



**SharePoint
Security
Sync**

**Robust and Secure solution
for replicating Dynamics 365
CRM security model to
SharePoint**



SharePoint Security Sync

crm@inogic.com



Available on
Microsoft AppSource

inogic

Key Features

Security Role Sync to SharePoint

Replicate addition / modification / deletion of Dynamics 365 CRM user's security privileges to SharePoint.

Custom Folder Structure

Support to create customized folder structure within SharePoint.

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.

DocuSign Integration

Seamless integration with DocuSign to electronically sign documents stored in SharePoint.

Security Privileges

Control user privileges to perform the various actions supported by the solution such as Upload, Download, Email, Create folder, Rename, Delete.

Save Storage Space

Move Attachments from Notes, Email & Sales Literature to SharePoint and leave behind the link to the file for easy reference.



Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 8.2 and above
- Power Apps
- CDS

DEPLOYMENTS

- DYNAMICS 365 ONLINE

Folder access based on CRM record access

← Show Chart + New Delete Click2Export Refresh Email a Link Flow Inogic

All Accounts ▾

✓	Account Name ↑ ▾	Main Phone ▾	Address 1: City ▾	Primary Contact ▾
	Alpine Ski House	+43-1-12345-0	Vienna	Cathan Cook
	Blue Yonder Airlines	555-0135	Sydney	Brian LaMee
	City Power & Light Assembly	425-555-7824	Seattle	---
	Coho Winery	+1-674-555-0162	Santa Cruz	Cat Francis

SS

Sam Sam
sam@inogitech.onmic
[View account](#)

Cs Communication site Home Documents Pages Site contents Edit Inogic

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Export to Excel Power Apps Automate

Account

Name ▾	Modified ▾	Modified By ▾	+ Add column ▾
Alpine Ski House_AAA19CDD88DFE311B8E...	About a minute ago	Abby Williams	
Blue Yonder Airlines_ACA19CDD88DFE311B...	A few seconds ago	Sam Sam	
City Power - Light Assembly_D56B3F4B1BE...	About a minute ago	Sam Sam	
Coho Winery_B0A19CDD88DFE311B8E56C3...	About a minute ago	Sam Sam	

SS

Sam Sam
sam@inogitech.onmic
[View account](#)
[My Office profile](#)

