

SharePoint Attachment Extractor and Metadata Manager

for

Microsoft Dynamics 365 CRM

Release Guide

Date	Version	Author Information
October-2016	Version 1.0	Debajit Dutta
July-2018	Version 2.0	Debajit Dutta



Minfo@xrmforyou.com

Table of Contents

System Requirements
Key Features
Installation Instructions
Setting Security Role to Users
Navigation
Configuration
Register Sharepoint User
Manage Sharepoint Metadata Configurations
Manage Entity Settings
i. Move attachments to Sharepoint when uploaded in CRM9
ii. Delete attachments in CRM once moved to CRM10
iii. Enable for Embedded View10
iv. Form(s) to show Embedded View11
Track the success of "Enable for Embedded View" operation using Sharepoint Triggers11
Add / Edit Sharepoint Metadata12
Add / Edit Sharepoint Metadata
Add / Edit Sharepoint Metadata 12 Sharepoint Document Attachment Section on the Entity Forms 20 Upload 21
Add / Edit Sharepoint Metadata 12 Sharepoint Document Attachment Section on the Entity Forms 20 Upload 21 New 27
Add / Edit Sharepoint Metadata 12 Sharepoint Document Attachment Section on the Entity Forms 20 Upload 21 New 27 Edit Attachments 29
Add / Edit Sharepoint Metadata 12 Sharepoint Document Attachment Section on the Entity Forms 20 Upload 21 New 27 Edit Attachments 29 Delete Attachments 33
Add / Edit Sharepoint Metadata 12 Sharepoint Document Attachment Section on the Entity Forms 20 Upload 21 New 27 Edit Attachments 29 Delete Attachments 33 Open Location 35
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38Paging Options39
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38Paging Options39Reload Grid41
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38Paging Options39Reload Grid41How to configure File Options41
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38Paging Options39Reload Grid41How to configure File Options41Moving Attachments automictically from Notes entity to share point43
Add / Edit Sharepoint Metadata12Sharepoint Document Attachment Section on the Entity Forms20Upload21New27Edit Attachments29Delete Attachments33Open Location35Search36Drag &Drop Files to Upload38Paging Options39Reload Grid41How to configure File Options41Moving Attachments automictically from Notes entity to share point43Moving Attachments automictically from Incoming Email to share point44



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

- 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



⊠ <u>info@xrmforyou.com</u>

III Dynamics 365 🗸	Sales ~ Dashboard	s >			- ۍ م	+ 7 0 (
Sales	Service	Marketing	Field Service	Project Service	Resource Scheduling	Settings
Business	Customization	System		Process Center	Application	Sharepoint Configur
Business Manageme	Customizations	administration	Email Configuratio	Processes	My Apps	Manage Sharepoint
Templates	Solutions	Security	Activity Feeds Con	fi Microsoft Flows		Sharepoint Triggers
2 Unified Service Desk	Microsoft AppSource	号 🙇 Data Management	Activity Feeds Rule	s		
Product Catalog	← Plug-In Trace Log	System Jobs	Dynamics 365 App	f		
Service Management		Document Manage	Intelligence Config	u		
		Auditing				
🗰 Dynamics 365 🗸	Settings ~ Docum	ent Manage			- ۍ ک	+ 7 🔹 🛛 🤇
Document Manageme	ent					
Which feature would you like	e to work with? ment Settings			SharePoint Sites		
Select default document m	nanagement settings for your organizatio	n.	355	A SharePoint site is a record on a Shar SharePoint server.	ePoint server or in a site collection. ShareP	oint site records map to sites or records on a
SharePoint Docume A document location recor SharePoint document libra record.	ent Locations rd maps to document libraries or folders ary record or a document location record.	on a SharePoint server. They are defined re They can be associated with a Microsoft D	elative to a bynamics 365	OneNote Integration Set up OneNote Integration for selectr Dynamics 365 record. Users will be abl record form in Dynamics 365 mobile a	ed entities so that a dedicated OneNote ne e to easily access a notebook directly on t pps.	otebook is automatically created for each he activity wall in Dynamics 365 or from the
Enable OneDrive fo Enable users to manage fil	r Business les stored in OneDrive for Business directi	y in Dynamics 365.				

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

	Dyı	namics 365 🗸	Settings ~ Docum	nent Manage					Q	9 +	∇	٥	[?]
+ 1	NEW	💼 delete 🔹 🖘 em	IAIL A LINK + p ^r FLOWS +	RUN REPORT 🔻	EXCEL TEMPLATES *	🔍 EXPORT TO EXC	EL 🔹 🝺 IMPORT DATA	A ▼ ■evie	w				
	-t= A	Active SharePoi	int Sites ¥						arch for re				9
		Name 🛧	Absolute URL			Parent Site	Relative URL	Default Sit	Last V	alidation S		٦	Ö
		Default Site	https://xrmforyoutraining4.sha	arepoint.com/sites/CRM	Docs			Yes	Valid				
			_										

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 (<u>https://xrmtremea.sharepoint.com/CrmDocs</u>)

Here **Root Site** : <u>https://xrmtremea.sharepoint.com</u> and **Sub site** : <u>CrmDocs</u>



⊠ info@xrmforyou.com

FILE SHAREPOINT SITE CUST	OMIZE	Sharing - 🔆 Follow			
Save Save & Close Book	Assign	View Hierarchy Copy a Link Tonfollow Bun St Workflow Dia	art Flows Word Run log - Templates - Report -		
Save	Analytics	Collaborate Proc	ess Data		
SharePoint Site : Informat	SharePoint Site	tionRootSite			SharePoint Sites 🔹 🕈 🌵
Related	4 General				
Child Locations	Name *	SpintegrationRootSite	× Owner *	sakthivadivel Kuppusamy	0 🗔
Audit History	Description				
4 Process Sessions	URL Options				
🚱 Background Processes	URL Type	Absolute URL Relative URL			
🔜 Real-time Processes	Absolute URL*	https://xrmforyoutraining4.sharepoint.com			
	Allow Embedding of Power BI Reports *	● No ○ Yes			
	URL Validation				
	Last Validation Status	Not Validated			\checkmark
	Last Validated				M
	Additional Information	This record's URL has not been validated.			\checkmark
					7

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 syn The information provided in this form is viewable I This user's information is managed by Office 365. 	chronization or the Email Router until its prim oy the entire organization. To edit this information visit the User Admini:	ary email address has been approved by the syster stration section of the Office 365 Portal.	n administrator.	
Role Associated View •				rch for records
Manage Roles 🛛 📇 📲 🛛 Remove Roles 🖉 More	Actions 👻			
□ Name ↑	Business Unit			T ()
Account Manager	xrmforyoutraining4			
CSR Manager	xrmforyoutraining4			
Sharepoint Metadata Reader	xrmforyoutraining4			

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.

🗰 Dynamics 365 🗸	Sales ~ Dashboard	s >
< Community	Resource Scheduling	Settings
Extensions	Application	Sharepoint Configur
Plug-in Profiles	My Apps	Manage Sharepoint
		Sharepoint Triggers
<		Sharepoint Settings
		Sharepoint Constants

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.





⊠ info@xrmforyou.com

Manage Sharepoint Metadata_Configurations_Page

Jser Name	sakthi@xrmforyoutraining4.onmicrosoft.com	(*For on-premise environment please include domain name in user name)	
Password		("Re-type the password explicitly if you need to modify password.)	
IEW ACTIVITY - Register Sharepo Manage Sharepo	+ NEW RECORD - IMPORT DATA AD	DVANCED FIND	
lanage Entity Sett	ings		
love attachments to S For Email entity, incor e processed by this se	harepoint when uploaded in CRM 🔲 ning email attachments will tting.	Enable for Embedded Form(s) to show No entity select View Embedded View available for ent	ed or no form(s) tity.
dd/Edit Sharepoi	nt Metadata		3 O >

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	test@crm4u2016.onmicrosoft.com	(*For on-premise environment please include domain name in user name)	
Password	•••••	(*Passwords will be encrytped 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.



info@xrmforyou.com

Manage Sharepoint Metadata Configurations

Add/Edit Sharepoint Metadata			3 0)
* For Email entity, incoming email attachments will be processed by this setting.	Enable for Embed View	ded Form(s) to show Embedded View	No entity selected or no form(s) available for entity.
Manage Entity S			
Select an Entity: Choose	v		

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 v	Settings ~	Manage Sharepoint				ρ	Ľ
 New ACTIVITY - + New Rect Register Sharepoint User Manage Sharepoint Metada 	ORD 🔹 🕞 IMPORT ata Configurations	DATA 👬 ADVANCED FIND					
Select an Entity: Account Manage Entity Settings		v					
Move attachments to Sharepoint wh * For Email entity, incoming email at be processed by this setting.	en uploaded in CRM 🗌 tachments will	Enab View	ole for Embedded	Form(s) to show Embedded View	Account for Interactive experience Account - Mobile Sales Insights Information		•

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					
Select an Entity: Account	v				
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	Account for Interactive experience Account - Mobile Sales Insights	^	
* For Email entity, incoming email attachments will be processed by this setting.			Information Account	~	

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.

	Dynamics 365 🐱 Settings	V Manage Sharepoint	ر کر	
۹	IEW ACTIVITY - + NEW RECORD - 🕏 IMP	DRT DATA – 👬 ADVANCED FIND		
\bigotimes	Register Sharepoint User			
\bigotimes	Manage Sharepoint Metadata Configuratio	15		
s	elect an Entity: Account	×		
N	lanage Entity Settings			
N	love attachments to Sharepoint when uploaded in CR elete attachments in CRM once moved to Sharepoint	Account for Interactive experience Account - Mobile Enable for Embedded View Form(s) to show Embedded View Sales Insights	^	
* b	For Email entity, incoming email attachments will e processed by this setting.	☐ Information ☑ Account	~	
-				

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.



