table. The table has columns for Name, Operation Type, Operation Sta., Data, Message, and Created On. There are five rows of data, all showing 'Operation - Entity Sharepoint Configuration Changes' with a 'Success' status.

Name	Operation Type	Operation Sta.	Data	Message	Created On
Operation - Entity Sharepoint Configuration Changes	Entity Configuration	Success	<data> <entity>account</entity> <enableforem...		8/1/2018 12:06 AM
Operation - Entity Sharepoint Configuration Changes	Entity Configuration	Success	<data> <entity>account</entity> <enableforem...		7/25/2018 4:52 PM
Operation - Entity Sharepoint Configuration Changes	Entity Configuration	Success	<data> <entity>account</entity> <enableforem...		7/25/2018 4:51 PM
Operation - Entity Sharepoint Configuration Changes	Entity Configuration	Success	<data> <entity>account</entity> <enableforem...		7/25/2018 4:45 PM
Operation - Entity Sharepoint Configuration Changes	Entity Configuration	Success	<data> <entity>account</entity> <enableforem...		7/17/2018 5:27 PM

Add / Edit Sharepoint Metadata

Prerequisite :

Please remember to configure the Entity Settings described above before proceeding to create Sharepoint metadata for the entity.

This is the section of the tool provides the options to create, Edit and delete the Sharepoint Metadata (attributes) settings for the selected CRM entity.

Click on the  icon to add the sharepoint metada in Sharepoint for the attachments of the selected Dynamics CRM entity.

Once  is Clicked, there will be a popup where you should enter the below mandatory details of the Sharepoint metadata you want to add.

- i. **Display Name** : This is the Display name for Sharepoint metadata field which will be displayed in Dynamics CRM.
- ii. **Name in Sharepoint** : This will be the name for the Sharepoint metadata field in Sharepoint.
- iii. **Metadata Type** : This is the field which represents the type of the metadata field and this has two options as
 - a. **Map to Existing Values**: This will provide the option to map the Sharepoint metadata to a CRM global Optionset so that users are allowed to select only the values available in the optionset for the Sharepoint metadata

Example: For Example, consider if you are creating a Sharepoint metadata (attribute) named “**Document type**” for **Account** entity and you want users to choose from only two options as “**financial**” and “**Non-financial**” for Document type attribute while uploading a document for an account, then this can be achieved by creating a Global OptionSet which contains two options as “**financial**” and “**Non-financial**” and set it for Metadata type of the Document type attribute (metadata).

NEW ACTIVITY ▾ + NEW RECORD ▾ IMPORT DATA ADVANCED FIND

You are using a trial version of the tool. Your trial would expire in 15 days.

Register Sharepoint User

Manage Sharepoint Metadata Configurations

Select an Entity: Account

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM
 Delete attachments in CRM once moved to Sharepoint

* For Email entity, incoming email attachments will be processed by this setting.

Add/Edit Sharepoint Metadata

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Column Order
<input type="checkbox"/>			Document Type	

Edit Metadata

- Display Name
- Name in Sharepoint
- Metadata Type
- Map Metadata Values To
- Show In Crm
- Column Order

- Budget
- Budget Estimate
- Campaign response convert to lead disqualify status
- Campaign response convert to lead option
- Campaign response convert to lead qualify status
- Case Origin
- Category
- Change Source
- Characteristic Type
- Commit Type
- Computable Fields
- Customer Budget
- Day
- Days of run
- Distance Unit
- Document Type**
- Duration Rounding Policy
- Enable Trigger
- Entity Approval State
- Estimate Header Type
- Expense Category Behavior
- Expense Status
- Expense Types
- Export Status
- Fact Type
- Feasibility
- Field Service Product Type
- Find Work Event Type
- Frequency
- Generic Type

New Metadata ✕

Display Name *

Name in Sharepoint *

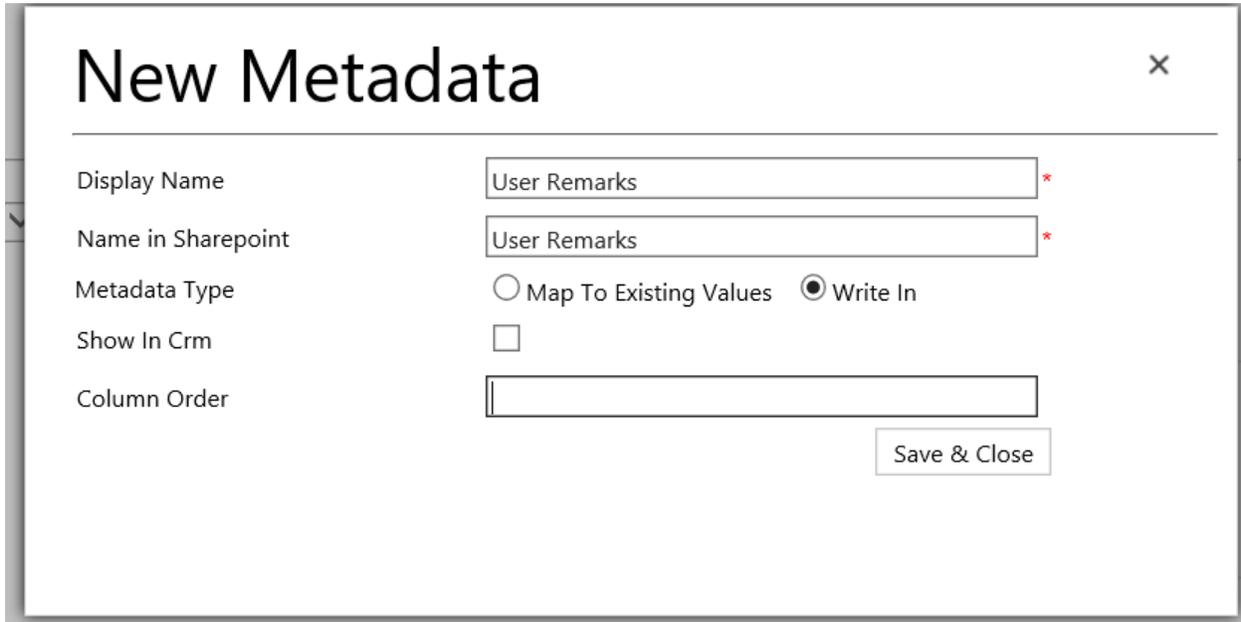
Metadata Type Map To Existing Values Write In

Map Metadata Values To ▼ *

Show In Crm

Column Order

b. Write In: This will provide the option to create text Sharepoint metadata so that so that the users can enter the text input for the metadata while uploading a document for the entity.



New Metadata [X]

Display Name: User Remarks *

Name in Sharepoint: User Remarks *

Metadata Type: Map To Existing Values Write In

Show In Crm:

Column Order: [Empty text box]

Save & Close

iv. **Show in CRM:** This option allows to configure whether you want to show the specific sharepoint metadata in CRM view or not.

v. **Column Order:** This option allows to configure the order in which the metadata will be displayed in the Sharepoint Document attachment control on the form.

New Metadata ✕

Display Name *

Name in Sharepoint *

Metadata Type Map To Existing Values Write In

Show In Crm

Column Order ✕

New Metadata ✕

Display Name *

Name in Sharepoint *

Metadata Type Write In

Show In Crm

Column Order

 Creating Metadata

Edit the Sharepoint Metadata : All the existing Sharepoint metadata can be edited by clicking the Edit icon () against each metadata.

Note: Administrators can change “Mapped to Existing Values” metadata to “Write In” metadata and vice versa using the **Edit** options

Add/Edit Sharepoint Metadata   

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	
<input type="checkbox"/>	Document Type	Document Type	Mapped	new_documenttype	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	User Notes	User Notes	Write-In		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	third field	third field	Mapped	new_documenttype	<input checked="" type="checkbox"/>		

Edit Metadata ✕

Display Name *

Name in Sharepoint *

Metadata Type Map To Existing Values Write In

Map Metadata Values To ▼ *

Show In Crm

Column Order

Edit Metadata ✕

Display Name *

Name in Sharepoint *

Metadata Type Map To Existing Values Write In

Show In Crm

Column Order

Delete the Sharepoint Metadata: All the Sharepoint metadata added for each entities can be deleted by selecting the metadata you want to delete and then clicking on then Delete icon (✕).

 **Manage Sharepoint Metadata Configurations**

Select an Entity:

Manage Entity Settings 

Move attachments to Sharepoint when uploaded in CRM
 Delete attachments in CRM once moved to Sharepoint

Enable for Embedded View
 Form(s) to show Embedded View

* For Email entity, incoming email attachments will be processed by this setting.

Account
 Account - Mobile
 Sales Insights
 Information
 Information

Add/Edit Sharepoint Metadata   

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	<input type="checkbox"/>
<input type="checkbox"/>	Document Type	Document Type	Mapped	new_documenttype	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Third Field	Third Field	Write-In		<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>
<input type="checkbox"/>	User Remarks	User Remarks	Write-In		<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>

Select an Entity:

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM
 Delete attachments in CRM once moved to Sharepoint

* For Email entity, incoming email attachments will be processed by this setting.

Enable for Embedded View Form(s) to show Embedded View

Message from webpage

Selected metadata configuration(s) would be deleted. Wish to continue?

OK Cancel

Add/Edit Sharepoint Metadata

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	
<input type="checkbox"/>	Document Type	Document Type	Mapped	new_documenttype	<input checked="" type="checkbox"/>	1	
<input checked="" type="checkbox"/>	Third Field	Third Field	Write-In		<input checked="" type="checkbox"/>	3	
<input type="checkbox"/>	User Remarks	User Remarks	Write-In		<input checked="" type="checkbox"/>	2	

» **Manage Sharepoint Metadata Configurations**

Select an Entity:

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM
 Delete attachments in CRM once moved to Sharepoint

* For Email entity, incoming email attachments will be processed by this setting.

Enable for Embedded View Form(s) to show Embedded View

Deleting Metadata...

Account
 Account - Mobile
 Sales Insights
 Information
 Information

Add/Edit Sharepoint Metadata

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	
<input type="checkbox"/>	Document Type	Document Type	Mapped	new_documenttype	<input checked="" type="checkbox"/>	1	
<input type="checkbox"/>	User Remarks	User Remarks	Write-In		<input checked="" type="checkbox"/>	2	
<input checked="" type="checkbox"/>	Third Field	Third Field	Write-In		<input checked="" type="checkbox"/>	3	

The Sharepoint Metadata named **“Third Field”** is deleted from Sharepoint.

Dynamics 365 Settings Manage Sharepoint...

NEW ACTIVITY NEW RECORD IMPORT DATA ADVANCED FIND

Manage Sharepoint Metadata Configurations

Select an Entity: Account

Manage Entity Settings

Move attachments to Sharepoint when uploaded in CRM
 Delete attachments in CRM once moved to Sharepoint Enable for Embedded View Form(s) to show Embedded View

* For Email entity, incoming email attachments will be processed by this setting.

- Account
- Account - Mobile
- Sales Insights
- Information
- Information

Add/Edit Sharepoint Metadata

<input type="checkbox"/>	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	
<input type="checkbox"/>	Document Type	Document Type	Mapped	new_documenttype	<input checked="" type="checkbox"/>	1	
<input type="checkbox"/>	User Remarks	User Remarks	Write-In		<input checked="" type="checkbox"/>	2	

Sharepoint Document Attachment Section on the Entity Forms

Once the above configuration are completed now , users will start seeing the Sharepoint Document attachment control on the entity forms of entities configured in above “Manage Entity Settings” step.

Example: In the above steps as an example, **Sharepoint Document Attachment** control is configured to show on the “**Account**” form of the “**Account**” entity.

Dynamics 365 Sales Accounts Xrmforyou

New Alert (1) Latest: You've got an alert for the mailbox 'saktivadivel.kuppusamy' / 7/9/2018 9:21 PM View Alerts

NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS

ACCOUNT Xrmforyou

Annual Revenue Number of Employees Owner saktivadivel.kuppusamy

SharePoint

NEW UPLOAD OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
No documents found at this location					

Page 1 of 0 15 records

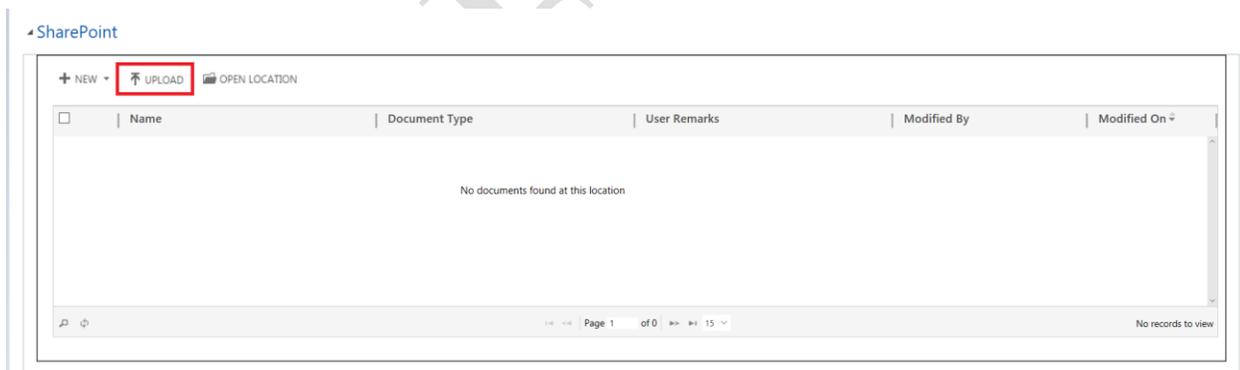
Now Let us see the features and Options available on the “Sharepoint Document Attachment” section.

