



**SharePoint
Security
Sync**

**Robust and Secure
SharePoint Integration for
Dynamics 365 CRM**

Key Features

Intuitive interface to perform common file/folder actions

Upload, download, rename files and folders .

Drag & Drop

Drag & Drop interface to upload multiple files and folders to SharePoint easily at one go.

Email link or file as an attachment

Email SharePoint files as attachment with a single click

Save Storage Space

Move Attachments from Notes, Email & Sales Literature to SharePoint and leave behind the link to the file for easy reference.

Security Privileges

Control user privileges to perform the various actions supported by the solution such as Upload, Download, Email, Create folder, Rename, Delete.

Security Role Sync to SharePoint

Replicate addition / modification / deletion of Dynamics 365 CRM user's security privileges to SharePoint

Available For

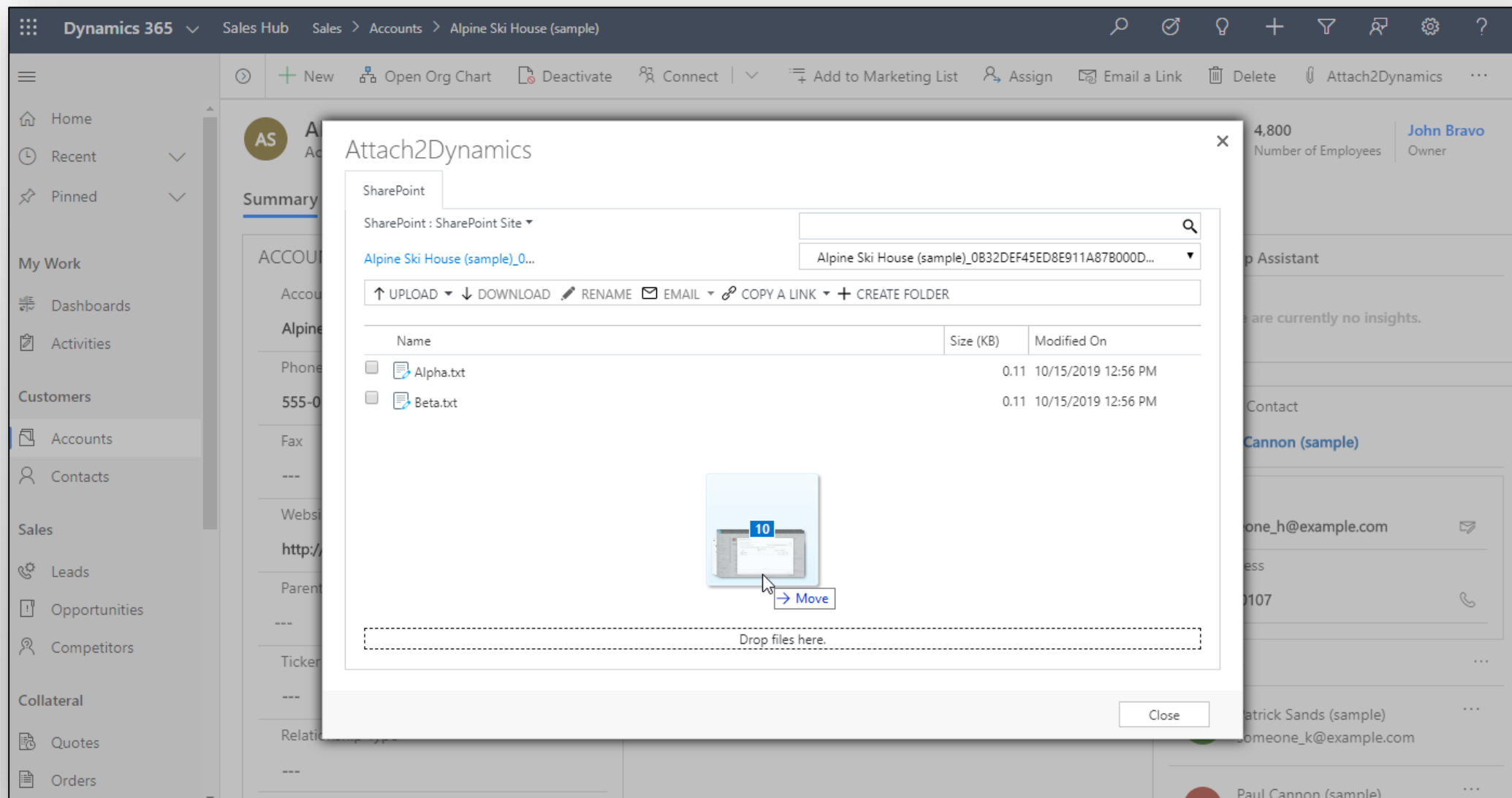
SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 8.2 and above
- Power Apps
- CDS

DEPLOYMENTS

- DYNAMICS 365 ONLINE
- ON-PREMISES WITH IFD

Drag and Drop multiple files & folders



The screenshot shows the Dynamics 365 interface with the 'Attach2Dynamics' dialog box open. The dialog box is titled 'Attach2Dynamics' and has a 'SharePoint' tab. It displays a list of files and folders in a SharePoint site. The files are 'Alpha.txt' and 'Beta.txt', both 0.11 KB and modified on 10/15/2019 at 12:56 PM. A 'Drop files here.' area is visible at the bottom of the dialog box, with a 'Move' button next to it. The background shows the Dynamics 365 interface with the 'Accounts' section selected, displaying details for 'Alpine Ski House (sample)'.