Custom Folder Structure

account - Sp_Sharepoint - Saved

Entity Configuration

General Create Custom Folder Structure Email Configuration Related

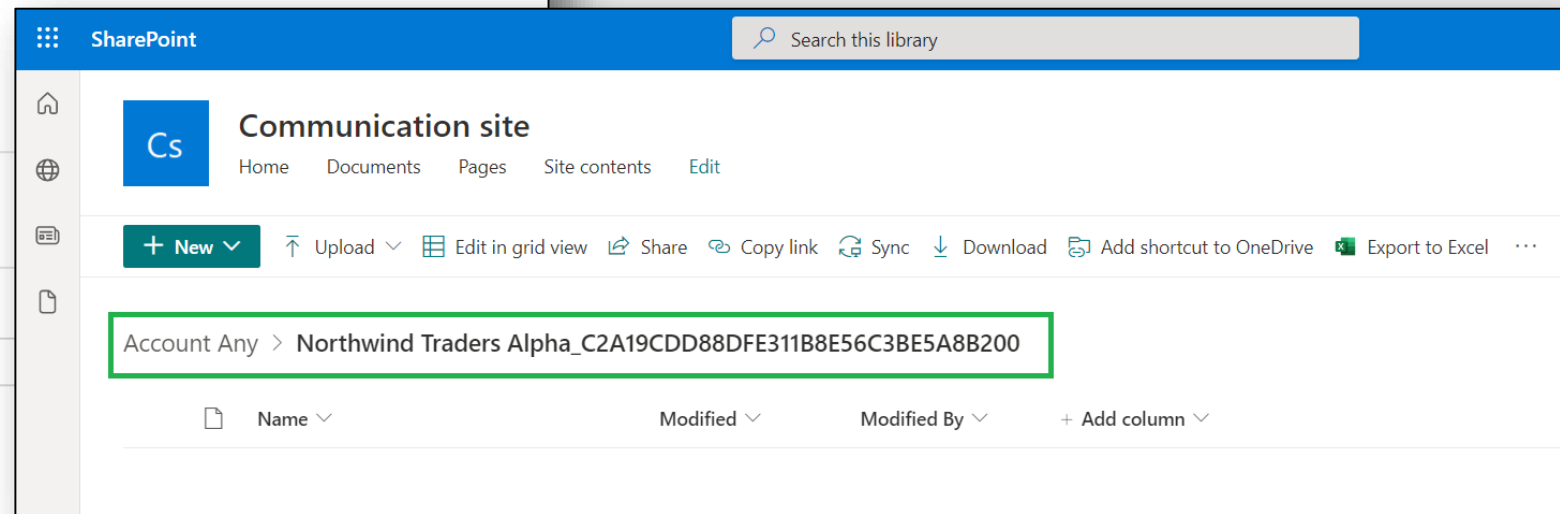
Create Library Structure

Library structure Custom

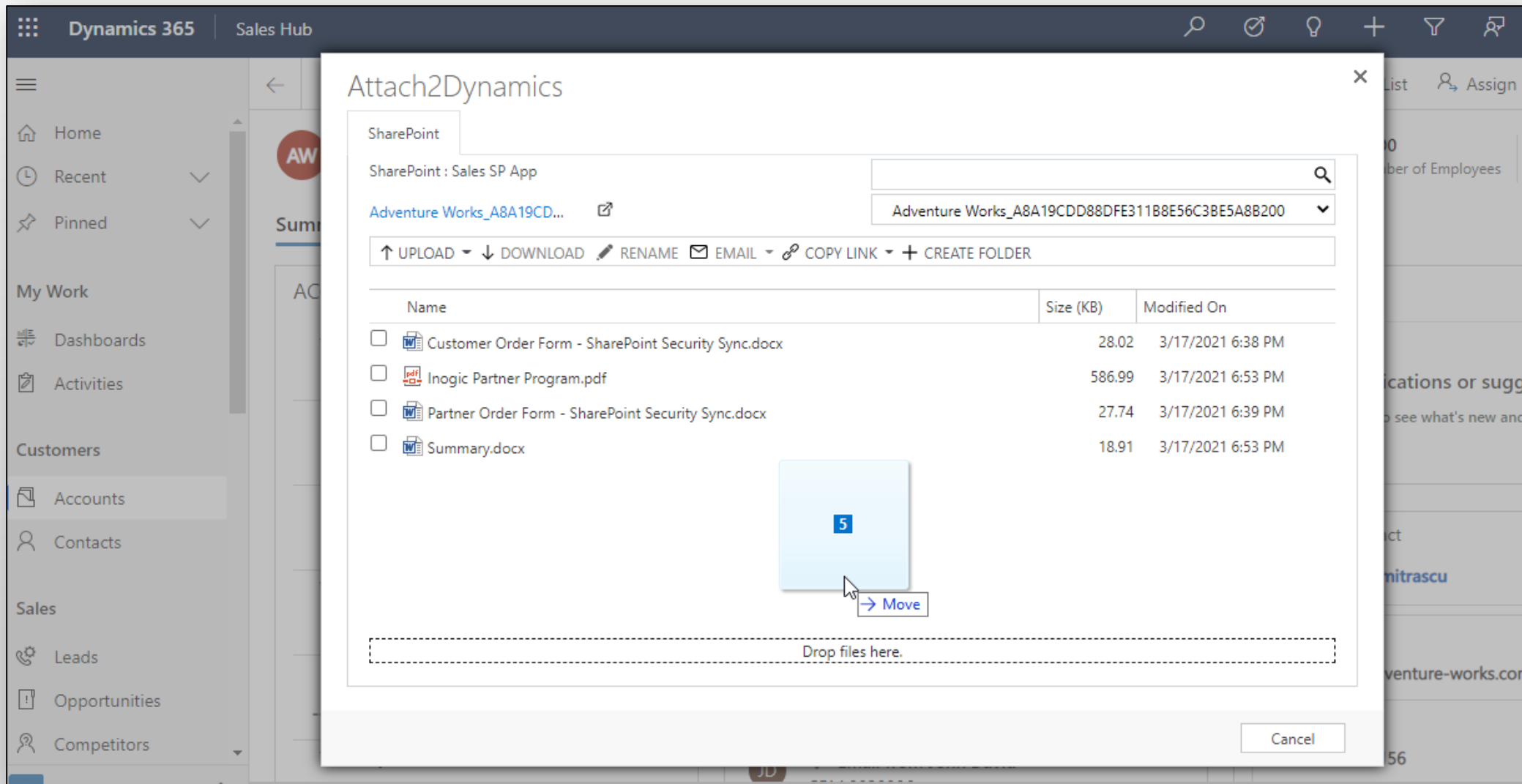
Document Library *
Format {preferredcontactmethodcode}