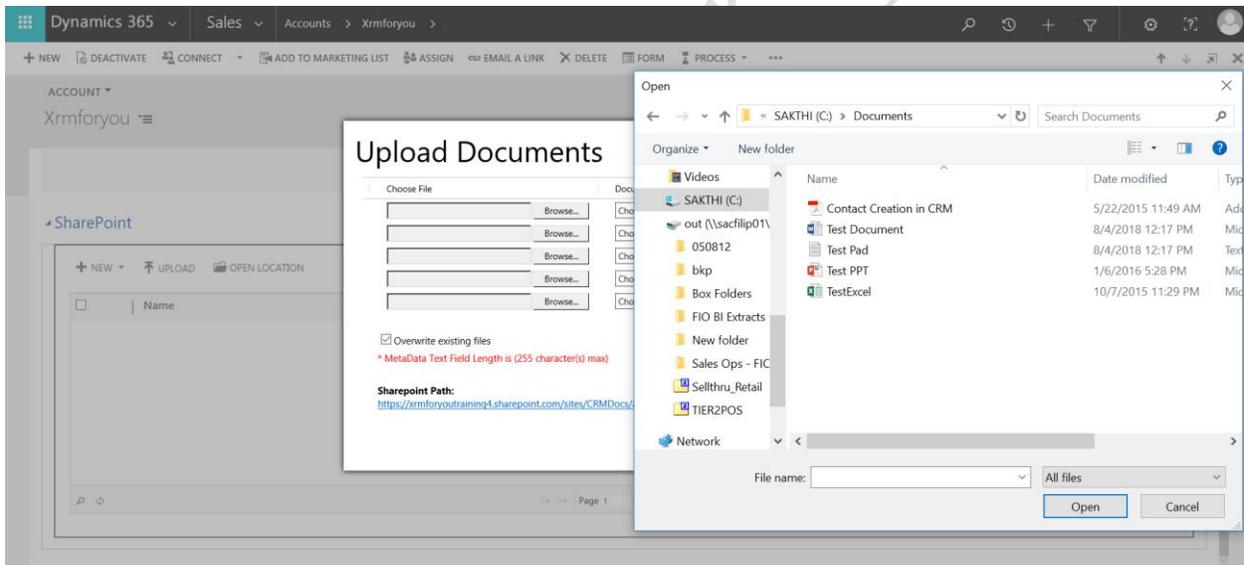
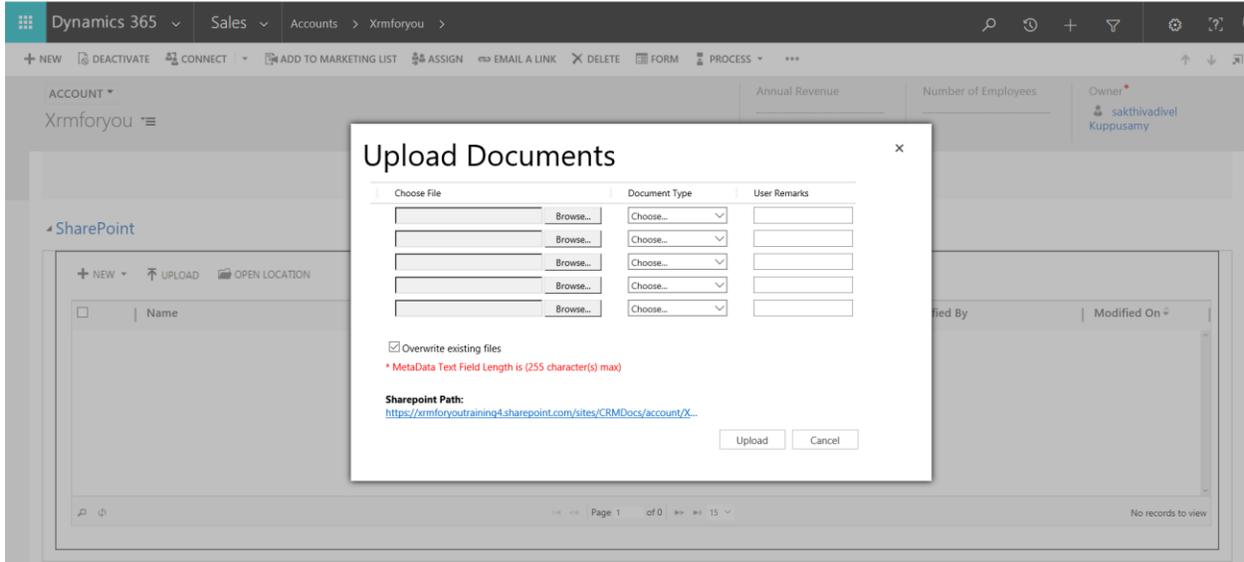
Upload:

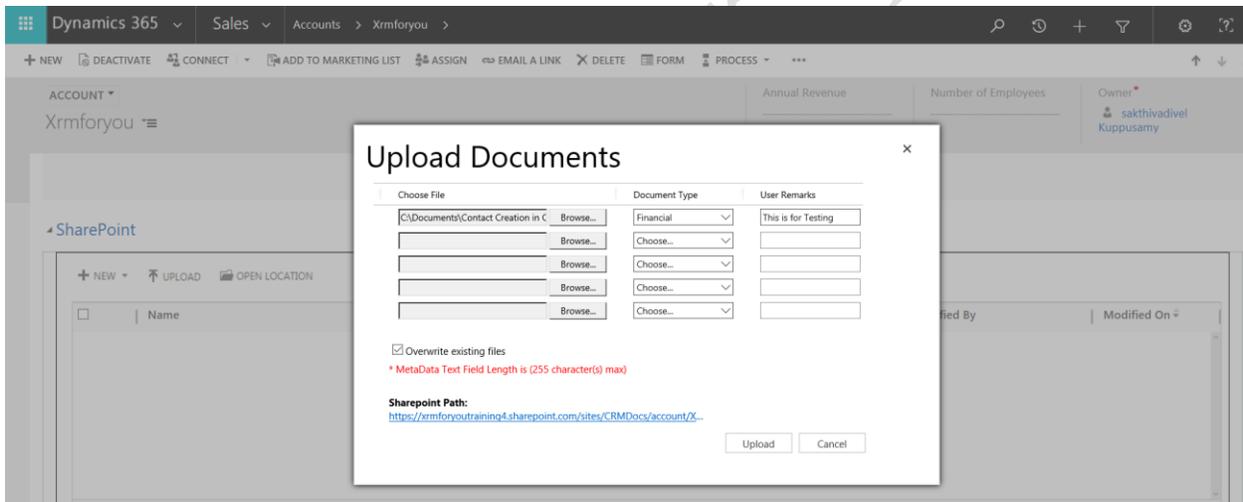
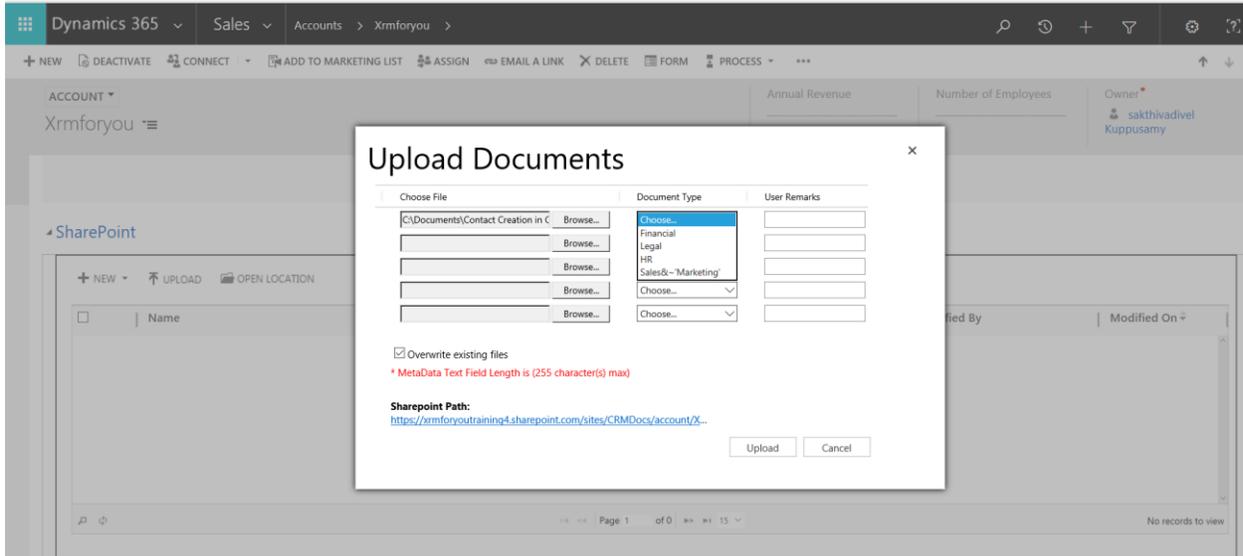
This option is used to upload the files to Sharepoint as attachments for CRM records through our Sharepoint Document attachment control on the entity forms.

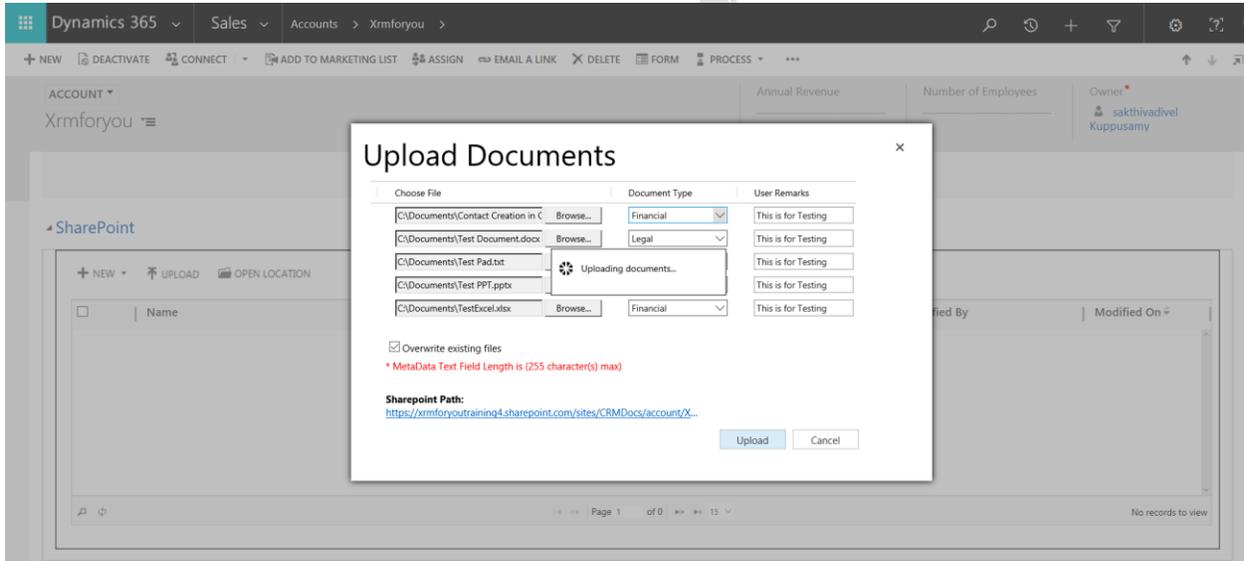
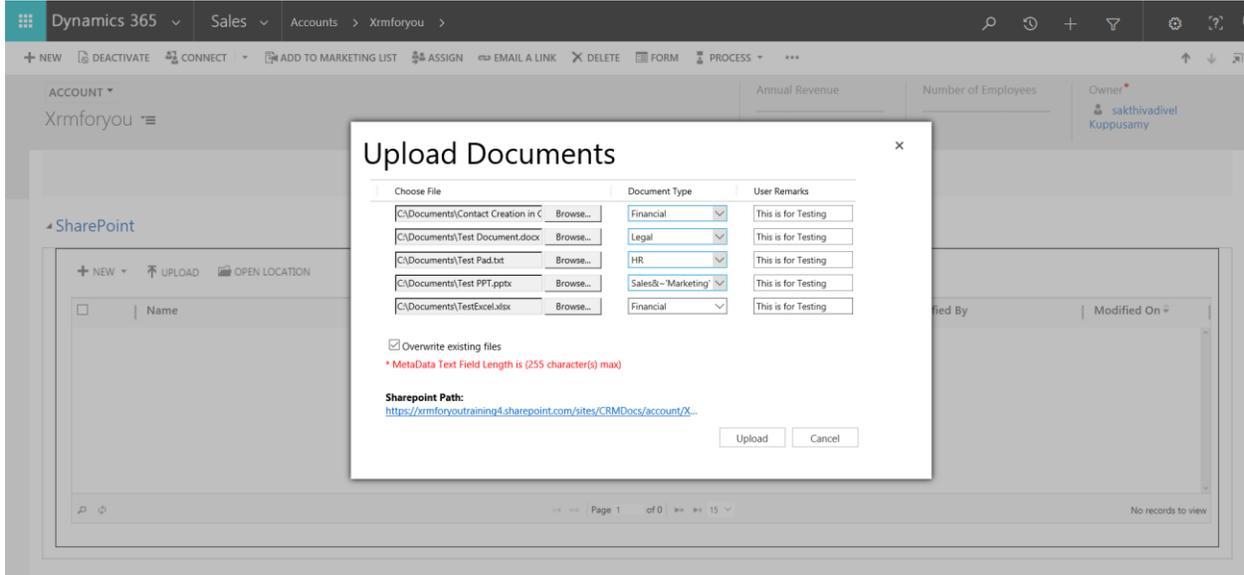
Points to Remember

