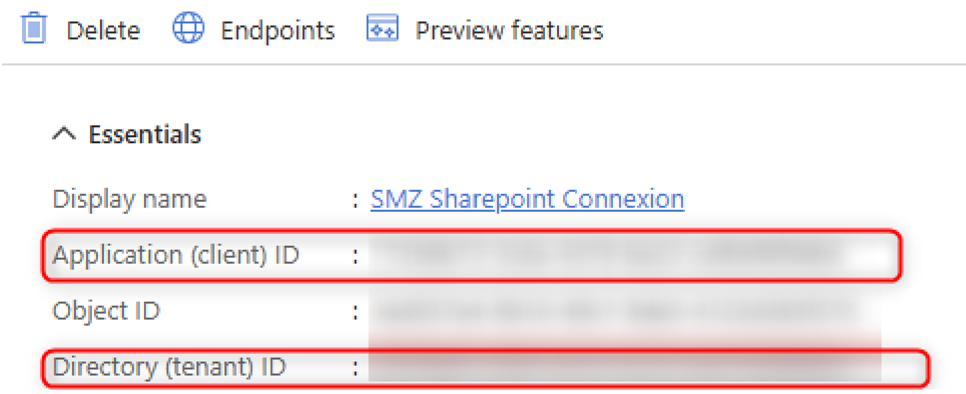
smz services

# SMZ SharePoint Connection Extension for Business Central

# Setup and User Guide

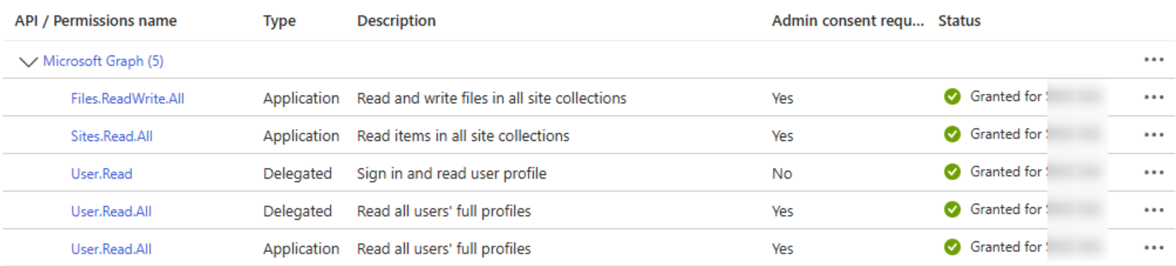
## Setup Azure App

Create an app registration, after the name you want (SMZ Sharepoint Connexion)



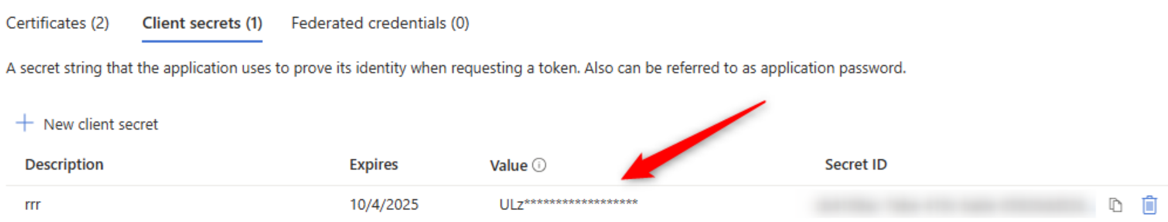

Application ID and Tenant ID will be used later.