Create Record Folder Structure

Folder Format {name} Alpha



Drag and Drop multiple files & folders



Upload/Download files & folders

The screenshot displays the 'Attach2Dynamics' window within the Dynamics 365 Sales Hub. The window is titled 'Attach2Dynamics' and has a close button (X) in the top right corner. It features a 'SharePoint' tab and a search bar. Below the search bar, there is a dropdown menu showing 'Adventure Works_A8A19CD...' and a search result 'Adventure Works_A8A19CDD88DFE311B8E56C3BE5A8B200'. A toolbar contains buttons for 'UPLOAD', 'DOWNLOAD', 'RENAME', 'EMAIL', 'COPY LINK', and 'CREATE FOLDER'. A mouse cursor is hovering over the 'UPLOAD' button, which has opened a sub-menu with 'Files' and 'Folder' options. Below the toolbar, there is a table listing files with columns for checkboxes, file names, sizes, and modification dates. At the bottom of the window, there is a 'Drop files here.' area and a 'Cancel' button.

		Size (KB)	Modified On
<input type="checkbox"/>	Customer Order Form - SharePoint Security Sync.docx	28.02	3/17/2021 6:38 PM
<input type="checkbox"/>	Inogic Partner Program.pdf	586.99	3/17/2021 6:53 PM
<input type="checkbox"/>	Partner Order Form - SharePoint Security Sync.docx	27.74	3/17/2021 6:39 PM
<input type="checkbox"/>	Summary.docx	18.91	3/17/2021 6:53 PM

Upload files & folders to multiple CRM records

The screenshot shows the Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', and 'CORE > Accounts'. The left sidebar shows navigation options like Home, Recent, Pinned, My Work, Activities, Dashboards, Customers, Accounts, and Contacts. The main area displays a table of accounts. The 'Attach2Dynamics' button is highlighted with a red box.

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

The screenshot shows the 'Attach2Dynamics' dialog box open over the CRM interface. The dialog has a 'SharePoint' tab and a text input field for 'SharePoint : SharePoint Site'. Below this is an 'UPLOAD' button. A file selection window is also open, showing a folder named 'Deal- Alpha' containing a file named 'Brochure.docx'. The file selection window has a search bar and a list of files with columns for Name, Date modified, and Type. The 'Open' button is highlighted.

