

User Manual

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Introduction

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.

Salient 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
- Supports all types of entities
- 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
- 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 DocuSign integration 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 structure in SharePoint

Available for :-

Microsoft Dynamics 365 CRM: Microsoft Dynamics 365 8.2 & above, Dataverse (Power Apps). Deployment: Online SharePoint: Online

Disclaimer: In the process of synchronizing security between CRM and SharePoint, the app breaks the inheritance of permission on the folder in SharePoint. If you ever wish to restore the original state of security on the folder, it needs to be done manually and **Inogic does not take any responsibility for** *recovering it to the original state.* It is highly recommended that you create backups and restore points, test the system in a test enviornment and take backup of original systems before moving it to the production enviornment.

Prerequisites

Before you start using SharePoint Security Sync solution, it is necessary to enable server-based SharePoint integration for your Dynamics 365 CRM environment.

To do this, follow the steps given below:

1) Navigate to Advanced Settings → Settings → Document Management.



2) Go to 'Enable Sever-Based Sharepoint Integration'.



3) Click on Next.

Enable Server-Based SharePoint Integration - Google Chrome —		×
 javanahar malyaanina aan/Kristikaani/Kian Kantaine asya Waasihis 20066000 	40.4	b
Enable Server-Based SharePoint Integration		
After you enable server-based SharePoint integration, you'll notice the following changes if you used the previous SharePoint integration:	1	
- You can perform SharePoint actions in the Dynamics 365 command bar.		
- SharePoint documents display in Microsoft Dynamics 365 lists.		
- There's no list component installation required for the SharePoint site.		
If you're already connected to SharePoint sites, all the sites must be valid for server-based SharePoint integration.		
<u>N</u> ext <u>C</u> ancel		

4) Now, select the location of SharePoint site and click on Next.

Define Deployment	Prepare Sites	Validate Sites
Server-based SharePoint integrat nultiple SharePoint sites are used	ion can connect to online or d, all sites must be of the san	on-premises SharePoint sites. I ne deployment type.
Select where your SharePoint sites are	located:	
 Online On-Premises 		
All SharePoint Online sites must b	e in the same tenant as Micro	soft Dynamics 365.

5) Now, enter the **URL of SharePoint site** that you want to use \rightarrow Click on **Next.**

Enable Server-based SharePoint Integration			
Define Deployment	Prepare Sites	Validate Sites	
No additional setup requireme SharePoint Online.	ents are required for connecting	Dynamics 365 Online to	
Enter the URL of the SharePoint	t site for use with server-based ir	ntegration.	
URL sha	repoint.com		J

6) You can get the URL of SharePoint site from here.

	Office 365 \rightarrow		
		. For best results, update your	apps to Unified Interface.
Apps			
CneDrive	word		
X Excel	PowerPoint	~	
N OneNote	SharePoint	ц ^о	r P
Dynamics 365	🔎 Power Autom		
		I Integration Fra	Connected Field Service
Admin		r communication channels immersive experience with	Use Connected Field Service to monitor connected devices to make
All apps $ ightarrow $		65	Dynamics 365
		ITERFACE	UNIFIED INTERFACE

7) Once the site is validated, click on **Finish.**

Define Dep	loyment	Prepare Sites	Validate S	Sites
Validation Status	Complete			
Name	Absolute U	JRL	Validatio	n
Default Site	https://jun	ework.sharepoint.com	Valid	
Validation Succee	ded.			
		Back	Finish	Cancel

8) The **server-based integration** of SharePoint site is now **enabled** for your Dynamics 365 CRM environment. Now, go back to **Settings** → **Document Management Settings**.



Select the Entities for which Document Management needs to be enabled →Enter the URL of active SharePoint sites where you want to store documents → Click on Next.