⊠ <u>info@xrmforyou.com</u>

l Dyn	amics 365 🔍	Settings ~ Sharep	pint Settings > New Sharepo	int Sett >		م	0 + 7 0	[?]
Sales		Service	Marketing	Field Service	Project Service	Resource Scheduling -	Settings	ning
Busines	s	Customization	System		Process Center	Application	Sharepoint Configur	
Bus	siness Manageme	Customizations	Administration	Email Configurati	ion Processes	My Apps	Manage Sharepoint	
Ter	mplates	Solutions	Security	Activity Feeds Co	nfi dicrosoft Flows		Sharepoint Triggers	
🙎 Uni	ified Service Desk	Microsoft AppSource	ට්තු Data Management	Activity Feeds Ru	les		Sharepoint Constants	
Pro Pro	oduct Catalog	←■ Plug-In Trace Log	System Jobs	Dynamics 365 Ap	op f		Sharepoint Settings	
🍾 Ser	rvice Management		Document Manage	Intelligence Conf	īgu			
			Auditing					
: Dyna + NEW (amics 365 🗸	Settings v Sharepu	Dint Triggers →	TEMPLATES 👻 🔩 EXPOR	tt to excel 🖙 📑 Import data 🖙	CHART PANE 👻 🚥	9 9 + 7 0	[?]
-⊨ Ac	ctive Sharepo	int Triggers 🖌				Search		Q,
	Name		Operation Type	Operation Sta Dr	ata	Message	Created On \downarrow 🍸 🖒	<
			operation type					0
	Operation - Entity Sha	repoint Configuration Changes	Entity Configuration	Success <	data> <entity>account</entity> <enablefo< td=""><td>rem</td><td>8/1/2018 12:06 AM</td><td>Charts</td></enablefo<>	rem	8/1/2018 12:06 AM	Charts
	Operation - Entity Sha Operation - Entity Sha	repoint Configuration Changes repoint Configuration Changes	Entity Configuration	Success <	data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo< td=""><td>rem</td><td>8/1/2018 12:06 AM 7/25/2018 4:52 PM</td><td>Charts 6</td></enablefo<></enablefo 	rem	8/1/2018 12:06 AM 7/25/2018 4:52 PM	Charts 6
	Operation - Entity Sha Operation - Entity Sha Operation - Entity Sha	repoint Configuration Changes repoint Configuration Changes repoint Configuration Changes	Entity Configuration Entity Configuration Entity Configuration	Success < Success < Success <	data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo< td=""><td>rem rem</td><td>8/1/2018 12:06 AM 7/25/2018 4:52 PM 7/25/2018 4:51 PM</td><td>Charts</td></enablefo<></enablefo </enablefo 	rem rem	8/1/2018 12:06 AM 7/25/2018 4:52 PM 7/25/2018 4:51 PM	Charts
	Operation - Entity Sha Operation - Entity Sha Operation - Entity Sha Operation - Entity Sha	repoint Configuration Changes repoint Configuration Changes repoint Configuration Changes repoint Configuration Changes	Entity Configuration Entity Configuration Entity Configuration Entity Configuration	Success < Success < Success < Success <	data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo data> <entity> account </entity> <enablefo< td=""><td>rem rem rem</td><td>8/1/2018 12:06 AM 7/25/2018 4:52 PM 7/25/2018 4:51 PM 7/25/2018 4:45 PM</td><td>Charts</td></enablefo<></enablefo </enablefo </enablefo </enablefo 	rem rem rem	8/1/2018 12:06 AM 7/25/2018 4:52 PM 7/25/2018 4:51 PM 7/25/2018 4:45 PM	Charts

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 You are using a trial version of the tool. Your trial would Register Sharepoint User	ADVANCED FIND	Budget Budget Estimate Campaign response convert to lead disqualify status Campaign response convert to lead option Campaign response convert to lead qualify status	^	_
Manage Sharepoint Metadata Configurations	Edit Metadat	Case Origin Category Change Source Characteristic Type	×	
Select an Entity: Account	Display Name Name in Sharepoint	Computable Fields Customer Budget Dav		
Manage Entity Settings	Metadata Type Map Metadata Values To	Days of run Distance Unit Document Type		
Move attachments to Sharepoint when uploaded in CRM 🗹 Delete attachments in CRM once moved to Sharepoint 🗹	Show In Crm Column Order	Duration Rounding Policy Enable Trigger Entity Approval State		^
* For Email entity, incoming email attachments will be processed by this setting.		Estimate Header i ype Expense Category Behavior Expense Status Expense Types		~
Add/Edit Sharepoint Metadata		Export Status Fact Type Feasibility Field Service Product Type Find Work Event Type Frequency	_	
Display Name Name in Share	epoint Metadata Type	Generic Type	n Coli	umn Order

New Metad	×	
Display Name	Document Type]∗
Name in Sharepoint	Document Type	*
Metadata Type	ullet Map To Existing Values $ightarrow$ Write In	
Map Metadata Values To	Document Type	*
Show In Crm		
Column Order]
	Save & Close	



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.

Display Name	User Remarks *
Name in Sharepoint	User Remarks *
Metadata Type	O Map To Existing Values
Show In Crm	
Column Order	
	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.



⊠ <u>info@xrmforyou.com</u>

Display Name	User Remarks	*
Name in Sharepoint	User Remarks	*
/letadata Type	O Map To Existing Values	
Show In Crm	\checkmark	
Column Order	2	×
	Save &	Close
New Meta	adata	×
New Meta	adata	×
New Meta Display Name Name in Sharepoint	adata User Remarks	×
New Meta Display Name Name in Sharepoint Metadata Type	adata User Remarks Creating Metadata	×
New Meta Display Name Name in Sharepoint Metadata Type Show In Crm	adata User Remarks Creating Metadata Write In	×
New Meta Display Name Name in Sharepoint Metadata Type Show In Crm Column Order	User Remarks Creating Metadata	×
New Meta Display Name Name in Sharepoint Metadata Type Show In Crm Column Order	User Remarks Creating Metadata Write In 2 Save &	×



×

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/Ed	it Sharepoint Metada	ta				3 O 🗙	
	Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column Order	Ā
	Document Type	Document Type	Mapped	new_documenttype	A	l l	2
	User Notes	User Notes	Write-In		A.	6	2
	third field	third field	Mapped	new_documenttype	st.	G	2
						· · · · · · · · · · · · · · · · · · ·	J

Display Name	Document Type	*
Name in Sharepoint	Document Type	*
Metadata Type	Map To Existing Values O Write In	
Map Metadata Values To	Document Type	*
Show In Crm	\checkmark	
Column Order	1	
	Save & Close	



Edit Metadata						
Display Name	Document Type *					
Name in Sharepoint	Document Type *					
Metadata Type	O Map To Existing Values					
Show In Crm	\checkmark					
Column Order	1					
	Save & Close					

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 (\times).

Manage Sharepoint Metadata Configurations

Select an E	ntity: Account		~					
Manage	Entity Settings							
Move attac Delete atta * For Email be process	hments to Sharepoint when to chments in CRM once moved entity, incoming email attach ed by this setting.	iploaded in CRM 🗹 to Sharepoint 🗹 ments will	Enable for Embedded View	Form	s) to show Embedded View	Account Account - Mobile Sales Insights Information Information	^	
Add/Edit	Sharepoint Metadata						•	×
	Display Name	Name in Sha	arepoint	Metadata Type	Metadata Values Mapped	To Show In Crm	Column Order	
	Document Type	Document T	ype	Mapped	new_documenttype	\checkmark	1	
	Third Field	Third Field		Write-In		\checkmark	3	
	User Remarks	User Remark	25	Write-In		\checkmark	2	



Minfo@xrmforyou.com

Select an Entity: Account	V					
Manage Entity Settings						
Move attachments to Sharepoint when uplo Delete attachments in CRM once moved to * For Email entity, incoming email attachme be processed by this setting.	oaded in CRM ☑ Sharepoint ☑ Enable for E nts will	Message from webpage	a configuration(s) would be del	× eted. Wish to		< >
Add/Edit Sharepoint Metadata			OK	Cancel	-	
Display Name	Name in Sharepoint	Metadata Type	Metadata Values Mapped To	Show In Crm	Column	Order
Document Type	Document Type	Mapped	new_documenttype	\checkmark	1	
✓ Third Field	Third Field	Write-In		\checkmark	3	
User Remarks	User Remarks	Write-In		\checkmark	2	
🔊 Manage Sharepoint Metadata Co	onfigurations					

Select an Entity: Account \mathbf{v} Manage Entity Settings ✓ Account Move attachments to Sharepoint when uploaded in CRM \checkmark Account - Mobile Delete attachments in CRM once moved to Sharepoint $\mathbf V$ Form(s) to show Embedded View Enable for Embedded View 🗹 Sales Insights * For Email entity, incoming email attachments will Information Deleting Metadata... be processed by this setting. ~ Information Add/Edit Sharepoint Metadata 🗟 🖸 🗙 Display Name Column Order Name in Sharepoint Metadata Type Metadata Values Mapped To Show In Crm Z Document Type new_documenttype \checkmark 1 Document Type Mapped User Remarks User Remarks Write-In \checkmark 2 Z ✓ Third Field Third Field Write-In \checkmark 3

The Sharepoint Metadata named "Third Field" is deleted from Sharepoint.



⊠ <u>info@xrmforyou.com</u>

Manage Sharepoint Metadata C	Configurations				
elect an Entity: Account Anage Entity Settings	v				
love attachments to Sharepoint when up elete attachments in CRM once moved t For Email entity, incoming email attachn e processed by this setting.	ploaded in CRM 🗹 to Sharepoint 🗹 Enable for Embe nents will	dded View 🗹 Form(s) to show Embedded	View Account Mobile View Sales Insights Information Information	^	
					9

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.

er Alert (1) Latert You've not an alert for the mailhow 's	atthicsfeed Kunsursmy, 7/9/2019 9:21 DM View Marte				
Alert (1) catest rouve got an alert for the mandox's	akunvaluver kuppusaniy. 176/2016 5.2 FPM View Alerts	× = •			
ew lo deactivate 🦓 connect 👻 📑	ADD TO MARKETING LIST 😤 ASSIGN 🚥 EMAIL A LINI	K A DELETE E FORM A PROCESS * ***		т	Ψ
account • Xrmforyou •≡		Annual Revenue	Number of Employees	Owner sakthivadivel Kuppusamy	
SharePoint					
	ATION				
+ NEW - T UPLOAD @ OPEN LOC	ATTON	User Remarks	Modified By	Modified On \hat{v}	I
+ NEW → T UPLOAD @ OPEN LOC	ATTON Document Type No documents fou	User Remarks	Modified By	Modified On \hat{v}	- ~
HNEW - TUPLOAD @OPENLOC Name	ATION Document Type No documents fou	User Remarks	Modified By	Modified On $\ddot{\circ}$	-
+ NEW + TUPLOAD @ OPEN LCC	ATION Document Type No documents fou	User Remarks	Modified By	Modified On \hat{v}	~ ~ ~



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.