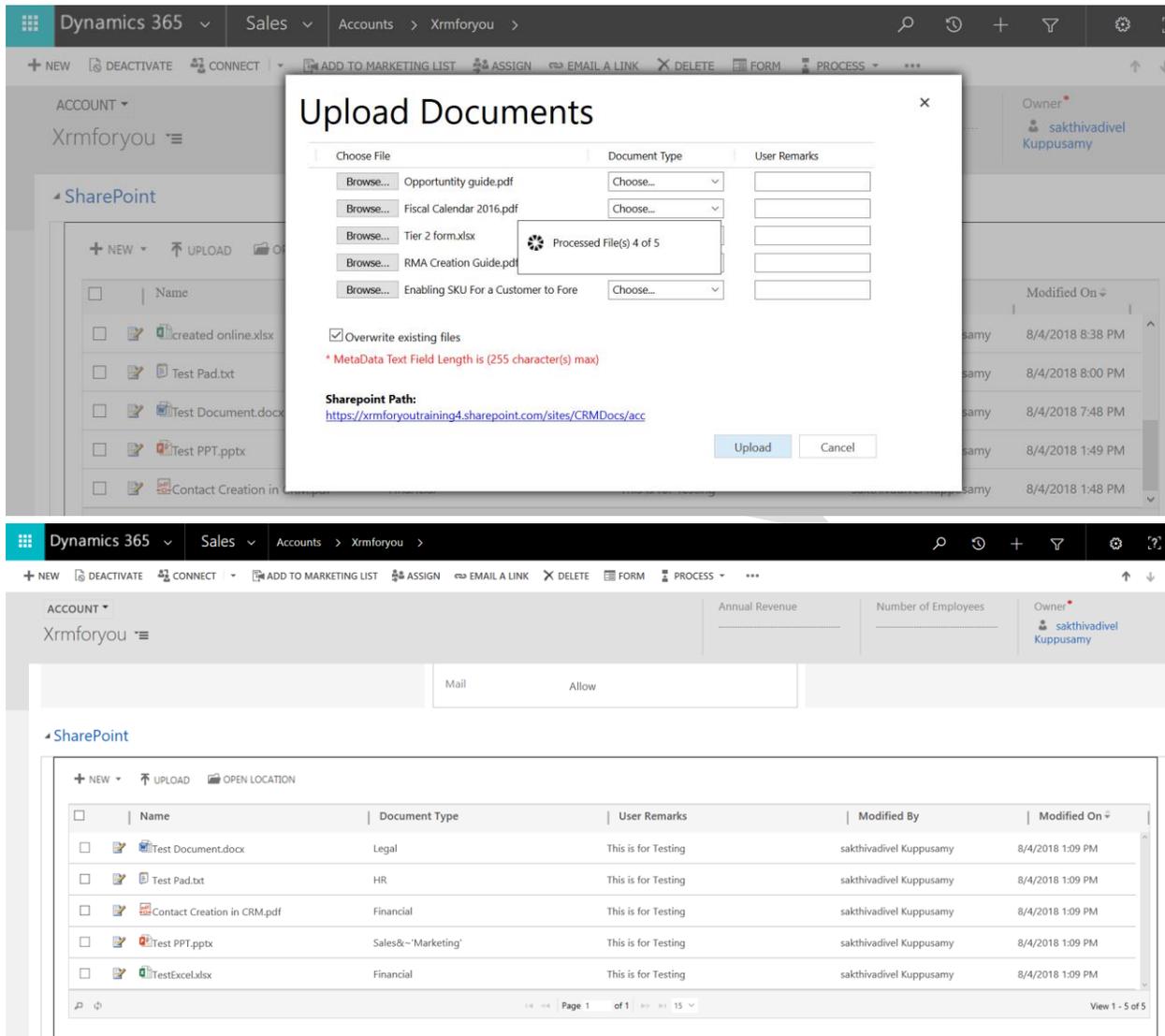
- ❖ Maximum of **five files** can be uploaded at one go.
- ❖ Users can configure the **File formats** they want to upload using the SharePoint Constant entity.
- ❖ Users can configure the **Maximum file size** to upload using the **SharePoint constant entity** and advisable size of individual files should not exceed **20 MB**.











The screenshot shows the Dynamics 365 CRM interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Accounts > Xrmforyou'. A 'SharePoint' section is visible on the left. The main area displays an 'Upload Documents' dialog box with the following content:

Choose File	Document Type	User Remarks
<input type="button" value="Browse..."/> Opportunity guide.pdf	<input type="text" value="Choose..."/>	<input type="text"/>
<input type="button" value="Browse..."/> Fiscal Calendar 2016.pdf	<input type="text" value="Choose..."/>	<input type="text"/>
<input type="button" value="Browse..."/> Tier 2 form.xlsx	<input type="text" value="Choose..."/>	<input type="text"/>
<input type="button" value="Browse..."/> RMA Creation Guide.pdf	<input type="text" value="Choose..."/>	<input type="text"/>
<input type="button" value="Browse..."/> Enabling SKU for a Customer to Fore	<input type="text" value="Choose..."/>	<input type="text"/>

Below the table, there is a checkbox for 'Overwrite existing files' which is checked. A red asterisk indicates a warning: '* MetaData Text Field Length is (255 character(s) max)'. The 'Sharepoint Path' is listed as <https://xrmforyoutraining4.sharepoint.com/sites/CRMDocs/acc>. 'Upload' and 'Cancel' buttons are at the bottom right.

The background shows a SharePoint document library with the following table:

Name	Document Type	User Remarks	Modified By	Modified On
Test Document.docx	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:09 PM
Test Pad.txt	HR	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:09 PM
Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:09 PM
Test PPT.pptx	Sales&--Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:09 PM
TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:09 PM

Overwrite Existing files: If this option is checked and when you try to upload a file with same name of same type as an existing file then the existing file will be overwritten with the new file.

If this option is not checked and when you try to upload a file with same name of same type as an existing file then the new file will be created with the same name appended with current time stamp.

Upload Documents ✕

Choose File	Document Type	User Remarks
<input type="text" value="C:\Documents\Contact Creation in C"/> <input style="float: right;" type="button" value="Browse..."/>	Financial <input type="button" value="v"/>	This is for Testing
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>

Overwrite existing files

* MetaData Text Field Length is (255 character(s) max)

Sharepoint Path:
<https://xrmforyourtraining4.sharepoint.com/sites/CRMDocs/account/X...>

Sharepoint path: Will be the path of the folder of the current CRM record in Sharepoint.

Upload Documents ✕

Choose File	Document Type	User Remarks
<input type="text" value="C:\Documents\Contact Creation in C"/> <input style="float: right;" type="button" value="Browse..."/>	Financial <input type="button" value="v"/>	This is for Testing
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>
<input type="text"/> <input style="float: right;" type="button" value="Browse..."/>	Choose... <input type="button" value="v"/>	<input type="text"/>

Overwrite existing files

* MetaData Text Field Length is (255 character(s) max)

Sharepoint Path:
<https://xrmforyourtraining4.sharepoint.com/sites/CRMDocs/account/X...>

NEW (+ NEW '):

This option is only available in Microsoft Dynamics 365 CRM online by which documents can be directly created using Microsoft office online directly from inside the Sharepoint document attachment control on the CRM entity form and these documents will be stored as attachment in Sharepoint for the respective CRM record.

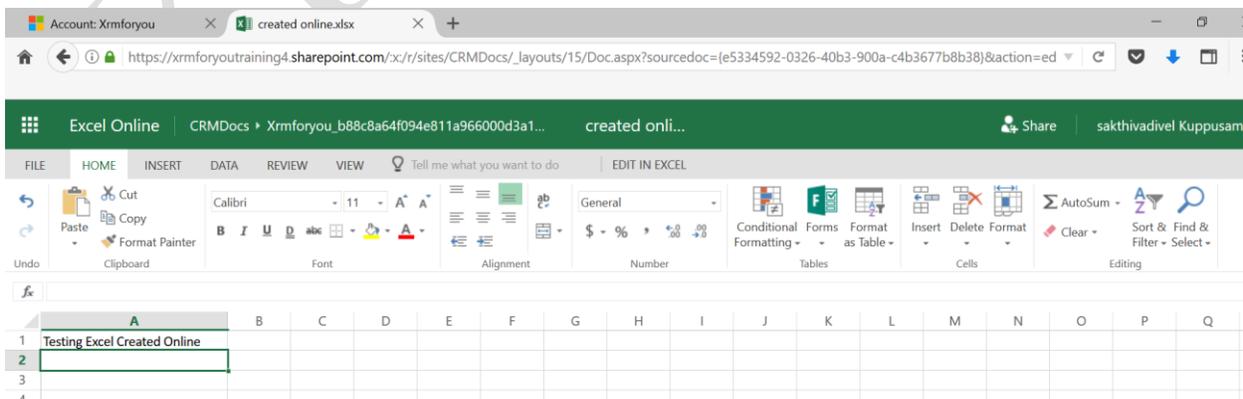
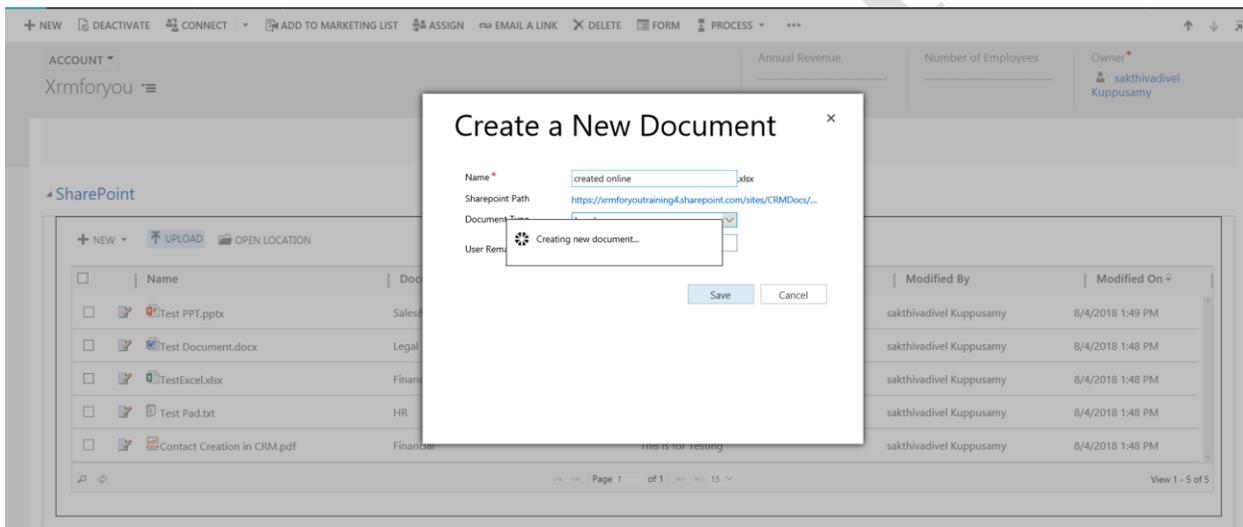
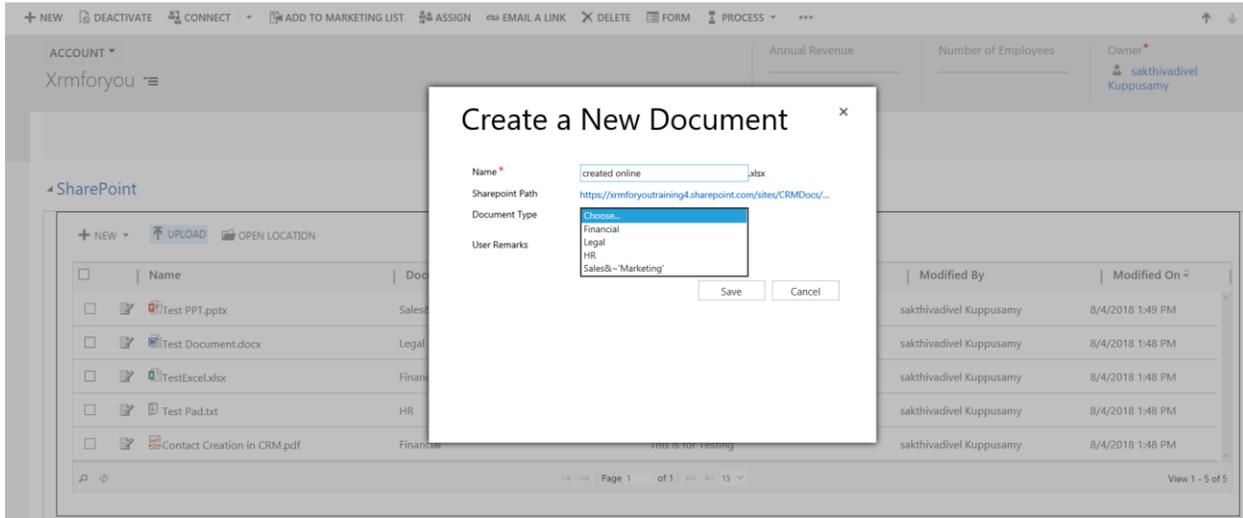
The below are the supported document format wwhich can be directly created from the

+ NEW ' option. Word, Excel, PowerPoint, One Note.

SharePoint



Since this tool allows to enter Sharepoint Metadata (attribute) for attachments so when you create a new document from the attachment section you will have option to fill in the values for the Sharepoint metadata. (Already created for the respective CRM entity through the configuration page of this tool).



SharePoint

+ NEW UPGRADE OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	created online.xlsx	Legal	testinhg	sakthivadivel Kuppusamy	8/4/2018 2:00 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
<input type="checkbox"/>	Test Document.docx	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
<input type="checkbox"/>	TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
<input type="checkbox"/>	Test Pad.txt	HR	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 1 of 1 View 1 - 6 of 6

Note : If you create a document using the **+ NEW** option with the same name as of other existing attached document of same type for the same CRM record then the existing document will be overwritten with newly created document.