Documen	t Management Settings - Google Chrome —		×
(and the set	ek a men dyr amlar a anny Nich Norse (Michael Cardalana, a ga N	il sector	
Docum	ent Management Settings	@ <u>H</u> e	lp
Select er Documer	tities It management will be enabled on the selected entities.		
	Entities		
	Account		
	Account Project Price List		
	Action Card Regarding		
	Action Card Role Setting		
	Actual		
	Actual Data Export (Deprecated)		
	Address		
	Agreement		
	Agreement Booking Date		
	Agreement Booking Incident		
\Box	A	•	
SharePoi	int site		
The selec	ted SharePoint site will be used as the default site for document managem	ent.	
		i	
SharePo	int Site: sharepoint.com/		
	Next	<u>C</u> ancel	

 Check 'Based on entity' to have document libraries and folders that are based on the Dynamics 365 Account entity automatically created on the SharePoint site. Users will not be prompted to create them.

If you don't want folders automatically created, **do not** select the **'Based on entity'** check box.

Click on **Next** button.

Document Manageme	nt Settings			<u> (</u> elp
https://junework.sharepoin	<u>nt.com/</u> is a vali	d URL.		
Select folder structure				
To create a folder structure ba entity. Folders will be created records.	sed on a specifi on SharePoint ir	c entity, click n the context	the check box, and of your Microsoft	d select an Dynamics 365
Based on entity			\sim	
		<u>B</u> ack	Next	<u>C</u> ancel

11) Click on Finish.

Document Librar	y Creation Status		
o be created:	38		
Newly created:	38		
ailed:	0		
Already existing:	0		
reation Details			
Entities	Document Library	Status	Failure Reason
Account	Management Association (%)	Succeeded	^
Agreement	New York Area and a second sec	Succeeded	
Agreement B	New York and American Street,	Succeeded	
Agreement B	https://peticite.com/articles/articles/articles/	Succeeded	
Agreement In	https://www.chickengolicite.com/http://	Succeeded	
Agreement In	Management Average States	Succeeded	
Article	Management Annual Contents	Succeeded	
Booking Time	Man Development American Street	Succeeded	
	Mps. () and and the spatial service.	Succeeded	
Category		Succeeded	
Category Expense	https://www.characteric.com/in-		

Once this is done, you can easily store Documents/Attachments related to selected Entities in the respective SharePoint site using Attach2Dynamics button.

Configuring Connectors

Disclaimer: The initial background process after the creation of Connector and Entity Configuration could take longer (could run for 3-4 hours) if there are high number of Users, Business Units or both.

Users --> More than 300

Business Units --> More than 10

Therefore, it is recommended to configure the application during off hours. This will ensure that other user activities are not hampered.

In SharePoint Security Sync the user can configure multiple connectors for SharePoint. For example: The user can create multiple connectors such as SharePoint_1, SharePoint_2, SharePoint_3, etc. for SharePoint.

To achieve this, navigate to **SharePoint Security Sync** App and then click **'Connectors'** Entity. Next, click **'New'** to create a new **'Connector**.'



Configuring SharePoint Connector

- a) Name: Give name to the connector
 Connector Type: Choose SharePoint from the drop-down.
 Default Connector: If required, enable the checkbox to set SharePoint_1 as default connector.
- **b)** SharePoint Site: It is the location of SharePoint, where files and folders will be stored. Select the valid SharePoint site here.

lew Connector			
eneral Credentials	Additional Settings Entity Configurations		
General			
Name	* SharePoint_1		
Connector Type	* SharePoint		
Default Connector			
SharePoint Site	* Look for SharePoint Site ,O		
Auth-Type	SharePoint Sites		
Enable DocuSign	Default Site		
integration	+ New SharePoint Site Change View		

Note: User cannot reuse the same SharePoint site for each new connector.

c) Enable DocuSign Integration: Enable the checkbox to make use of DocuSign features.

