



**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 window open. The window displays the following information:

- SharePoint** section:
 - SharePoint : SharePoint Site
 - Alpine Ski House (sample)_0...
 - Alpine Ski House (sample)_0B32DEF45ED8E911A87B000D...
- Actions: UPLOAD, DOWNLOAD, RENAME, EMAIL, COPY A LINK, CREATE FOLDER
- File List:

Name	Size (KB)	Modified On
<input type="checkbox"/> Alpha.txt	0.11	10/15/2019 12:56 PM
<input type="checkbox"/> Beta.txt	0.11	10/15/2019 12:56 PM

Below the table is a "Drop files here." area with a dashed border and a "Move" button.

Upload/Download 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 selected. It displays the following information:

- SharePoint : SharePoint Site
- Alpine Ski House_0140885E... (selected)
- Alpine Ski House_0140885E32E4E911B3B90003FFAA2115
- Actions: UPLOAD, DOWNLOAD, RENAME, EMAIL, COPY A LINK, CREATE FOLDER
- File/Folder list:

	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

The dialog box also includes a "Drop files here." area and a "Close" button.

Upload files & folders to multiple CRM records

Dynamics 365 CRM Hub CORE > Accounts

Show Chart Edit Activate Deactivate **Attach2Dynamics** Delete Add to Marketing

All Accounts

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

Dynamics 365 Sales Hub Sales > Accounts

Show Chart Edit Activate Deactivate Attach2Dynamics Delete Click2Export Promote UnLink Click2Clone

Attach2Dynamics

SharePoint
SharePoint : SharePoint Site

UPLOAD

Name
This folder is empty. Upload documents here.

Open

Deal-Alpha > Deal-Beta

Search Deal-Beta

Name	Date modified	Type
Brochure.docx	31-07-2019 17:05	Microso

File name: All Files (*.*)
Open Cancel

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

The image shows a Dynamics 365 Sales Hub interface with the Attach2Dynamics tool overlaid. The tool is connected to a SharePoint site and displays a file list:

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

A context menu is open over the 'Alpha.docx' file, showing 'View' and 'Edit' options. A second window titled 'Shared link of Alpha.docx' is open, displaying a text input field for the link and a 'Copy' button.

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

Dynamics 365 | Sales Hub | Sales > Accounts > Alpine Ski House

Attach2Dynamics

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
Alpha.docx	19.15	10/15/2019 1:13 AM
Beta.docx	19.14	10/15/2019 1:13 AM

Attach Documents
Links

Send Save Refresh Attach File Insert Template Insert Signature Process Convert To Delete Email a Link Assign

Email: Attach2Dynamics Form Review Documents

Priority Normal Due

From Katie Montijo

To Peter Dane

Cc

Bcc

Subject Review Documents

Attachment

- Initial Findings.docx 796,119
- notes.png 2,391

Timeline

Enter a note...

No records to show.

Designer HTML Preview

Send Save Refresh Attach File Insert Template Insert Signature Process Convert To

New Email

Email Related

Drop files here.

Links generated by Attach2Dynamics -

- [Initial Findings.docx](#)
- [notes.png](#)

Assign Close Action

Deep Search

The screenshot shows the Dynamics 365 Sales Hub interface for the 'Alpine Ski House' account. A dialog box titled 'Attach2Dynamics' is open, displaying search results for 'Alpha' in a SharePoint site. The dialog includes a search bar with 'Alpha' entered, a dropdown menu showing the selected site, and a table of search results. Below the table is a 'Drop files here.' area and a 'Close' button.

SharePoint

SharePoint : SharePoint Site ▾ Alpha

Alpine Ski House_0140885E...

Search result for "Alpha"

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

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

Drop files here.

Close

Delete File

The screenshot shows the Dynamics 365 interface with a modal window titled "Attach2Dynamics" open. The modal window displays a SharePoint file list with two files: "Alpha.docx" and "Beta.docx". The "Beta.docx" file is selected, and a red box highlights the delete icon (trash can) in the right column of the table. The background shows the Dynamics 365 navigation pane and a record view for "Alpine Ski House".

SharePoint

SharePoint : SharePoint Site

Alpine Ski House_0140885E... / Deal

Alpine Ski House_0140885E32E4E911B3B90003FFAA2115

↑ 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 a Microsoft Dynamics 365 interface with a file attachment dialog box open. The dialog box, titled "Attach2Dynamics", is positioned over a record view for "Alpine Ski House". The dialog box displays a list of files in a SharePoint site, with "Beta.docx" selected. The background shows the Dynamics 365 navigation pane and a record view for "Alpine Ski House".

