White Paper

Aim:

SharePoint Security Sync is a comprehensive solution for integrating Microsoft Dynamics 365 and Power Apps with SharePoint for document management. It provides seamless integration between two systems and syncs security privileges from Dynamics 365 to SharePoint, thereby ensuring secure and reliable access to confidential documents stored in SharePoint.

Features:

- Real time sync of security permission
- Replicate Association and Dissociation of security role to/from a user/team in Dynamics 365 CRM with SharePoint
- Replicate sharing of record with another user/team in Dynamics 365 CRM with SharePoint
- Assign record to another user/team in Dynamics 365 CRM and reflect it in SharePoint simultaneously
- Add/Remove members to/from team in Dynamics 365 CRM and replicate it in SharePoint simultaneously
- Sync deletion of security role in Dynamics 365 CRM with SharePoint
- Multiple files and folders can be dragged and dropped at one time to SharePoint
- Single as well as multiple files or folders can be uploaded
- Users can download documents from SharePoint
- Email with file's link or file as attachment can be sent
- Files/Folders can be renamed
- Bulk Copy/move Note/Email/Sales Literature Attachments to SharePoint
- Sharable links of files/folders can be created which can also be copied for external use
- Deep search can be done for the entered keyword
- Access control of user actions on Attach2Dynamics
- Delete files from SharePoint
- View files before downloading
- Support for configuring multiple SharePoint connectors

- If any logged in user uploads or performs any attachment action on SharePoint their name will appear for the action
- Supports all types of entities
- Support for single sign-on
- Support for setting default from, to, cc and bcc for an email using Email Configuration
- Support for hierarchy structure to store attachments/documents in SharePoint
- Seamless integration with DocuSign to electronically sign documents stored in SharePoint
- Support to directly open record folder present on SharePoint site from the UI
- Support to create customized folder structures in SharePoint
- Thumbnail View and List View on Attach2Dynamics UI
- Attach Files of Various Records Directly from Email Form

Supported Versions

Versions: Microsoft Dynamics 365 CRM 9.1 & above, Dataverse (Power Apps).
Deployment Models: Online.
SharePoint: Online

Who needs it?

Security models of both Dynamics 365 CRM and SharePoint are different. At times, it becomes necessary to restrict access to Dynamics 365 CRM data stored in SharePoint. With SharePoint Security Sync you can safely store and manage documents in SharePoint by replicating Dynamics 365 CRM security privileges in SharePoint.

Configure Connectors

Configure connector to enable syncing with SharePoint security model.

Support for single sign-on

Perform all actions in the context of logged-in user. For SharePoint connector, when Auth-Type is credential, then for any attachment action the name of that user appears who has authenticated the connector while, when auth-type is App, for any attachment action the name of logged-in user appears.

Entity Configuration

Configure Entities with a connector which needs to be given controlled access.
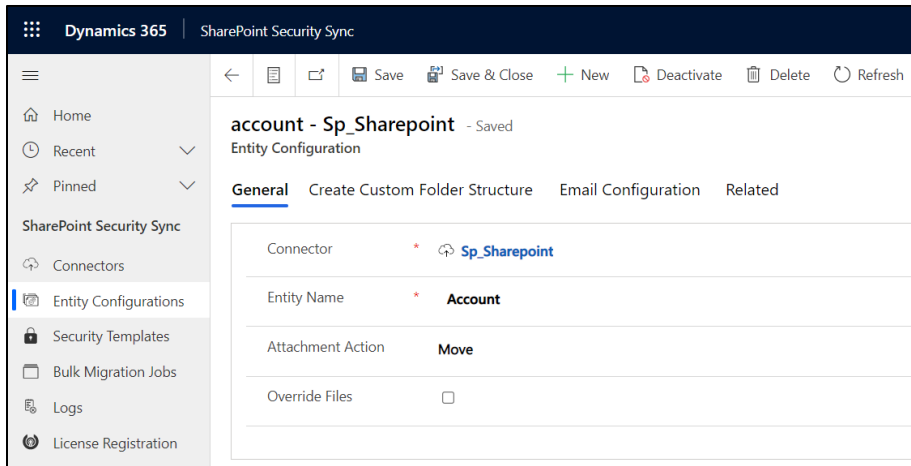
Set default from, to, cc, and bcc for an email using Email Configuration.
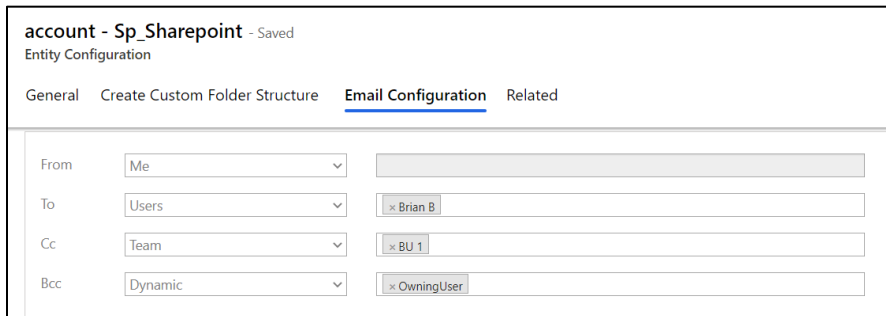
Hierarchy Structure