Add the below API permissions, that will allow the Microsoft Graph API (used by our extension) to access SharePoint:



| API / Permissions name | Type | Description | Admin consent requ... | Status |
|---|---|---|---|---|
| Microsoft Graph (5) | | | | |
| Files.ReadWrite.All | Application | Read and write files in all site collections | Yes | Granted for |
| Sites.Read.All | Application | Read items in all site collections | Yes | Granted for |
| User.Read | Delegated | Sign in and read user profile | No | Granted for |
| User.Read.All | Delegated | Read all users' full profiles | Yes | Granted for |
| User.Read.All | Application | Read all users' full profiles | Yes | Granted for |

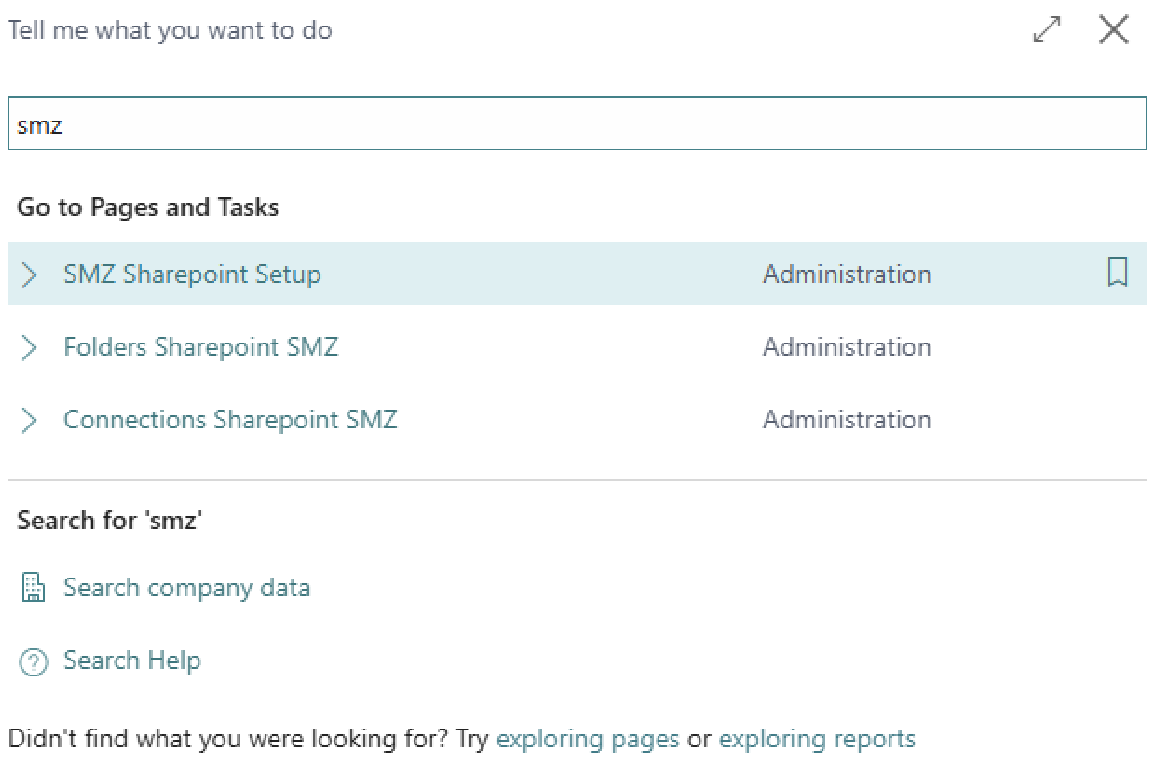
Create a new secret to authenticate the extension when accessing Azure:




White down the value of the secret ***and keep it safe, as this would enable anyone accessing and writing/deleting content on your azure data !***

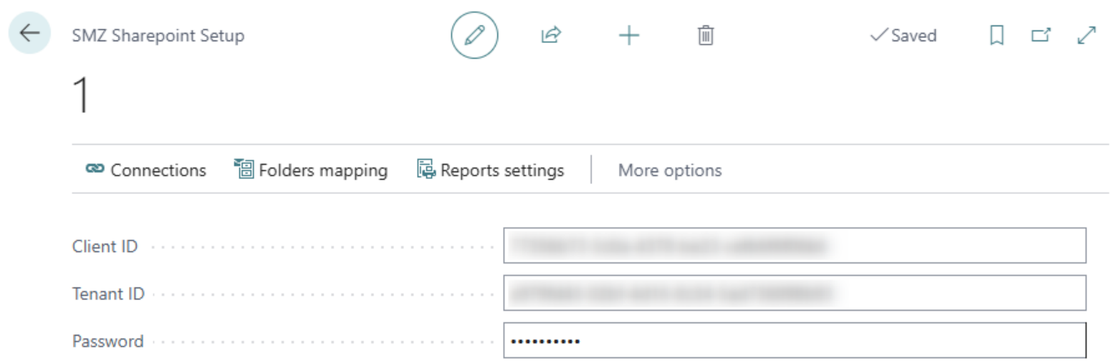
## Setup Business Central Extension

Look for “SMZ SharePoint Setup” :