Attach2Dynamics

SharePoint

SharePoint : SharePoint Site

Alpine Ski House (sample)_0...

Alpine Ski House (sample)_0B32DEF45ED8E911A87B000D...

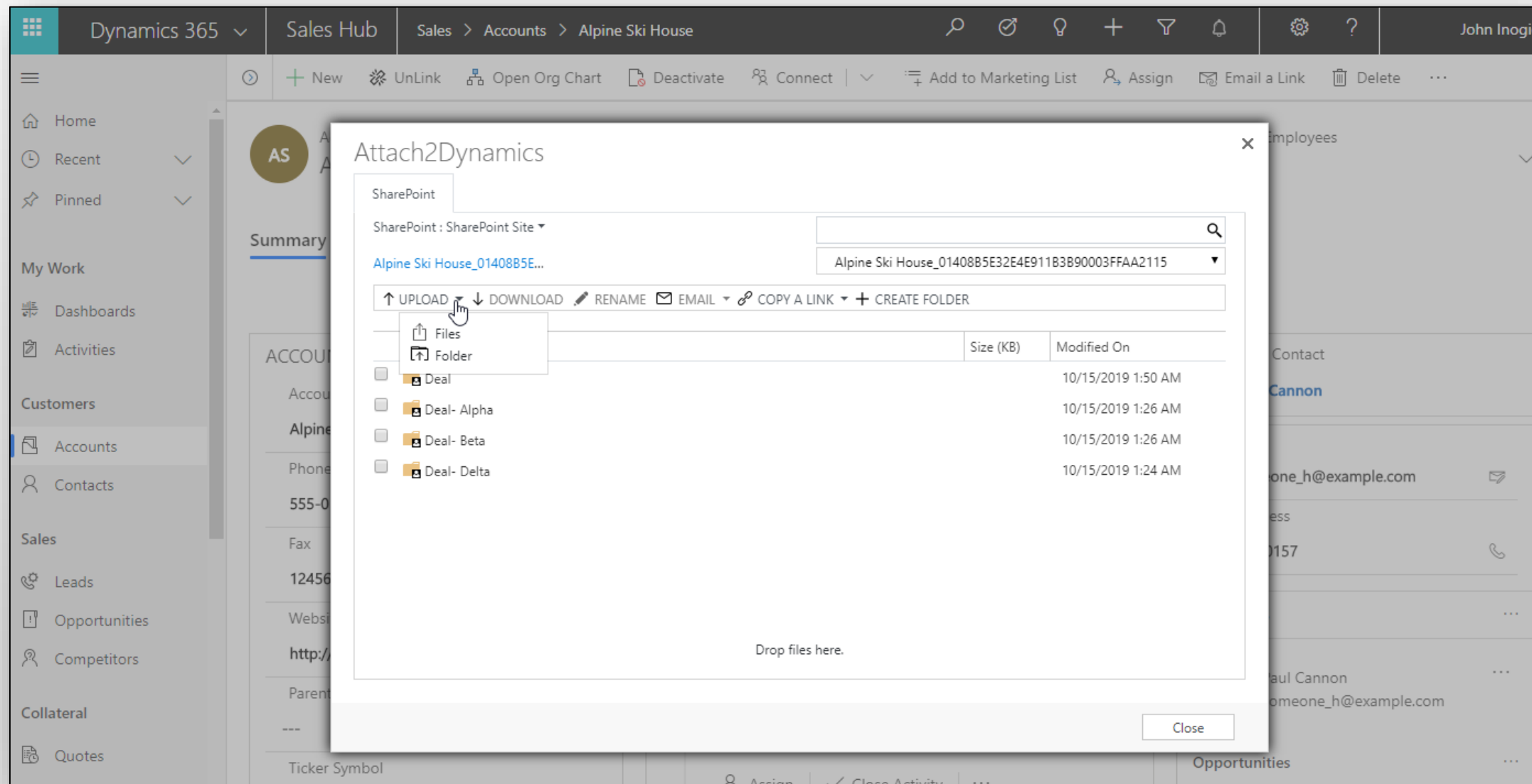
↑ UPLOAD ↓ DOWNLOAD ✎ RENAME ✉ EMAIL 🔗 COPY A LINK + CREATE FOLDER

Name	Size (KB)	Modified On
Alpha.txt	0.11	10/15/2019 12:56 PM
Beta.txt	0.11	10/15/2019 12:56 PM

Drop files here.

Close

Upload/Download files & folders



The screenshot shows the Dynamics 365 Sales Hub interface. The main window displays the 'Alpine Ski House' account details. An 'Attach2Dynamics' overlay window is open, showing a file management interface. The overlay has a 'SharePoint' tab selected, a search bar, and a dropdown menu showing 'Alpine Ski House_01408B5E...'. Below this, there are buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A file list is displayed with columns for 'Size (KB)' and 'Modified On'. The file list contains four items: 'Deal', 'Deal- Alpha', 'Deal- Beta', and 'Deal- Delta'. The 'Deal' item is selected, and a context menu is open showing 'Files' and 'Folder' options. The 'Drop files here.' text is visible at the bottom of the overlay.

