



**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

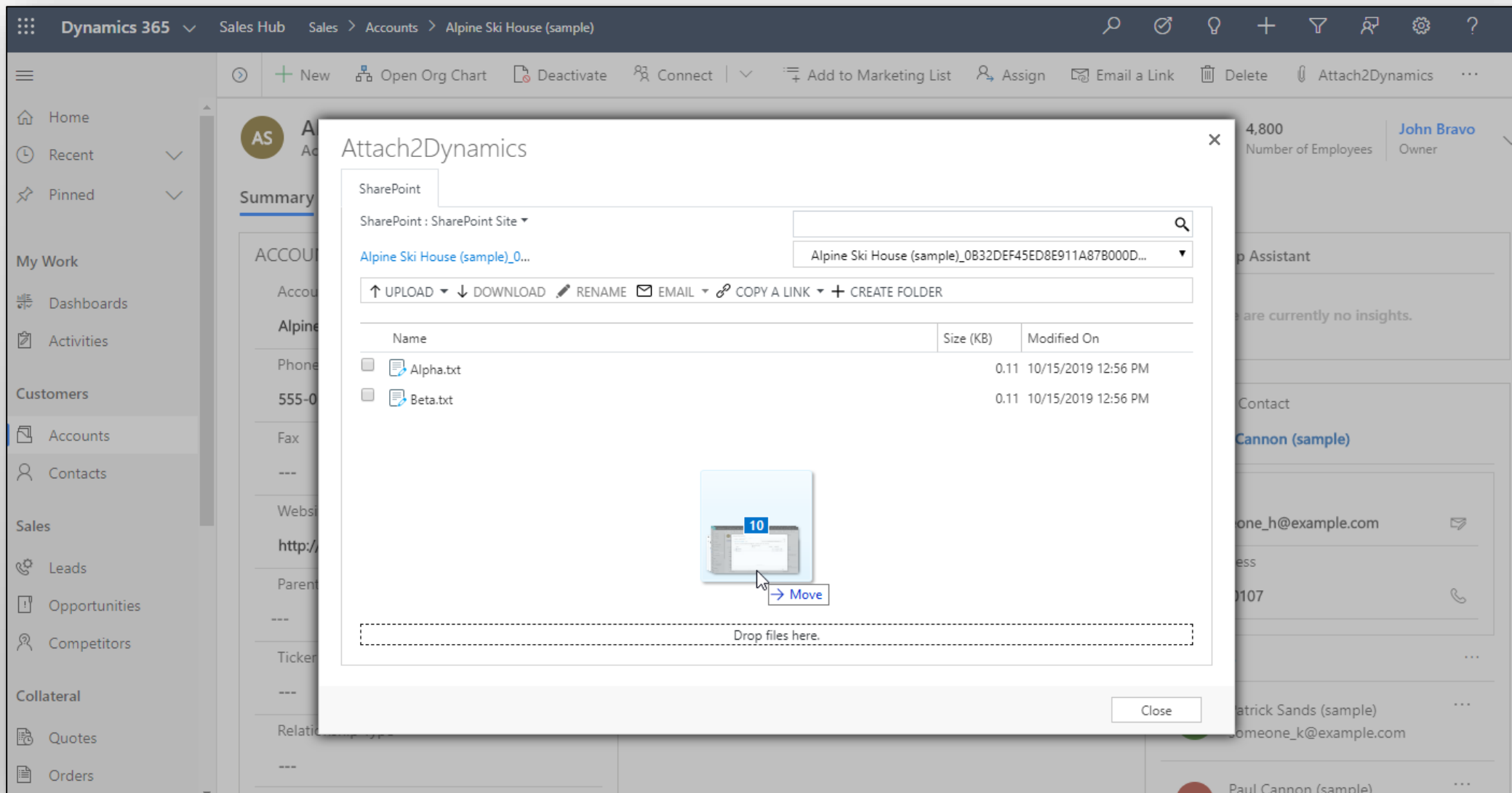
SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above

