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EBOOK

**Comprehensive Guide to
SharePoint, Security, and
Microsoft Dynamics 365 CRM**

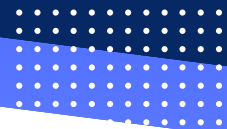


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CHAPTER - 1

INTRODUCTION TO SHAREPOINT AND MICROSOFT DYNAMICS 365 CRM



SharePoint and Microsoft Dynamics 365 CRM are powerful tools that can revolutionize the way organizations manage their data and collaborate.

SharePoint is a robust platform that allows organizations to create and manage sites and libraries within Microsoft Dynamics 365 CRM. These sites and libraries can be customized to meet specific organizational needs, enabling efficient storage and sharing of documents, data, and information.

On the other hand, Microsoft Dynamics 365 CRM provides comprehensive customer relationship management capabilities, helping organizations streamline their sales, marketing, and customer service processes.

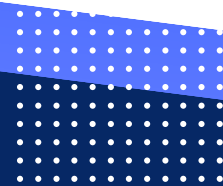
When integrated, SharePoint and Microsoft Dynamics 365 CRM create a seamless ecosystem where data can be effectively managed, workflows can be automated, and real-time insights can be gained. They empower organizations to optimize their operations, enhance collaboration, and deliver exceptional customer experiences.

More than 75,000 organizations
use SharePoint



CHAPTER - 2

SHAREPOINT SECURITY



Understanding SharePoint Security Models

SharePoint offers different security models to control access to sites, lists, libraries, and content. The two main security models in SharePoint are:

- **SharePoint Groups:** These are collections of users with similar permissions within a SharePoint site. Custom groups can be created and assigned specific permission levels to control access to site resources.

Example - A "Finance Team" group can be created with permission to access financial documents and lists.

- **Permission Inheritance:** SharePoint uses a hierarchical permission structure, inheriting permissions from parent to child objects. This ensures easier management and consistent permissions across the site hierarchy.

Example - Granting permissions at the site level automatically extends them to subsites and lists, unless specifically changed.

Managing User Permissions and Access Levels

In SharePoint, you can give specific users or groups permission to access certain resources. Permissions can be set at different levels like sites, lists, libraries, folders, and items. Access levels determine what actions a user or group can do, such as read, contribute, edit, or have full control. For instance, you can give the "Read" access level to a group called "Employees" for a document library, allowing them to view documents but not make any changes.

Implementing Authentication and Authorization

SharePoint supports different authentication methods to verify user identities before granting access. Examples of authentication methods include:

- **Windows Authentication:** Users authenticate with their Windows credentials.
- **Forms-Based Authentication:** Users provide a username and password for authentication.
- **Claims-Based Authentication:** Users authenticate using a claims provider, such as Active Directory Federation Services (ADFS) or Azure Active Directory (AAD).

Authorization determines user or group access based on their verified identity. SharePoint integrates with different authorization mechanisms like Active Directory (AD) groups and SharePoint groups to manage permissions efficiently.

Securing SharePoint Sites and Content

SharePoint provides several security features to protect sites and content from unauthorized access or modifications. These include:

- **Secure Site Provisioning:** Implementing security best practices during site provisioning ensures that security is considered from the beginning. For example, setting up appropriate permissions and access levels during site creation.
- **Information Rights Management (IRM):** IRM allows you to protect sensitive documents by applying restrictions such as preventing printing, copying, or forwarding. This helps ensure that confidential information is only accessed by authorized individuals.
- **Document-Level Security:** SharePoint allows you to set unique permissions for individual documents or folders within a library. This granular control ensures that specific documents can only be accessed by authorized users.

Auditing and Monitoring SharePoint Security

SharePoint offers auditing and monitoring capabilities to track and analyze security-related events within the platform. This helps in identifying potential security breaches or policy violations. Examples of auditing and monitoring features include:

- **Audit Logs:** SharePoint records events like user logins, document access, and modifications in audit logs. These logs can be reviewed to identify suspicious activities or compliance violations.
- **Usage Analytics:** SharePoint provides usage analytics reports that show user activity, popular content, and trends. This information can help administrators identify unusual patterns or suspicious behavior.
- **Security and Compliance Center:** SharePoint's Security and Compliance Center provides centralized administration and reporting for security-related tasks, such as managing security policies, data loss prevention, and eDiscovery.