Account: Account: Alpine Ski Ho... x Beta.docx x +

Dynamics 365 Sales Hub Sales > Accounts > Alpine Ski House

Home Recent Pinned My Work Dashboards Activities Customers Accounts Contacts Sales Leads Opportunities Competitors Collateral Quotes Orders

Summary

AS

Attach2Dynamics

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

Move/Copy Dynamics 365 CRM Attachments

Email

Notes

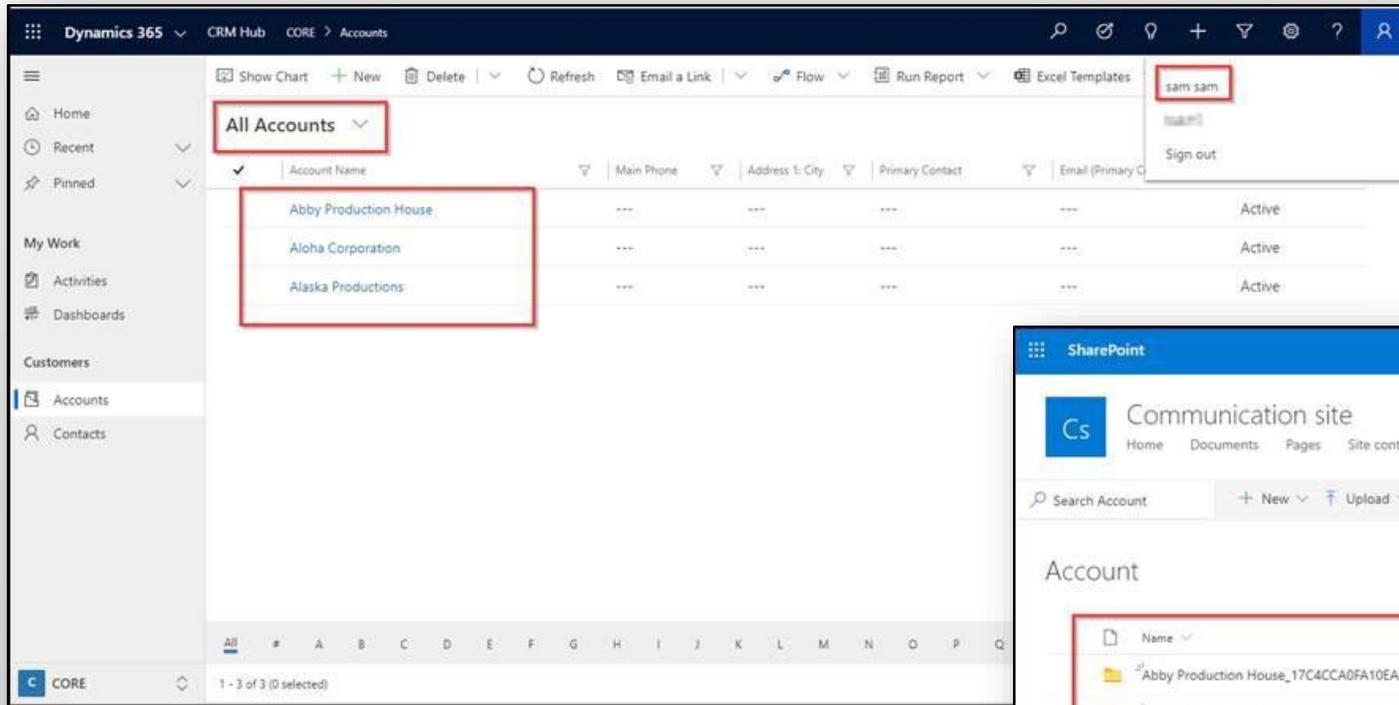
The screenshot shows an email interface in Dynamics 365. The email is from John Inogic to WAYNE & SONS, with the subject 'Sales Files CRM:0004010'. The email body contains the text: 'Hi, Please find attachment Thanks, John'. On the right side, there is a 'Timeline' section with a note: 'Note modified by Sam Inogic - Just now' and 'File Name : Sales Effective Report - Screenshot.PNG'. A red box highlights this note.

Sales Literature

The screenshot shows a contact record in Dynamics 365. The contact details are: Topic: 'Good Prospect (sample)', Name: 'Peter Houston (sample)', and Job Title: '-----'. On the right side, there is a 'NOTES' tab with a note: 'Product Demo' and an attachment 'Initial Notes.docx'. Below the note, there is a URL: 'https://[redacted].sharepoint.com/lead/Peter Houston (sample)_9234204B8936E911A95B000D3AF2C9D4/Today.txt' and the text 'Katie Montijo - 2/22/2019 3:35 PM'.