Edit Attachments:  : This is setting by which you can edit the already attached document. Once you click on the  button an Edit Properties will open which allows you edit the metadata for this document.

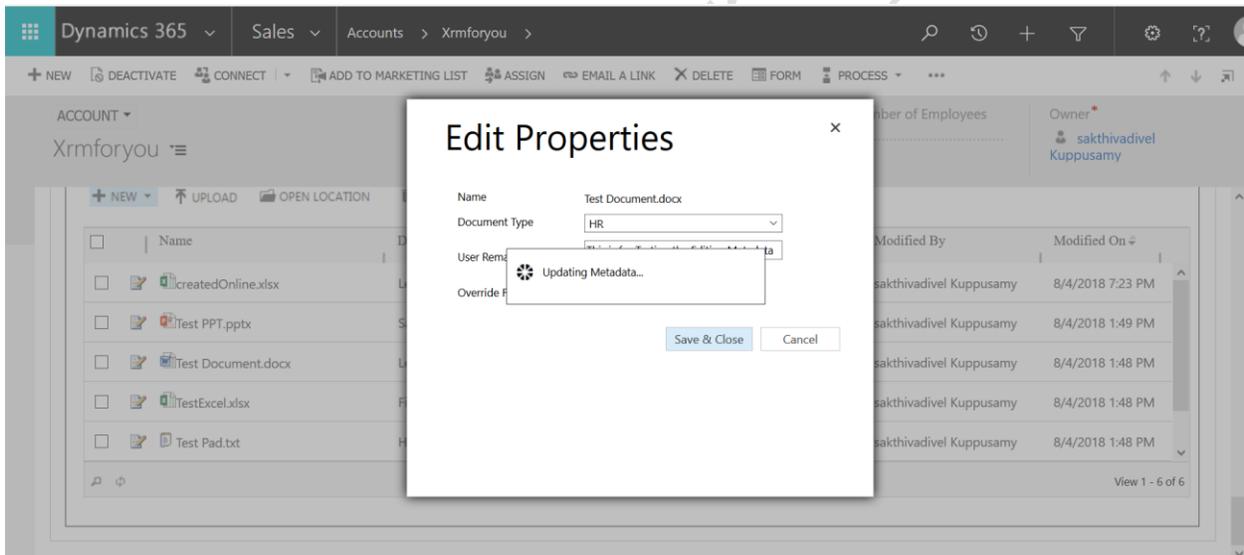
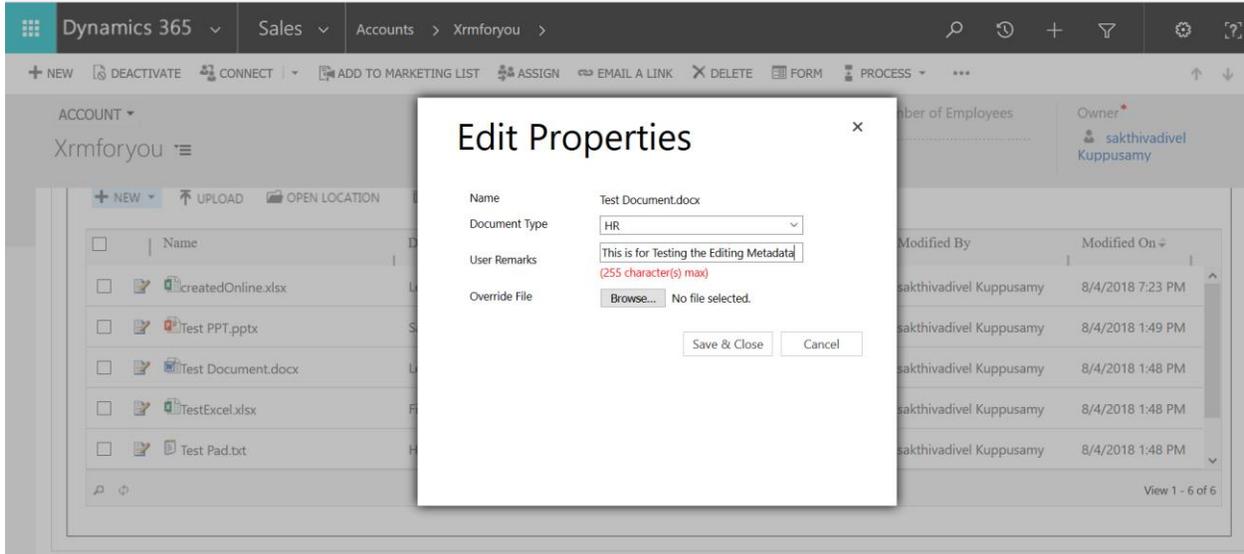
SharePoint

+ NEW UPGRADE OPEN LOCATION DELETE

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	created online.xlsx	Legal	testinhg	sakthivadivel Kuppusamy	8/4/2018 2:00 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
<input checked="" type="checkbox"/>	Test Document.docx	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
<input type="checkbox"/>	TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
<input type="checkbox"/>	Test Pad.txt	HR	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 1 of 1 View 1 - 6 of 6

Edit Attachments



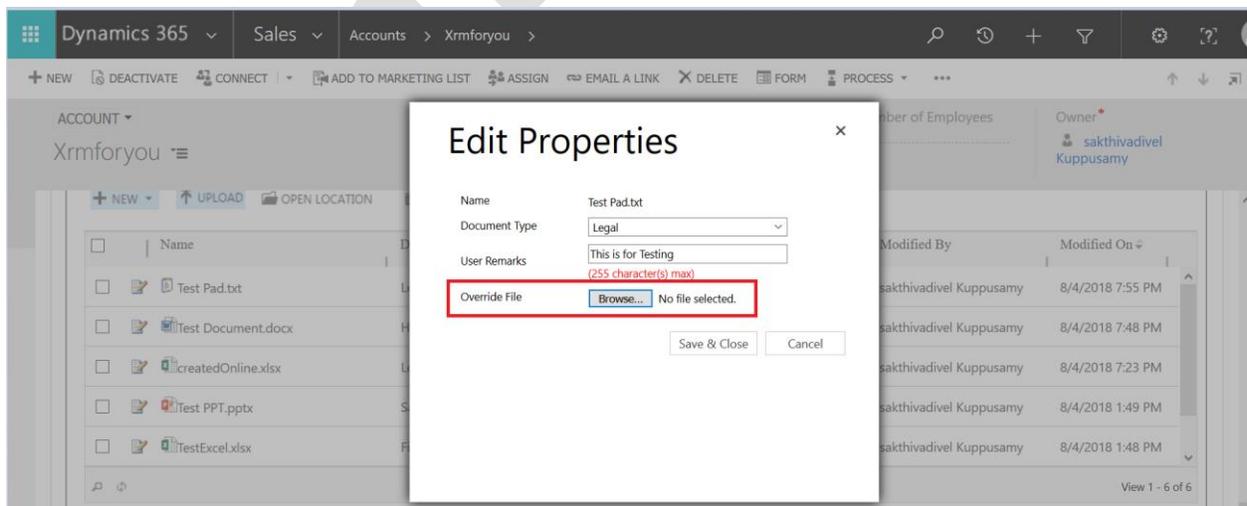
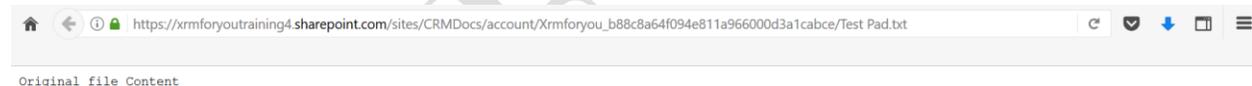
SharePoint

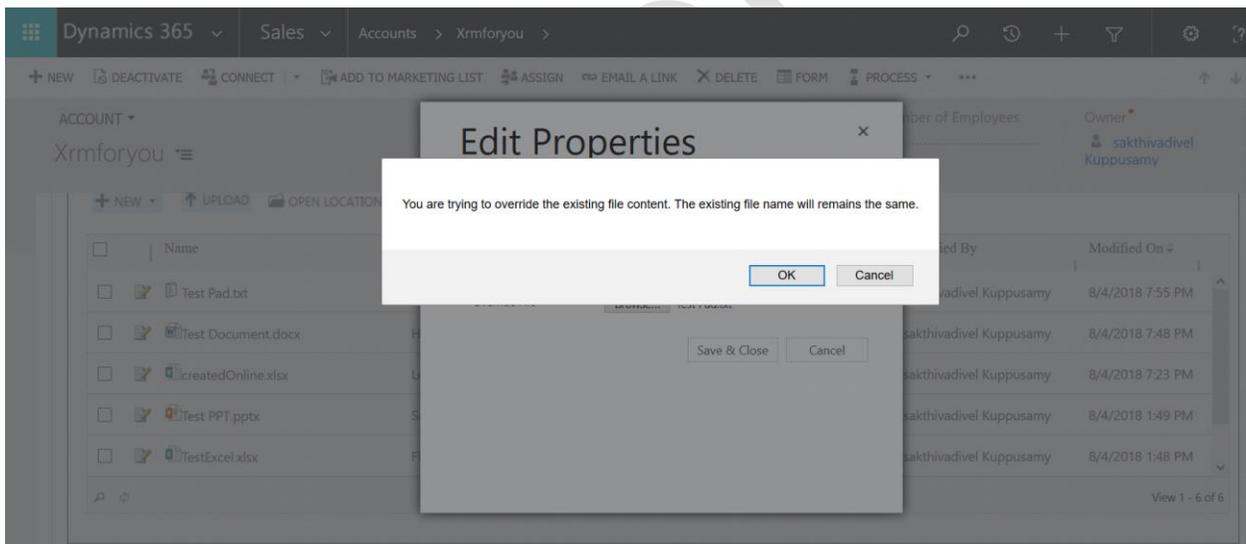
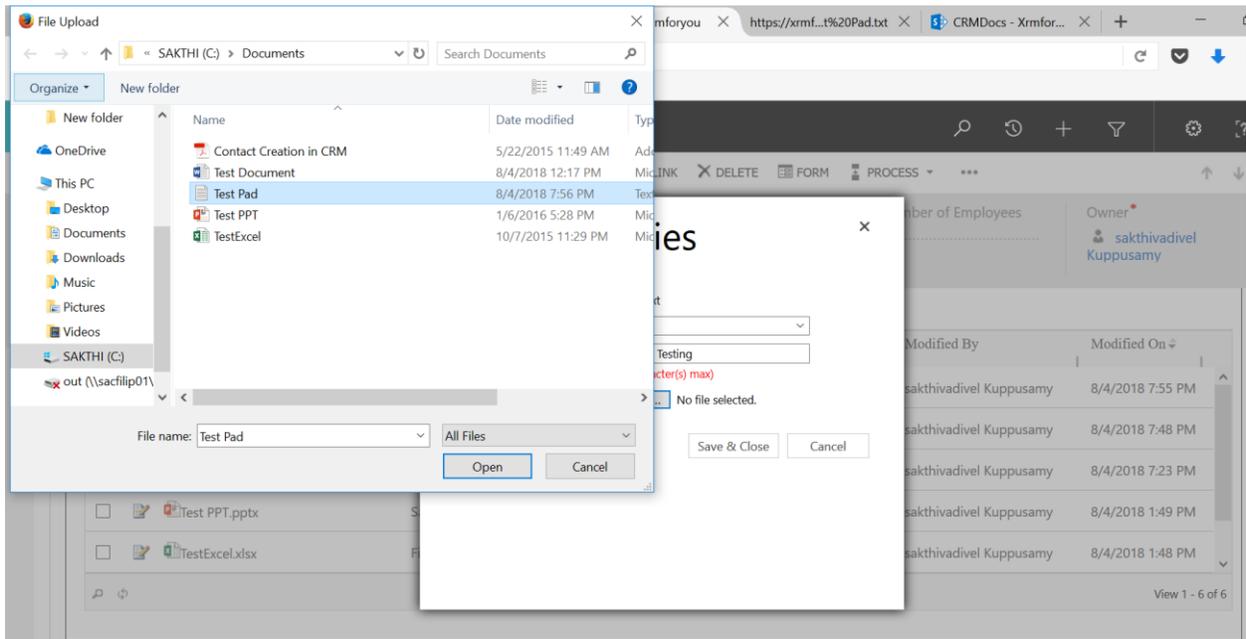
	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadel Kuppusamy	8/4/2018 7:48 PM
<input type="checkbox"/>	createdOnline.xlsx	Legal	Testing	sakthivadel Kuppusamy	8/4/2018 7:23 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~Marketing	This is for Testing	sakthivadel Kuppusamy	8/4/2018 1:49 PM
<input type="checkbox"/>	TestExcel.xlsx	Financial	This is for Testing	sakthivadel Kuppusamy	8/4/2018 1:48 PM
<input type="checkbox"/>	Test Pad.txt	HR	This is for Testing	sakthivadel Kuppusamy	8/4/2018 1:48 PM

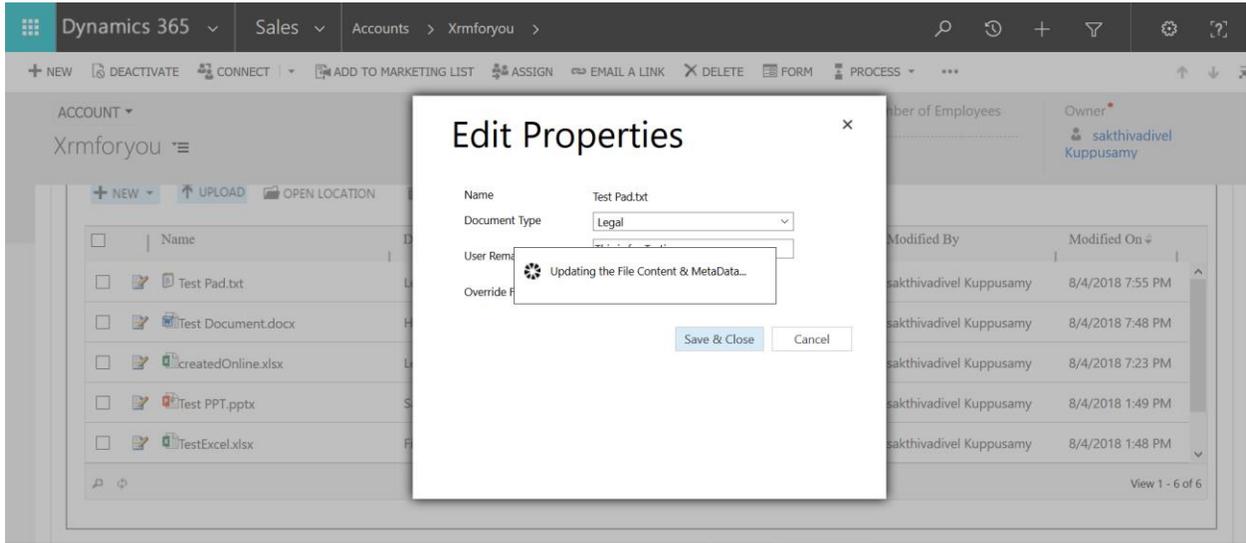
Override file content using Edit:

To edit the content of the already attached file you can just upload a new file of the same filetype with the edited content then the content of the existing file will be overwritten with the new content.