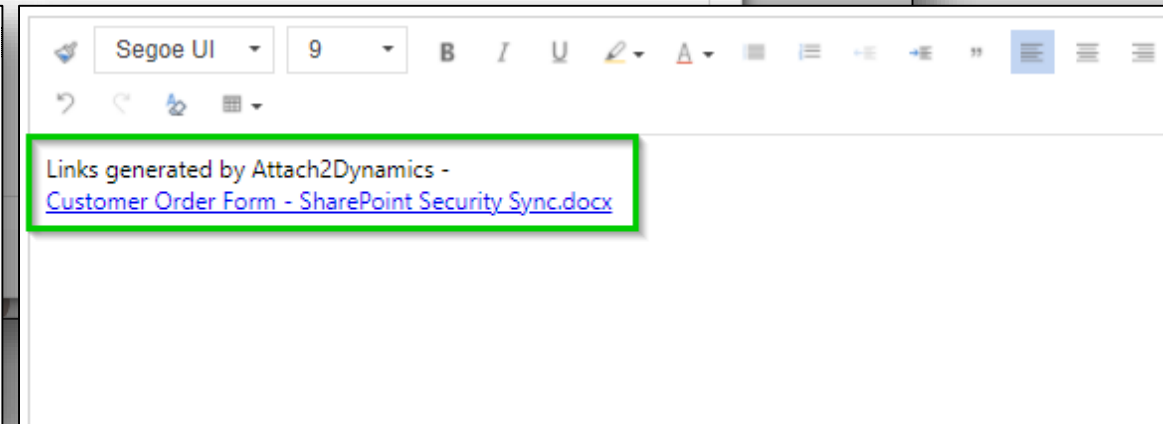
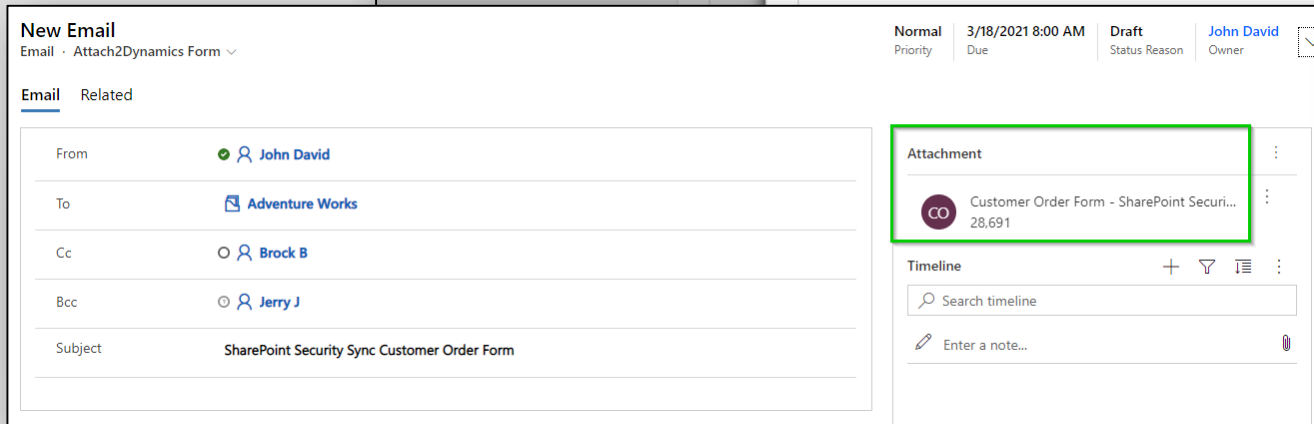
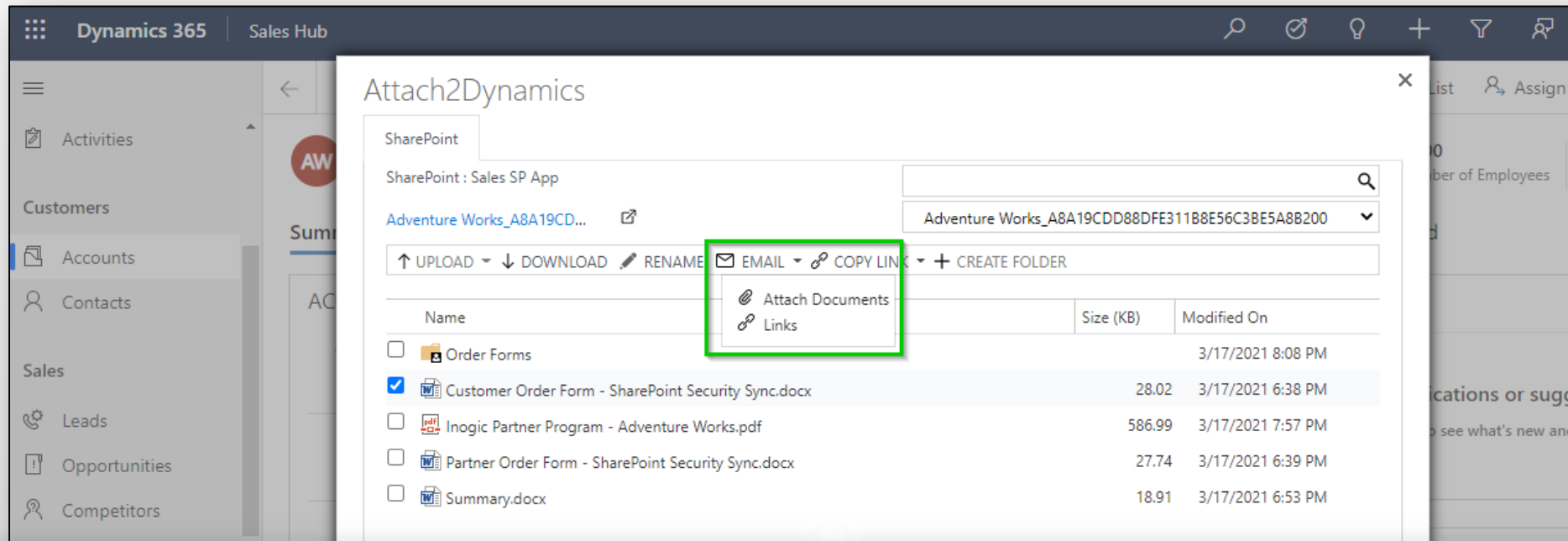
Get a Read-only or Editable Anonymous Shareable link of files & folders