Store attachments/documents of Dynamics 365 CRM records on the basis of hierarchy in SharePoint.
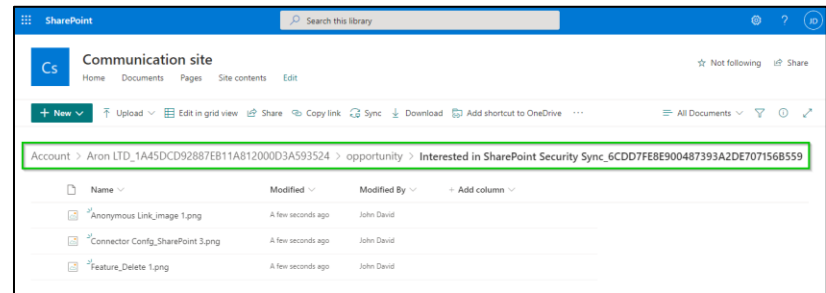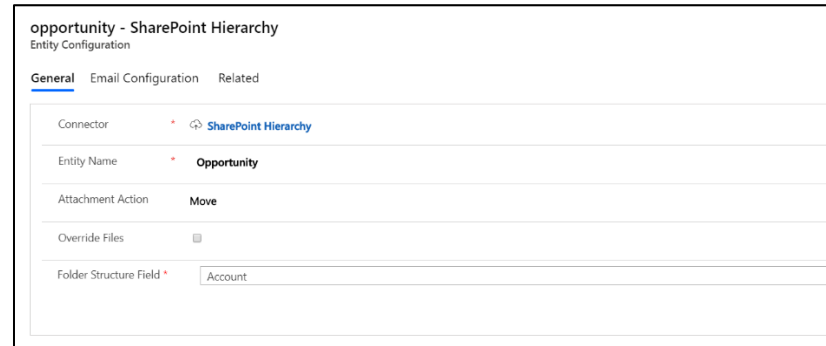
Custom Folder Structure

Create a customized folder structure in SharePoint to store and manage attachments easily.

Security Templates

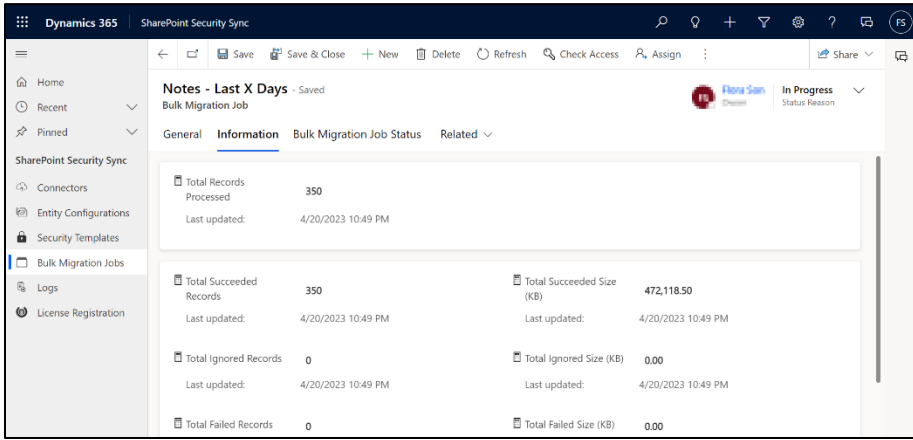Restrict user actions over various features of Attach2Dynamics such as Upload, Download, Email, Create Folder, Delete, etc.