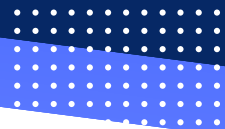
By leveraging these security features, administrators can ensure that SharePoint sites and content are protected, users have appropriate access levels, and security-related events are audited and monitored effectively.

SharePoint is the most widely used intranet platform, with a market share of over 50%.



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SECURITY IN MICROSOFT DYNAMICS 365 CRM



User Management and Security Roles

In CRM, user management involves creating and managing user accounts, assigning security roles, and defining teams and business units. Roles determine the access and permissions of users, allowing them to view and edit relevant data.

Defining CRM Access Levels and Permissions

Access levels and permissions determine what a user can and cannot do within the CRM system. Microsoft Dynamics 365 CRM offers various access levels such as organization, business unit, team, and user.

Configuring Field-Level Security

Field-level security allows administrators to restrict access to specific fields within a record based on the user's security role or access level.

Implementing Record-Based Security

Record-based security is used to restrict access to individual records within a specific entity. This allows administrators to control who can view or edit specific records.

Managing CRM Security Auditing and Compliance

CRM security auditing and compliance involves tracking and monitoring user activity, ensuring system security and compliance with regulations. Features like audit logging, data encryption, and user access reports help administrators track changes and ensure authorized usage.

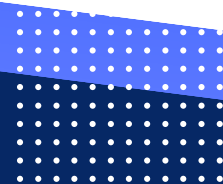
By leveraging the various security features and capabilities available, organizations can better protect their data and ensure that users have the appropriate level of access to perform their job functions.

Companies using Microsoft Dynamics 365 CRM experience an average sales productivity increase of 15-20%.



CHAPTER - 4

BEST PRACTICES



Designing Secure SharePoint or CRM Solutions

When designing a SharePoint or CRM solution, security should be a top priority. Here are some best practices for designing secure solutions:

- Conduct a security assessment to identify potential security risks and vulnerabilities.
- Limit the number of users who have administrative access to the platform.
- Implement multi-factor authentication to prevent unauthorized access to the platform.
- Use SSL encryption to protect data in transit.
- Regularly apply security patches and updates to the platform to address security vulnerabilities.

Example: An organization wants to implement SharePoint for their employees to collaborate and share documents. Before implementing SharePoint, they conduct a security assessment to identify potential security risks. They limit the number of users who have administrative access to the platform, implement multi-factor authentication, and use SSL encryption to protect data in transit.

Implementing Role-Based Security Models in CRM

Role-based security models allow you to grant access to specific resources based on the user's role. Here are some best practices for implementing role-based security models:

- Identify the roles that require access to the platform and the resources they need to access.
- Define roles and access levels based on the principle of least privilege, granting users only the permissions they need to perform their job duties.
- Regularly review and update role-based permissions to ensure they align with the organization's security policies.

Example: A healthcare organization implements CRM to manage patient data. They define roles for doctors, nurses, and administrative staff, granting them access to specific resources based on their job duties. They regularly review and update role-based permissions to ensure they align with the organization's security policies.

Data Protection and Disaster Recovery Strategies

Data protection and disaster recovery strategies help ensure that your data is secure and can be recovered in case of a disaster. Here are some best practices for data protection and disaster recovery:

- Implement data backup and recovery procedures to protect against data loss.
- Store backups in an offsite location to protect against physical disasters such as fires or floods.
- Regularly test backup and recovery procedures to ensure they are effective.

Example: A financial services organization implements SharePoint to store sensitive financial data. They implement data backup and recovery procedures and store backups in an offsite location. They regularly test backup and recovery procedures to ensure they are effective.

Optimizing Performance and Scalability

Optimizing performance and scalability helps ensure that your platform can handle increasing demand and provide a good user experience. Here are some best practices for optimizing performance and scalability:

- Implement caching to reduce the load on the platform.
- Use load balancing to distribute requests across multiple servers.
- Regularly monitor performance metrics and adjust the platform configuration as needed.

Example: An e-commerce organization implements SharePoint to manage their website. They implement caching and use load balancing to distribute requests across multiple servers. They regularly monitor performance metrics and adjust the platform configuration as needed.