	Size (KB)	Modified On
Deal		10/15/2019 1:50 AM
Deal- Alpha		10/15/2019 1:26 AM
Deal- Beta		10/15/2019 1:26 AM
Deal- Delta		10/15/2019 1:24 AM

Upload files & folders to multiple CRM records

The screenshot shows the Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', and 'CORE > Accounts'. The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Activities', 'Dashboards', 'Customers', 'Accounts', and 'Contacts'. The main area displays a table of accounts. The 'Attach2Dynamics' button is highlighted with a red box.

Account Name	Main Ph...
Fourth Coffee (sample)	555-0150
Litware, Inc. (sample)	555-0151
Adventure Works Pvt. Ltd.	555-0152
Fabrikam, Inc. (sample)	555-0153
Blue Yonder Airlines (sample)	555-0154
City Power & Light (sample)	555-0155

The screenshot shows the 'Attach2Dynamics' dialog box open over the CRM interface. The dialog has a 'SharePoint' tab and a text input field for 'SharePoint : SharePoint Site'. Below this is an 'UPLOAD' button. A file selection window is also open, showing a folder named 'Deal- Alpha' containing a file named 'Brochure.docx'. The file selection window has a search bar and a list of files with columns for 'Name', 'Date modified', and 'Type'. The 'File name' field is empty, and the file type is set to 'All Files (*.*)'. The 'Open' button is highlighted.

Get a Read-only or Editable Anonymous Shareable link of files & folders

The screenshot displays the Dynamics 365 Sales Hub interface for the 'Alpine Ski House' account. The 'Attach2Dynamics' application is open, showing a file list with columns for Name, Size (KB), and Modified On. The file list contains two files: Alpha.docx (19.15 KB, 10/15/2019 1:13 AM) and Beta.docx (19.14 KB, 10/15/2019 1:13 AM). A context menu is open over the 'Alpha.docx' file, showing options for View, Edit, and Copy A Link. A 'Shared link of Alpha.docx' dialog box is displayed, showing a long URL and a 'Copy' button. The background interface includes a navigation pane on the left with sections like 'My Work', 'Customers', 'Sales', and 'Collateral'. The top navigation bar shows 'Sales > Accounts > Alpine Ski House'.