The image displays two screenshots of the Dynamics 365 Sales Hub interface, illustrating the steps to generate a shareable link for a file stored in SharePoint.

Left Screenshot: The "Attach2Dynamics" window is open, showing a list of files in a SharePoint library. The file "Inogic Partner Program - Adventure Works.pdf" is selected, indicated by a green box around its checkbox. The "COPY LINK" button is also highlighted with a green box. A mouse cursor is hovering over the "View" button, which has a tooltip that says "View or download".

Right Screenshot: The same "Attach2Dynamics" window is shown, but now a "Shared link of Inogic Partner Program - Advent..." dialog box is open. This dialog displays the generated shareable link: [https://\[redacted\].sharepoint.com/_fb/g/EZyxXP-0VcIGkR1beVtLxE88HeAocCh](https://[redacted].sharepoint.com/_fb/g/EZyxXP-0VcIGkR1beVtLxE88HeAocCh). A "Copy" button is visible at the bottom right of the dialog, and a "Cancel" button is at the bottom right of the main window.

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



Deep Search

The screenshot shows the Dynamics 365 Sales Hub interface. A dialog box titled "Attach2Dynamics" is open, displaying a search for "Connector" in a SharePoint location. The search results show three files: "Connector Config_SharePoint 1.png", "Connector Config_SharePoint 2.png", and "Connector Config_SharePoint 3.png". The dialog also includes a search bar, a list of actions (UPLOAD, DOWNLOAD, RENAME, EMAIL, COPY LINK, CREATE FOLDER), and a "Drop files here." prompt.

SharePoint

SharePoint : Sales SP App

Adventure Works_A8A19CD...

Search result for "Connector"

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

	Name	Path	Size (KB)
<input type="checkbox"/>	Connector Config_SharePoint 1.png	/account/Adventure Works_A8A19CDD88DFE311B8E56C3BE5A8B200/Or...	24.14
<input type="checkbox"/>	Connector Config_SharePoint 2.png	/account/Adventure Works_A8A19CDD88DFE311B8E56C3BE5A8B200/Or...	32.47
<input type="checkbox"/>	Connector Config_SharePoint 3.png	/account/Adventure Works_A8A19CDD88DFE311B8E56C3BE5A8B200/Or...	40.41

Drop files here.