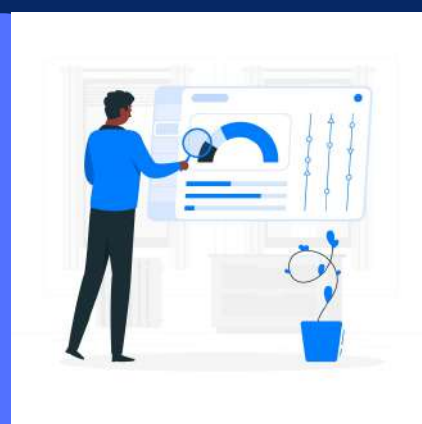
Managing Change and Upgrades in SharePoint and CRM

Managing change and upgrades helps ensure that your platform remains secure and up to date. Here are some best practices for managing change and upgrades:

- Regularly apply updates and patches to the platform to address security vulnerabilities.
- Implement a change management process to ensure that changes are properly tested and approved before implementation.
- Communicate changes and upgrades to users to minimize disruption and ensure that they understand any new features or functionality.

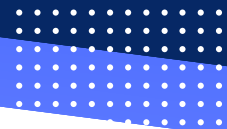
Example: A manufacturing organization implements CRM to manage their sales and customer relationships. They regularly apply updates and patches to the platform to address security vulnerabilities. They implement a change management process to ensure that changes are properly tested and approved before implementation. They communicate changes and upgrades to users to minimize disruption and ensure that they understand any new features or functionality.

SharePoint integration with Microsoft Dynamics 365 CRM improves data accuracy and reduces data entry time by up to 70%.



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INTEGRATING SHAREPOINT AND MICROSOFT DYNAMICS 365 CRM



Out-of-the-box Integration

SharePoint and Microsoft Dynamics 365 CRM offer native integration features that can be set up easily. You can configure SharePoint document libraries within CRM entities to store and manage related documents. This integration allows you to associate documents with CRM records and provides a seamless user experience.

SharePoint Web Parts

SharePoint offers web parts that can be embedded in CRM. You can add SharePoint web parts like document libraries, lists, or custom forms directly into CRM pages. This allows users to access SharePoint functionality and content without leaving the CRM interface.

Custom Code

For more advanced integration scenarios, you can use custom code to connect SharePoint and CRM. Microsoft provides APIs (Application Programming Interfaces) and development frameworks, such as SharePoint Framework (SPFx) and Power Automate, that enable developers to create custom solutions. This approach allows for extensive customization and automation possibilities.

Power Automate

Power Automate is a cloud-based service that allows you to create automated workflows and integrate various systems, including SharePoint and Microsoft Dynamics 365 CRM. You can use Power Automate to trigger actions in SharePoint based on CRM events or vice versa. For example, you can automatically create a SharePoint document when a new CRM record is created.

Microsoft Dataverse Integration

Microsoft Dataverse is a data storage and modeling platform that underlies CRM. SharePoint can be connected to Microsoft Dataverse, enabling data synchronization between SharePoint libraries and CRM entities. This integration ensures that documents stored in SharePoint are associated with the corresponding CRM records.

Third-Party Tools

There are third-party tools and connectors available in the Microsoft ecosystem that facilitate the integration between SharePoint and Microsoft Dynamics 365 CRM. These tools often offer pre-built connectors, templates, and automation features to streamline the integration process. Examples include SharePoint Security Sync by Inogic

SharePoint Security Sync is a Preferred App on **Microsoft AppSource** for integrating Dynamics 365 CRM with SharePoint for managing documents in CRM. With SharePoint Security Sync, you can sync user security privileges set in Microsoft Dynamics 365 CRM with the document access permissions in SharePoint. This ensures the same level of security as that in Dynamics CRM for documents and records stored in SharePoint. Users can also overcome the limitations of storing 50,000 items in document libraries by creating custom folder structures and can also use workflows to automate the process of creating these folders.

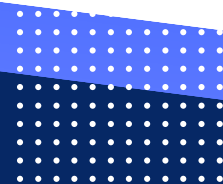
Note- It's important to evaluate your specific requirements and consider the complexity and maintenance aspects when choosing an integration method. The chosen approach should align with your organization's needs, technical expertise, and scalability requirements.