	Document Type	User Remarks	Modified By	│ Modified On ÷
	botantin type	o o riteritaria	incance by	
	No documents foun	d at this location		
φ Q		I << Page 1 of 0 ⇒ ⊨I 15 ∨		No records



CCOUNT *							Owner*	
rmforyou =							sakthivadivel Kuppusamy	
	Upload Do	cument	s		>	4		
	Choose File		Document Type	User Remar	ks			
SharePoint		Browse	Choose	×				
		Browse	Choose	~				
🕂 NEW 👻 🛧 UPLOAD 🚔 OPEN LOCATION		Browse	Choose					
		Browse	Choose	<u> </u>			1.11-10-0	
L Name						пеа ву	Moainea On +	
	Overwrite existing files							
	* MetaData Text Field Leng	th is (255 character(s) in	nax)					
	Sharepoint Path: https://xrmforyoutraining4	sharepoint.com/sites/C	RMDocs/account/X					
				Upload	Cancel			
						_		

		Open					-,
ccount י rmforyou י≡		← → • ↑ 🖡 « SAK	THI (C:) > Documents	∨ U Se	arch Documents		,
	Upload Documents	Organize • New folder				•	(
	Choose File Docu	Videos ^	Name		Date mod	dified	
SharePoint	BrowseCho	✓ SACTHI (C.)	Contact Creation in CRM		5/22/2015	5 11:49 AN	N
	Browse Cho	050812	Test Document		8/4/2018	12:17 PM	
+ NEW + 🔭 UPLOAD 🖼 OPEN LOCATION	Browse Cho	bkp	Test PPT		1/6/2016	5:28 PM	
	Browse Cho	Box Folders	TestExcel		10/7/2015	5 11:29 PM	N
Name Name	browse Cho	FIO BI Extracts					
	Overwrite existing files	New folder					
	* MetaData Text Field Length is (255 character(s) max)	Sales Ops - FIC					
	Sharepoint Path:	Sellthru_Retail					
	https://xrmforyoutraining4.sharepoint.com/sites/CRMDocs/	TIER2POS					
		🥩 Network 🗸 🗸	<				
		File nam	e:	~ AI	ll files		~
P o	Page 1				Open	Cance	al



CCOUNT *					Owner sakthivadivel
rmforyou ™	Upload Docume	ents	P	×	Kuppusamy
SharePoint	Choose File C\Documents\Contact Creation in C Broc Broc Broc	Document Type Use	r Remarks		
+ NEW ▼ T UPLOAD GPEN LOCATION Name	Brc	Sales&-'Marketing' wse_ Choose_ wse_ Choose_		fied By	│ Modified On ♀
	Overwrite existing files MetaData Text Field Length is (255 chara	acter(s) max)			
	https://xmforyoutraining4.sharepoint.com	n/sites/CRMDocs/account/X Upload	Cancel		
ρφ		→ Page 1 of 0 +> ++ 15 ×		_	No records
		P			
Dynamics 365 V Sales V Acc	counts > Xrmforyou >			৫ ৩	+ 7 0
ссоимт * rmforyou т≡			nual Revenue	Number of Employees	Owner sakthivadivel Kuppusamy
	Upload Docume	ents		×	
SharePoint	Choose File C\Documents\Contact Creation in C Broi Broi Broi	Document Type User wse Financial This wse Choose V	Remarks is for Testing		
+ NEW - 🛧 UPLOAD 📾 OPEN LOCATION	Brow	wse Choose V			
Name	Brow	Choose V		fied By	│ Modified On ♀
	* MetaData Text Field Length is (255 chara Sharepoint Path: https://xmforyoutraining4.sharepoint.com	<pre>.cter(s) max) ./sites/CRMDocs/account/X</pre>			
		Upload	Cancel		



ACCOUNT				
Krmforvou =		Annual Revenue	Number of Employees	Owner*
	Upload Documents		×	Kuppusamy
	Choose File Document To Choose File Document To Choose File Document of Resume	pe User Remarks		
SharePoint	C:Documents/Contact Creation in C Downer. Primical C:Documents/Test Document.docx Browse Legal	This is for Testing		
+ NEW - TUPLOAD COPEN LOCATION	C:\Documents\iest Pad.bxt browse Pik C:\Documents\Test PPT.pptx Browse Sales&~TMa	rketing' This is for Testing This is for Testing		
Name Name	C\Documents\iestxcel.xtsx Browse Financial	This is for Testing	fied By	Modified On ÷
	* MetaData Text Field Length is (255 character(s) max)			
	Sharepoint Path: https://xrmforyoutraining4.sharepoint.com/sites/CRMDocs/account	Inload Cancel		
		oprodu		
φ φ	Page 1 of 0 +	» ⊪i 15 ~		No records to vi
Dynamics 365 Salas Assour	nte X Vembouru X		0 0	
	MARKETING LIST 🎄 ASSIGN 🖘 EMAIL A LINK 🗙 DELETE 🗔 FORM	PROCESS - ····	ي کر	+ Y &
CCOUNT *				Owner*
rmforyou =			×	sakthivadivel Kuppusamy
		ine Hear Pamarke		
SharePoint	C\Documents\Contact Creation in C Browse Financial	This is for Testing		
+ NEW ▼ T UPLOAD 📾 OPEN LOCATION	C:\Documents\Test Pad.txt Uploading documents_	This is for Testing		
□ Name	C\Documents\Test PPT.pptx C\Documents\TestExcel.xlsx Browse_ Financial	This is for Testing This is for Testing	fied By	Modified On ♀
	✓ Overwrite existing files			
	* MetaUata Text Field Length is (255 character(s) max) Sharepoint Path:			
	https://xrmforyoutraining4.sharepoint.com/sites/CRMDocs/account	Upload Cancel		
φ	I a var Page 1 of 0 +	> #1 15 ¥		No records to v





info@xrmforyou.com

W 🗟 DEACTIVATE 📲 CONNECT 🖂	📑 ADD TO MARKETING LIST 🚔 ASSIGN 🖘	EMAIL A LINK X DELETE	FOR FORM PROCESS	* ***	
ACCOUNT -	Upload Documen	its		×	Owner sakthivadive
	Choose File	Document Type	User Remarks		Kuppusamy
ChanaDaint	Browse Opportuntity guide.pdf	Choose	/		
SharePoint	Browse Fiscal Calendar 2016.pdf	Choose	<		
+ NEW - TUPLOAD	Browse Tier 2 form.xlsx Pro Browse RMA Creation Guide.pdt	ocessed File(s) 4 of 5			
Name Name	Browse Enabling SKU For a Customer to Fo	ore Choose	-		Modified On \$
					9/4/2019 9:29 0
Minereated online.xlsx	 Overwrite existing files MetaData Text Field Length is (255 character) 	s) max)		samy	8/4/2018 8:38 Pf
🔲 🔡 🗊 Test Pad.txt	······			samy	8/4/2018 8:00 PM
	Sharepoint Path: https://xrmforyoutraining4.sharepoint.com/site	s/CRMDocs/acc		samy	8/4/2018 7:48 PM
🗌 🔐 📽 Test PPT.pptx			Upload Cancel	samy	8/4/2018 1:49 PM
Pynamics 365 Sales Acco	ounts > Xrmforyou > 'o Marketing List ∯&assign ∞ eMaiLa Link X D	PELETE FORM PROCESS	· · · · · ·	samy	8/4/2018 1:48 PM + V C
Contact Creation in	ounts > Xrmforyou > to marketing list ∰8 assign ⇔email a link X d	RELETE 🔲 FORM 📱 PROCESS	Annual Revenue	samy ک ک Number of Employees	8/4/2018 1:48 PM
Dynamics 365 V Sales V Acc Dynamics 365 V Sales V Acc Deactivate Connect V Prado 1 COUNT V Tmforyou T=	ounts > Xrmforyou > To Marketing List 🗍 assign 📾 email a link X d Mail	PELETE FORM SPROCESS	Annual Revenue	Number of Employees	8/4/2018 1:48 PM + V - Owner - Sakthivadivel Kuppusamy
Dynamics 365 ∨ Sales ∨ Acc Dynamics 365 ∨ Sales ∨ Acc D DEACTIVATE CONNECT * RADD 1 COUNT * TMFORYOU *=	ounts > Xmforyou > to marketing list ∰&assign ⇔email a link X d Mail	RELETE FORM TO PROCESS	Annual Revenue	Number of Employees	8/4/2018 1:48 PF
Contact Creation in Contact Creatio	sounts > Xrmforyou > no Marketing List ∰å Assign ⇔ email a Link X d Maii	Allow	Annual Revenue	Number of Employees	8/4/2018 1:48 PF
Contact Creation in Contact	counts > Xrmforyou > ro Marketing List ∰4 Assign ⇔ EMAILA LINK X D Mail	elete Form 2 process	Annual Revenue	Number of Employees	8/4/2018 1:48 PM + 7 C Owner* & sakthivadivel Kuppusamy
Image: Contact Creation in Line Appamics 365 ∨ Sales ∨ Acc Appamics 365 ∨ Sales ∨ Acc Image: Contact Creation in Line Image: Contact Creation in Line Acc Image: Contact Creation in Line Image: Contact Creation in Line Acc Image: Contact Creation Image: Contact Creation in Line Acc Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Creation Image: Contact Cre	counts > Xrmforyou > ro Marketing List 🎄 Assign 🖘 EMAILA LINK 🗙 D Mail	Allow	Annual Revenue	Number of Employees	8/4/2018 1:48 PM + 7 C Owner* - Sakthivadivel Kuppusamy
	counts > Xrmforyou > To Marketing List ♣ª Assign ∞ EMAIL A Link X D Mail	RELETE FORM PROCESS	Annual Revenue	Number of Employees	8/4/2018 1:48 PM + - Owner* Sakthivadivel Kuppusamy Modified On *
Image: Contact Creation in Line Aynamics 365 ∨ Sales ∨ Acc Image: Connect +	counts > Xmforyou > TO MARKETING LIST ∰\$ASSIGN ⇔ EMAIL A LINK X D Mail i i Legal	ELETE FORM PROCESS	Annual Revenue	Number of Employees Modified By ivadivel Kuppusamy	8/4/2018 1:48 PM
Image: Contact Creation in Contact Creation in Contact Creation in Contact States Account → Image: Contact Creation in Contact Contact Creation in Contact	sounts > Xrmforyou > TO MARKETING UST ♣&ASSIGN ⇔ EMAIL A LINK X D Mail	Allow User Remarks This is for Testing This is for Testing	Annual Revenue	Author of Employees Number of Employees Addified By ivadivel Kuppusamy ivadivel Kuppusamy	8/4/2018 1:48 PM + - Cowner* - Sakthivadivel Kuppusamy - B/4/2018 1:99 PM 8/4/2018 1:99 PM
Contact Creation in Contact Creation in Contact Creation in Contact Creation in Contact	counts > Xrmforyou > TO MARKETING LIST ∰&ASSIGN ⇔ EMAIL A LINK X D Mail 4 1 1 1 1 1 1 1 1 1 1 1 1 1	Allow User Remarks This is for Testing This is for Testing This is for Testing	Annual Revenue Manual Revenue	Number of Employees Number of Employees Nodified By Vivadivel Kuppusamy Vivadivel Kuppusamy	8/4/2018 1:48 PM + 7 6 - Owner* - & sakthivadivel Kuppusamy - Modified On * 8/4/2018 1:99 PM 8/4/2018 1:99 PM
Contact Creation in Contact Creation in Contact Creation in Count Count Tmforyou Tmforyou	counts > Xrmforyou > TO MARKETING LIST ∰& ASSIGN ← EMAIL A LINK × D Mail 4 4 1 1 1 1 1 1 1 1 1 1 1 1 1	Allow	Annual Revenue Manual R	Addified By ivadivel Kuppusamy ivadivel Kuppusamy ivadivel Kuppusamy	8/4/2018 1:48 PM + 7 (- Owner* - & sakthivadivel Kuppusamy - Modified On * 8/4/2018 1:99 PM 8/4/2018 1:99 PM 8/4/2018 1:99 PM
Contact Creation in Contact Creation in Contact Creation in Count Count Tmforyou Tmforyou	counts > Xrmforyou > TO MARKETING LIST ♣4 ASSIGN ↔ EMAIL A LINK × D Mail (Allow Image: Select test Image: Select test Image: The Select test Image: Select test Image: Test Image: Select test		Addified By ivadivel Kuppusamy ivadivel Kuppusamy ivadivel Kuppusamy	8/4/2018 1:48 PM + 7 (2) - Owner* * sakthivadivel Kuppusamy 8/4/2018 1:99 PM 8/4/2018 1:99 PM 8/4/2018 1:99 PM 8/4/2018 1:99 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.



