Dynamics 365 & SharePoint

Dynamics 365 SharePoint Integration

Store and Manage documents in context of Dynamics 365

- Create, upload, view and delete documents in SharePoint within Dynamics 365

- SharePoint Storage costs < Dynamics 365 storage costs
  0.20 USD/GB vs 10 USD/GB

- Collaboration for non Dynamics Users and external sharing (Note: security is handled separately)

- SharePoint document management abilities:
  - Check-In/ Check-Out
  - Version History
  - Advanced Search capabilities (e.g. Delve)

Setup

- Wizard (Settings->Document Management)
  https://technet.microsoft.com/en-us/library/jj863709.aspx

- List-component vs Server-based SharePoint integration!

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Important Links
General Info: https://msdn.microsoft.com/en-us/library/gg334768.aspx
Step-by-Step: https://www.youtube.com/watch?v=d4r9ywWw4tg

SharePoint Add-Ons

Streamlining and automating the Dynamics 365 SharePoint integration

AttachmentExtractor

- Automatically move files from Dynamics 365 to SharePoint

- Reduce Online storage costs

- Build structured repository

- Archiving (move data older than x months/years etc.)

DocumentsCorePack

- Save generated documents to SharePoint

- Online Editing of documents

- Save SharePoint properties (e.g. Populate Metadata for extended Search capabilities)

General

- Create document locations
  - Custom names (all attributes supported - DCP)
  - GUID not required (DCP and AE)

- Organization Insights: https://appsource.microsoft.com/en-us/product/dynamics-365/mscrm.04931187-431c-415d-8777-f7f482ba8095?tab=Overview

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Getting Started:
Online: Install from AppSource
On-Premise: Download install package from mscrm-addons.com

Demo

Part 1: AttachmentExtractor
      How it works

Part 2: DocumentsCorePack
      Online Editing of documents
      Creating SharePoint locations

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Thank you!

- You can find us on the web at http://www.mscrm-addons.com

- Help-Center (Live-Chat, Support): http://www.mscrm-addons.com/Support.aspx

- Don't forget we have an awesome blog at http://www.mscrm-addons.com/Blog, you'll find it to be a helpful resource!

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