Organizations that integrate SharePoint and Microsoft Dynamics 365 CRM report a 15% increase in customer satisfaction.



CHAPTER - 6

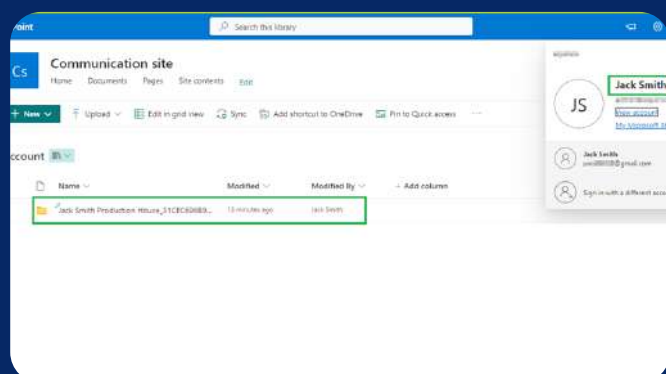
BENEFITS OF INTEGRATION VIA SHAREPOINT SECURITY SYNC



Security and Compliance

The integration of SharePoint and CRM ensures consistent security, compliance, and data integrity. SharePoint's permission settings and CRM's security features protect data and ensure regulatory compliance. With SharePoint Security Sync, changes to a user's security role in Dynamics 365 CRM are replicated in SharePoint. It also enables bulk sync of previous records and easy management of security privileges. Administrators can track and resolve failed syncs to control access to SharePoint resources.

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	●	●	●	●	●	●	●	●
AD/TrustManager	○	●	○	○	○	○	○	○
Action Card	○	●	○	○	○	○	○	○
Action Card/Lite Settings	○	●	○	○	○	○	○	○
Activity	○	●	○	○	○	○	○	○
Advanced Similarity Rule	○	○	○	○	○	○	○	○
Amusement	○	○	○	○	○	○	○	○
Application File	○	●	○	○	○	○	○	○
Category	○	●	○	○	○	○	○	○
Connection	○	●	○	○	○	○	○	○
Connection Role	○	●	○	○	○	○	○	○
Contact	○	●	○	○	○	○	○	○
Customer Relationship	○	●	○	○	○	○	○	○
Data Import	○	○	○	○	○	○	○	○
Data Map	○	○	○	○	○	○	○	○
Data Performance Dashboard	○	○	○	○	○	○	○	○
Document Location	○	●	○	○	○	○	○	○
Document Suggestions	○	○	○	○	○	○	○	○
Duplicate Detection Rule	○	○	○	○	○	○	○	○
Email Signature	○	○	○	○	○	○	○	○
Email Template	○	○	○	○	○	○	○	○

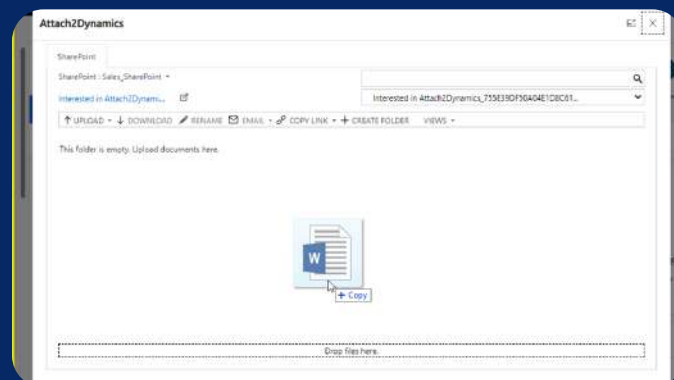


Enhanced Collaboration

SharePoint enables teams to collaborate on documents and projects, integrated with CRM to promote real-time collaboration. SharePoint Security Sync connects files and folders across multiple SharePoint sites, streamlining collaboration and access.