Bulk Migration Job

Migrate documents/history data for an estimated period in bulk from Dynamics 365 CRM to SharePoint.
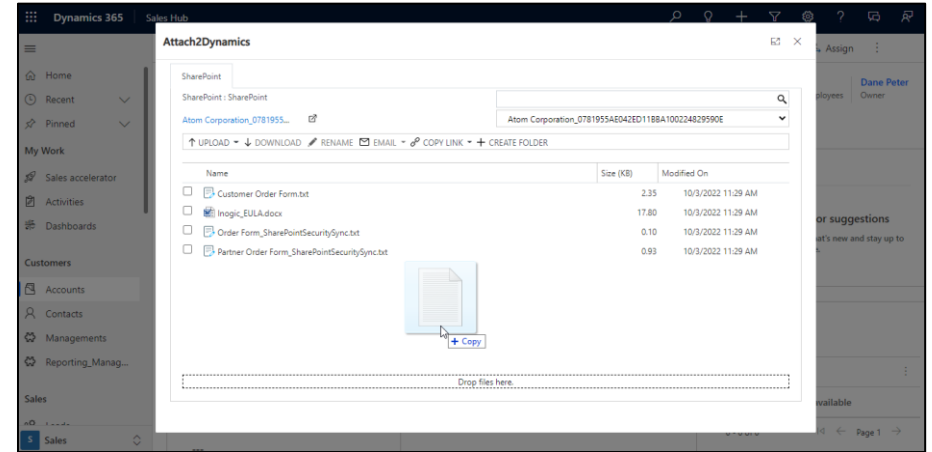
Move/Copy Attachments

Move/Copy Dynamics 365 CRM Notes/Email/Sales Literature Attachments to SharePoint.
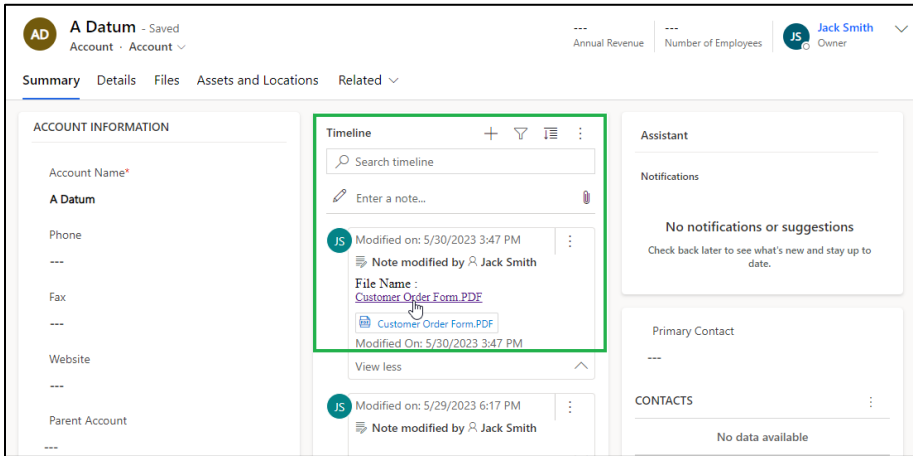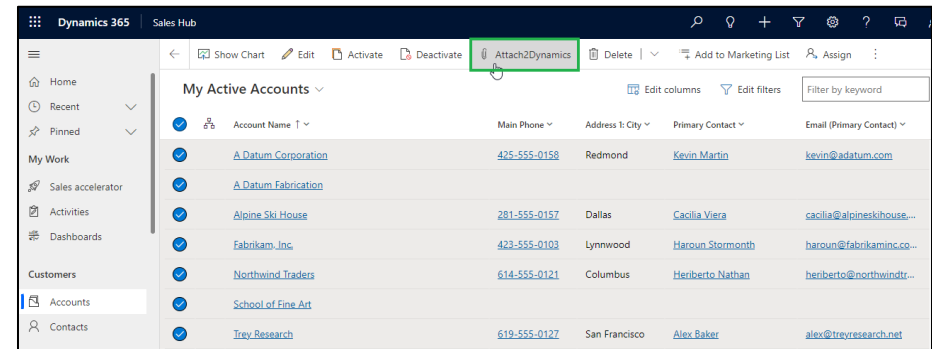