Then, the setup will occur in  steps:

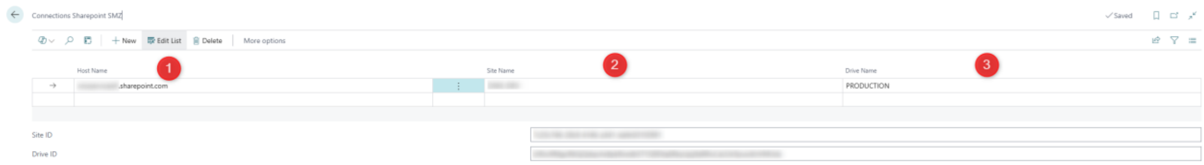
## 1. Setup the Azure connection




Input here:

- Your Azure App Client ID
- Your Azure Tenant
- The secret text you have setup on Azure for this app

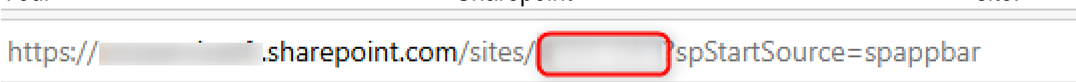
## 2. Setup Connections with Sharepoint




To achieve this setup, you should input:

a. Your hostname :


b. Your Sharepoint site:



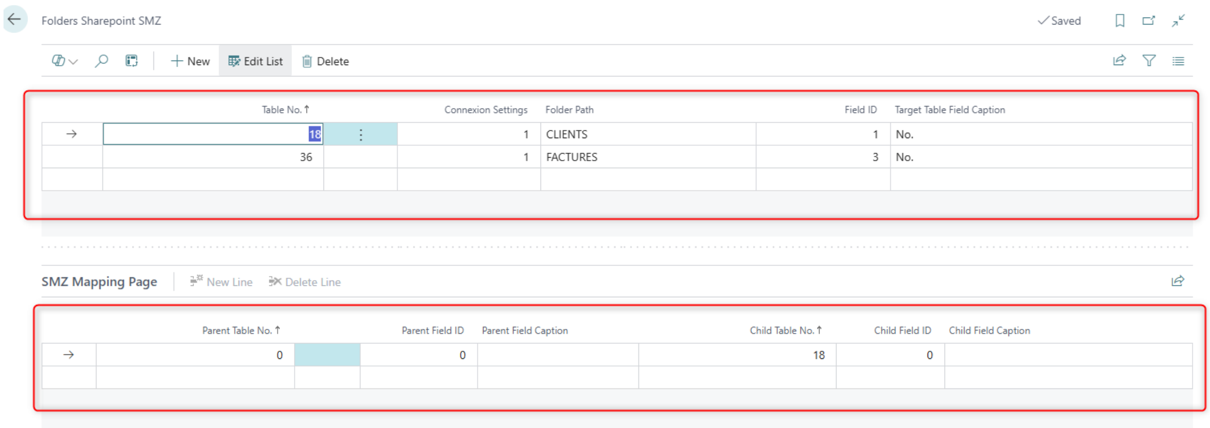

c. And the library in which you want to store the files:

Note that when you will validate the SharePoint site, you will have a popup message showing all the libraries available for this SharePoint site.

Site ID and Drive ID are shown down of the page, just for information.

## 3. Setup Folders mapping

This allows the extension to understand how to organize the files depending on the record you have opened in each page.




The easiest part is the upper part of the page:

- For each record (table ID), you select the SharePoint Connection to use (this allows you to store data in different libraries/sites, depending on the record). For example, you could save all sales invoices into a site dedicated to Sales, all employee documents into another site dedicated to HR.
- You then select the root folder that the system will use in the library, as well as the Field ID that will be used to create a subfolder.