⊠ <u>info@xrmforyou.com</u>

		Document Type	User Remarks	
C:\Documents\Contact Creation in C	Browse	Financial \checkmark	This is for Testing	
	Browse	Choose 🗸		
	Browse	Choose 🗸		
	Browse	Choose 🗸		
	Browse	Choose 🗸		
Overwrite existing files MetaData Text Field Length is (255	character(s) m	ax)		

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

\Documents\Contact Creation in C Browse Browse Choose Browse Choose Browse Choose Browse Choose Browse Choose Choose Image: Choose Deverwrite existing files etaData Text Field Length is (255 character(s) max)	Lhoose File			Document Type		User Remarks
Browse Browse Choose Browse Choose Browse Choose Dverwrite existing files etaData Text Field Length is (255 character(s) max)	C:\Documents\Contact Creation in C	Browse		Financial	\sim	This is for Testing
Browse Browse Browse Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose Choose.		Browse		Choose	\sim	
Browse Choose Browse Choose Overwrite existing files etaData Text Field Length is (255 character(s) max)		Browse		Choose	\sim	
Browse Choose Overwrite existing files etaData Text Field Length is (255 character(s) max)		Browse		Choose	\sim	
Overwrite existing files etaData Text Field Length is (255 character(s) max)		Browse		Choose	\sim	
	Overwrite existing files MetaData Text Field Length is (255	character(s)	max)		1	



⊠ <u>info@xrmforyou.com</u>

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 theShareponint 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

0	ser Notes	third field	Modified By	│ Modified On ♀
ustry.xml			sakthivadivel Kuppusamy	7/25/2018 11:13 AI
			sakthivadivel Kuppusamy	7/17/2018 7:22 PM
	ustry.xml	ustry.xml	ustry.xml	ustry.xml sakthivadivel Kuppusamy sakthivadivel Kuppusamy

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).



⊠ <u>info@xrmforyou.com</u>

mforyou 📹									sakthi Kuppusam	ivadive Iy
		Create	a New	Docum	ent	×				
		Name *	created online		xlsx					
SharePoint		Sharepoint Path Document Type	https://xrmforyo	atraining4.sharepoint.co	m/sites/CRMDocs/					
+ NEW - TUPLOAD COPEN LOCATION		User Remarks	Financial Legal							
Name	Doc		HR Sales&~"Market	ing'		1	Modified By		Modified	On ≑
🗌 🔡 🕮 Test PPT.pptx	Sales8			Save	Cancel	sal	cthivadivel Kupp	usamy	8/4/2018 1:49	PM
Image: Test Document.docx	Legal					sal	cthivadivel Kupp	usamy	8/4/2018 1:48	PM
TestExcel.xlsx	Financ					sal	cthivadivel Kupp	usamy	8/4/2018 1:48	PM
🗌 🔐 🖡 Test Pad.txt	HR					sal	cthivadivel Kupp	usamy	8/4/2018 1:48	PM
Contact Creation in CRM.pdf	Finance	a		This is for resting		sal	cthivadivel Kupp	usamy	8/4/2018 1:48	PM
φ			ra ka Page 1	of 1 => == 15 ~						View 1
										_
			K 🗙 DELETE 📧		< ₩ ***					*
IS DEACHWATE - CONNECT - CHADDION	ARKEIING LIST 3# P	ASSIGN NO EMAIL A LIN		PORM PROCES	Annual Pevenue				Owner*	т
mforvou =									a sakthivad	livel
		Create			nt ×				Kuppusaniy	
		Create		Jocume	nt					
		Name *	created online	be.	DX					
harePoint		Sharepoint Path	https://xrmforyoutr	aining4.sharepoint.com	sites/CRMDocs/					
+ NEW - TUPLOAD OPEN LOCATION		User Rema	ating new document							
Name	Doc					N	lodified By		Modified On	τŶ
🗆 🔡 🕅 Test PPT.pptx	Sales8			Save	Cancel	sakth	ivadivel Kuppusa	my	8/4/2018 1:49 PM	
Image: Imag	Legal					sakth	ivadivel Kuppusa	my	8/4/2018 1:48 PM	
TestExcel.xlsx	Financ					sakth	ivadivel Kuppusa	my	8/4/2018 1:48 PM	
🗌 🔡 🕑 Test Pad.txt	HR					sakth	ivadivel Kuppusa	my	8/4/2018 1:48 PM	
Contact Creation in CRM.pdf	Financia			nis is for resting		sakth	ivadivel Kuppusa	my	8/4/2018 1:48 PM	
φ			ra ka Page 1	of 1 >> >= 15 Y					Vie	ew 1 - 5
count: Xrmforyou × Ki created onlin	e.xisx ×	T		1 1 50						
https://xrmforyoutraining4.share	ooint.com/:x:/r/site	es/CRMDocs/_layou	ts/15/Doc.aspx?	sourcedoc={e53	34592-0326-40	b3-900a-c4b	3677b8b38}8	laction=ed	• C	•
									1	
Excel Online CRMDocs • Xrmforyou	1_b88c8a64f094e8	811a966000d3a1	created (onli				🐴 Share	sakthivadiv	/el Ku
HOME INSERT DATA REVIEW	VIEW Q Tell	me what you want to d	o EDIT IN	I EXCEL				16 N		
Calibri	- 11 - A A	= = = ab	General	*	F 🖉	2		Σ	AutoSum - 🏻 👌	5
Paste Springer B I U D alace	🗄 • 👌 • <u>A</u> •	€ #	- \$-%	500 00 C ₩ Fo	onditional Forms rmatting + +	Format as Table +	Insert Delete F	Format 🥠	Clear * Sort 8 Filter	& Find • Sele
Clipboard For	t	Alignment	Nur	nber	Tables		Cells		Editing	
	~		6						0	



⊠ <u>info@xrmforyou.com</u>

SharePoint

+ NE	w •	T UPLOAD 🚔 OPEN LOCATION				
		Name	Document Type	User Remarks	Modified By	Modified On ÷
	2	Created online.xlsx	Legal	testinhg	sakthivadivel Kuppusamy	8/4/2018 2:00 PM
		Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
	2	Test Document.docx	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	2	TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	2	🕖 Test Pad.txt	HR	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
р¢			I a sa Page	1 of 1 🕨 🖬 15 🗸		View 1 - 6 of

Note : If you create a document using the **HNEW** 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: If this is setting by which you can edit the already attached document. Once you click on the W button an Edit Properties will open which allows you edit the metadata for this document.