Drag & Drop

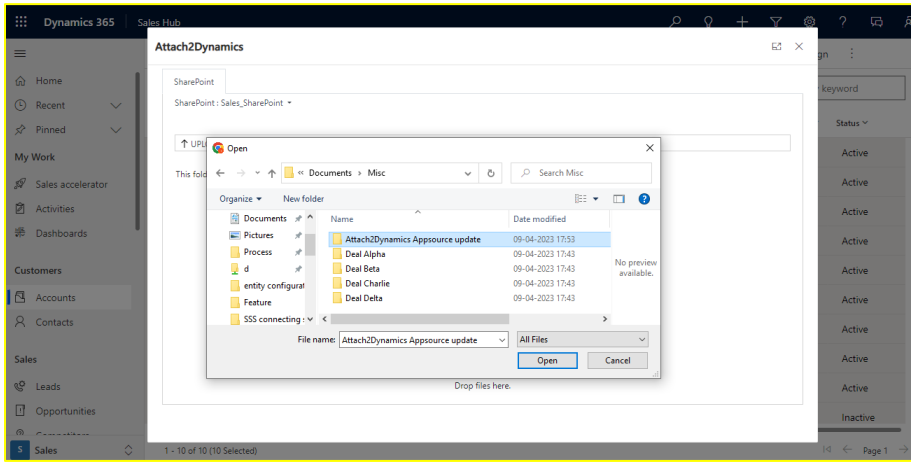Drag and Drop files/folders through the Attach2Dynamics UI.

Direct Upload of files from Home Page

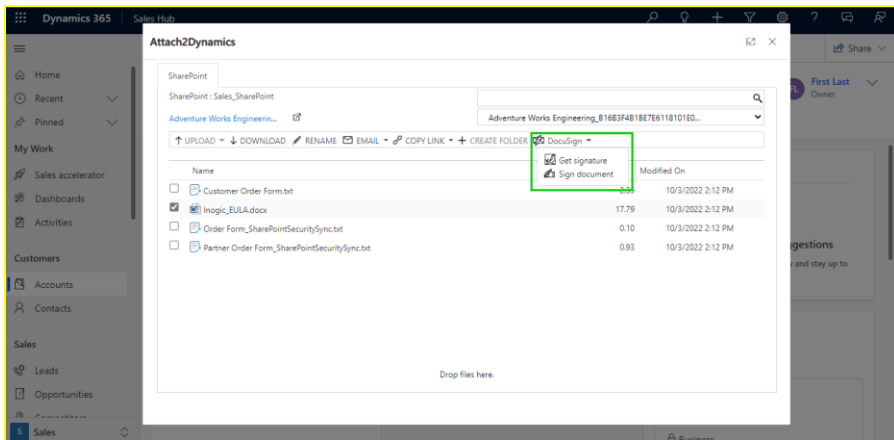Upload files directly from home page for selected records.
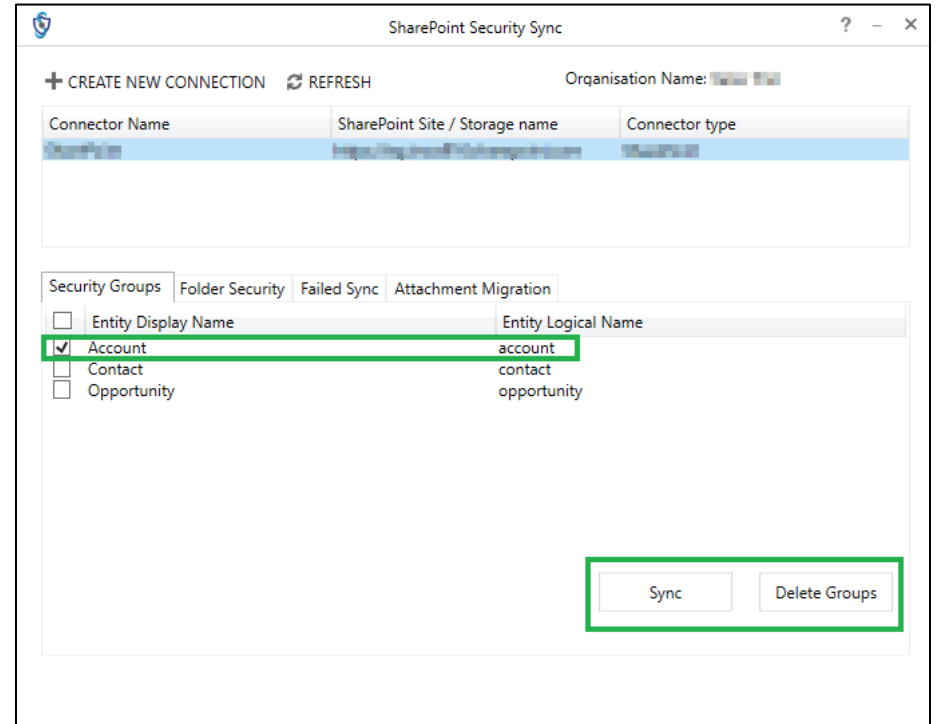
DocuSign Integration

Use DocuSign to electronically sign documents stored in SharePoint.