For example :

- Table 18 (customer)
- Folder “CUSTOMERS”
- Field ID 1 (No.)

Let’s say you are on the customer page of customer “CONTOSO”, which No is “CONTO”. All the documents will be stored into the selected library, with path: “CUSTOMERS/CONTO”.

The folders will be automatically created if not existent.

Easy, right?!

Now, the lower part of the page. This enables you to store data into subfolders, depending on the relation you will create here. For example, saving the sales invoices into subfolders in each customers folder path!

Same example as above, for the main settings, with additional :

- Table 36 (sale header)
- Folder “SALES”
- Field ID 3 (No)

And then on the lower part, we will mapp the sales header record with the customer record:


| Parent Table No. ↑ | Parent Field ID | Parent Field Caption | Child Table No. ↑ | Child Field ID | Child Field Caption |
|---|---|---|---|---|---|
| 18 | 1 | No. | 36 | 2 | Sell-to Customer No. |

Here, we will link the child table (sales header) with the parent table (customer), saying the link will be done on :

- Customer.No = Sales Header.Sell-to-Customer No

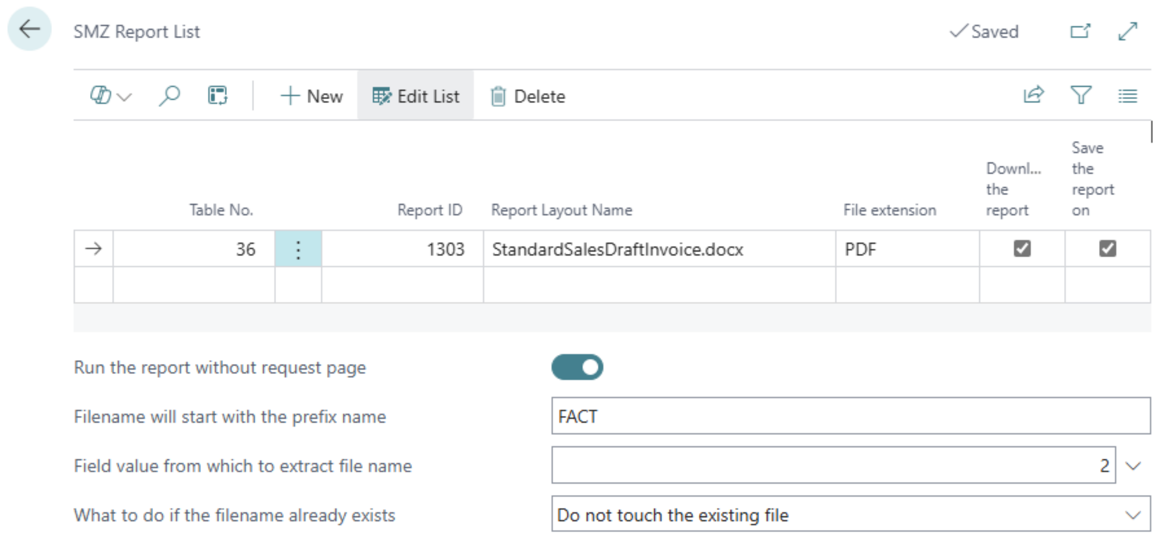
Let’s say you have recorded a new sales for this customer, with sales Number: ABC123. All documents related to this sale will be stored here:

CUSTOMERS/CONTO/SALES/ABC123

You can input as much links as you want, provided the parent table is always the same!