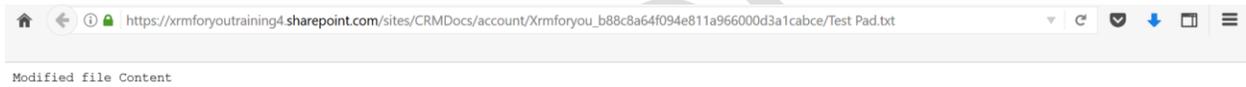
Originally uploaded file content for Test Pad.txt



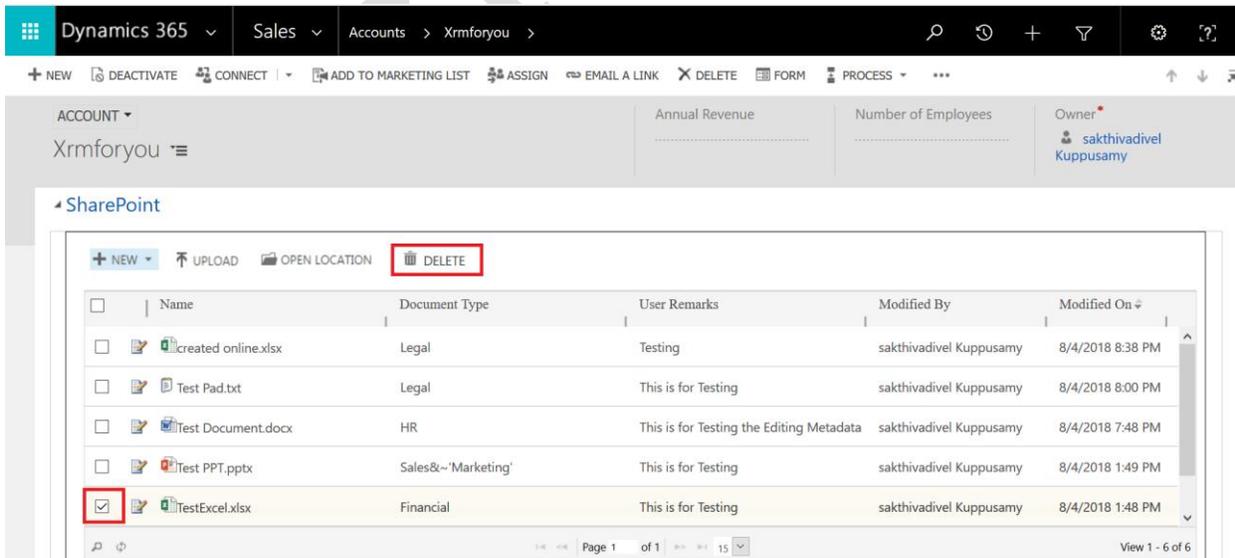


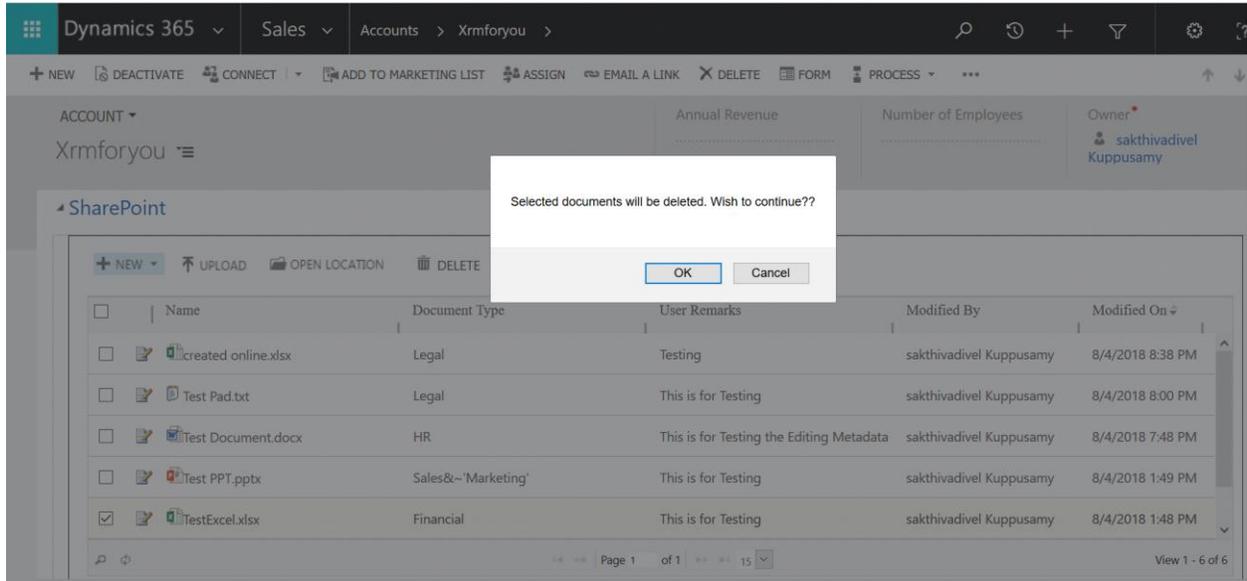


Overwritten file content for Test Pad.txt



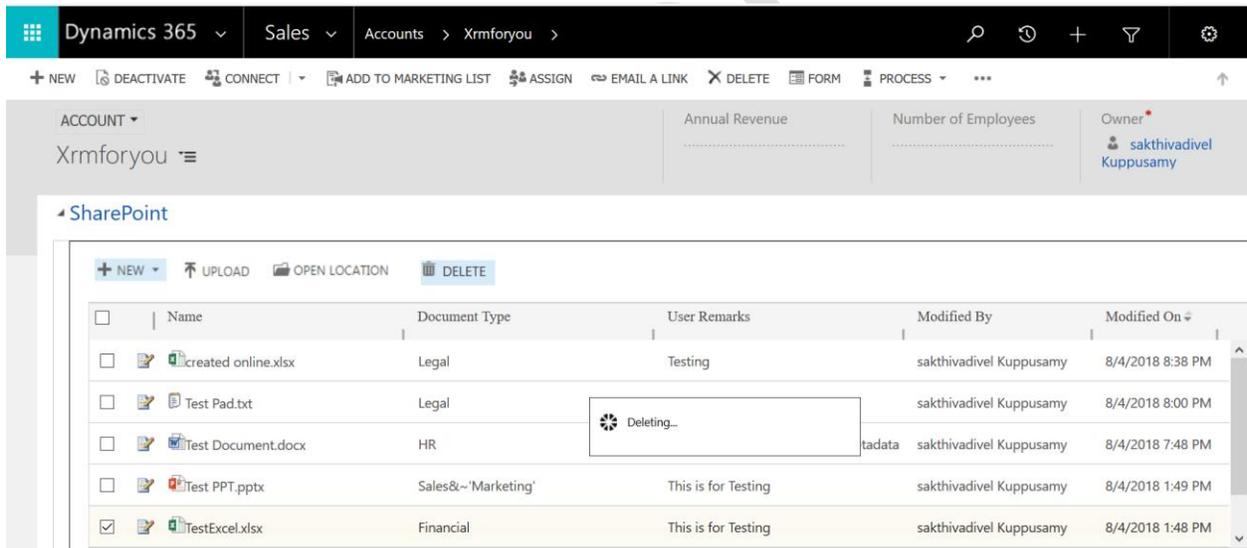
Delete Attachments: This is used to delete the attachment from Sharepoint.





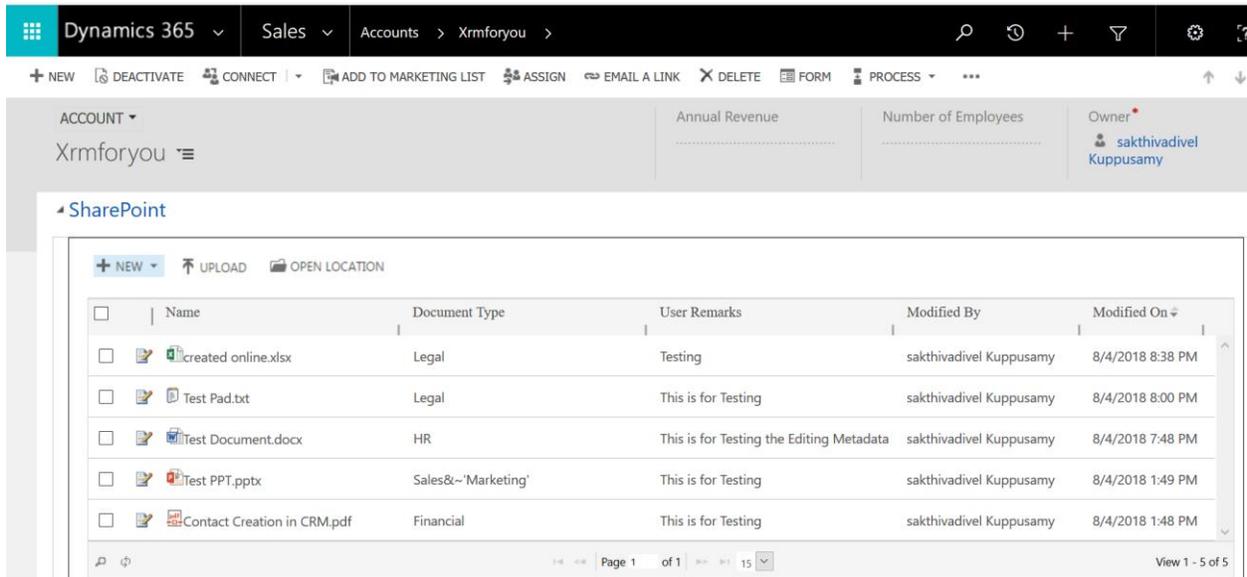
The screenshot shows the Dynamics 365 CRM interface for the 'Xrmforyou' account. A SharePoint document list is displayed with columns: Name, Document Type, User Remarks, Modified By, and Modified On. A confirmation dialog box is overlaid on the list, asking 'Selected documents will be deleted. Wish to continue??' with 'OK' and 'Cancel' buttons.

Name	Document Type	User Remarks	Modified By	Modified On
created online.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
Test Pad.txt	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:00 PM
Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
Test PPT.pptx	Sales&~Marketing	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM



The screenshot shows the Dynamics 365 CRM interface for the 'Xrmforyou' account. The SharePoint document list is displayed, and the 'Test Document.docx' row now has a 'Deleting...' status in the User Remarks column, indicating the deletion process is in progress.

Name	Document Type	User Remarks	Modified By	Modified On
created online.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
Test Pad.txt	Legal		sakthivadivel Kuppusamy	8/4/2018 8:00 PM
Test Document.docx	HR	Deleting...	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
Test PPT.pptx	Sales&~Marketing	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM



ACCOUNT: Xrmforyou

Annual Revenue: _____

Number of Employees: _____

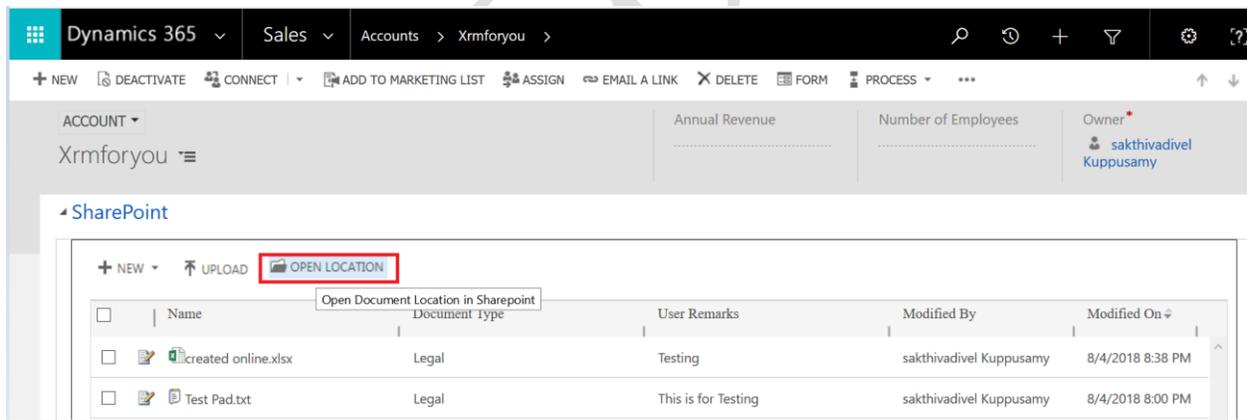
Owner: sakthivadel Kuppusamy

SharePoint

Name	Document Type	User Remarks	Modified By	Modified On
created online.xlsx	Legal	Testing	sakthivadel Kuppusamy	8/4/2018 8:38 PM
Test Pad.txt	Legal	This is for Testing	sakthivadel Kuppusamy	8/4/2018 8:00 PM
Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadel Kuppusamy	8/4/2018 7:48 PM
Test PPT.pptx	Sales&~Marketing	This is for Testing	sakthivadel Kuppusamy	8/4/2018 1:49 PM
Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadel Kuppusamy	8/4/2018 1:48 PM

Page 1 of 1 | 15 | View 1 - 5 of 5

Open Location: This is the setting takes to the respective folder in the sharepoint for the CRM record.