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 search bar for 'SharePoint : SharePoint Site' with the results 'Alpine Ski House (sample)_0...' and 'Alpine Ski House (sample)_0B32DEF45ED8E911A87B000D...'. Below the search bar, there are buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY A LINK', and 'CREATE FOLDER'. A table lists files with columns 'Name', 'Size (KB)', and 'Modified On'. The table contains two rows: 'Alpha.txt' and 'Beta.txt', both with a size of 0.11 KB and a modified date of 10/15/2019 12:56 PM. Below the table, there is a 'Drop files here.' area with a dashed border. A mouse cursor is hovering over a 'Move' button. The background shows the Dynamics 365 interface with the 'Accounts' section selected in the left navigation pane.

| 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 |

Upload/Download files & folders

The screenshot displays the Dynamics 365 Sales Hub interface with the 'Attach2Dynamics' window open. The window is titled 'Attach2Dynamics' and shows a 'SharePoint' tab. The 'SharePoint : SharePoint Site' dropdown is set to 'Alpine Ski House_01408B5E...'. The 'Alpine Ski House_01408B5E...' dropdown is set to 'Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115'. The 'UPLOAD' button is highlighted, and a dropdown menu is open showing 'Files' and 'Folder' options. Below the menu, a table lists files and folders:

| | 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 |

At the bottom of the window, there is a 'Drop files here.' prompt and a 'Close' button.

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 'My Work' (Home, Recent, Pinned) and 'Customers' (Accounts, Contacts). The main area displays 'All Accounts' with a table of account records. 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 visible over the file list, showing 'View' and 'Edit' options. A 'Shared link of Alpha.docx' dialog box is open, displaying a long alphanumeric link and a 'Copy' button.