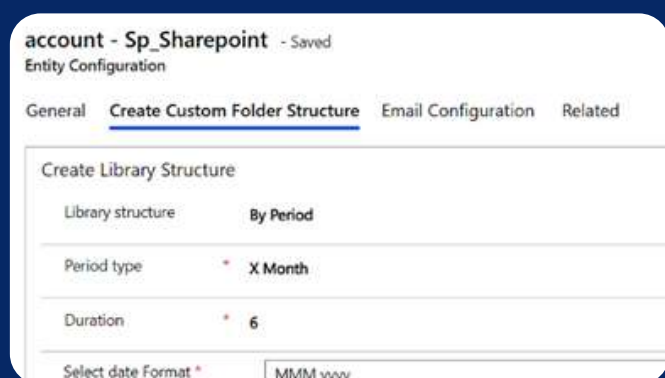
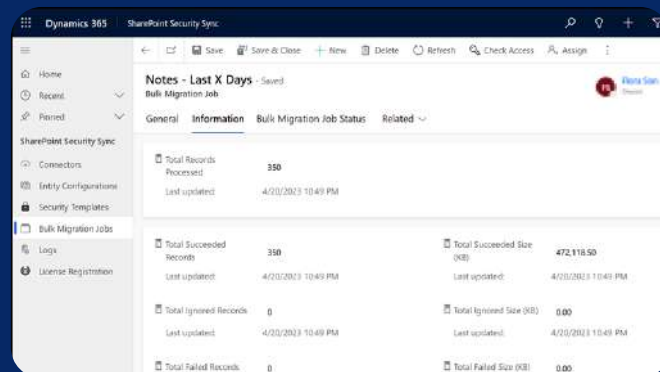
User Experience

The integration offers anonymous sharing, deep search, and other powerful capabilities. Real-time integration enables easy copying or moving of attachments from Dynamics 365 CRM to SharePoint, ensuring centralized storage and integrated critical information. Drag & Drop functionality in SharePoint Security Sync enables quick migration and movement of documents, saving time and optimizing document management. These features contribute to an efficient and user-friendly document management system.



Streamlined Data Management

SharePoint's document management capabilities, combined with CRM's customer data management, centralize and organize data in one platform. Bulk Migration Job and Real-time migration take care of historical and present-based migrations.

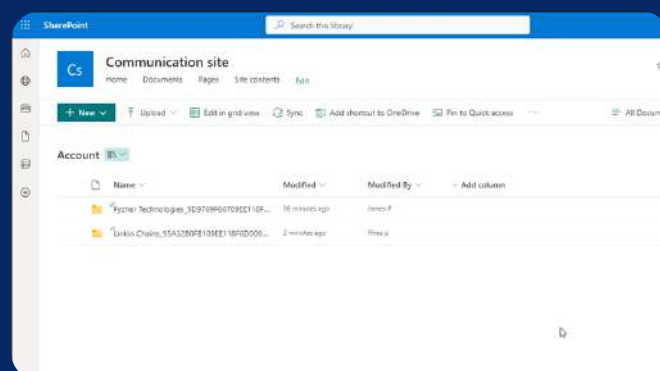


Scalability and Customization

SharePoint and CRM are scalable and customizable platforms. The integration allows tailored solutions by customizing document libraries, lists, workflows, and CRM entities and fields. SharePoint Security Sync supports a customized folder system and record folder structure based on criteria for efficient CRM file management.

Seamless Document Sync

SharePoint's document libraries seamlessly connect with CRM entities, associating relevant documents with specific CRM data. SharePoint Security Sync ensures consistent access control through Auto-Sync Privileges feature. Any modifications made to a user's security role in D365 CRM will automatically propagate to SharePoint, ensuring consistent access control.



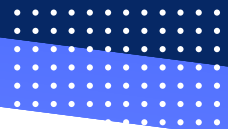
Overall, integrating SharePoint and Microsoft Dynamics 365 CRM provides a unified environment that brings together the strengths of both platforms, enhancing collaboration, data management, and productivity.

SharePoint is used by more than 80% of Fortune 500 companies.



CHAPTER - 7

FUTURE TRENDS AND INNOVATIONS



Emerging Technologies in SharePoint and CRM

SharePoint and CRM platforms continue to evolve, incorporating emerging technologies to enhance their capabilities. Some of the emerging technologies in SharePoint and CRM include:

- **Chatbots:** Chatbots are AI-powered virtual assistants that can interact with users, answer queries, and perform tasks within SharePoint and CRM systems. For example, a CRM chatbot can help users retrieve customer information or provide real-time updates on sales metrics.
- **Robotic Process Automation (RPA):** RPA involves using software robots to automate repetitive tasks and workflows. In SharePoint and CRM, RPA can be used to automate data entry, document management processes, and CRM record updates, improving efficiency and reducing manual effort.
- **Internet of Things (IoT) Integration:** IoT devices generate vast amounts of data that can be leveraged within SharePoint and CRM systems. For instance, integrating IoT sensors with CRM can provide real-time data on customer usage patterns, enabling personalized marketing campaigns.