ACCOUNT: Xrmforyou

Annual Revenue: _____

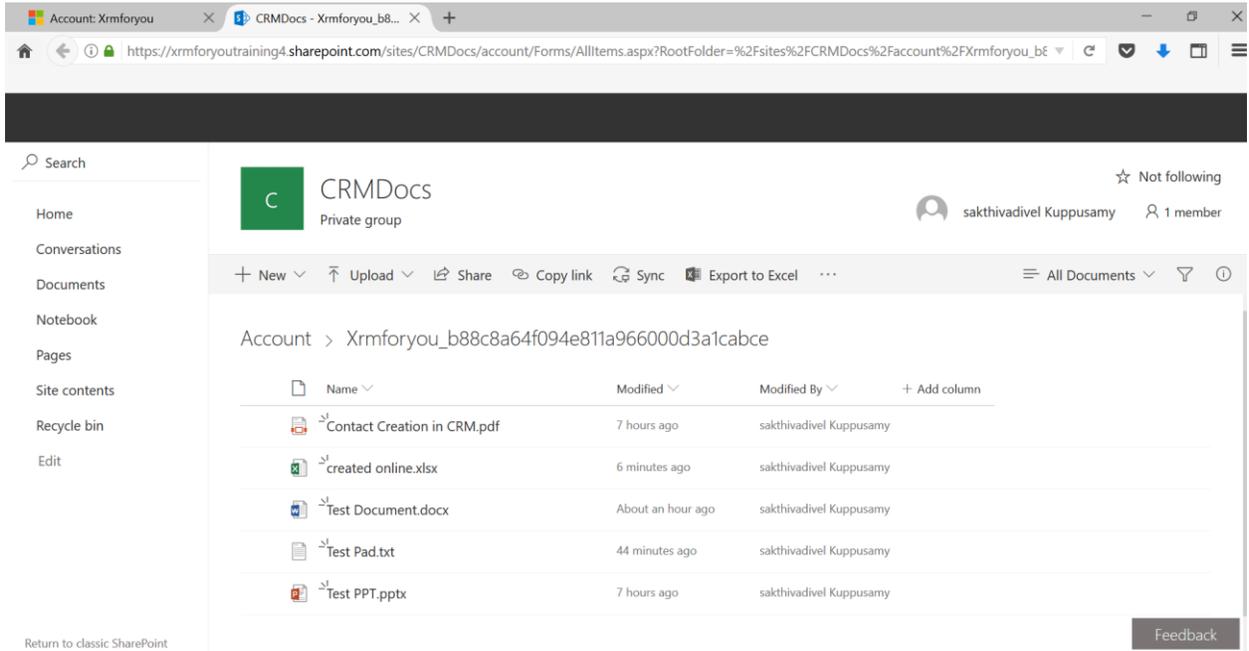
Number of Employees: _____

Owner: sakthivadel Kuppusamy

SharePoint

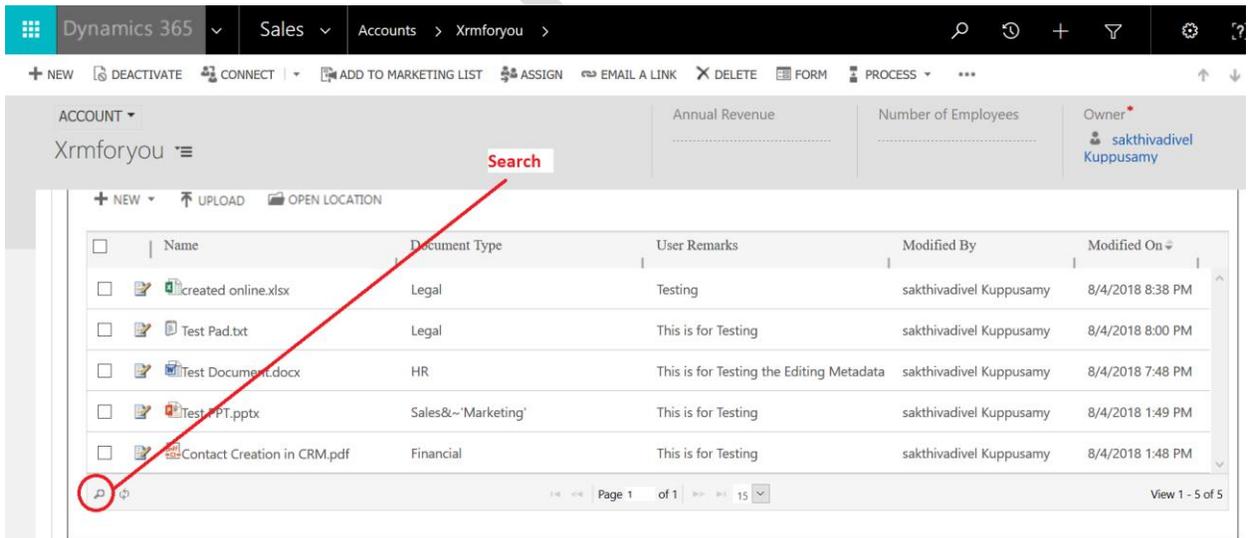
Name	Document Type	User Remarks	Modified By	Modified On
created online.xlsx	Legal	Testing	sakthivadel Kuppusamy	8/4/2018 8:38 PM
Test Pad.txt	Legal	This is for Testing	sakthivadel Kuppusamy	8/4/2018 8:00 PM

Open Document Location in Sharepoint



Search:

This feature can be used to search filter the available attachments in the Sharepoint Document Attachment control.



+ NEW ↑ UPLOAD 📁 OPEN LOCATION

Search_

Name begins with contact creation

equal
 not equal
begins with
 does not begin with
 ends with
 does not end with
 contains
 does not contain
 is null
 is not null
 is in

Reset Find

User Remarks	Modified By	Modified On
No records to view		

Page 1 of 0 15

ACCOUNT Annual Revenue Number of Employees Owner sakthivadivel Kuppusamy

Xrmforyou

+ NEW ↑ UPLOAD 📁 OPEN LOCATION

Search_

Name begins with contact creation

Reset Find

User Remarks	Modified By	Modified On
This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 1 of 1 15 View 1 - 1 of 1

Dynamics 365 Sales Accounts > Xrmforyou

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS

ACCOUNT Annual Revenue Number of Employees Owner sakthivadivel Kuppusamy

Xrmforyou

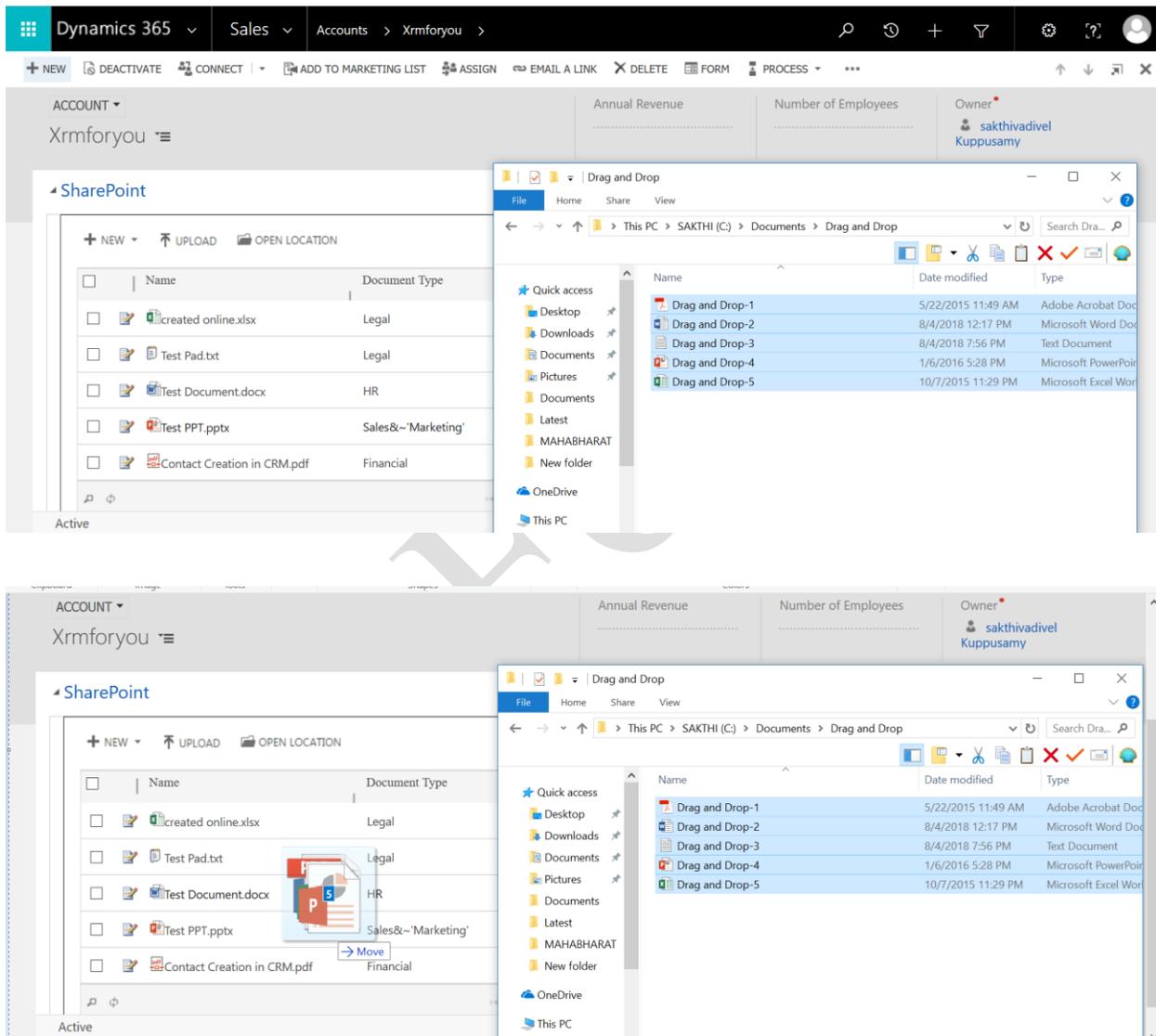
+ NEW ↑ UPLOAD 📁 OPEN LOCATION

Name	Document Type	User Remarks	Modified By	Modified On
Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 1 of 1 15 View 1 - 1 of 1

Drag & Drop Files to Upload:

You can drop files into our Sharepoint control on the entity form to upload the files to Sharepoint from Microsoft Dynamics CRM.



ACCOUNT ▾
Xrmforyou ☰

Annual Revenue
Number of Employees
Owner ^{*}
sakhivadivel Kuppusamy

SharePoint

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	Drag and Drop-2.docx			sakhivadivel Kuppusamy	8/4/2018 9:53 PM
<input type="checkbox"/>	Drag and Drop-1.pdf			sakhivadivel Kuppusamy	8/4/2018 9:53 PM
<input type="checkbox"/>	Drag and Drop-4.pptx			sakhivadivel Kuppusamy	8/4/2018 9:53 PM
<input type="checkbox"/>	Drag and Drop-3.txt			sakhivadivel Kuppusamy	8/4/2018 9:53 PM
<input type="checkbox"/>	Drag and Drop-5.xlsx			sakhivadivel Kuppusamy	8/4/2018 9:53 PM

Page 1 of 1 15 ▾ View 1 - 10 of 10

Paging Options:

Xrmforyou ☰

SharePoint

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	Drag and Drop-5.xlsx			sakhivadivel Kuppusamy	8/4/2018 9:53 PM
<input type="checkbox"/>	Created online.xlsx	Legal	Testing	sakhivadivel Kuppusamy	8/4/2018 8:38 PM
<input type="checkbox"/>	Test Pad.txt	Legal	This is for Testing	sakhivadivel Kuppusamy	8/4/2018 8:00 PM
<input type="checkbox"/>	Test Document.docx	HR	This is for Testing the Editing Metadata	sakhivadivel Kuppusamy	8/4/2018 7:48 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~'Marketing'	This is for Test	sakhivadivel Kuppusamy	8/4/2018 1:49 PM

Page 1 of 1 15 ▾

Xrmforyou ☰

SharePoint

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	Fiscal Calendar 2015.xlsx			sakhivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	QL Customers.xlsx			sakhivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	Distribution Channel.JPG			sakhivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	FQEs from Kavosh's org.xlsx			sakhivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	MRF Accounts.jpg			sakhivadivel Kuppusamy	8/4/2018 10:00 PM

Page 1 of 2 15 ▾ Next Page

ACCOUNT ▾ Xrmforyou ☰

Annual Revenue Number of Employees Owner sakthivadivel Kuppusamy

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On ▾
<input type="checkbox"/>	Fiscal Calendar 2015.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	QL Customers.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	Distribution Channel.JPG			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	FQEs from Kavosh's org.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
<input type="checkbox"/>	MRF Accounts.jpg			sakthivadivel Kuppusamy	8/4/2018 10:00 PM

Page 1 of 2 15 ▾ View 1 - 15 of 20

Last Page

ACCOUNT ▾ Xrmforyou ☰

Annual Revenue Number of Employees Owner sakthivadivel Kuppusamy

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On ▾
<input type="checkbox"/>	created online.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
<input type="checkbox"/>	Test Pad.txt	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:00 PM
<input type="checkbox"/>	Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
<input type="checkbox"/>	Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 2 of 2 15 ▾ View 16 - 20 of 20

Previous Page

ACCOUNT ▾ Xrmforyou ☰

Annual Revenue Number of Employees Owner sakthivadivel Kuppusamy

+ NEW ▾ ↑ UPLOAD 📁 OPEN LOCATION

<input type="checkbox"/>	Name	Document Type	User Remarks	Modified By	Modified On ▾
<input type="checkbox"/>	created online.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
<input type="checkbox"/>	Test Pad.txt	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:00 PM
<input type="checkbox"/>	Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
<input type="checkbox"/>	Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

Page 2 of 2 15 ▾ View 16 - 20 of 20

First Page

Reoad Grid:

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM PROCESS ...