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

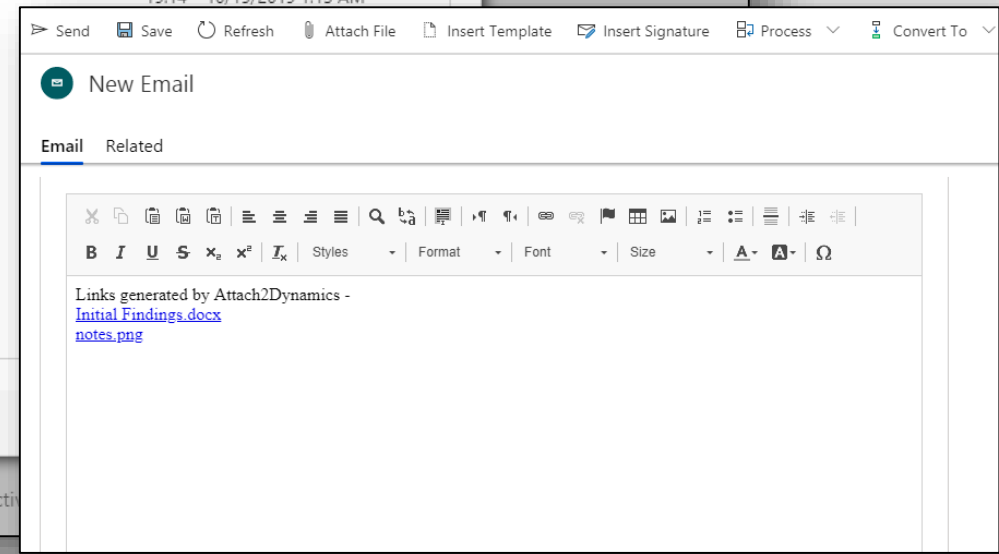
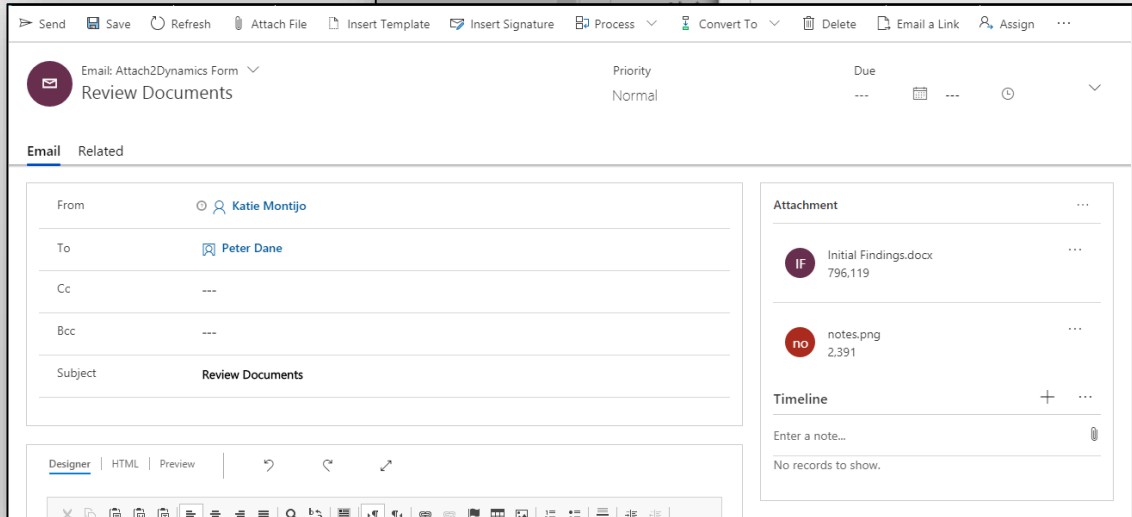
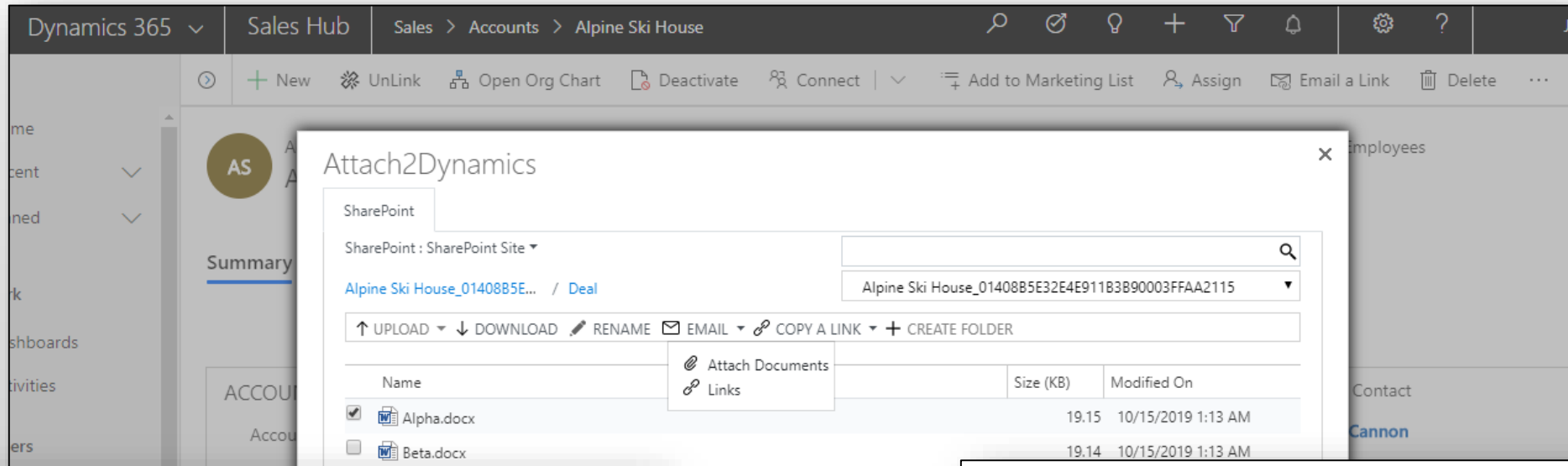
| Name | Size (KB) | Modified On |
|--|-----------|--------------------|
| <input checked="" type="checkbox"/> Alpha.docx | 19.15 | 10/15/2019 1:13 AM |
| <input type="checkbox"/> Beta.docx | 19.14 | 10/15/2019 1:13 AM |

Drop files here.