SharePoint Security Sync Tool

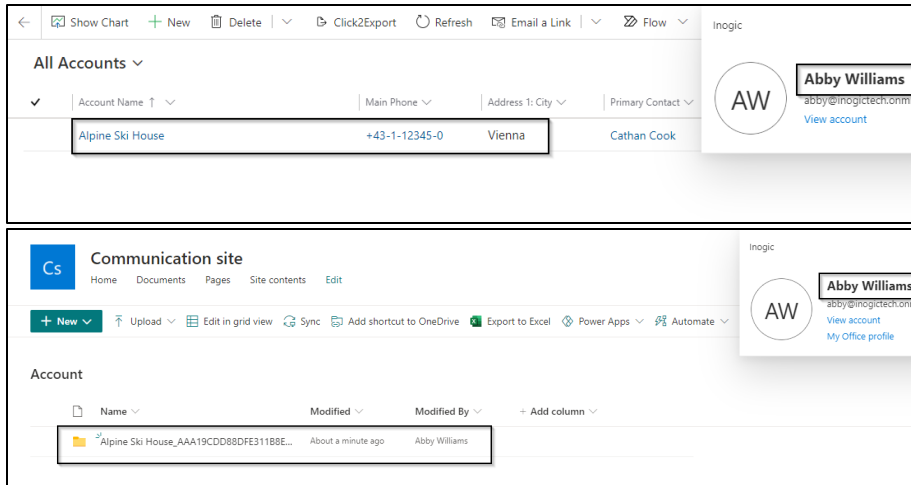Use SharePoint Security Sync tool to sync security privileges on a large scale with ease.
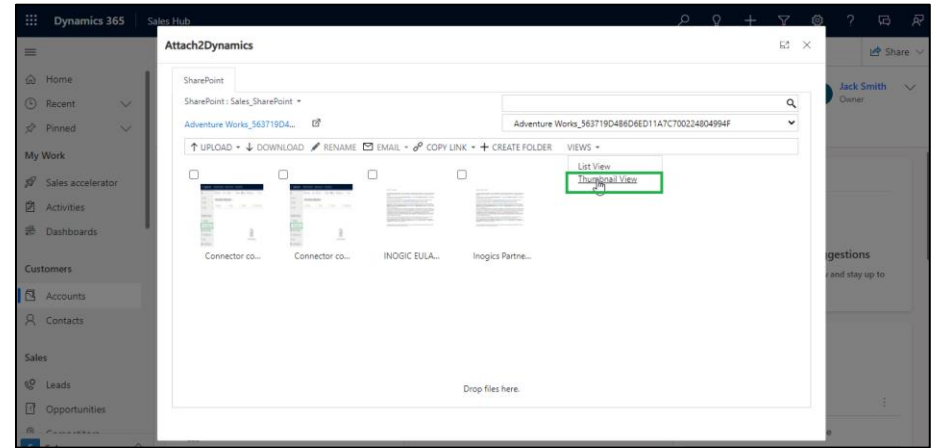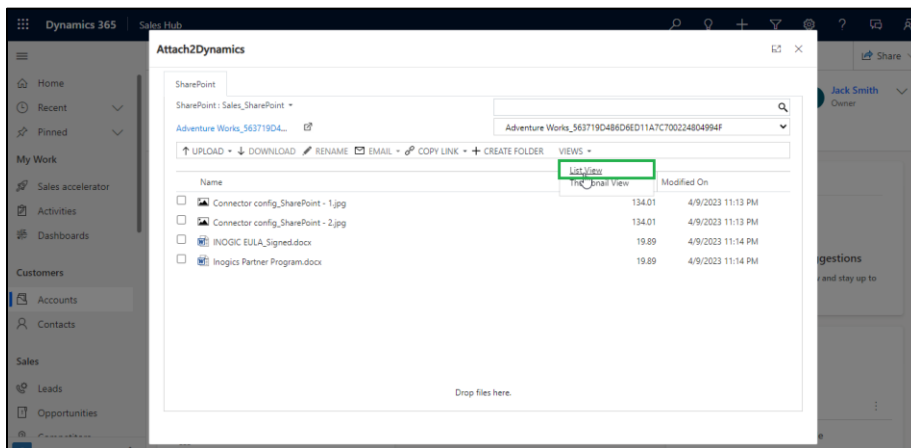
Sync Details of User with User Level Privilege

Sync the visibility of records visible in Dynamics 365 to SharePoint.