Cancel

Delete File

The screenshot shows the Dynamics 365 Sales Hub interface with the Attach2Dynamics window open. The window displays a file list from a SharePoint location. The file 'Summary.docx' is selected, and a green box highlights the delete icon (trash can) in the right column of the table.

Attach2Dynamics

SharePoint

SharePoint : Sales SP App

Adventure Works_A8A19CD...

Review Documents

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

Name	Size (KB)	Modified On
<input type="checkbox"/> Order Forms		3/17/2021 8:08 PM
<input type="checkbox"/> Customer Order Form - SharePoint Security Sync.docx	28.02	3/17/2021 6:38 PM
<input type="checkbox"/> Inogic Partner Program - Adventure Works.pdf	586.99	3/17/2021 7:57 PM
<input type="checkbox"/> Partner Order Form - SharePoint Security Sync.docx	27.74	3/17/2021 6:39 PM
<input checked="" type="checkbox"/> Summary.docx	18.91	3/17/2021 6:53 PM

Drop files here.

Cancel

View File

The screenshot shows a Dynamics 365 Sales Hub interface. A browser tab titled "Customer Order Form - SharePoint" is highlighted. The main window displays the "Attach2Dynamics" dialog box, which is open to the "SharePoint" tab. The dialog shows the "SharePoint : Sales SP App" and a search bar. Below the search bar, there is a "Review Documents" dropdown menu. A toolbar contains buttons for "UPLOAD", "DOWNLOAD", "RENAME", "EMAIL", "COPY LINK", and "CREATE FOLDER". A table lists the files in the SharePoint library:

Name	Size (KB)	Modified On
<input type="checkbox"/> Order Forms		3/17/2021 8:08 PM
<input type="checkbox"/> Customer Order Form - SharePoint Security Sync.docx	28.02	3/17/2021 6:38 PM
<input type="checkbox"/> Inogic Partner Program - Adventure Works.pdf	586.99	3/17/2021 7:57 PM
<input type="checkbox"/> Partner Order Form - SharePoint Security Sync.docx	27.74	3/17/2021 6:39 PM

At the bottom of the dialog, there is a "Drop files here." prompt and a "Cancel" button.

Open Folder

The image displays two overlapping windows. The background window is titled 'Attach2Dynamics' and shows a SharePoint interface. A green box highlights the 'Open Folder' icon (a folder with an arrow) next to the file 'A Datum Corporation_A16B3F4B1BE7E6118101E0071B6AF2...'. The foreground window is a web browser showing a SharePoint 'Communication site'. The site has a blue header with the 'Cs' logo and navigation links: Home, Documents, Pages, Site contents, and Edit. Below the header is a toolbar with options: + New, Upload, Edit in grid view, Share, Copy link, Sync, Download, and Add shortcut to OneDrive. The main content area shows the path 'Account > A Datum Corporation_A16B3F4B1BE7E6118101E0071B6AF231' and a table of files and folders.

Name	Modified	Modified By
📁 Emails	February 5	Komal Pawar
📄 Sharing SharePoint site with the users who doesn't have access to the SharePo...	About a minute ago	Komal Pawar

Move/Copy Dynamics 365 CRM Attachments

Email

Notes

Sales Literature

The image illustrates a workflow in Dynamics 365 CRM for moving attachments. It is divided into three main sections:

- Email Section:** Shows an email titled "SharePoint Security Sync Presentation" with a subject "SharePoint Security Sync Presentation". The email header includes "From", "To", "Cc", "Bcc", and "Subject". The email body shows an attachment "SharePoint Security Sync - Presentation.pdf".
- Notes Section:** Shows a contact record for "A.Datum". The "Timeline" tab is selected, displaying a note: "Note modified by Shafali Verma" with a file name "SharePoint Security Sync - Presentation.pdf".
- Sales Literature Section:** Shows a "Sales Literature" record for "Product Catalog". The "Attachments" tab is selected, displaying a list of attachments. One attachment, "Customer Product Catalog", is highlighted, showing its file name "Catalog_7D5E7CAFC764E911A82A000D3A1D9FBE/Brochure.docx".

