



Dynamics 365 Secure Vault

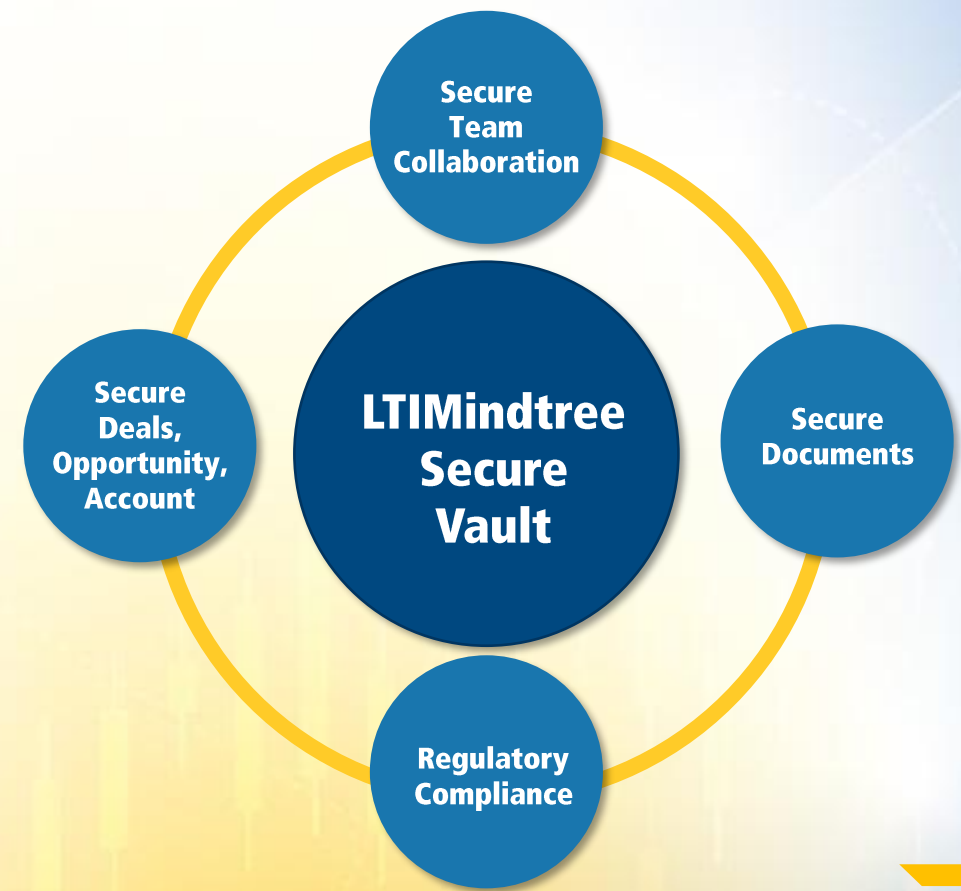
Enhance Security of critical business records
(Deals, opportunity, leads)

Microsoft Partner
Azure Expert MSP
 Microsoft

 Microsoft
Solutions Partner

Industry: Secure Commercial banking Deals, Opportunity

- Mergers and acquisitions opportunity involve large teams which needs time bound access.
- Manage BFSI Fraud audit/investigation.
- Financial institution compliance.



CHALLENGES

- Security roles give fixed access
- Conditional Security for critical accounts and deals
- Record wise security required

IDEAL SOLUTION

- Configurable Record wise security for HNI records .
- Seamless access to CRM and SharePoint records

DESIRED OUTCOMES

- Complies with banking regulatory requirements
- BSFI Fraud audit
- Configurable team definitions
- Easily configurable document access