Attach2Dynamics

SharePoint Azure Blob Storage Dropbox

SharePoint : SharePoint Site

Alpine Ski House_01408B5E... / Deal

Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115

↑ UPLOAD ↓ DOWNLOAD ✎ RENAME ✉ EMAIL 🔗 COPY A LINK + CREATE FOLDER

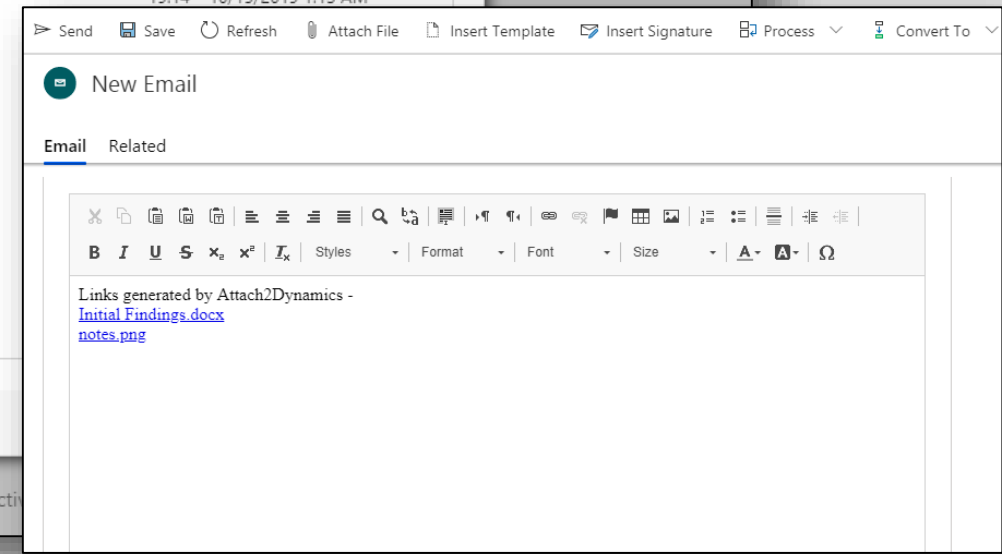
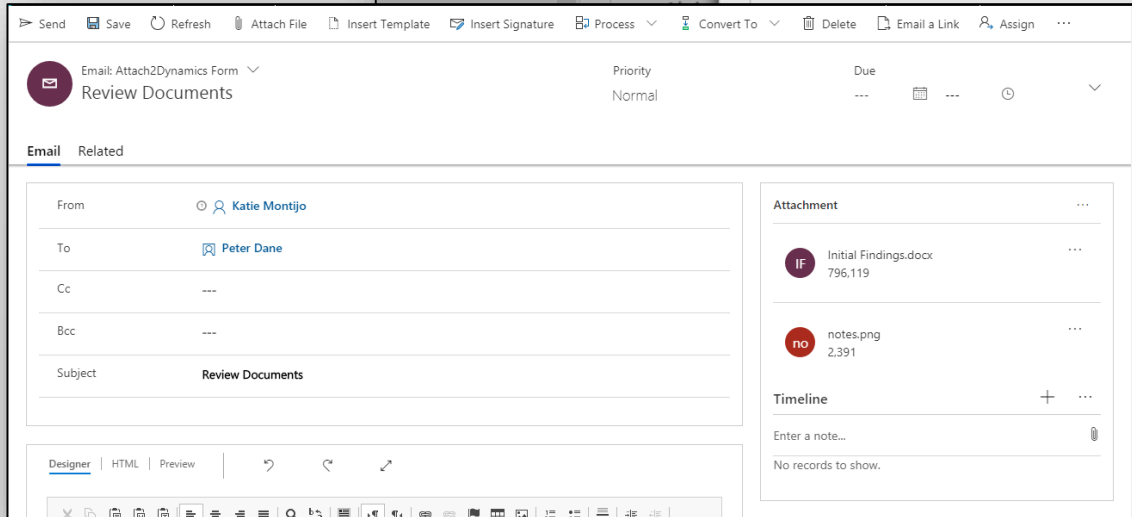
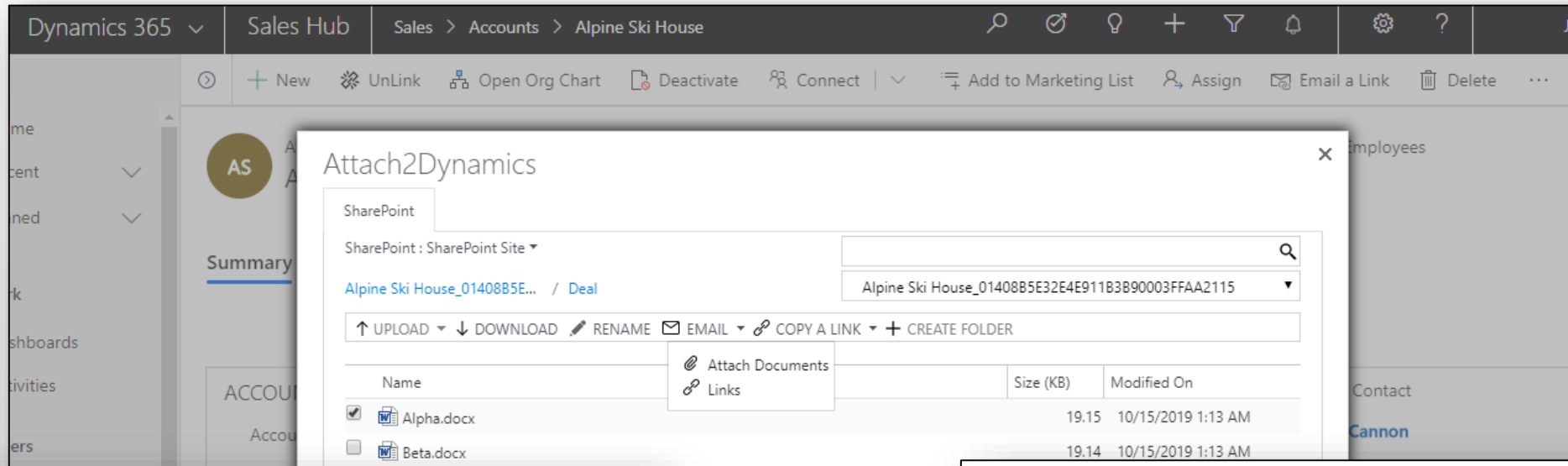
Name	Size (KB)	Modified On
Alpha.docx	19.15	10/15/2019 1:13 AM
Beta.docx	19.14	10/15/2019 1:13 AM

Drop files here.

Shared link of Alpha.docx

Copy

Email files as an attachment or share the link to the files



Deep Search

The screenshot shows the Dynamics 365 Sales Hub interface with the 'Attach2Dynamics' dialog box open. The dialog is titled 'Attach2Dynamics' and has a 'SharePoint' tab selected. It shows the search results for 'Alpha' in a SharePoint site. The search results table lists the following items:

Name	Path	Size (KB)
<input type="checkbox"/> Deal- Alpha	/account/Alpine...	
<input type="checkbox"/> Alpha.docx	/account/Alpine...	19.15

Below the table, there is a 'Drop files here.' prompt and a 'Close' button at the bottom right of the dialog.

Delete File

The screenshot shows the Dynamics 365 Sales Hub interface for the 'Alpine Ski House' account. A modal window titled 'Attach2Dynamics' is open, displaying a file list from a SharePoint site. The file list has columns for 'Name', 'Size (KB)', and 'Modified On'. Two files are listed: 'Alpha.docx' and 'Beta.docx'. The 'Beta.docx' row is highlighted, and a red box is drawn around the delete icon (trash can) in the rightmost column of that row. The background interface shows the account summary and a list of related records.