Shared link of Alpha.docx

Copy

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



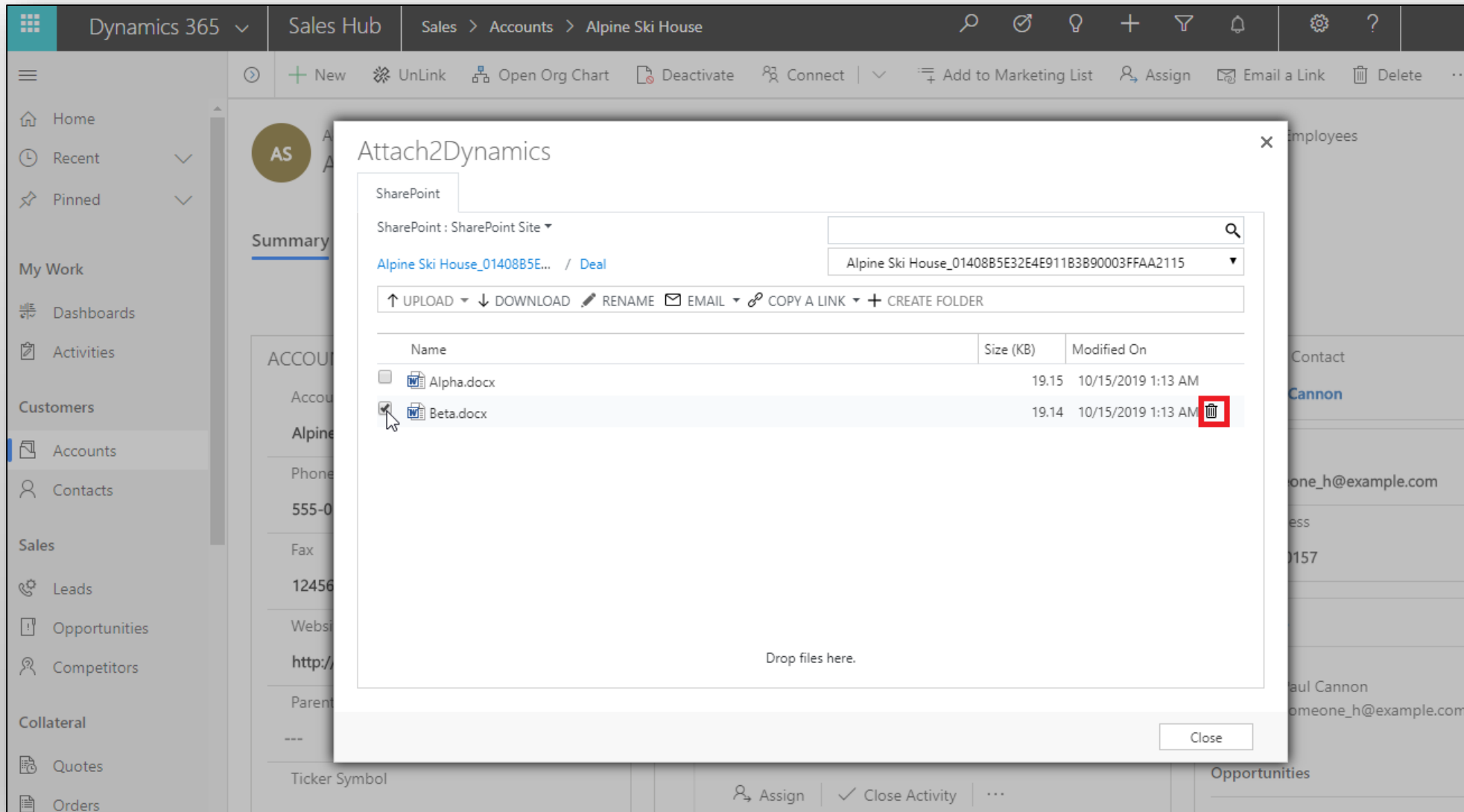
Deep Search

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 interface with the 'Attach2Dynamics' dialog box open. The dialog is titled 'Attach2Dynamics' and has a 'SharePoint' tab. It displays a list of files from a SharePoint site. The file 'Beta.docx' is selected, and a red box highlights the delete icon (trash can) next to it.