H NEW ▼	TUPLOAD IN OPEN LOCATION	DELETE			
	Name	Document Type	User Remarks	Modified By	Modified On
	Created online.xlsx	Legal	testinhg	sakthivadivel Kuppusamy	8/4/2018 2:00 PM
	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
	Test Document.docx	Legal	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	🖹 Test Pad.txt	HR	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
φq		14	Page 1 of 1 >> >= 15 Y		Vie



ACCOUNT → Xrmforyou = Name	Name Test Document.dox Document Type HR User Remarks This is for Testing the Editing Metadata (255 character(s) max) Override File Browse Save & Close Cancel	★ ber of Employees Owner ▲ sakthivadivel Kuppusamy Modified By Modified By Modified On ‡ sakthivadivel Kuppusamy 8/4/2018 7:23 PM sakthivadivel Kuppusamy 8/4/2018 1:49 PM sakthivadivel Kuppusamy 8/4/2018 1:48 PM
Dynamics 365 V Sales V Accounts EW & DEACTIVATE CONNECT V ADD TO MARKE ACCOUNT V Xrmforyou T Name Name C M CreatedOnline.xlsx C M C C M C C M C C M C C M C C M C C M C C M	Xrmforyou > TING LIST ASSIGN ASSIGNT AS	PROCESS * * Image: Constraint of Employees Owner* Modified By Modified On # sakthivadivel Kuppusamy 8/4/2018 7:23 PM sakthivadivel Kuppusamy 8/4/2018 1:49 PM
	Save & Close Cancel	sakthivadivel Kuppusamy 8/4/2018 1:48 PM sakthivadivel Kuppusamy 8/4/2018 1:48 PM sakthivadivel Kuppusamy 8/4/2018 1:48 PM view 1 - 6 of 6



⊠ <u>info@xrmforyou.com</u>

SharePoint

+ N	EW 🔻	T UPLOAD CPEN LOCATION	m delete				
		Name	Document Type	User Remarks	Modified By	Modified On ₽	
	2	Test Document.docx	HR	This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM	^
	2	CreatedOnline.xlsx	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 7:23 PM	
	2	Test PPT.pptx	Sales&~'Marketing'	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM	
	2	TestExcel.xlsx	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM	
	2	🔋 Test Pad.txt	HR	This is for Testing	sakthivadivel 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

nal file Content				
Dynamics 365 v Sales v Accounts	> Xrmforyou >	P D +	- 7 0	
ew IS deactivate I connect I I in add to market Account I Xrmforyou III H New I I UPLOAD I OPEN LOCATION	ITING LIST ♣ ASSIGN ← EMAIL A LINK × DELETE FORM F PR Edit Properties × Name Test Pad.bt	NOCESS	Owner sakthivadivel Kuppusamy	Υ ·
□ Name D I □ ■ ■ Test Pad.txt L	Document Type Legal ~ User Remarks This is for Testing (255 character(s) max) Override File Browse No file selected.	Modified By sakthivadivel Kuppusamy	Modified On ↓	^
	Save & Close Cancel	sakthivadivel Kuppusamy sakthivadivel Kuppusamy sakthivadivel Kuppusamy	8/4/2018 7:48 PM 8/4/2018 7:23 PM 8/4/2018 1:49 PM	
TestExcel.xisx F		sakthivadivel Kuppusamy	8/4/2018 1:48 PM	~



🥑 File Upload			\times n	foryou × https://xrmft%2	0Pad.txt 🗦	< 🚯 CRMDocs - Xrmfor	\times +	-	
— 🔶	THI (C:) > Documents	と Search Documents	P				C	◙	ŧ
Organize • New folder		III - 🛄	0						
New folder	Name	Date modified	Тур			+ ت م		÷	
a OneDrive	Contact Creation in CRM	5/22/2015 11:49 AM	Ade						
This DC	📹 Test Document	8/4/2018 12:17 PM	Mic_1	NK 🗙 DELETE 🔢 FORM		SS 🔻 ***		1	N 1
S Inis PC	📄 Test Pad	8/4/2018 7:56 PM	Text		_				
E Desktop	💕 Test PPT	1/6/2016 5:28 PM	Mic		~	nber of Employees	Owner*		
Documents	TestExcel	10/7/2015 11:29 PM	Mic	es	^		🔒 sakthiv	adivel	
👃 Downloads							Kuppusamy		
🐌 Music									
Terres 🔁			ct						
📕 Videos				~		Vedified Dec	Madified O		
👟 SAKTHI (C:)			1	esting		Modified By		n∓	
Sout (\\sacfilip01\			IC.	ter(s) max)		sakthivadival Kuppusamv	8///2018 7·	55 DM	^
× ·	<		>	No file selected.		sakulivadivel kuppusality	0/4/2010 /.	DD FIVI	
File nam	e: Test Pad	 All Files 	~			sakthivadivel Kuppusamy	8/4/2018 7:	48 PM	
		Open Cancel		Save & Close Cance		sakthivadivel Kuppusamy	8/4/2018 7:	23 PM	
	Test PPT.pptx	S.				sakthivadivel Kuppusamy	8/4/2018 1:	49 PM	
🗆 🕑 🛍	TestExcel.xlsx	Fi				sakthivadivel Kuppusamy	8/4/2018 1:	48 PM	~
φ							١	/iew 1 - 6	of 6

III Dynamics 365 - Sales - Accounts	> Xrmforyou >		P © +	- Y	۲	
	KETING LIST 🎄 ASSIGN 🐡 EMAIL A LINK 🗙 DELETE 🔳 FORM	PROCESS *				
account + Xrmforyou *≡	Edit Properties	×	of Employees	Owner sakthiv Kuppusamy		
+ NEW + TUPLDAD COPEN LOCATION YO	u are trying to override the existing file content. The existing file name will ren	nains the same.				
Name			ied By			
🔲 🔐 🗊 Test Pad.txt	OK	Cancel	vadivel Kuppusamy			
Image: Imag	Save & Close Can	sakth				
P CreatedOnline.xlsx		sakth				
🗌 🔐 🕮 Test PPT.pptx S		sakth				
		sakth				~
					/iew 1 - 6 of	



⊠ <u>info@xrmforyou.com</u>

rmforyou =	Edit Properties	×	sakthivadivel opusamy
Name Name	Name Test Pad.bt Document Type Legal	Modified By Mo	odified On≑
🗌 📝 🖲 Test Pad.bxt 🛛 🛛	Override F	sakthivadivel Kuppusamy 8/4	4/2018 7:55 PM
First Document.docx	Save & Close Cance	sakthivadivel Kuppusamy 8/4	4/2018 7:48 PM
CreatedOnline.xlsx		sakthivadivel Kuppusamy 8/4	4/2018 7:23 PM
S 📄 😰 🖾 Test PPT.pptx		sakthivadivel Kuppusamy 8/4	4/2018 1:49 PM
FrestExcel.xlsx		sakthivadivel Kuppusamy 8/4	4/2018 1:48 PM
φ φ		_	View 1 -
written file content for Test D	ad tyt		
whiten the content for restric			

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

V 🗟 DEACTIVATE 📲 CONNECT 👻 🎼 ADD	TO MARKETING LIST 👫 ASSIGN 📼 🛙	EMAIL A LINK 🗙 DELETE 🗐 FORM 📱 PRO	CESS - ···	
ccount • rmforyou ™		Annual Revenue N	umber of Employees	Owner Sakthivadivel Kuppusamy
SnarePoint				
+ NEW - TUPLOAD OPEN LOCATI	ION 🟛 DELETE			
+ NEW • T UPLOAD GOPEN LOCATI	Document Type	User Remarks	Modified By	Modified On ₽
+ NEW ▼ UPLOAD	ION DELETE Document Type	User Remarks I Testing	Modified By	Modified On ≑ 8/4/2018 8:38 PM
NEW Tupload OPEN LOCATI Name Preseted online.xlsx Preseted online.xlsx Preseted online.xlsx	ION DELETE Document Type Legal Legal	User Remarks I Testing This is for Testing	Modified By sakthivadivel Kuppusamy sakthivadivel Kuppusamy	Modified On ÷ 8/4/2018 8:38 PM 8/4/2018 8:00 PM
NEW TUPLOAD OPEN LOCATI Name New Test Pad.txt P Test Document.docx	Document Type Legal Legal HR	User Remarks I Testing This is for Testing This is for Testing the Editing Metadata	Modified By sakthivadivel Kuppusamy sakthivadivel Kuppusamy sakthivadivel Kuppusamy	Modified On ¢ 8/4/2018 8:38 PM 8/4/2018 8:00 PM 8/4/2018 7:48 PM
NEW Tupload OPEN LOCATI Name Prest Pad.txt Prest Pad.txt Prest Pad.txt Prest Pad.txt Prest Pad.txt Prest Pad.txt Prest Pad.txt	ION DELETE Document Type Legal Legal HR Sales&~'Marketing'	User Remarks Testing This is for Testing This is for Testing the Editing Metadata This is for Testing	Modified By sakthivadivel Kuppusamy sakthivadivel Kuppusamy sakthivadivel Kuppusamy sakthivadivel Kuppusamy	Modified On ¢ 8/4/2018 8:38 PM 8/4/2018 8:00 PM 8/4/2018 7:48 PM 8/4/2018 1:49 PM



☑ 📝 🖬 TestExcel.xlsx

Minfo@xrmforyou.com

sakthivadivel Kuppusamy

8/4/2018 1:48 PM

acco Krm	unt • Iforyou ™		Annual Revenue		Owner sakthivadive
Sh	arePoint	Selected do	ocuments will be deleted. Wish to continue??		
	+ NEW - TUPLOAD COPEN LOCATION	DELETE	OK Cancel		
	Name	Document Type	User Remarks	Modified By	Modified On ₽
	C 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
	If the second seco	HR	This is for Testing the Editing M	etadata 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
	φ φ	14	Page 1 of 1 ++ ++ 15	7	View 1
Dv	ραφίες 265 με Salas με Auro	in a start former a start	Page 1 of 1 == 15		View 1
Dyi	Р ф namics 365 ∨ Sales ∨ Ассол © реастичате 📲 соллест Г → ард то Р	ints > Xrmforyou > IARKETING LIST 🍰 ASSIGN	Co EMAIL A LINK X DELETE	P ③ + PROCESS ▼ ····	View 1
Dyn w Accco	Р Ф namics 365 ∨ Sales ∨ Accor В реастічате ∰ connect I + № add то м липт • Iforyou т≡	unts > Xrmforyou > 1ARKETING LIST – ♣ª ASSIGN	Cost EMAIL A LINK X DELETE FORM	PROCESS • ••• Number of Employees	View 1 - View 1 Owner* & sakthivad Kuppusamy
Dyn ew Acccc Krrr	P	unts > Xrmforyou > IARKETING LIST 🚔 ASSIGN	Page 1 of 1 + 15	P S +	View 1 - Y Owner* & sakthivad Kuppusamy
Dyn w Acccc Krm Sh	P φ hamics 365 ∨ Sales ∨ Accor Connect V Readd to M DUNT * hfor you *= arePoint + NEW * ↑ UPLOAD @ OPEN LOCATION	unts > Xrmforyou > NARKETING LIST 👫 ASSIGN	← Page 1 of 1 ← = 15 ← EMAIL A LINK X DELETE FORM Annual Revenue	PROCESS - ···	View 1 Owner* & sakthivad Kuppusamy
Dyn w Acccc Krm	P	Ints > Xrmforyou > ARKETING LIST Standard Assign Delette Document Type	Company and the second	PROCESS - ··· Number of Employees Modified By	View 1 - View 1 Owner* Sakthivad Kuppusamy Modified On 4
Dyr Acccc Krm	P	Ints > Xrmforyou > NARKETING LIST Standard DELETE Document Type Legal	Cee EMAIL A LINK X DELETE FORM	P S +	View 1 Owner* Sakthivad Kuppusamy Modified On # I 8/4/2018 8:38