Name	Size (KB)	Modified On
Alpha.docx	19.15	10/15/2019 1:13 AM
Beta.docx	19.14	10/15/2019 1:13 AM

View File

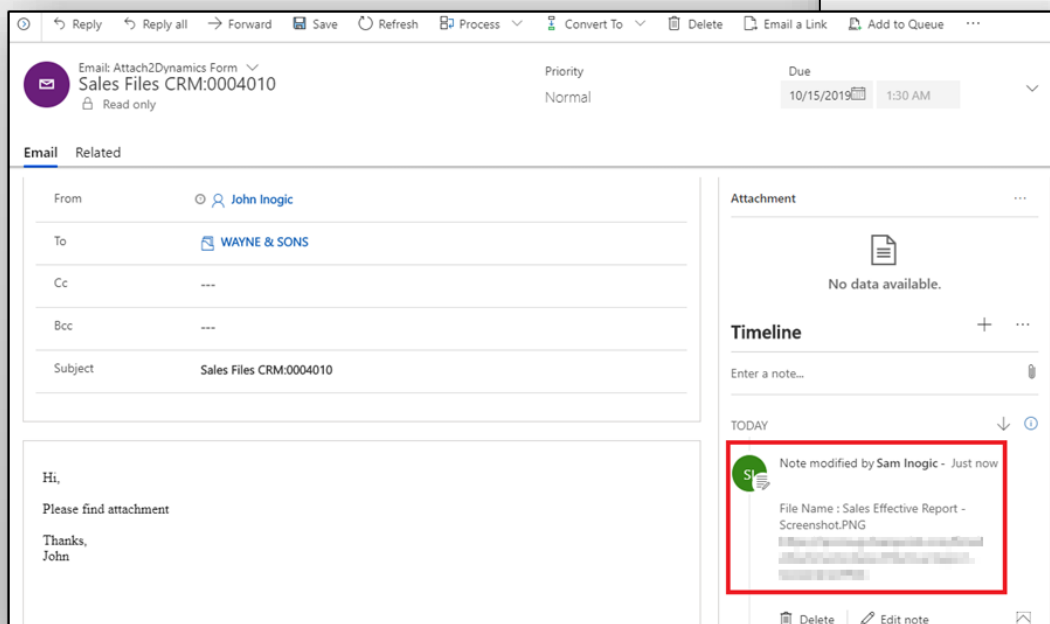
The screenshot displays a Microsoft Dynamics 365 web interface. At the top, a browser tab is labeled 'Beta.docx' and is highlighted with a red rectangle. The main navigation pane on the left includes sections for 'Home', 'Recent', 'Pinned', 'My Work', 'Customers', 'Sales', and 'Collateral'. The central area shows a record for 'Alpine Ski House' with a 'Summary' tab selected. A modal window titled 'Attach2Dynamics' is open in the foreground. This window has a 'SharePoint' tab and a search bar. Below the search bar, there are buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A table lists two files: 'Alpha.docx' (19.15 KB, modified 10/15/2019 1:13 AM) and 'Beta.docx' (19.14 KB, modified 10/15/2019 1:13 AM). The 'Beta.docx' file is selected with a checkmark. A 'Drop files here.' message is visible at the bottom of the modal, and a 'Close' button is in the bottom right corner.

Name	Size (KB)	Modified On
<input type="checkbox"/> Alpha.docx	19.15	10/15/2019 1:13 AM
<input checked="" type="checkbox"/> Beta.docx	19.14	10/15/2019 1:13 AM