SharePoint

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 | |
|-------------------------------------|------------|-----------|--------------------|---|
| <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 |  |

Drop files here.

Close

View File

The screenshot shows the Microsoft Dynamics 365 interface. The top navigation bar includes 'Dynamics 365', 'Sales Hub', and a breadcrumb trail 'Sales > Accounts > Alpine Ski House'. A browser tab at the top is labeled 'Beta.docx'. A modal dialog titled 'Attach2Dynamics' is open, showing a file selection interface. The dialog has a 'SharePoint' tab and displays the following information:

- SharePoint : SharePoint Site
- Alpine Ski House_01408B5E... / Deal
- Alpine Ski House_01408B5E32E4E911B3B90003FFAA2115
- Actions: UPLOAD, DOWNLOAD, RENAME, EMAIL, COPY A LINK, CREATE FOLDER

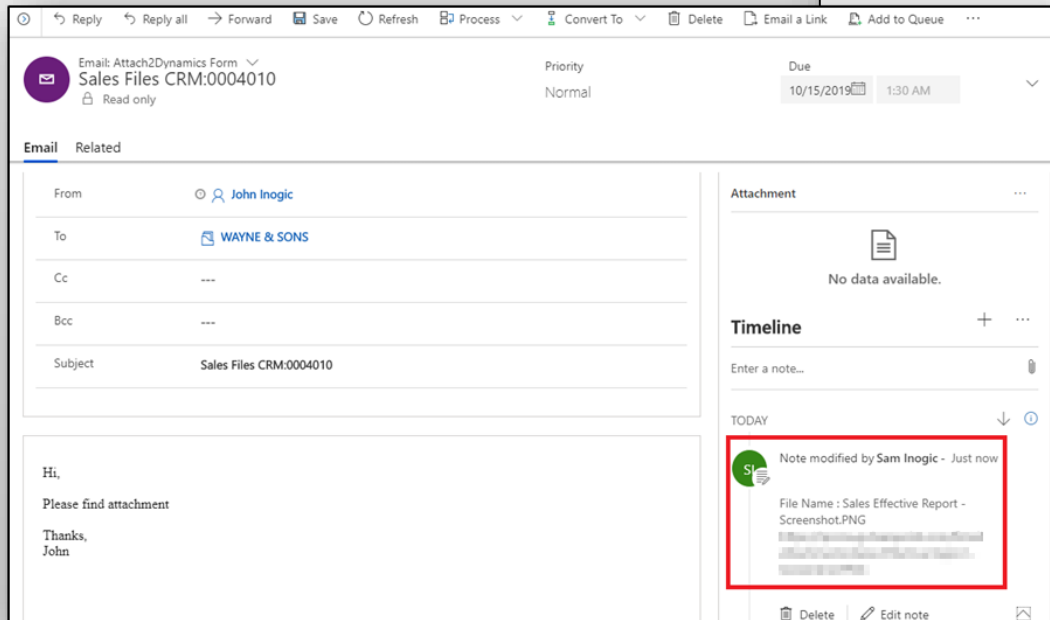
| Name | Size (KB) | Modified On |
|---|-----------|--------------------|
| <input type="checkbox"/> Alpha.docx | 19.15 | 10/15/2019 1:13 AM |
| <input checked="" type="checkbox"/> Beta.docx | 19.14 | 10/15/2019 1:13 AM |

Below the table is a 'Drop files here.' area and a 'Close' button at the bottom right.