Thumbnail View and List View

Users can now view folders/files stored on Sharepoint in List View as well as Thumbnail View with Attach2Dynamics UI in Dynamics 365 CRM.
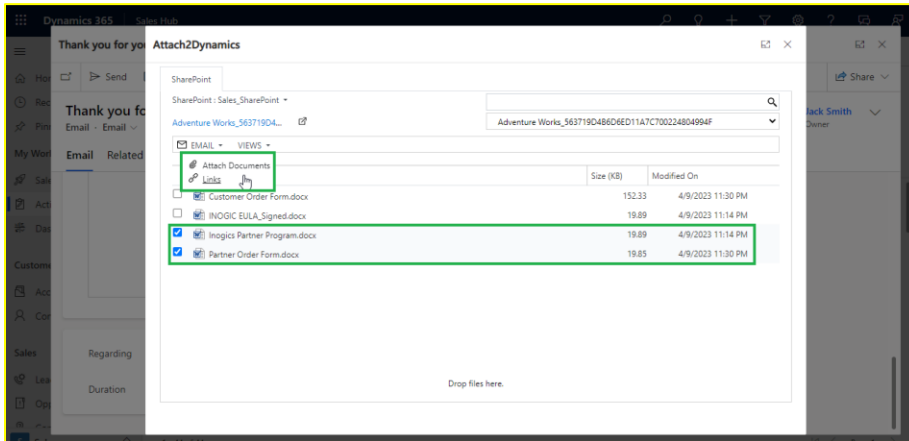

Attach Files of Various Records Directly from Email Form

With this feature, users can attach files/documents of various records directly from email activity form without switching between different entities.
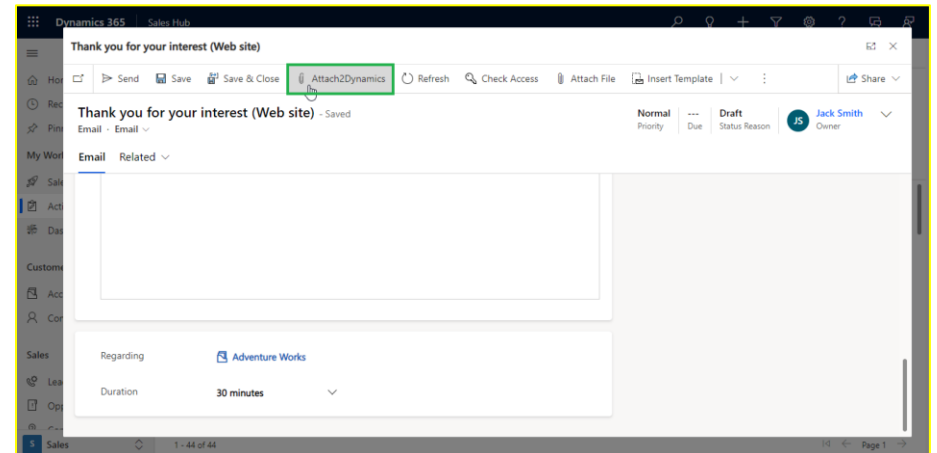
Download & Upload

Download & Upload files/folders through the UI directly into SharePoint.

Deep Search Tab

Search for files/folders within subfolders by entering keyword in search tab.

Email

Email anonymous link (of a file/folder) or file as an attachment.

Create folder

Create folders in SharePoint as per requirement.

Rename

Rename files/folders in SharePoint.

Copy a Link

Copy and share generated link as per requirement.

Delete

Delete unwanted files from SharePoint.

View Files

Preview files stored in SharePoint before downloading.

Open Folder

Open record folder present on SharePoint site directly from Attach2Dynamics document management UI.

Log

View 'Log' entity for errors occurred during the functioning of SharePoint Security Sync.

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