## 4. Setup Document Generation

Here you will setup the logic for generating reports with the extension:




All the setup is made based on:

- The Table from which you are reading the data on the main page
- The report ID you want to use
- Optional, the report layout you want to use (allows you to bypass the default report layout)
- The file extension you will use

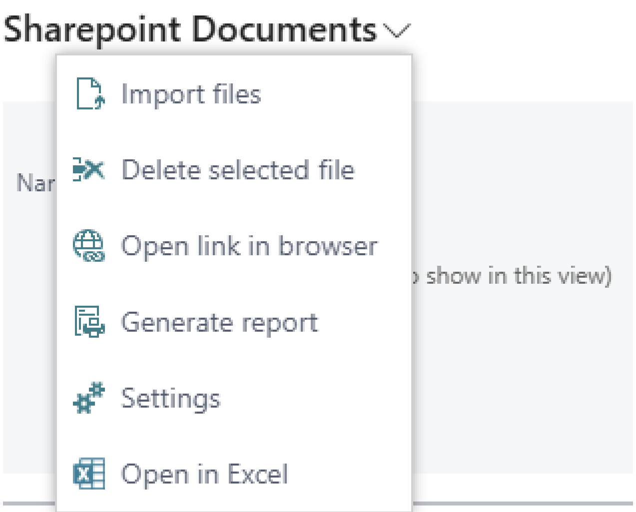
Then, you should think:

- Download the report: Downloads and saves the report on your computer
- Sale the report on the cloud: saves the report on SharePoint, according to the folder mapping done previously
- Run the report without request page: allows you to avoid showing the request page, and makes sure the report is printed with the standard values
- Filename will start with the prefix name: allows you to name the file with a “fixed” prefix
- Field value from which to extract file name: allows you to define which Field will be used on the record to dynamically name the file (customer name, customer No, Sales No, etc.)
- What to do if the filename already exists:
  - Do not touch the existing file : file will not be updated online, the old file will stay
  - Replace the file : file content will be replaced, but the File ID will stay the same. If the file itself was directly shared with some users with a link, that link will stay alive
  - Delete file and create a new one: the old file will be deleted and replaced with a new one, with a new File ID. Any share of the old file with a link will be dead.

# SMZ SharePoint Connection Extension for Business Central

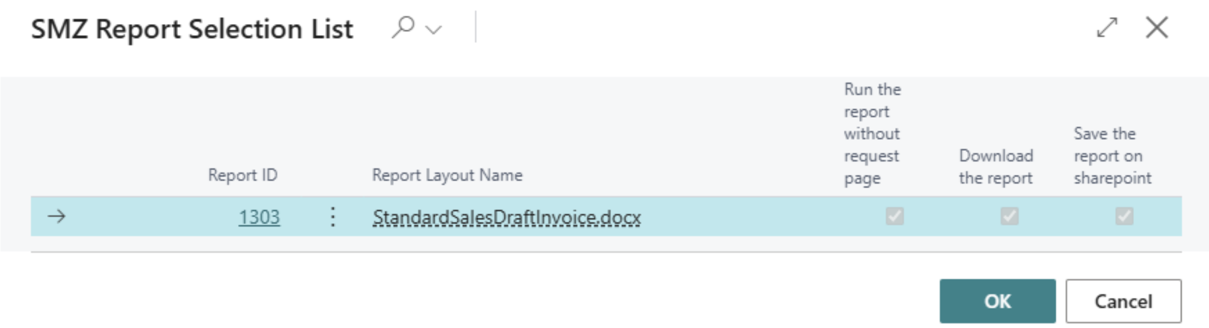
## Use SharePoint Connection Extension

On all the pages where the extension is activated:



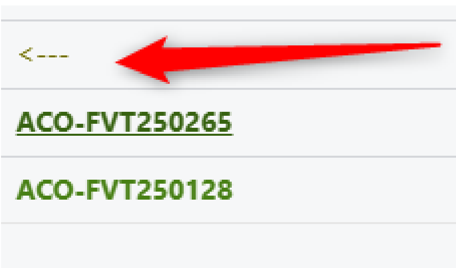

- Import Files: allows you to import multiples files at once
- Delete selected file : deletes the file from SharePoint, PERMANENT !
- Open link in browser: opens the main folder in your browser
- Settings: allows you to setup the extension, depending on your access rights.

When generating a report, you will have to select the report you want to generate from the popup and press “OK”.




You can click any document to open it in your browser. If you click folder (in green), the factbox will navigate to the selected folder.

Once there, you can navigate back to the main folder of the record with “<---”




## Support

Get support at support@smz-services.fr