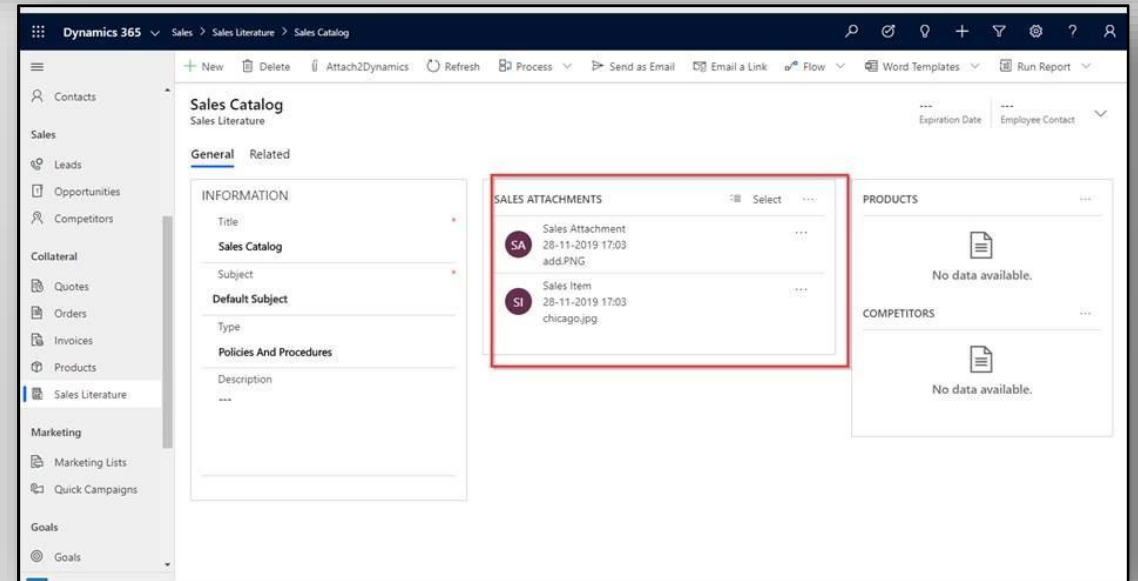
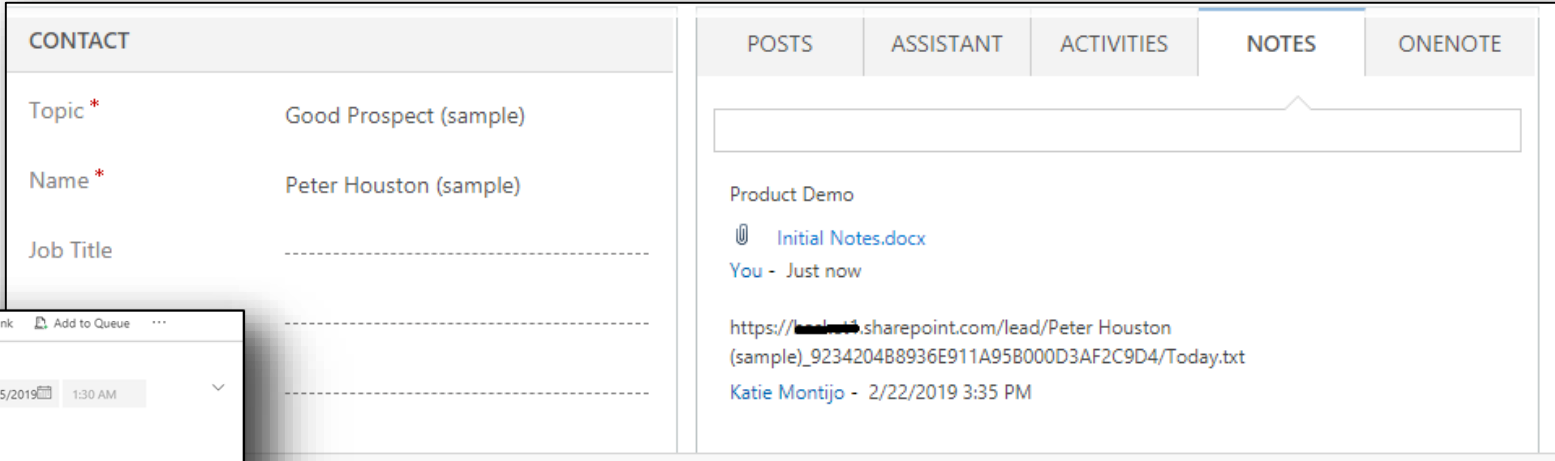
Move/Copy Dynamics 365 CRM Attachments