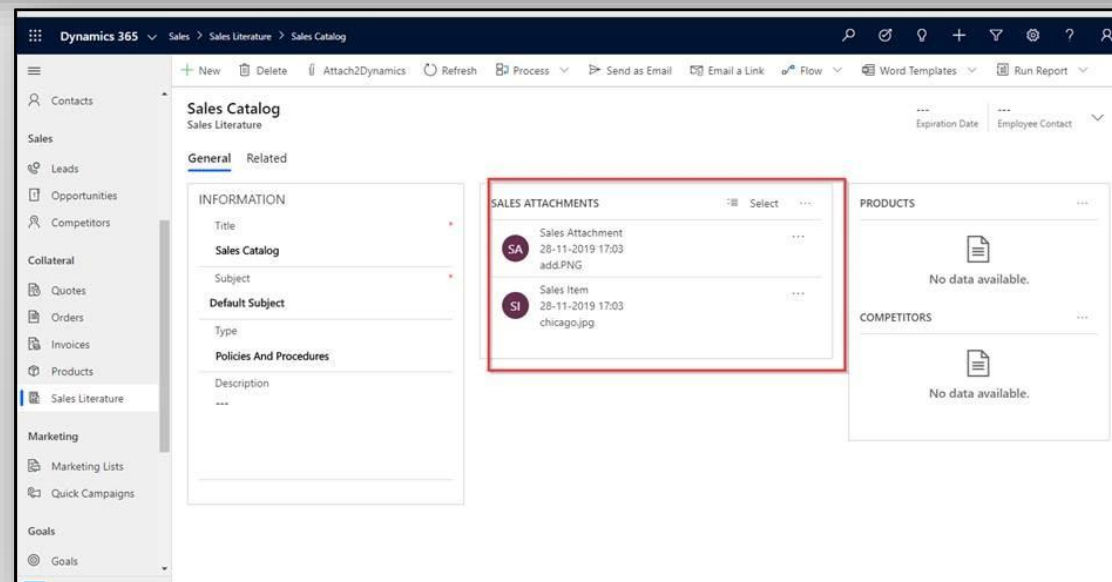
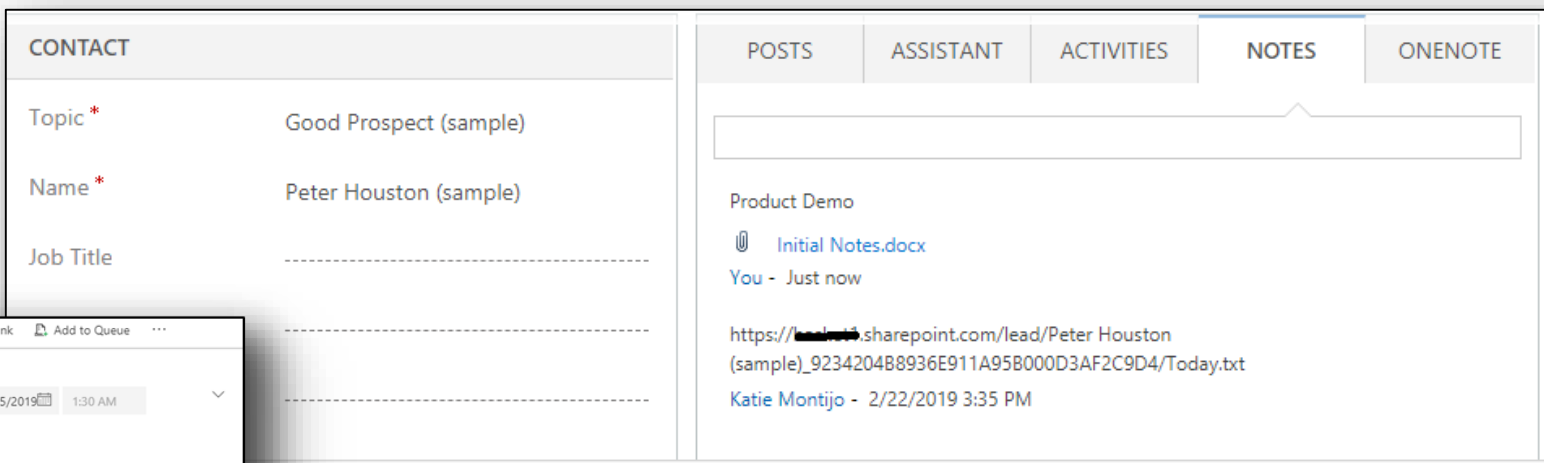
Move/Copy Dynamics 365 CRM Attachments