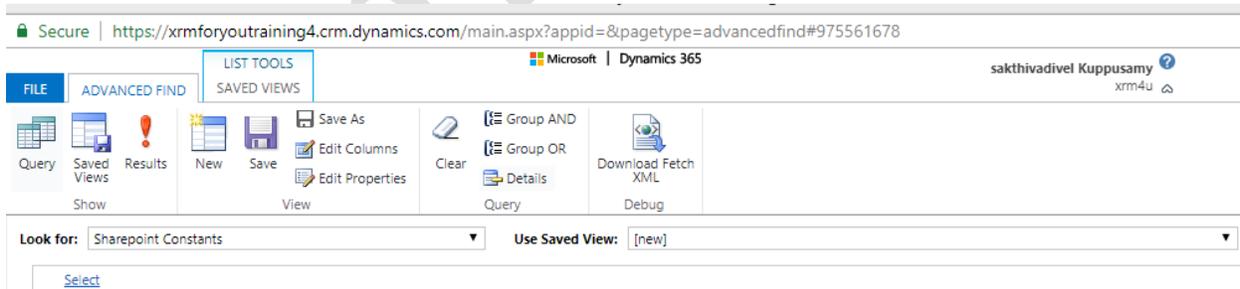
ACCOUNT Xrmforyou Annual Revenue Number of Employees Owner: sakthivadivel Kuppusamy

	Name	Document Type	User Remarks	Modified By	Modified On
<input type="checkbox"/>	created online.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
<input type="checkbox"/>	Test Pad.txt	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:00 PM
<input type="checkbox"/>	Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
<input type="checkbox"/>	Test PPT.pptx	Sales&~Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
<input type="checkbox"/>	Contact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM

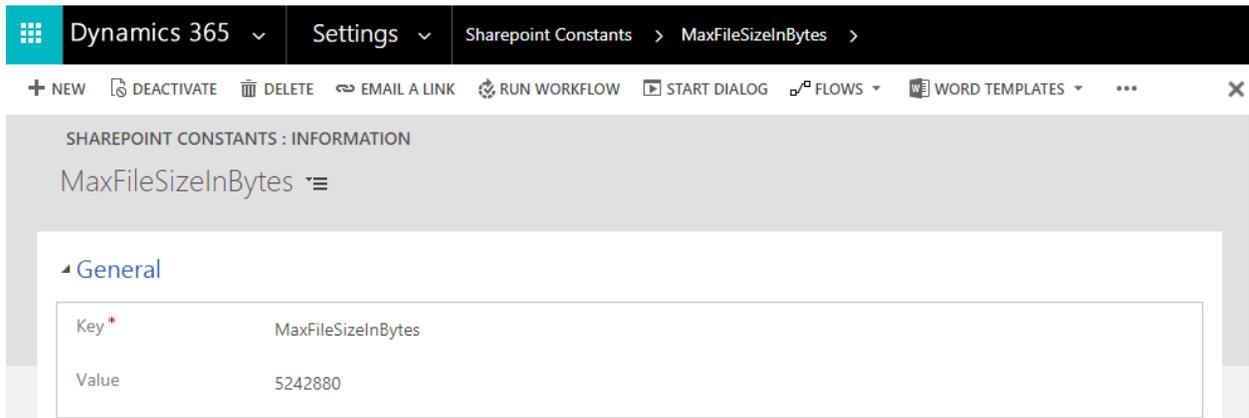
Page 2 of 2 View 16 - 20 of 20 Reload Grid

How to configure File Options (File size, Allowed File Extensions and File Upload Error Message for the attachments)

- Configure File size ,Allowed file extensions and Custom file upload error message in Sharepoint Constants Entity.



- **File size** : To configure file size, create Sharepoint constant record with key as **“MaxFileSizeInBytes”** and specify the value of file size limit in bytes.



Dynamics 365 Settings > Sharepoint Constants > MaxFileSizeInBytes

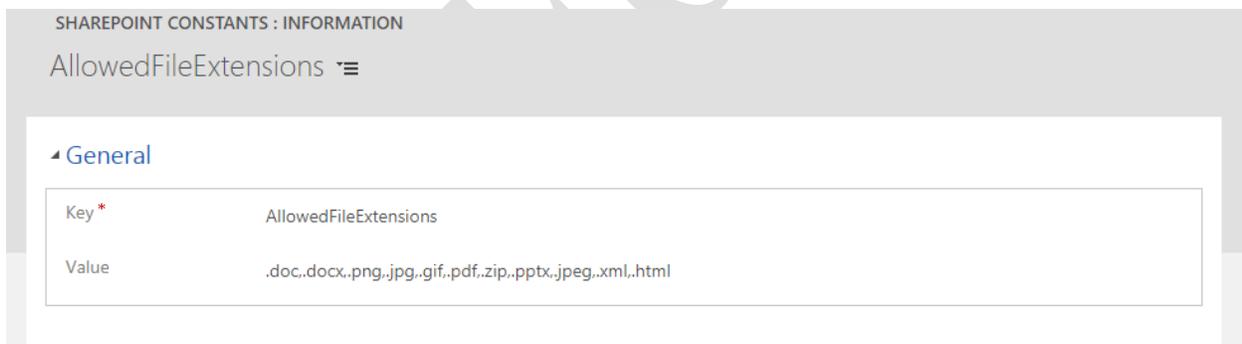
SHAREPOINT CONSTANTS : INFORMATION

MaxFileSizeInBytes

General

Key *	MaxFileSizeInBytes
Value	5242880

- AllowedFileExtensions** : To configure allowed file extensions for upload ,Create Sharepoint Constant record with key as **AllowedFileExtensions** and value as allowed file extensions by a comma separated values.
(Please make sure there are no spaces between two extensions which are separated by comma).



SHAREPOINT CONSTANTS : INFORMATION

AllowedFileExtensions

General

Key *	AllowedFileExtensions
Value	.doc,.docx,.png,.jpg,.gif,.pdf,.zip,.pptx,.jpeg,.xml,.html

- File Upload Error Message** : To Configure custom error message for uploading files of size more than allowed limit by the above “**MaxFileSizeInBytes**”, Create a SharePoint Constant record with Key as **FileUploadErrorMessage** with “a value of file size limit. Since to notify the user when file size limit is exceeded while uploading the files.

SHAREPOINT CONSTANTS : INFORMATION

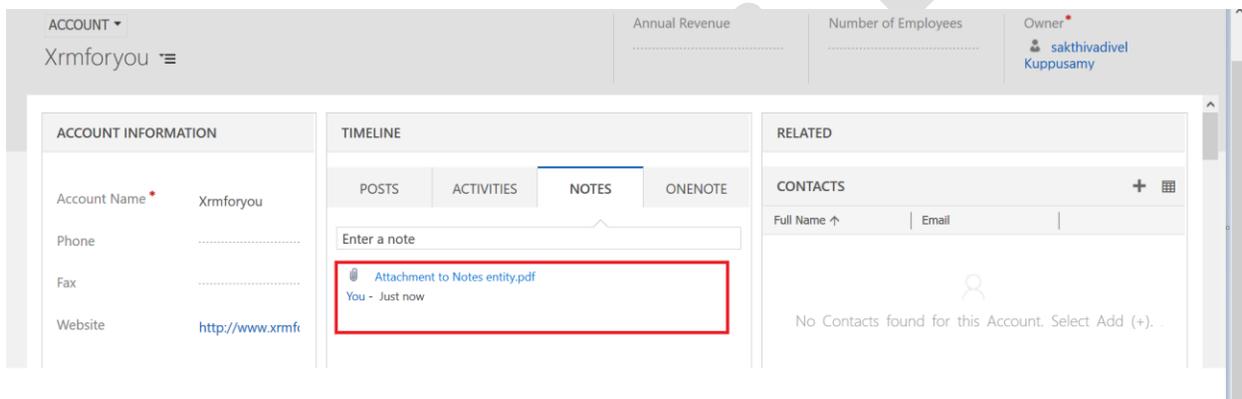
FileUploadErrorMessage

General

Key*	FileUploadErrorMessage
Value	5.00MB

Moving Attachments automatically from Notes entity to share point

Files attached to Notes



ACCOUNT: Xrmforyou

Annual Revenue: Number of Employees: Owner: sakthivaidel Kuppusamy

ACCOUNT INFORMATION: Account Name: Xrmforyou, Phone:, Fax:, Website: http://www.xrmf...

TIMELINE: POSTS, ACTIVITIES, **NOTES**, ONENOTE

Enter a note

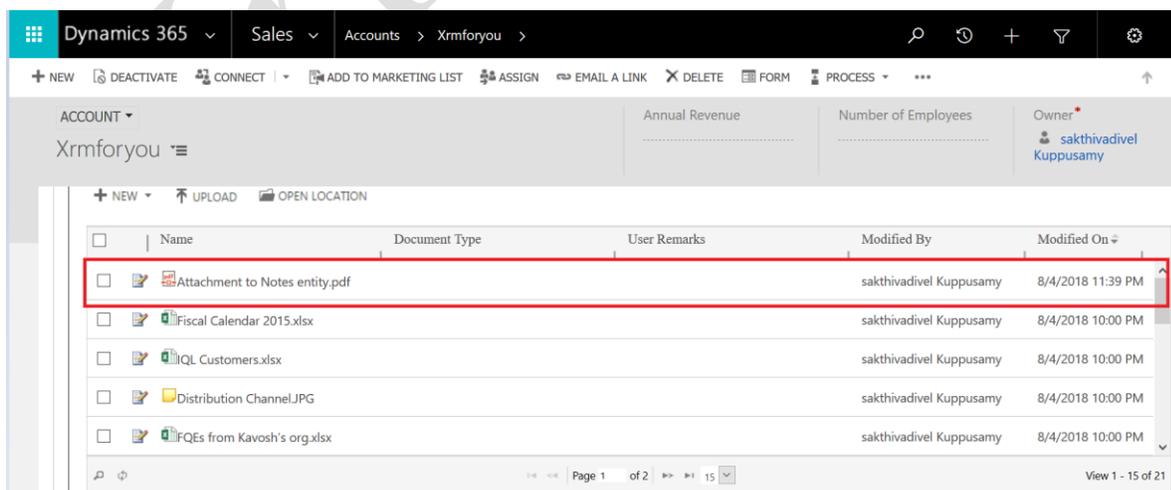
Attachment to Notes entity.pdf
You - Just now

RELATED: CONTACTS

Full Name | Email

No Contacts found for this Account. Select Add (+).