The Impact of Artificial Intelligence and Machine Learning

Artificial Intelligence (AI) and Machine Learning (ML) are revolutionizing how SharePoint and CRM systems operate. Here are a few examples of their impact:

- **Predictive Analytics:** AI and ML algorithms can analyze historical data within CRM systems to identify patterns and trends. This allows for accurate sales forecasting, lead scoring, and customer behavior analysis, enabling proactive decision-making.
- **Intelligent Search and Recommendations:** AI-powered search capabilities in SharePoint can understand user intent and provide more relevant search results. In CRM, ML algorithms can suggest personalized product recommendations based on customer preferences and behavior.
- **Sentiment Analysis:** AI algorithms can analyze customer interactions, such as emails or chat logs, to determine sentiment and identify customer satisfaction levels. This information can be used to improve customer service and address issues promptly.

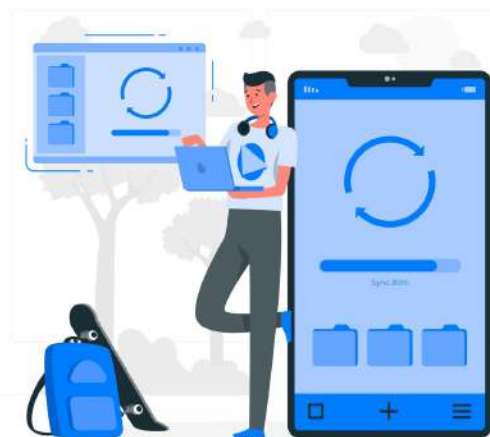
Cloud-Based Solutions and Hybrid Deployments

Cloud computing has transformed the way SharePoint and CRM systems are deployed and managed. Here are a few trends related to cloud-based solutions and hybrid deployments:

- **SharePoint Online and CRM Online:** Microsoft offers SharePoint Online and CRM Online as part of its cloud-based suite, Microsoft 365. These solutions provide easy scalability, reduced infrastructure costs, and frequent updates and enhancements.
- **Hybrid Deployments:** Many organizations opt for hybrid deployments, combining on-premises and cloud-based solutions. This approach allows them to leverage the flexibility and scalability of the cloud while maintaining certain sensitive data or customizations on-premises.
- **Integration with Other Cloud Services:** SharePoint and CRM can integrate with various cloud services such as Microsoft Azure, enabling advanced functionalities like AI and ML services, data analytics, and advanced security features.

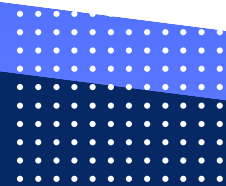
These future trends and innovations in SharePoint and CRM demonstrate the potential for enhanced user experiences, improved decision-making, and increased productivity through the adoption of emerging technologies and cloud-based solutions. Organizations that embrace these trends can gain a competitive edge and better meet the evolving needs of their users and customers.

Over 75% of organizations that use SharePoint also use Microsoft Dynamics 365 CRM.



CHAPTER - 8

TAKEAWAY



SharePoint and Microsoft Dynamics 365 CRM offer a powerful combination of tools that can transform the way organizations manage data, collaborate, and deliver exceptional customer experiences. By leveraging SharePoint's robust platform and customizable features, organizations can create and manage sites, libraries, and lists within CRM, enabling efficient storage and sharing of documents, data, and information. Integration between SharePoint and CRM creates a seamless ecosystem where data can be effectively managed, workflows can be automated, and real-time insights can be gained. Moreover, by implementing best practices for security, data protection, performance optimization, and change management, organizations can ensure the integrity, confidentiality, and availability of their data while maximizing the benefits of these powerful tools. With SharePoint Security Sync, organizations can further enhance their integration by syncing user security privileges between CRM and SharePoint, ensuring consistent access control and seamless document management. By embracing the benefits of SharePoint and Microsoft Dynamics 365 CRM integration, organizations can create secure, scalable, and efficient solutions that drive productivity and success.



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