Security Templates

SharePoint security template

Security Template

General Permissions Related

Name * SharePoint security template

Connector *  SharePoint

SharePoint security template

Security Template

General Permissions Related

All ☒

Upload File/Folder ☒

Download
Files/Folders ☒

Create Folder ☒

Delete Files ☒

DocuSign ☒


Rename File/Folder ☒

View Files ☒

Copy Link ☒

Email ☒




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
 Read only

Status Reason
Completed

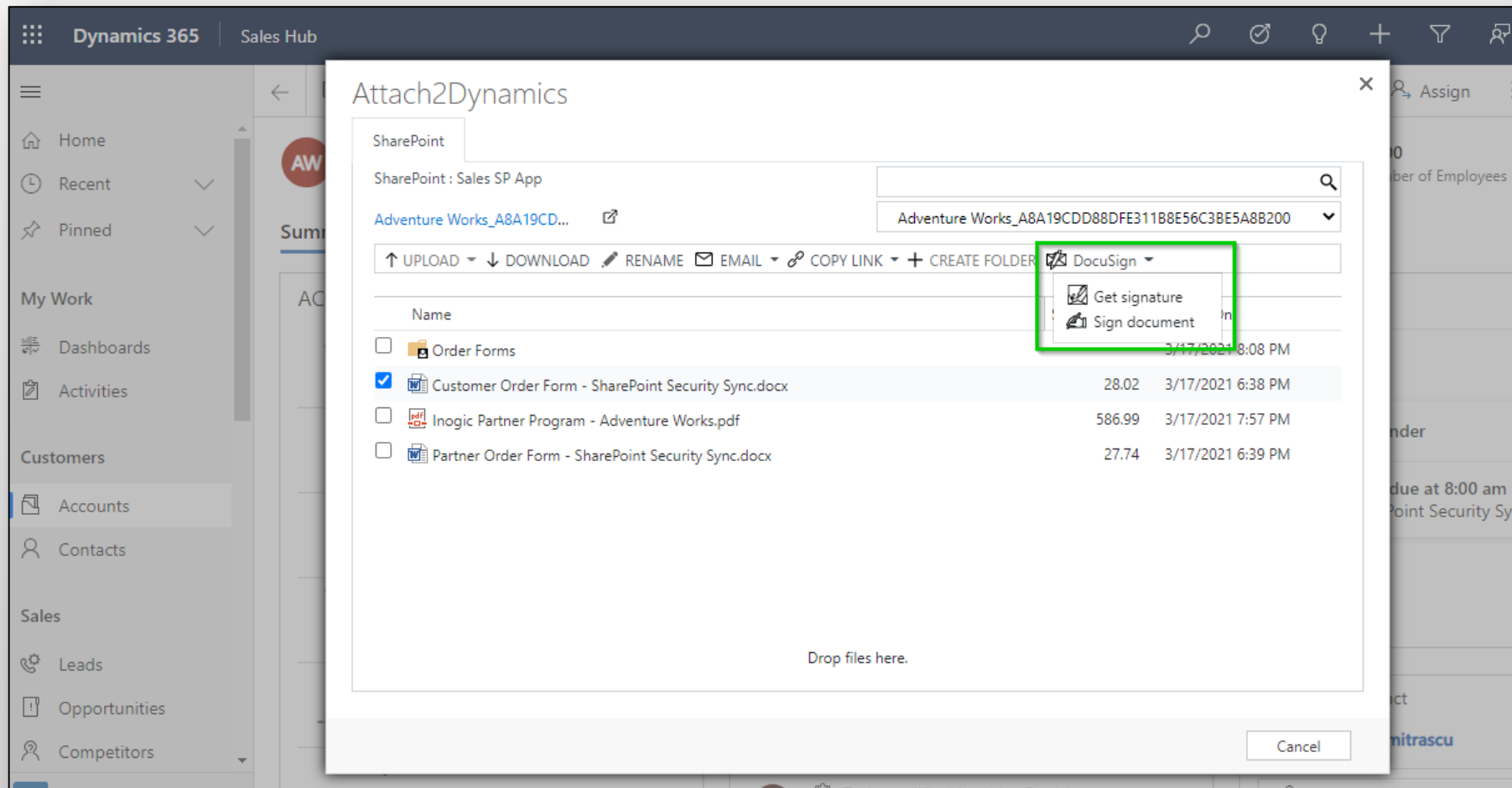
Owner
John Inogic

General **Information** Bulk Migration Job Status Related

 Total Records Processed	145
Last updated:	10/15/2019 3:37 AM

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

Integration with DocuSign for eSignature



Connector Configuration

The screenshot displays the 'Sharepoint Connector' configuration page within the 'SharePoint Security Sync' application. The left sidebar contains navigation options: Home, Recent, Pinned, Connectors (selected), Entity Configurations, Security Templates, Bulk Migration Jobs, Logs, and License Registration. The top toolbar includes actions: Save, Save & Close, New, Deactivate, Delete, and Authenticate. The main content area is titled 'Sharepoint Connector' and has tabs for General, Credentials, Additional Settings, Entity Configurations, and Related. The 'General' tab is active, showing the following configuration details:

General	
Name	* Sharepoint Connector
Connector Type	* SharePoint
Default Connector	<input type="checkbox"/>
SharePoint Site	* Default Site
Auth-Type	* Credential
Enable DocuSign Integration	<input checked="" type="checkbox"/>
Signed document naming convention	Original Document Name + "_signed" + timestamp

Entity Configuration

Dynamics 365 | SharePoint Security Sync

Home Recent Pinned

SharePoint Security Sync

Connectors

Entity Configurations

Security Templates

Bulk Migration Jobs


Logs

License Registration

← Save Save & Close + New Deactivate Delete Refresh