Email

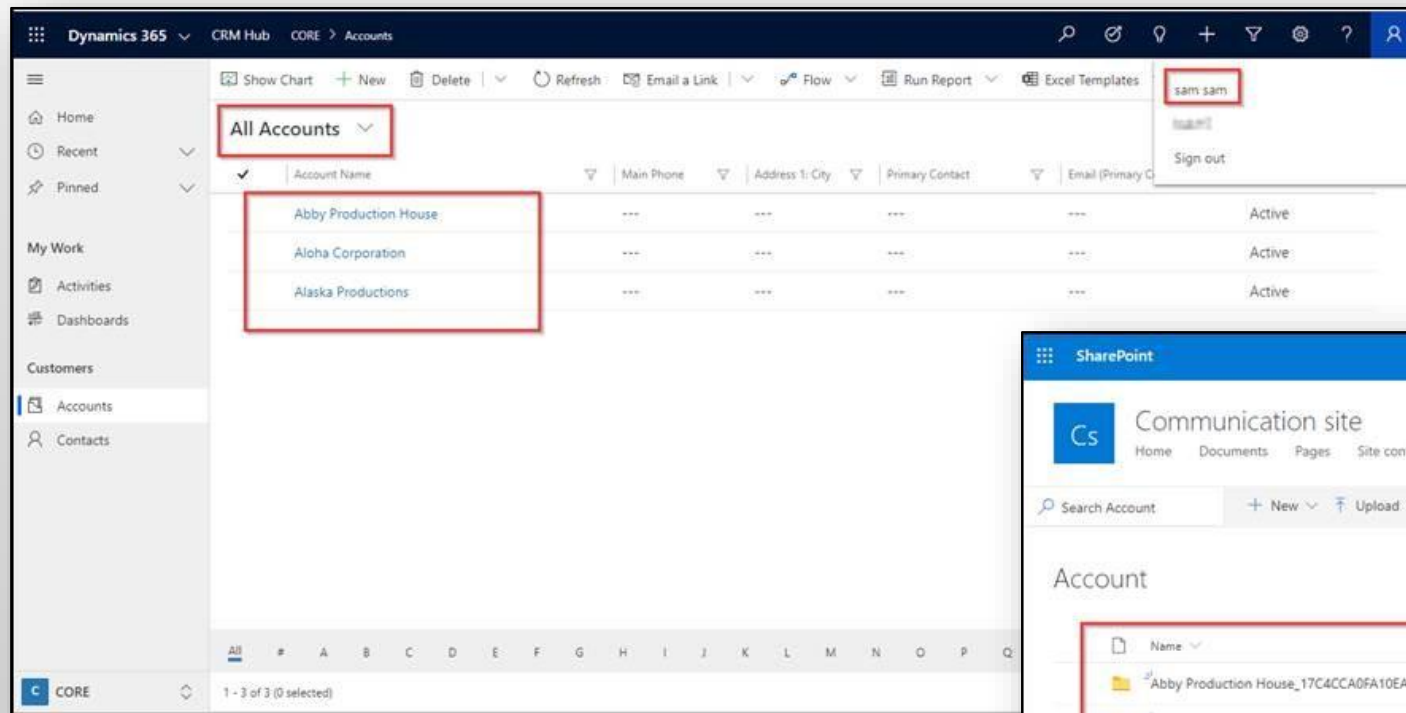
Notes



Sales Literature

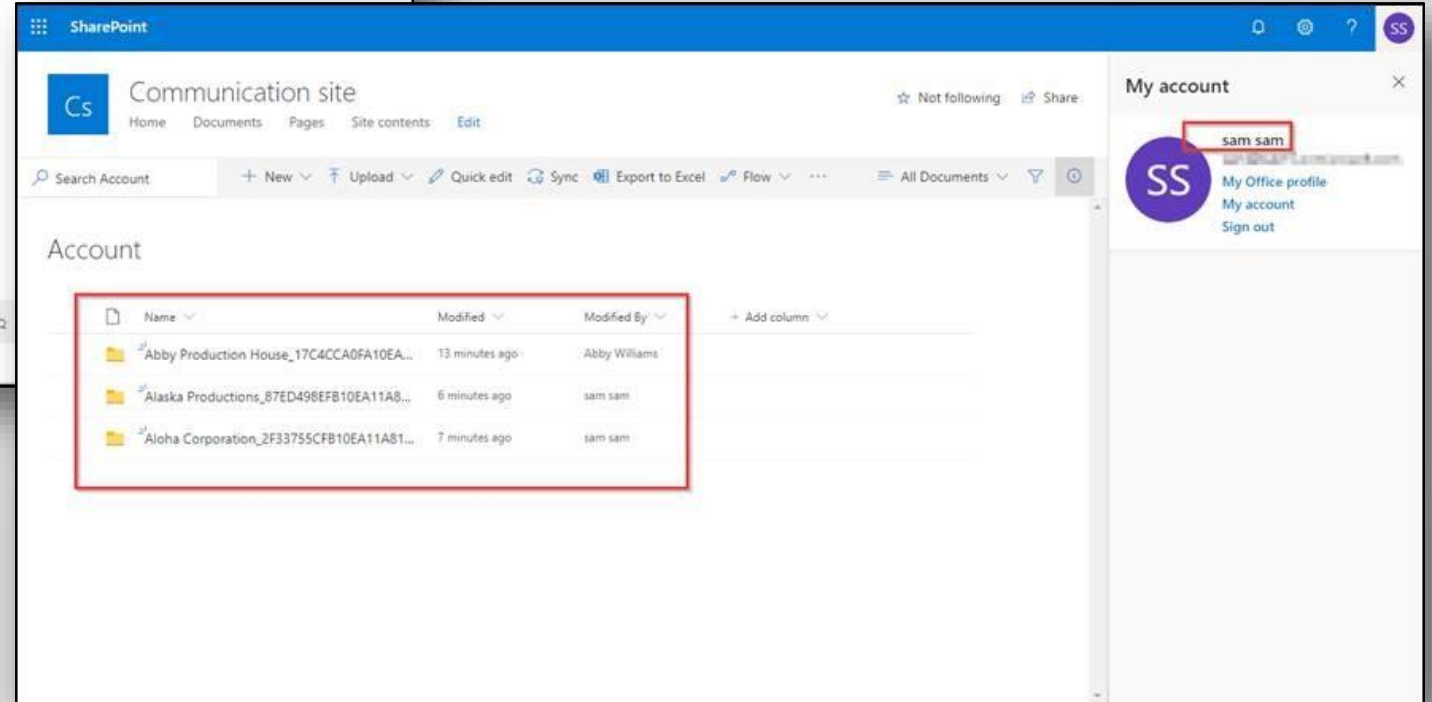


Folder access based on CRM record access



The screenshot shows the Microsoft Dynamics 365 Accounts list view. The 'All Accounts' dropdown is highlighted with a red box. The user 'sam sam' is logged in, as indicated by the profile icon in the top right corner. The table below shows a list of accounts:


Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary)	Status
Abby Production House	---	---	---	---	Active
Aloha Corporation	---	---	---	---	Active
Alaska Productions	---	---	---	---	Active



The screenshot shows a SharePoint Communication site. The user 'sam sam' is logged in, as indicated by the profile icon in the top right corner. The site is titled 'Communication site'. The 'Account' list view is shown, with a table of folders:


Name	Modified	Modified By
Abby Production House_17C4CCA0FA10EA...	13 minutes ago	Abby Williams
Alaska Productions_87ED498EFB10EA11A8...	6 minutes ago	sam sam
Aloha Corporation_2F33755CFB10EA11A81...	7 minutes ago	sam sam

Security Templates


 SECURITY TEMPLATE
SharePoint security template

Owner
John Inogic


General Permissions Related

Name	* SharePoint security templ...
Connector	*  SharePoint Site

Users

 Add Existing User ...