Email

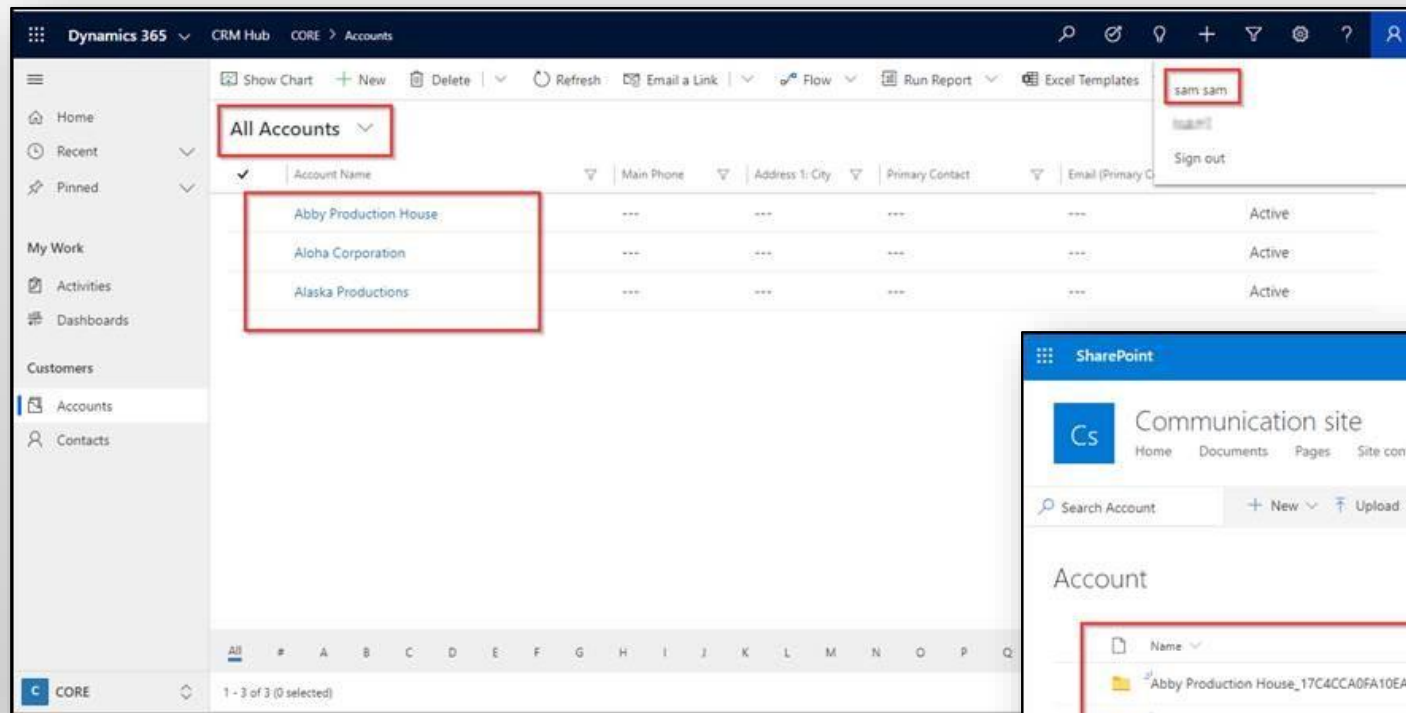
Notes



Sales Literature

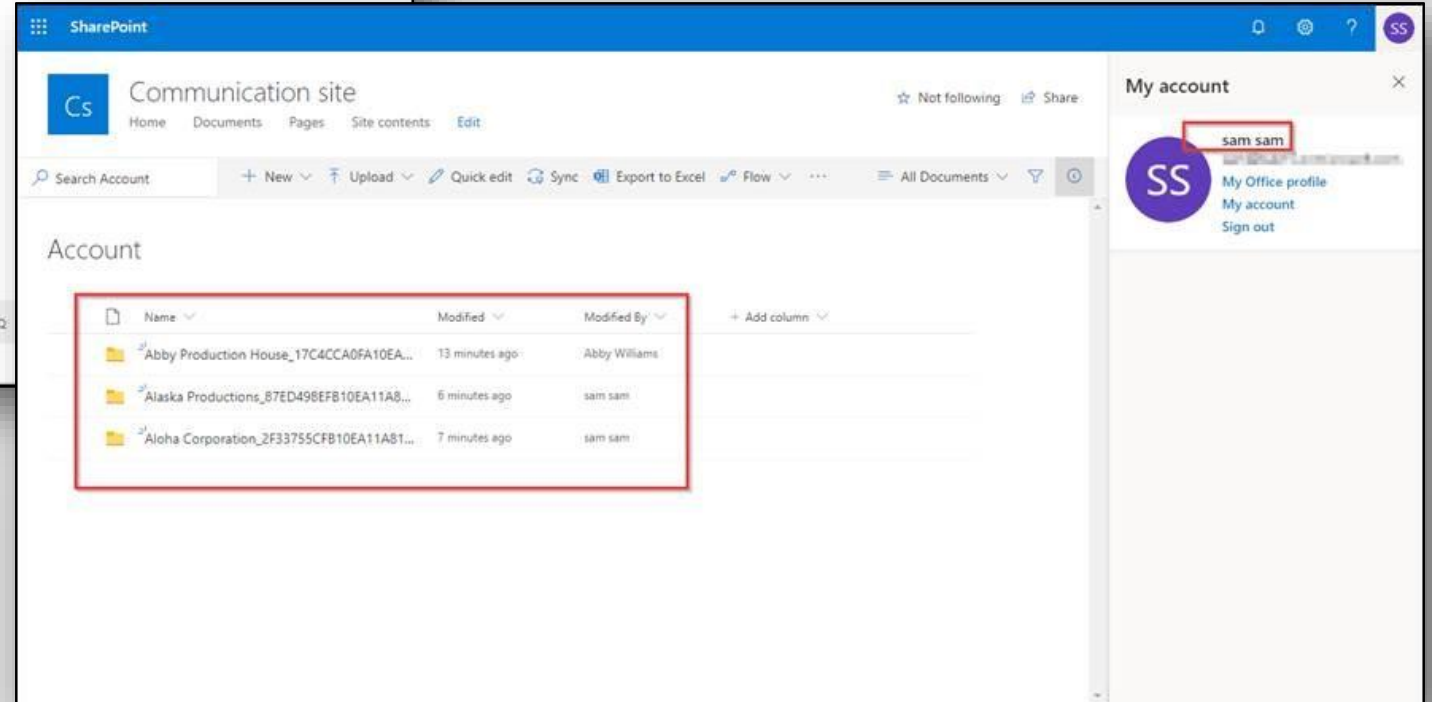


Folder access based on CRM record access



The screenshot shows the Microsoft Dynamics 365 Accounts list view. The 'All Accounts' dropdown menu is highlighted with a red box. The user's name 'sam sam' is visible in the top right corner, also highlighted with a red box. 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 the Microsoft SharePoint Communication site. The user's name 'sam sam' is visible in the top right corner, highlighted with a red box. The 'Account' list view shows a table of folders, with the folder names highlighted by a red box:


| 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

New Connector

General Credentials Additional Settings Entity Configurations Permissions

General

| | | |
|-------------------|---|--|
| Name | * | SharePoint_1 |
| Connector Type | * | SharePoint |
| Default Connector | | <input type="checkbox"/> |
| SharePoint Site | * |  Default Site |
| Auth-Type | * | <div>--Select-- --Select-- Credential App</div> |

Entity Configuration

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

[New](#) [Deactivate](#) [Delete](#) [Refresh](#) [Assign](#) [Share](#) [Email a Link](#) [Flow](#) [Word Templates](#) [Run Report](#)

account - SharePoint_1

Entity Configuration

General Sync Status Related

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

Logs

[Refresh](#) [Run Report](#) ...

| Record Id | Entity Configuration | Information | Record URL | Created On |
|-----------|----------------------|-------------|------------|------------|
|-----------|----------------------|-------------|------------|------------|

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!](#)

Email: crm@inogic.com