This is for Testing

Financial



⊠ info@xrmforyou.com

Lo DEACTIVATE	ADD TO MARKETING LIST	ASSIGN 🗢 EMAIL A LINK 🗡 DELETE	E FORM PROCESS * ***	1
rmforyou ™≡		Annual Rever	ue Number of Employees	Owner sakthivadivel Kuppusamy
SharePoint				
+ NEW ▼ ▼ UPLOAD ■	OPEN LOCATION Document Type	User Remarks	Modified By	Modified On ≑
+ NEW T UPLOAD IName IName In IP International Internatione Internatione International Internatione International Inter	DOPEN LOCATION Document Type I sx Legal	User Remarks I Testing	Modified By I sakthivadivel Kuppu:	Modified On ≑ samy 8/4/2018 8:38 PM
H NEW Test Pad.txt	arrow open location boundary provide the second se	User Remarks I Testing This is for Testing	Modified By I sakthivadivel Kuppu: sakthivadivel Kuppu:	Modified On ↓ samy 8/4/2018 8:38 PM samy 8/4/2018 8:00 PM
+ NEW ▼ ↑ UPLOAD ■ Name Name Prest Pad.txt Prest Pad.txt Prest Pad.txt	CALCATION Control Contro Control Control Control Control Control Control C	User Remarks Testing This is for Testing This is for Testing	Modified By sakthivadivel Kuppu: sakthivadivel Kuppu: the Editing Metadata sakthivadivel Kuppu:	Modified On ♀ samy 8/4/2018 8:38 PM samy 8/4/2018 8:00 PM samy 8/4/2018 7:48 PM
+ NEW ▲ UPLOAD ■ □ Name □ ♥ ① created online.xt □ ♥ ② Test Pad.txt □ ♥ ③ Test Pad.txt □ ♥ ◎ Test Pad.txt □ ♥ ◎ Test Pad.txt	CARTON Control Contro Control Control Control Control Control Control Cont	User Remarks Testing This is for Testing This is for Testing ing' This is for Testing	the Editing Metadata sakthivadivel Kuppu: sakthivadivel Kuppu: sakthivadivel Kuppu: sakthivadivel Kuppu:	Modified On ♀ ssamy 8/4/2018 8:38 PM ssamy 8/4/2018 8:00 PM ssamy 8/4/2018 7:48 PM ssamy 8/4/2018 7:48 PM ssamy 8/4/2018 1:49 PM
+ NEW ▲ UPLOAD ▲ □ Name ■ □ ▶ Main ■	POPEN LOCATION Document Type Legal Legal Legal Locx HR Sales&~'Marketi nin CRM.pdf Financial	User Remarks Testing This is for Testing This is for Testing ing' This is for Testing This is for Testing	he Editing Metadata sakthivadivel Kuppu: sakthivadivel Kuppu: sakthivadivel Kuppu: sakthivadivel Kuppu: sakthivadivel Kuppu:	Modified On ÷ samy 8/4/2018 8:38 PM samy 8/4/2018 8:00 PM samy 8/4/2018 7:48 PM samy 8/4/2018 1:49 PM samy 8/4/2018 1:49 PM samy 8/4/2018 1:48 PM

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

Dynamics 365 v Sales v	Accounts > Xrmforyou >		P © +	7 0
NEW 🗋 DEACTIVATE 📲 CONNECT 🛛 👻 ADI) TO MARKETING LIST 🚔 ASSIGN 👓 E	MAIL A LINK 🗙 DELETE 📑 FORM	PROCESS -	个
		Annual Revenue	Number of Employees	Owner*
XIIIIOIyOu =				Kuppusamy
 SharePoint 				
+ NEW - TUPLOAD	ION			
Open D	ocument Location in Sharepoint Document Type	User Remarks	Modified By	Modified On ≑
Image: Imag	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



⊠ <u>info@xrmforyou.com</u>

E Account: Xrmforyou	K 🚯 CRMDocs - Xrmforyou_b8 X +				-	o x
★ ③ ▲ https://xrmfo	ryoutraining4.sharepoint.com/sites/CRMDocs/account/Forms/All	Items.aspx?RootFolder=%	62Fsites%2FCRMDocs%2Fa	account%2FXrmforyou_b8	- C	↓ □ =
Search Home Conversations	C CRMDocs Private group			sakthivadivel K	☆ No uppusamy 우	ot following
Documents	$+$ New \vee $\ ar{\uparrow}$ Upload \vee $\ \ B$ Share $\ \ $ Copy link	G Sync 🛚 🕸 Expor	t to Excel ····	\equiv A	II Documents $ imes $	70
Notebook Pages	Account > Xrmforyou_b88c8a64f094e8	11a966000d3a1cab	oce			
Site contents	🗅 Name 🗠	Modified \searrow	Modified By \searrow	+ Add column		
Recycle bin	Contact Creation in CRM.pdf	7 hours ago	sakthivadivel Kuppusamy			
Edit	Created online.xlsx	6 minutes ago	sakthivadivel Kuppusamy			
	Test Document.docx	About an hour ago	sakthivadivel Kuppusamy			
	Test Pad.txt	44 minutes ago	sakthivadivel Kuppusamy			
	i ≦ ¹ Test PPT.pptx	7 hours ago	sakthivadivel Kuppusamy			
Return to classic SharePoint						Feedback

Search:

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

Annual Revenue N	umber of Employees	Owner* Sakthivadivel Kuppusamy
User Remarks	Modified By	Modified On \$
Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:00 PM
This is for Testing the Editing Metadata	sakthivadivel Kuppusamy	8/4/2018 7:48 PM
This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	Jser Remarks festing This is for Testing This is for Testing the Editing Metadata This is for Testing This is for Testing	Jser Remarks Modified By resting sakthivadivel Kuppusamy rhis is for Testing sakthivadivel Kuppusamy rhis is for Testing Metadata sakthivadivel Kuppusamy rhis is for Testing sakthivadivel Kuppusamy rhis is for Testing sakthivadivel Kuppusamy rhis is for Testing sakthivadivel Kuppusamy



⊠ info@xrmforyou.com

		^			
Name	- begins with - co	ontact creation			
	equal				
+ Reset	not equal	Find o			
- Neser	begins with	tind 2			
A	does not begin with				
	ends with				
	contains				
дð	does not contain	14	Page 1 of 0 B> BI 15		No records to
	is null				
	is not null				
	is in				
ACCOUNT -			Annual Revenue	Number of Employees	Owner*
(reference)					sakthivadiv
rmioryou •≡					Kuppusamy
+ NEW - 7	UPLOAD	1			
			Hear Damarke	Modified By	Modified On =
Search		×			
Name	✓ begins with	contact creation	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 F
¢ ۾		14	← Page 1 of 1 → → 15 ×		View 1
ρφ Dynamics 365	 Sales < Acc 	counts > Xrmforyou >	Page 1 of 1 >> >= 15 V	+ ت <i>ک</i>	View:
рф Dynamics 365 w 🗟 deactivate	✓ Sales ✓ Acc Acc	counts > Xrmforyou >	⇔ Page 1 of 1 >> >> 15 ∨ ⇔ EMAIL A LINK X DELETE EFORM		View
рф Dynamics 365 w िреастіvате ассоилт т	✓ Sales ✓ Acc Sales ✓ Acc Acc	counts > Xrmforyou >	Page 1 of 1 >> >> 15 Y Control of 1 >> >> >> >> 15 Y Control of 1	Process → ···· Number of Employees	View - Y Owner*
P Φ Dynamics 365 W B DEACTIVATE ACCOUNT (rmforvou *=	✓ Sales ✓ Acc ✓ Sales ✓ Acc ✓ Sales ✓ Acc	counts > Xrmforyou >		PROCESS - ····	View - V Owner* skthivadi
P ¢ Dynamics 365 w & to deactivate account → (rmforyou *= + New * ↑	✓ Sales ✓ Acc ✓ Sale	counts > Xrmforyou >		PROCESS	View Owner* sakthivadi Kuppusamy
P ¢ Dynamics 365 W I& Deactivate Account ← (rmforyou *= + NEW ← ↑ □ Nam	✓ Sales ✓ Acc ✓ Sales ✓ Acc ✓ CONNECT ✓ MADD TC ✓ UPLOAD ✓ OPEN LOCATION e	counts > Xrmforyou > D MARKETING LIST Stassign		PROCESS PROCESS Number of Employees Modified By	View Owner* Sakthivadi Kuppusamy
P	✓ Sales ✓ Acc ✓ Sales ✓ Acc ✓ CONNECT ↓ ← PADD TC ✓ UPLOAD	counts > Xrmforyou > D MARKETING LIST 🖓 ASSIGN	Constraints This is for Testing	PROCESS • ••• PROCESS • ••• Number of Employees Modified By sakthivadivel Kuppusamy	View Owner Sakthivadi Kuppusamy Modified On \$
P Φ Dynamics 365 W © Deactivate account • (rmforyou •=) + NEW • ↑ □ Nam □ Nam □ ?	✓ Sales ✓ Acc ✓ Sales ✓ Acc ✓ CONNECT ↓ ← PADD TC ✓ UPLOAD ← OPEN LOCATION e ontact Creation in CRM.pdf	counts > Xrmforyou > D MARKETING LIST SA ASSIGN Document Type Financial	Constraints Cons	PROCESS • ••• PROCESS • ••• Number of Employees Modified By sakthivadivel Kuppusamy	View Owner Sakthivadii Kuppusamy Modified On \$ 8/4/2018 1:48 f



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.