✓	Full Name	Site	Business Unit	Title
	John Inogic	---	ipcrmug	---


 SharePoint security template

General Permissions Related

All	<input checked="" type="checkbox"/>
Upload	<input checked="" type="checkbox"/>
Download	<input checked="" type="checkbox"/>
View Files	<input checked="" type="checkbox"/>
Rename	<input checked="" type="checkbox"/>

Email	<input checked="" type="checkbox"/>
Copy A Link	<input checked="" type="checkbox"/>
Create Folder	<input checked="" type="checkbox"/>
Delete File	<input checked="" type="checkbox"/>


Bulk Migrate Dynamics 365 CRM Attachments


 BULK MIGRATION JOB
Emails - Last X Weeks

Status Reason
Scheduled

Owner
John Inogic

General Information Bulk Migration Job Status Related

For ?	* Emails	Operator	* Last X Weeks
Connector	*  SharePoint Site	Value	* 1
Schedule Date	* 10/11/2019 7:30 AM		
Attachment Action	* Move		

 BULK MIGRATION JOB
Emails - Last X Weeks
Read only

Status Reason
Completed

Owner
John Inogic

General **Information** Bulk Migration Job Status Related

Total Records Processed	145
Last updated:	10/15/2019 3:37 AM

Total Succeeded Records	145	Total Succeeded Size (KB)	11,559.09
Last updated:	10/15/2019 3:37 AM	Last updated:	10/15/2019 3:37 AM
Total Ignored Records	0	Total Ignored Size (KB)	0.00
Last updated:	10/15/2019 3:37 AM	Last updated:	10/15/2019 3:37 AM
Total Failed Records	0	Total Failed Size (KB)	0.00
Last updated:	10/15/2019 1:37 AM	Last updated:	10/15/2019 3:37 AM

Connector Configuration

The screenshot displays the Dynamics 365 SharePoint Security Sync application. The top navigation bar includes 'Dynamics 365' and 'SharePoint Security Sync'. A left-hand menu lists various options: Home, Recent, Pinned, SharePoint Security Sync (expanded), Connectors (selected), Entity Configurations, Security Templates, Bulk Migration Jobs, Logs, and License Registration. The main content area is titled 'New Connector' and features four tabs: General (active), Credentials, Additional Settings, and Entity Configurations. The 'General' tab contains the following configuration fields:

General	
Name	* SharePoint_1
Connector Type	* SharePoint
Default Connector	<input type="checkbox"/>
SharePoint Site	* Default Site
Auth-Type	* App v

Entity Configuration

Dynamics 365 > SharePoint Security Sync > Administration > Entity Configurations > account - SharePoint_1

account - SharePoint_1
Entity Configuration

General Sync Status Email Configuration Related

Connector	* SharePoint_1
Entity Name	* Account
Attachment Action	Move
Override Files	<input type="checkbox"/>

Logs

Dynamics 365 > SharePoint Security Sync > Administration > Entity Configurations > account - SharePoint_1

account - SharePoint_1
Entity Configuration

General Sync Status **Email Configuration** Related

From	Me	
To	Users	<input type="text" value="x Dave N"/>
Cc	Team	<input type="text" value="x Sales"/>
Bcc	Manager	<input type="text" value="x OwningUser"/>

Bulk Sync Tool

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Cred Subsite SP	https://trial2020feb.sharepoint.com/sub:	john@trial2020feb.onmicrosoft.com
Team Sub Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com
Team Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com

Security Groups Folder Security Failed Sync

<input checked="" type="checkbox"/> Entity Display Name	Entity Logical Name
<input checked="" type="checkbox"/> Opportunity	opportunity

Sync Delete Groups

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Cred Subsite SP	https://trial2020feb.sharepoint.com/sub:	john@trial2020feb.onmicrosoft.com
Team Sub Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com
Team Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com

Security Groups Folder Security Failed Sync

<input checked="" type="checkbox"/> Entity Display Name	Entity Logical Name	From Date	To Date
<input checked="" type="checkbox"/> Opportunity	opportunity	2020-01-27	2020-02-20

Sync

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Cred Subsite SP	https://trial2020feb.sharepoint.com/sub:	john@trial2020feb.onmicrosoft.com
Team Sub Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com
Team Site	https://trial2020feb.sharepoint.com/site	john@trial2020feb.onmicrosoft.com

Security Groups Folder Security Failed Sync

Sync records that are failed due to SharePoint Security Sync app.

Sync

Next Steps

Learn more about [SharePoint Security Sync](#) today.

Get your free **SharePoint Security Sync** trial from [our website!](#)

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