



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 ONLINEON-PREMISES WITH IFD





Drag and Drop multiple files & folders

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SharePoint Security Sync



Upload/Download files & folders

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SharePoint Security Sync



Upload files & folders to multiple CRM records

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

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SharePoint Security Sync



Deep Search

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Delete File

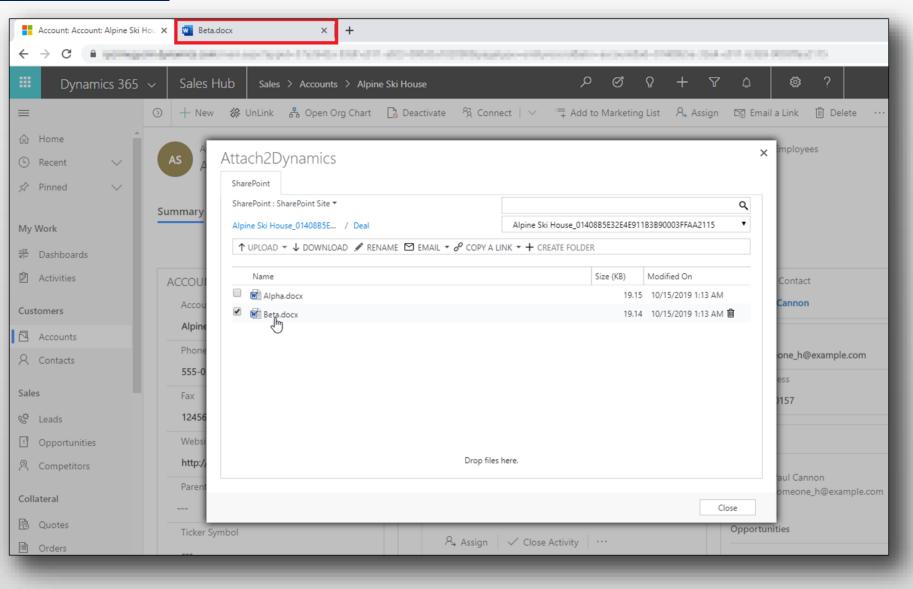
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View File

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crm@inogic.com

Move/Copy Dynamics 365 CRM Attachments

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SharePoint Security Sync



Folder access based on CRM record access

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SharePoint Security Sync



Security Templates

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Bulk Migrate Dynamics 365 CRM Attachments

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SharePoint Security Sync



Connector Configuration

New Connector

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SharePoint Security Sync



Bulk Sync Tool

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Next Steps

Learn more about <u>SharePoint</u> <u>Security Sync</u> today.

Get your free SharePoint Security Sync trial from our website!

Email: <u>crm@inogic.com</u>