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

Connector	*  Sp_Sharepoint
Entity Name	* Account
Attachment Action	Move
Override Files	<input type="checkbox"/>

account - Sp_Sharepoint - Saved
Entity Configuration

General Create Custom Folder Structure Email Configuration Related

From	Me	
To	Users	× Brian B
Cc	Team	× BU 1
Bcc	Dynamic	× OwningUser

Bulk Sync Tool

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Test Connector #1	https://26nov.sharepoint.com	czer@26nov.onmicrosoft.com

Security Groups Folder Security Failed Sync Attachment Migration

<input type="checkbox"/> Entity Display Name	Entity Logical Name
<input checked="" type="checkbox"/> Account	account
<input type="checkbox"/> Contact	contact
<input type="checkbox"/> Opportunity	opportunity

Sync Delete Groups

Sync Security of selected entities

Security Groups Folder Security Failed Sync Attachment Migration

Sync records that are failed due to SharePoint Security Sync app.

Sync

Sync the sel

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Test Connector #1	https://26nov.sharepoint.com	czer@26nov.onmicrosoft.com

Security Groups Folder Security Failed Sync Attachment Migration

<input type="checkbox"/> Entity Display Name	Entity Logical Name	From Date	To Date
<input type="checkbox"/> Account	account	08-12-2020 15	08-12-2020 15
<input checked="" type="checkbox"/> Contact	contact	08-12-2020 15	08-12-2020 15
<input type="checkbox"/> Opportunity	opportunity	08-12-2020 15	08-12-2020 15

Sync

Sync rec

SharePoint Security Sync

+ CREATE NEW CONNECTION REFRESH

Connector Name	SharePoint Site	User
Test Connector #1	https://26nov.sharepoint.com	czer@26nov.onmicrosoft.com

Security Groups Folder Security Failed Sync Attachment Migration

For?	Emails	From	01-09-2020 15
Entity	Account,Contact	To	08-12-2020 15
Action	Copy		

Proceed

Move History A

Next Steps

Learn more about [SharePoint Security Sync](#) today.

Get your free **SharePoint Security Sync** trial from [our website](#) or [Microsoft AppSource](#)!

Email: crm@inogic.com