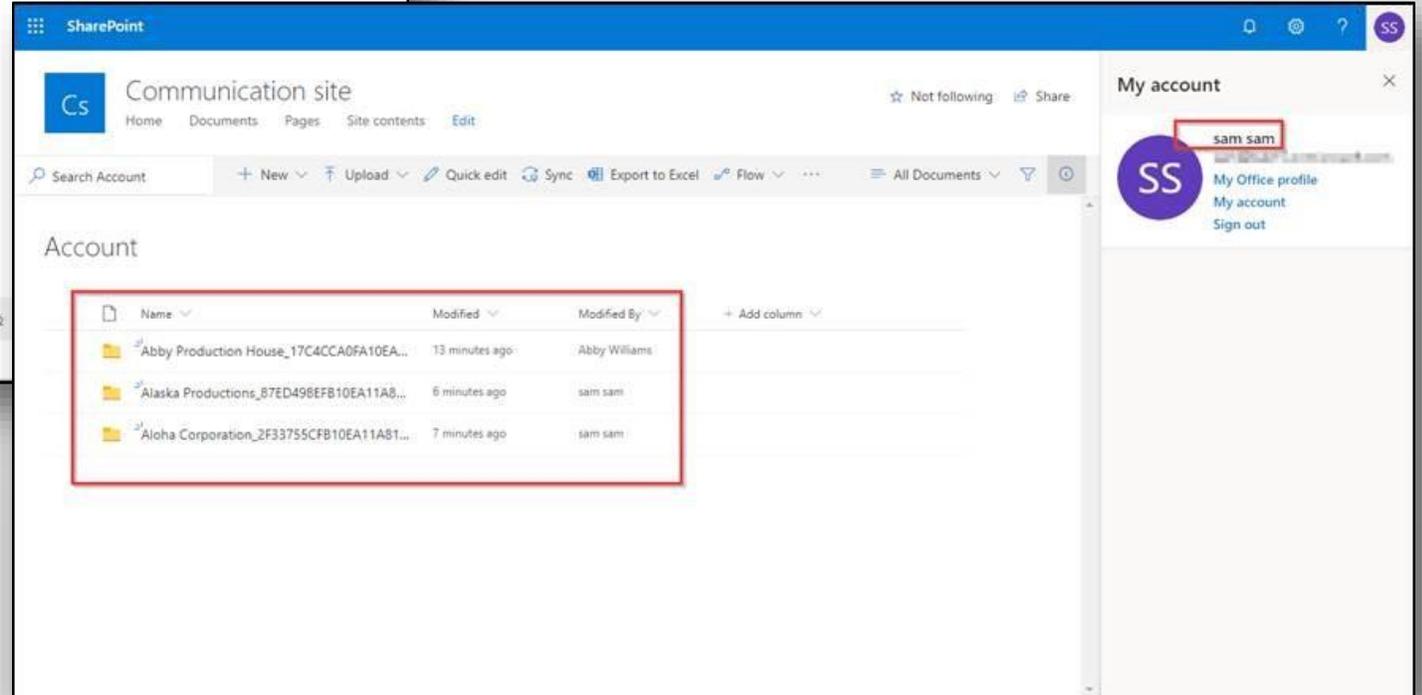
The screenshot shows a 'Sales Catalog' record in Dynamics 365. The record is titled 'Sales Catalog' and is under the 'Sales Literature' category. The 'SALES ATTACHMENTS' section is highlighted with a red box and contains two items: 'Sales Attachment' (28-11-2019 17:03 add.PNG) and 'Sales Item' (28-11-2019 17:03 chicago.jpg). The 'PRODUCTS' and 'COMPETITORS' sections are empty.

Folder access based on CRM record access



The screenshot shows the Dynamics 365 Accounts list view. The user is logged in as 'sam sam'. The 'All Accounts' dropdown is highlighted. The list contains three accounts: Abby Production House, Aloha Corporation, and Alaska Productions. The user's profile picture and name are visible in the top right corner.

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 is logged in as 'sam sam'. The site is titled 'Communication site'. The 'Account' list view is shown, with three folders listed: Abby Production House, Alaska Productions, and Aloha Corporation. The user's profile picture and name are visible in the top right corner.

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	---

SECURITY TEMPLATE
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

Status Reason: **Completed** Owner: John Inogic

General **Information** Bulk Migration Job Status Related

Read only

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

Connector Configuration

Dynamics 365 SharePoint Security Sync

Save Save & Close + New Flow

New Connector

General Credentials Additional Settings Entity Configurations

General

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

Entity Configuration

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

Entity Configuration: account - SharePoint_1

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

Entity Configuration: account - SharePoint_1

General | Sync Status | Email Configuration | Related

From	Me	
To	Users	x Dave N
Cc	Team	x Sales
Bcc	Manager	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	From Date	To Date
<input checked="" type="checkbox"/>	Opportunity	opportunity	2020-01-27	2020-02-20

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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