		Annual Davanua	or of Ferral autors
Account • Xrmforyou •≡			er of Employees Owner sakthivadivel Kuppusamy
SharePoint		 I I I I I I I I I I I I I I I I I I I	
+ NEW - TUPLOAD DPEN LOCA	TION	$\leftarrow \rightarrow \checkmark \uparrow$ 📜 > This PC > SAKTHI (C:) > Documents	> Drag and Drop V Search Dra
Name Name	Document Type	^ Name	Date modified Type
Created online.xlsx	l Legal	Quick access Desktop Desktop Drag and Drop-1 Drag and Drop-2	5/22/2015 11:49 AM Adobe Acroba 8/4/2018 12:17 PM Microsoft Wor
🗌 📝 🔋 Test Pad.txt	Legal	Downloads 7 Documents 7 Documents 7	8/4/2018 7:56 PM Text Document 1/6/2016 5:28 PM Microsoft Pow
Test Document docy	HR	Pictures * Drag and Drop-5	10/7/2015 11:29 PM Microsoft Exce
Prest PPT.pptx	Sales&~'Marketing'	Documents Latest MAHARHARAT	
Contact Creation in CRM.pdf	Financial	New folder	
¢ م		a OneDrive	
Active		This PC	
Active Account → Xrmforyou =	unges	Annual Revenue Numb	Der of Employees Owner
Active Account ▼ Xrmforyou ™	-	Annual Revenue Numb	ber of Employees Owner Sakthivadivel Kuppusamy
Active Account → Xrmforyou ་≡ • SharePoint		Annual Revenue Numb	Der of Employees Owner Sakthivadivel Kuppusamy –
Active Account → Xrmforyou *= • SharePoint		This PC Annual Revenue Numb Image: State State State File Home Share View ← ⇒ ✓ ↑ > This PC > SAKTHI (C:) > Documents	Deer of Employees Owner* Sakthivadivel Kuppusamy - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
Active Account → Xrmforyou = • SharePoint + NEW • ↑ UPLOAD © OPEN LOCA	ATION	This PC Annual Revenue Numb Image: I	Owner* & sakthivadivel Kuppusamy - - > Drag and Drop V Image: The second
Active Account Account Xrmforyou SharePoint New ↑ UPLOAD OPEN LOCA Name	ATION Document Type	This PC Annual Revenue Numb Annual Revenue Numb File Home Share View ← → ∨ ↑ ▲ > This PC > SAKTHI (C:) > Documents Name	Deer of Employees Owner* & sakthivadivel Kuppusamy - I > Drag and Drop V V Search Dra. Image: Search Dra. Image: Search Dra. Image: Sear
Active Account Xrmforyou SharePoint New Nupload OPEN Loca Name	ATION Document Type Legal	This PC Annual Revenue Numb Image: I	ber of Employees Owner S sakthivadivel Kuppusamy - □ S > Drag and Drop V Search Dra. Date modified Type 5/22/2015 11:49 AM Abobe Acrob 8/4/01812-12 PM
Active Account Account Xrmforyou	ATION Document Type	This PC Annual Revenue Numb Image: Share View Image: Share	Deer of Employees Owner S sakthivadivel Kuppusamy - Date modified Search Dra. Date modified Type 5/22/2015 11:49 AM Adobe Acrob 8/4/2018 12:17 PM Kicrosoft We 8/4/2018 12:56 PM Text Document
Active Account Xrmforyou	ATION Document Type Legal	This PC Annual Revenue Numb Image: Share View Image: Share	Deer of Employees Downer S sakthivadivel Kuppusamy - Drag and Drop Date modified S/22/2015 11:49 AM Adobe Acrob 8/4/2018 12:17 PM Microsoft PM 10/2/218 7:56 PM Text Docume 10/2/216 5:28 PM Microsoft PM
Active Account Account Xrmforyou	ATION Document Type Legal Legal HR	This PC Annual Revenue Numb Image: Share View Image: Share	Deer of Employees Downer* Sakthivadivel Kuppusamy Drag and Drop Deter modified Syz2/2015 11:49 AM Adobe Acrob 8/4/2018 12:17 PM Microsoft Wo 8/4/2018 7:56 PM Test Docume 1/6/2016 5:28 PM Microsoft Exc
Active AccouNT ← Xrmforyou *= SharePoint + NEW ← ▼ UPLOAD @ OPEN LOCU Name Name Name F @ Created online.xlsx F @ Test Pad.txt F @ Test Pad.txt	ATION i Document Type i Legal i Legal i HR Sales&-'Marketing'	This PC Annual Revenue Numb Image: Share View Image: Share	Der of Employees Cowner* S sakthivadivel Kuppusamy Cupusamy C
Active Account Xrmforyou	ATION Document Type Legal Legal HR Sales&'Marketing' Financial	This PC Annual Revenue Number Image:	Deer of Employees Owner S sakthivadivel Kuppusamy - Date modified Type 5/22/2015 11:49 AM Adobe Acrob 8/4/2018 15:56 PM Text Docume 1/6/2016 5:28 PM Microsoft Exc
Active Active Account Xrmforyou SharePoint Account Name Name Name	ATION Legal Legal Legal Legal Legal Legal Legal Legal Legal Legal Legal	This PC Annual Revenue Numb Image: Share View Image: Share	ber of Employees Owner S sakthivadivel Kuppusamy - □ S > Drag and Drop → C Date modified Type S/22/2015 11:49 AM Adobe Acrob 8/4/2018 12:17 PM Microsoft Wc 8/4/2018 5:56 PM Inter Soft Por 10/7/2015 11:29 PM Microsoft Exc



⊠ info@xrmforyou.com

ACCOUNT -		Annual Revenue	Number of Employees	Owner sakthivadivel
Xrmtoryou ™				Kuppusamy
SharePoint				
+ NEW - TUPLOAD 🖬 OPEN LOCATIO	N			
□ Name	Document Type	User Remarks	Modified By	Modified On ≑
Brag and Drop-2.docx			sakthivadivel Kuppusamy	8/4/2018 9:53 PM
Drag and Drop-1.pdf			sakthivadivel Kuppusamy	8/4/2018 9:53 PM
Image: Drag and Drop-4.pptx			sakthivadivel Kuppusamy	8/4/2018 9:53 PM
🔲 📝 🖡 Drag and Drop-3.txt			sakthivadivel Kuppusamy	8/4/2018 9:53 PM
BY Drag and Drop-5.xlsx			sakthivadivel Kuppusamy	8/4/2018 9:53 PM
р ф		14 <4 Page 1 of 1 ⇒> ≥1 15 ∨		View 1 - 10 o
ing Options:				
Xrmtoryou ™				Kuppusamy
A SharePoint				
+ NEW - 🕈 UPLOAD 🖆 OPEN LOCATIO	N			
Name	Document Type	User Remarks	Modified By	Modified On ≑ 0/4/2010 9.00 Pivi
Image: Second contine.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
Image: Imag	HR	This is for Testing the Editing Me	etadata sakthivadivel Kuppusamy	8/4/2018 7:48 PM
🗌 🔡 🛍 Test PPT.pptx	Sales&~'Marketing'	This is for Tes 15 30	sakthivadivel Kuppusamy	8/4/2018 1:49 PM
	Financial	This is for To 50	addinadi ad Kumanaamu	0/4/2010 1-40 DM View 1 - 10 (
mforyou =				Kuppusamy
+ NEW - TUPLOAD 🖬 OPEN LOCATION				
Name Name	Document Type	User Remarks	Modified By	Modified On ≑
Fiscal Calendar 2015.xlsx		1	sakthivadivel Kuppusamv	8/4/2018 10:00 PM
IQL Customers.xlsx			sakthivadivel Kuppusamv	8/4/2018 10:00 PM
Distribution Channel.JPG			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
FQEs from Kavosh's org.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
WRF Accounts.ipg			sakthivadivel Kuppusamv	8/4/2018 10:00 PM
۵ ش ۵			· · · · · · · · · · · · · · · · · · ·	View 1 - 15 of
		PdQP 0		



⊠ info@xrmforyou.com

account - Xrmforyou =		Annual Revenue	Number of Employees	Owner* sakthivadivel Kuppusamy
+ NEW - T UPLOAD COPEN LOCATION				
Name Name	Document Type	User Remarks	Modified By	Modified On ≑
🗌 📝 🗊 Fiscal Calendar 2015.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
Image: Customers.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
Distribution Channel JPG			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
PQEs from Kavosh's org.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
Image: MRF Accounts.jpg			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
φ	ra <a 1<="" page="" td=""><td>of 2 + 15</td><td></td><td>View 1 - 15 of</td>	of 2 + 15		View 1 - 15 of
		Last Page		
ACCOUNT -		Annual Revenue	Number of Employees	Owner*
Xrmforyou ™				sakthivadivel Kuppusamy
+ NEW → T UPLOAD 🚔 OPEN LOCATION				
□ Name	Document Type	User Remarks	Modified By	Modified On ≑
Ereated 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
Image: Imag	HR	This is for Testing the Editing Metada	ata 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
Image: Second action and CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
φ	Page 2	of 2 🕨 🕅 15 💙		View 16 - 20 c
	Previous Pa	ge		
ссоилт - rmforyou =		Annual Revenue	Number of Employees	Owner* sakthivadivel Kuppusamy
+ NEW 🔻 🕈 UPLOAD 🛛 OPEN LOCATION				
	Document Type	User Remarks	Modified By	Modified On ≑
Name	Booument Type			
Name Image: State of the	Legal	Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM
Name Image: State on	Legal	Testing This is for Testing	sakthivadivel Kuppusamy	8/4/2018 8:38 PM 8/4/2018 8:00 PM
Name Image: State of the	Legal HR	Testing This is for Testing This is for Testing the Editing Metadat	sakthivadivel Kuppusamy sakthivadivel Kuppusamy a sakthivadivel Kuppusamy	8/4/2018 8:38 PM 8/4/2018 8:00 PM 8/4/2018 7:48 PM
Name Image: State of the	Legal Legal HR Sales&~'Marketing'	Testing This is for Testing This is for Testing the Editing Metadat This is for Testing	sakthivadivel Kuppusamy sakthivadivel Kuppusamy a sakthivadivel Kuppusamy sakthivadivel Kuppusamy	8/4/2018 8:38 PM 8/4/2018 8:00 PM 8/4/2018 7:48 PM 8/4/2018 1:49 PM
Name Image: State of the	Legal HR Sales&~'Marketing' Financial	Testing This is for Testing This is for Testing the Editing Metadat This is for Testing This is for Testing	sakthivadivel Kuppusamy sakthivadivel Kuppusamy a sakthivadivel Kuppusamy sakthivadivel Kuppusamy sakthivadivel Kuppusamy	8/4/2018 8:38 PM 8/4/2018 8:00 PM 8/4/2018 7:48 PM 8/4/2018 1:49 PM 8/4/2018 1:49 PM



⊠ <u>info@xrmforyou.com</u>

Reoad Grid:

account • Xrmforyou ™≡		Annual Revenue	Number of Employees	Owner [*] 🍰 sakthivadivel Kuppusamy
+ NEW - T UPLOAD COPEN LOCATIO	N			
□ Name	Document Type	User Remarks	Modified By	Modified On ↓
Ereated 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
Image: Imag	HR	This is for Testing the Editing Metao	data 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
Image: Secontact Creation in CRM.pdf	Financial	This is for Testing	sakthivadivel Kuppusamy	8/4/2018 1:48 PM
	।च ≪च Р	age 2 of 2 ▷> ▷ 15 ¥		View 16 - 20 o

How to configure File Options (File size, Alloweded 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.