File Automatically moved to Sharepoint



Dynamics 365 | Sales | Accounts > Xrmforyou

ACCOUNT: Xrmforyou

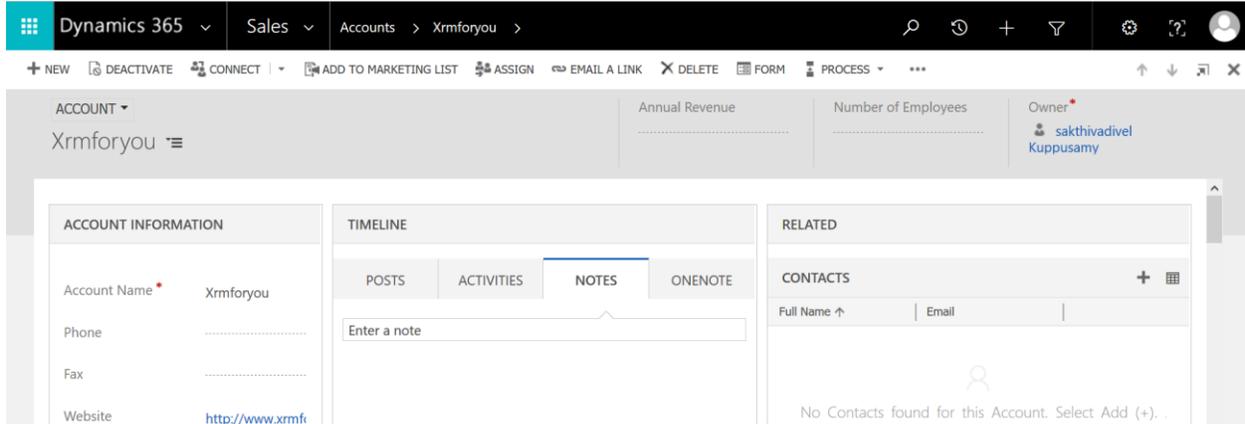
Annual Revenue: Number of Employees: Owner: sakthivaidel Kuppusamy

NEW | UPLOAD | OPEN LOCATION

Name	Document Type	User Remarks	Modified By	Modified On
Attachment to Notes entity.pdf			sakthivaidel Kuppusamy	8/4/2018 11:39 PM
Fiscal Calendar 2015.xlsx			sakthivaidel Kuppusamy	8/4/2018 10:00 PM
SQL Customers.xlsx			sakthivaidel Kuppusamy	8/4/2018 10:00 PM
Distribution Channel.JPG			sakthivaidel Kuppusamy	8/4/2018 10:00 PM
FQEs from Kavosh's org.xlsx			sakthivaidel Kuppusamy	8/4/2018 10:00 PM

Page 1 of 2 | View 1 - 15 of 21

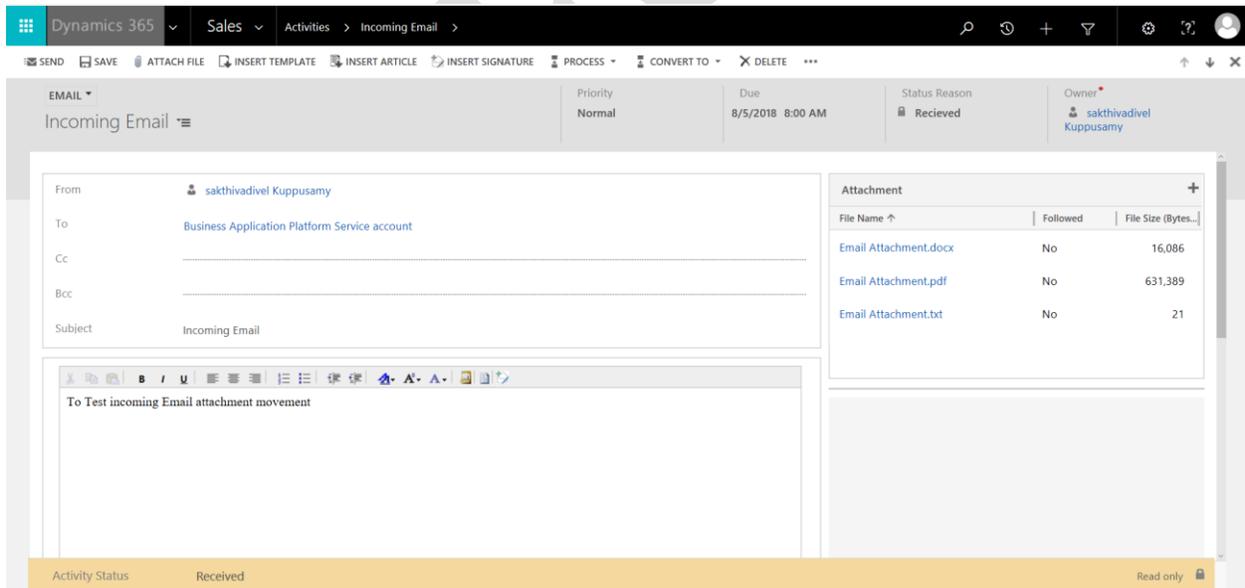
File gets Automatically deleted from Notes Entity



The screenshot shows the Dynamics 365 CRM interface for an account named 'Xrmforyou'. The 'NOTES' tab is selected in the 'TIMELINE' section. The 'RELATED' section shows 'CONTACTS' with a message: 'No Contacts found for this Account. Select Add (+)'. The account information includes: Account Name: Xrmforyou, Phone: _____, Fax: _____, Website: http://www.xrmf.com. The owner is 'sakhivadivel Kuppusamy'.

Moving Attachments automatically from Incoming Email to share point

Incoming email with Attachments

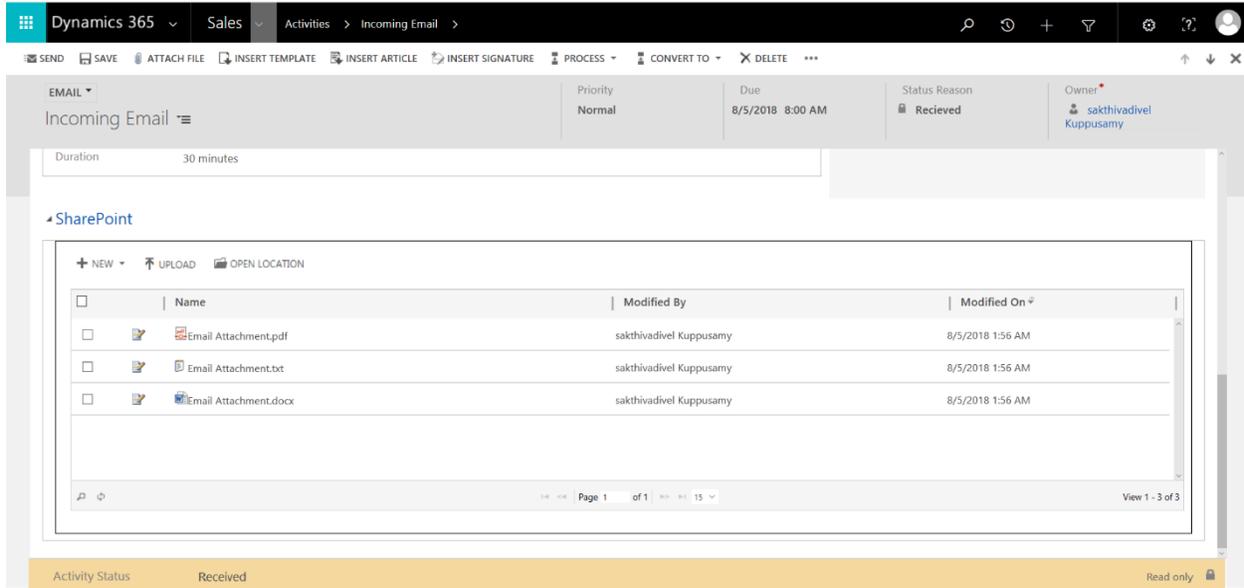


The screenshot shows the Dynamics 365 CRM interface for an incoming email. The email is from 'sakhivadivel Kuppusamy' to 'Business Application Platform Service account'. The subject is 'Incoming Email'. The email body contains the text: 'To Test incoming Email attachment movement'. The email has three attachments:

File Name	Followed	File Size (Bytes...)
Email Attachment.docx	No	16,086
Email Attachment.pdf	No	631,389
Email Attachment.txt	No	21

The email status is 'Received' and the activity status is 'Received'. The owner is 'sakhivadivel Kuppusamy'.

Email attachments automatically moved to Sharepoint

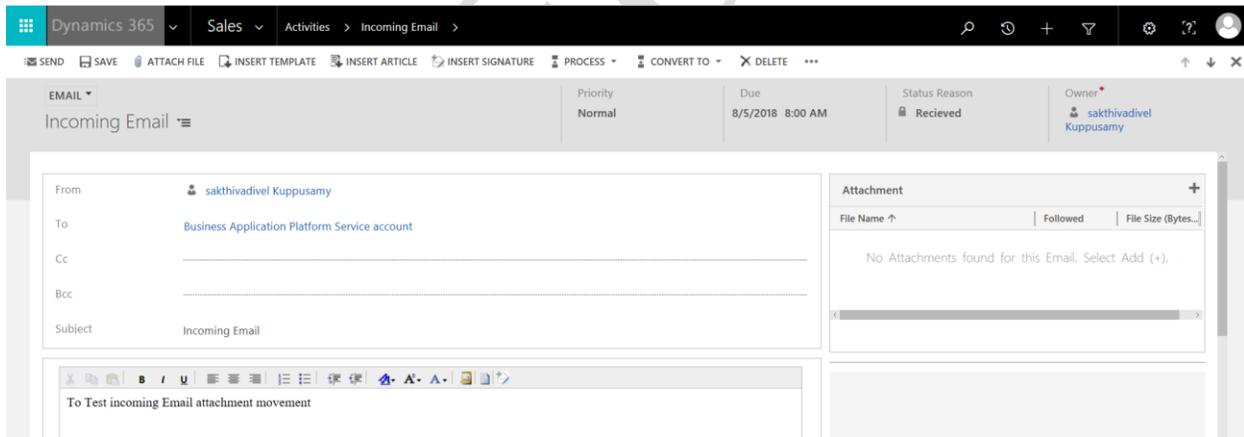


The screenshot shows the Dynamics 365 interface for an incoming email. The email is titled "Incoming Email" and has a status of "Received". The duration is 30 minutes. The email content area shows a SharePoint view with a table of attachments:

Name	Modified By	Modified On
Email Attachment.pdf	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
Email Attachment.txt	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
Email Attachment.docx	sakthivadivel Kuppusamy	8/5/2018 1:56 AM

The interface also shows a "SharePoint" section with a table of attachments. The table has columns for Name, Modified By, and Modified On. The attachments listed are Email Attachment.pdf, Email Attachment.txt, and Email Attachment.docx, all modified by sakthivadivel Kuppusamy on 8/5/2018 at 1:56 AM. The page shows "Page 1 of 1" and "View 1 - 3 of 3".

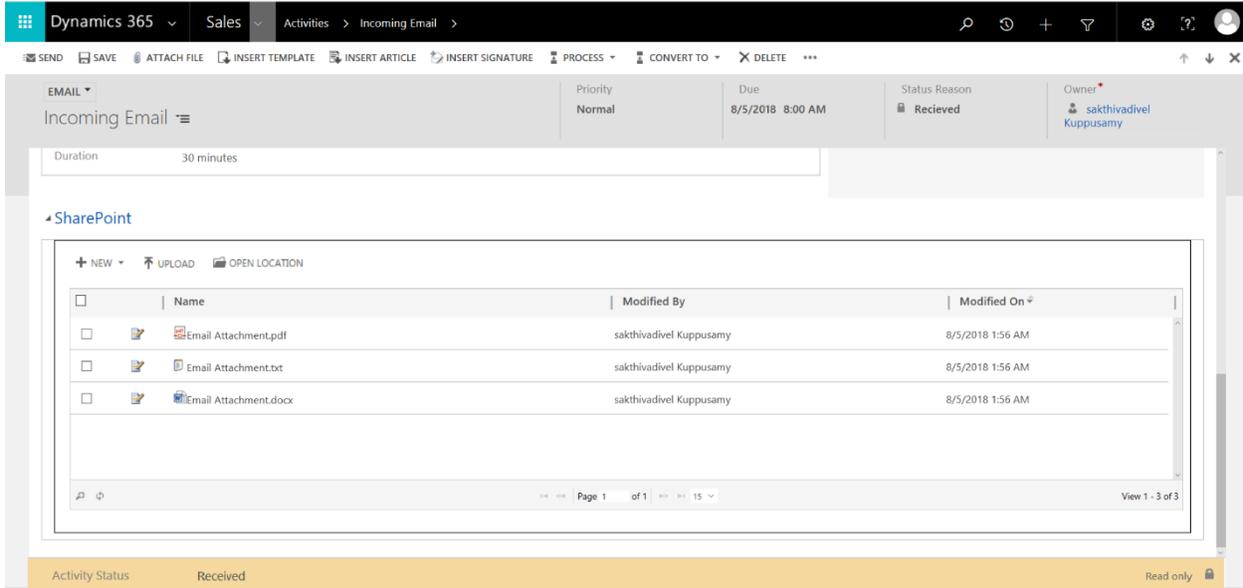
Attachments deleted from the Attachment section and attachments uploaded to Sharepoint



The screenshot shows the Dynamics 365 interface for an incoming email. The email is titled "Incoming Email" and has a status of "Received". The email content area shows the following details:

From: sakthivadivel Kuppusamy
 To: Business Application Platform Service account
 Cc:
 Bcc:
 Subject: Incoming Email

The email body contains the text: "To Test incoming Email attachment movement". The Attachment section is empty, showing "No Attachments found for this Email. Select Add (+)".



The screenshot shows the Dynamics 365 interface for an incoming email. The email is titled "Incoming Email" and has a duration of 30 minutes. It is categorized as "SharePoint" and contains three attachments: "Email Attachment.pdf", "Email Attachment.txt", and "Email Attachment.docx". All attachments were modified by "sakthivadivel Kuppusamy" on 8/5/2018 at 1:56 AM. The interface also shows the email's priority (Normal), due date (8/5/2018 8:00 AM), status (Received), and owner (sakthivadivel Kuppusamy).

Name	Modified By	Modified On
Email Attachment.pdf	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
Email Attachment.txt	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
Email Attachment.docx	sakthivadivel Kuppusamy	8/5/2018 1:56 AM

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- Our Licening is designed keeping in mind customers of various size so our license model contains different options to suit custmners of different size.
- We provides one year of free support from the date of purchase of license with all our licenses and Following one year, customer has the option to subscribe for multiple support options provided by **xrmforyou**.
- A license is valid only for the specific version, the customer purchase. If Xrmforyou releases a new version of the product and the customers wants to upgrade to the new version, customers would need to pay the difference in the license fee for license of the same type.
- One license is valid for only one Dynamics 365 CRM Production organization and we provide **3 free license for respective Development environments and 3 free license for respective Sanbox environments with one Production license**.
- For Pricing, free trial and more info on SharePoint Attachment Extractor and Metadata Manager for Microsoft Dynamics 365 CRM, Please write to us @ info@xrmforyou.com.

Contact us

For Pricing, free trial and further info on SharePoint Attachment Extractor and Metadata Manager for Microsoft Dynamics 365 CRM

Please feel free to write to us @ info@xrmforyou.com