Business Challenges

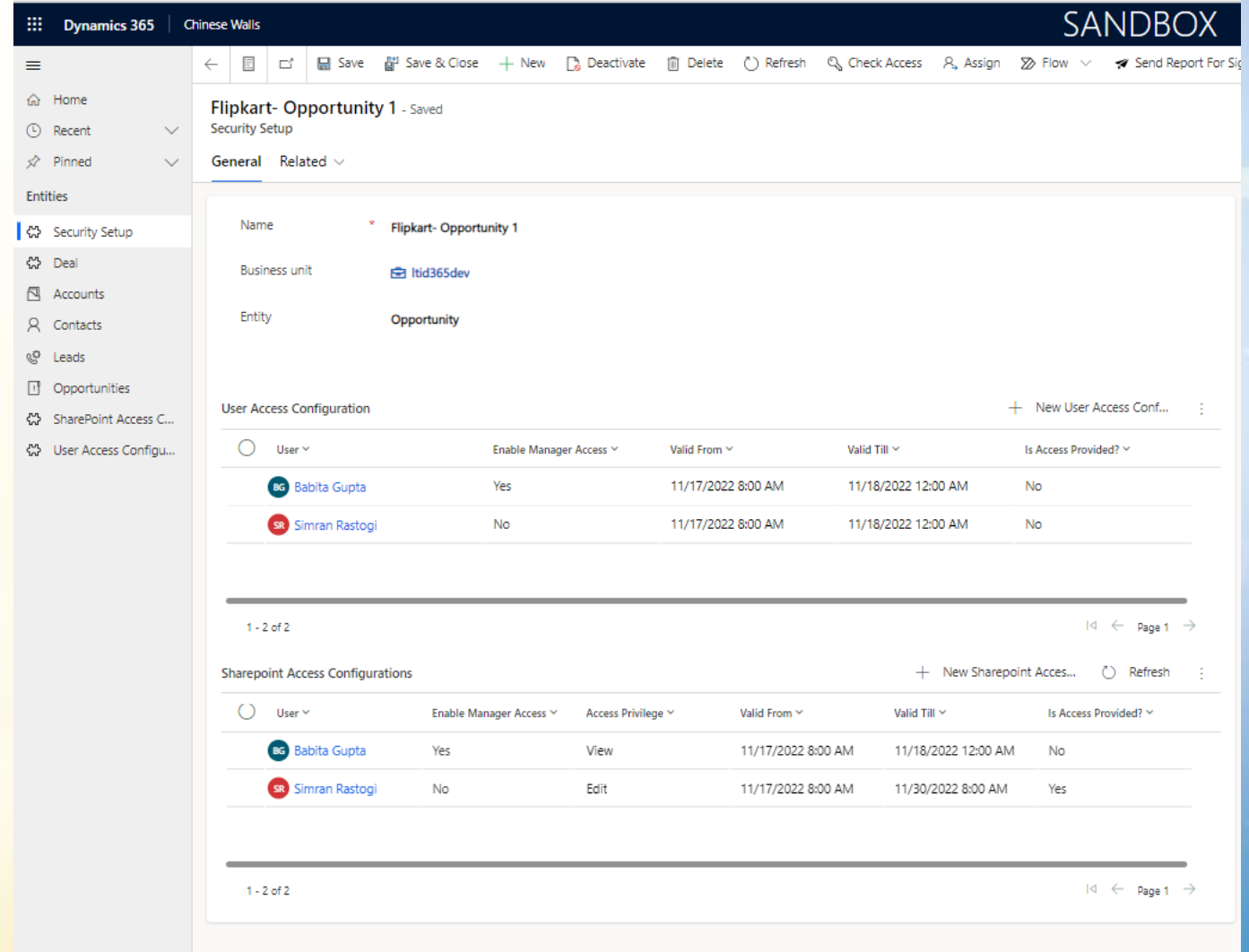
- Commercial banking HNI Deals
- Mergers and acquisitions opportunity involve large teams which needs time bound access
- Manage BFSI Fraud audit / investigation
- Financial institution compliance

Features

- Manages virtual team creation across the organization
- Control access to team in CRM and SharePoint
- Enable secure collaboration
- Conditional data access polices
- Timebound data access polices
- Support multiple entities

Key Benefits

- Complies with banking regulatory requirements
- BSFI Fraud audit
- Configurable team definitions
- Easily configurable document access



The screenshot shows the Dynamics 365 interface for 'Flipkart- Opportunity 1' in the 'Security Setup' section. The page is titled 'Flipkart- Opportunity 1 - Saved' and 'Security Setup'. The left sidebar shows navigation options like Home, Recent, Pinned, Entities, Security Setup, Deal, Accounts, Contacts, Leads, Opportunities, SharePoint Access C..., and User Access Configu... The main content area is divided into 'General' and 'Related' tabs. The 'General' tab shows the following details:

- Name: Flipkart- Opportunity 1
- Business unit: Itid365dev
- Entity: Opportunity

Below this, there is a 'User Access Configuration' table with columns: User, Enable Manager Access, Valid From, Valid Till, and Is Access Provided?. The table contains two rows:

User	Enable Manager Access	Valid From	Valid Till	Is Access Provided?
Babita Gupta	Yes	11/17/2022 8:00 AM	11/18/2022 12:00 AM	No
Simran Rastogi	No	11/17/2022 8:00 AM	11/18/2022 12:00 AM	No

At the bottom, there is a 'Sharepoint Access Configurations' table with columns: User, Enable Manager Access, Access Privilege, Valid From, Valid Till, and Is Access Provided?. The table contains two rows:

User	Enable Manager Access	Access Privilege	Valid From	Valid Till	Is Access Provided?
Babita Gupta	Yes	View	11/17/2022 8:00 AM	11/18/2022 12:00 AM	No
Simran Rastogi	No	Edit	11/17/2022 8:00 AM	11/30/2022 8:00 AM	Yes

Solution Architecture



Deal Admin

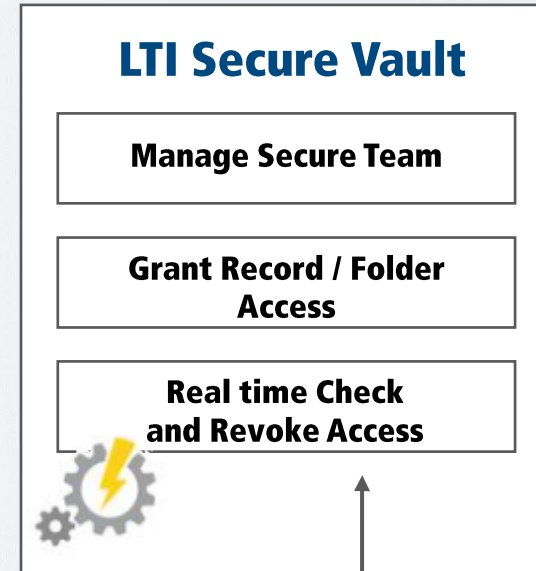
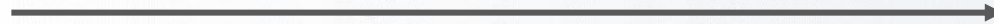


Deal User



Deal Manager

1 Define Security rules for Deal



Publish Rules

2



Dynamics CRM

Access



3

Access



SharePoint

Publish Rules

4

Revoke Access

[Customized call to action for Your Company Name Your Solution Name]

Get a free trial: [yourhyperlinkedtrialURL.com]

Call for more information: [555-555-5555]

Ask a question via email: [email@site.com]

Learn more: [yourhyperlinkedproductsiteURL.com]

Link to your Microsoft Commercial Marketplace offer