Secure https://xrm	nforyoutraining4.crm.dynamic	s.com/main.aspx?appid=&pagetype=advancedfind#	975561678
FILE ADVANCED FIND	LIST TOOLS SAVED VIEWS	Microsoft Dynamics 365	sakthivadivel Kuppusamy 🕜 xrm4u 🚕
Query Saved Results	New Save As	Image: Clear Image: Clear	
Look for: Sharepoint Cons	view tants	Use Saved View: [new]	•

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



⊠ <u>info@xrmforyou.com</u>

	Dyn	amics 365	~ 2	Settings	~	Sharepoint Constants	> MaxFileSizel	nBytes >			
+ 1	NEW		DELETE	ස EMAIL	A LINK	🔅 RUN WORKFLOW	START DIALOG	₀⁄ [□] FLOWS ▼	WI WORD TEMPLATES 🔻	•••	×
	SHAR	EPOINT CONST	ANTS : INF	ORMATION	1						
	Max	FileSizeIn	Bytes ™	E							
	⊿ Gei	neral									
	Key *	*	MaxFi	leSizeInByte	es						
	Valu	e	52428	80							

• 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 CONSTANT	IS : INFORMATION
AllowedFileExter	nsions 📹
▲ General	
Kov *	Allowed File Free allowed
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.



info@xrmforyou.com

ts : INFORMATION Message ™≡
FileUploadErrorMessage
5.00MB

Moving Attachments automatically from Notes entity to share point

Files attached to Notes

account - Krmforyou *≡			Ar	nnual Revenue		Number of E	mployees	Owner sakthivadivel Kuppusamy
ACCOUNT INFORM	ATION	TIMELINE			RELATE	D		
Account Name *	Xrmforyou	POSTS ACTIVITIES	NOTES	ONENOTE	CONTA	CTS	Email	+ =
Phone		Enter a note			Full Name	2 1	Ellidii	
Fax		Attachment to Notes entity.pdf You - Just now						
Website	http://www.vrmf				No	Contacts fou	ind for this A	

File Automatically moved to Sharepoint

Uynamics 365 V Sales V Accounts	> Xrmforyou >		+ © Q	7 0 (
+ NEW 🗋 DEACTIVATE 🗳 CONNECT 👻 📑 ADD TO MARK	eting list 🚔 Assign 🐢 email a link	X DELETE 💷 FORM 📱 PROC	ESS 👻 🚥	Ϋ́
account - Xrmforyou ™	A 	Innual Revenue Nu	mber of Employees	Owner* sakthivadivel Kuppusamy
+ NEW ▼ ↑ UPLOAD → OPEN LOCATION Name D	Document Type Use	r Remarks	Modified By	Modified On ≑
Attachment to Notes entity.pdf			sakthivadivel Kuppusamy	8/4/2018 11:39 PM
🗌 🔮 🛍 Fiscal Calendar 2015.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
In the second seco			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
Distribution Channel JPG			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
PQEs from Kavosh's org.xlsx			sakthivadivel Kuppusamy	8/4/2018 10:00 PM
φ φ	Page 1 of 2	▶> ▶1 15 ¥		View 1 - 15 of 21



⊠ info@xrmforyou.com

File gets Automatically deleted from Notes Entity

	Dynamics 365	~ Sales ~	Accounts > 2	Krmforyou >				Q	3	+	$\mathbf{\nabla}$	۵	[?]	
+ NEV	V 🗟 DEACTIVATE 🖣	🖁 CONNECT 🛛 👻 📑 A	DD TO MARKETING	LIST 🚔 ASSIGN	🖘 EMAIL A LINK	🗙 delete 🔳	FORM PROCESS	• •••				\uparrow	\downarrow	a x
A X	rmforyou =				4 	Annual Revenue	Numbe	r of Emp	oyees		Dwner Sakthi Kuppusam	vadivel V		
														^
	ACCOUNT INFORMAT	ION	TIMELINE				RELATED							
	Account Name *	Xrmforvou	POSTS	ACTIVITIES	NOTES	ONENOTE	CONTACTS					+		
	Phone		Enter a note				Full Name 🛧	E	mail					
	Fax													
	Website	http://www.xrmfe					No Contact	s found	for this	Accou	nt. Select	t Add (+).		

Moving Attachments automatically from Incoming Email to share point

In a sakthivadivel kuppusamy From In sakthivadivel kuppusamy To Business Application Platform Service account Cc Bcc Statu Reason Subject Incoming Email To Test incoming Email <th>Dynamics 3</th> <th>65 - Sales - Activities > Incoming Email ></th> <th></th> <th></th> <th></th> <th>م</th> <th>9 + V</th> <th>۲</th> <th>[?]</th> <th></th>	Dynamics 3	65 - Sales - Activities > Incoming Email >				م	9 + V	۲	[?]	
MAIL* Priority Due Status Reason Owner* ncoming Email = Priority Brecieved Image: Comment of the State (Reason) Owner* From \$ sakthivadivel Kuppusamy Image: Comment of the State (Reason) Attachment / File State (Reason) To Business Application Platform Service account Image: Comment of the State (Reason) Cc Image: Comment of the State (Reason) Image: Comment of the State (Reason) Subject Incoming Email Image: Comment of the State (Reason) To Test incoming Email attachment movement Image: Comment of the State (Reason)	END 🕞 SAVE	🏽 ATTACH FILE 🛛 📮 INSERT TEMPLATE 📑 INSERT ARTICLE 🏷 INSERT SIGNAT	URE 📱 PROCESS 👻	CONVERT TO	X DELETE ····				Υ.	Ψ
From \$ sakthivadivel Kuppusamy To Business Application Platform Service account Cc Bucc Bublect Incoming Email IT or Test incoming Email attachment To Test incoming Email Attachment The Tes	mail • Icoming E	mail =	Priority Normal		Due 8/5/2018 8:00 AM	Status Reason	Owner & sa Kuppu	r* akthivadivel isamy		
To Business Application Platform Service account Cc	From	sakthivadivel Kuppusamy				Attachment			+	
Cc Email Attachment.docx No 16,086 Bcc Email Attachment.pdf No 631,389 Subject Incoming Email No 21 To Test incoming Email attachment movement Image: State of the s	То	Business Application Platform Service account				File Name ↑	Followed	File Size (Byt	tes	
Back Subject Incoming Email To Test incoming Email attachment movement To Test incoming Email attachment movement Email Attachment.pdf No 631,389 Email Attachment.pdf No 21	Cc					Email Attachment.docx	No	16,08	6	
Subject Incoming Email Image: Solution of the	Rec					Email Attachment.pdf	No	631,38	9	
Image: An and a standing chain Image: A standing chain To Test incoming Email attachment movement	Subject	Incoming Email				Email Attachment.txt	No	2	1	
	X R C	B / U ■ ● ■ 注 注 体 体 Δ・ Λ・ ▲ ① ▷								

Incoming email with Attachments



⊠ info@xrmforyou.com

Email attachments automatically moved to Sharepoint

	ITACH FILE 🔀 INSERT TEMPLATE 🗟 INSERT ARTICLE	🔂 INSERT SIGNATURE 📲 PROCESS 👻	CONVERT TO 👻 X DELETE 🚥		
a∎.▼ oming Ema	il =	Priority Normal	Due 8/5/2018 8:00 AN	Status Reason Recieved	Owner sakthivadivel Kuppusamy
ration	30 minutes				
+ NEW → 不					
	Name		Modified By	Modified On ♀	
	Name	s	Modified By kthivadivel Kuppusamy	Modified On ♥ 8/5/2018 1:56 AM	
	Email Attachment.pdf Email Attachment.txt	l s	Modified By kthivadivel Kuppusamy kthivadivel Kuppusamy	Modified On ♥ 8/5/2018 1:56 AM 8/5/2018 1:56 AM	
	Name Semail Attachment.pdf Email Attachment.txt Semail Attachment.docx	 s s	Modified By kthivadivel Kuppusamy kthivadivel Kuppusamy kthivadivel Kuppusamy	Modified On * 8/5/2018 1:56 AM 8/5/2018 1:56 AM 8/5/2018 1:56 AM	,
□ 2° □ 2° □ 2° □ 2°	Kame Email Attachment.pdf Email Attachment.bxt Email Attachment.docx	s s × ++ Page 1	Modified By kthivadivel Kuppusamy kthivadivel Kuppusamy of 1 ===================================	Modified On ¥ 8/5/2018 1:56 AM 8/5/2018 1:56 AM	Vier 1 - 3 of 3

Attachments deleted from the Attachment section and attachments uploaded to Sharepoint

Incoming Em	ail 📹		Norm	al	8/5/2018 8:00 AM	1	Recieved	🚨 sa Kuppu	kthivadivel samy
From	sakthivadivel Kuppusamy					Attachm	ent		-
То	Business Application Platform	Service account				File Name	↑	Followed	File Size (Bytes.
Cc						No	Attachments found f	for this Email. Sel	ect Add (+).
Bcc						<			
Subject	Incoming Email								
Х 🖻 🖪 В		E (# 🕢 K- A- 📓	1 2 2						
To Test incomin	ng Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	g Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	ng Email attachment movement								
To Test incomin	g Email attachment movement								
To Test incomin	ng Email attachment movement								



<u>
 info@xrmforyou.com</u>

comina Email ™	Priority Due Normal 8/5/2018 8:00 AM	Status Reason Owner* Recieved Sakthivadivel
Juration 30 minutes		indifferenti k
SharePoint + NEW - 不 UPLOAD @ OPEN LOCATION		
Name	Modified By	Modified On v
BY BEmail Attachment.pdf	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
B Email Attachment.txt	sakthivadivel Kuppusamy	8/5/2018 1:56 AM
Breail Attachment.docx	sakthivadivel Kuppusamy	8/5/2018 1:56 AM

License & Support Information

- Our Licening is designed keeping in mind customers of various size so our license model contains different options to suit custmers 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 @ <u>info@xrmforyou.com.</u>



⊠ 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