Note: To use DocuSign feature from Attach2Dynamics UI it is necessary to install and configure DocuSign solution in Dynamics 365 CRM.

lew Co	onnector	
ieneral	Credentials	Additional Settings Entity Configurations
Genera	I	
Name	e	* Sharepoint_1
Conn	ector Type	* SharePoint
Defau	ult Connector	
Share	Point Site	* 🖾 Default Site
Auth	-Туре	*
Enab Integ	le DocuSign ration	

d) Auth-Type: The Auth-Type is of two types, Credential and App.

New Connector									
General Credentials	Additional Settings Entity Configurations								
General	General								
Name	* SharePoint_1								
Connector Type	* SharePoint								
Default Connector									
SharePoint Site	* 🖾 Default Site								
Auth-Type	*Select ~								
Enable DocuSign Integration	Select Credential App								

Credential: This indicates that Authentication with the connector is done through Credential
i.e. id and password. It is mandatory to enter credentials in order to create a new Connector.
For authentication through credentials, for any attachment action, the name of user appears
who has authenticated the Connector. Enter value for Id and Password/Secret. Next
authenticate the credentials.

New Connector					
General Credentia	Is Additional Settings Entity Configurations				
ld	* :				
Password/Secret	* ZZZZZ UXNVE LKVLB GAGVK RWBTC AESVQ BUJI				

Note: Id and Password for SharePoint: In the *Id* field enter your username and in *Password/Secret* field enter password. It can be your normal Dynamics 365 CRM credentials.

2. App: This is to provide authentication with App. In App authentication, if any action is performed then the name of logged-in user appears.

New Connector		Sam Richard Unauthenticate Owner Status Reason
General Credentials	Additional Settings Entity Configurations	
Password/Secret	*	https://a4ddev.crm8.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html Create Azure Active Directory App

In order to know how to generate Id and Password/Secret for App click here.

After you have generated the Id and Password enter them in the fields provided.

Sales SharePoint Site	Sam Richard Unauthenticated Owner Status Reason
General Credentials Additional Settings Entity Configurations Related	I
ld * ef6166ad-617d-4904-a6ae-c44b058e6c97	Use below as your redirect url
Password/Secret * ZZZZZ VQMVE LAUGW EHDTH NQBOV UDJCA H	https://a4ddev.crm8.dynamics.com/WebResources/ikl_/Attach2Dynamics/Callback.html Create Azure Active Directory App
	In order to get Id and Secret Key please follow this blog

Now if any logged in user uploads or performs any attachment action on files in SharePoint, their name will appear for the action.

Let's upload few files and see how it works.

Attach2Dynamics	
SharePoint	
SharePoint : SharePoint Connector	
Fyzher Technologies_C7388 🛛 🖉	Fyzher Technologies_C596028E9281EB11A812000D3AF218
A2D and SSS.docx Kanban Board Article.docx	17.57 3/10/2021 4:53 PM 40.31 3/10/2021 4:54 PM
	Drop files here

Here the name of the admin appears when they are logged in and have uploaded the file.

::: SharePoint						Q	ø	?	SR
CS Communication site Home Documents Pages Site contents Edit							are		
$ ho$ Search Account + New \sim $\bar{\uparrow}$ Upload \sim	🖉 Quick edit 🖙 Sh	are 💿 Copy lin	k 🗔 Sync 🛓 Download	🕮 Export to Excel	•••		V	(i)	2
Account > Fyzher Techologies_C738BE243B	47EA11A812000D	3AF02CD4							<u></u>
L Name ∽	Modified \checkmark	Modified By \checkmark	+ Add column 🗸						
A2D and SSS.docx	2 hours ago	Sam Richard							
Kanban Board Article.docx	2 hours ago	Sam Richard							

Now let's take another use-case when a user, who is not an admin uploads a file. Rhea is a Sales Manager who does not have admin rights. Now she uploads the files while being logged in, and her name appears as the user uploading the file.

::: SharePoint							Q	۵	?	RP
Cs Communication site Home Documents Pages Site conten	ts Edit					☆ No	t follov	wing	년 Sh	are
\sim Search Account + New \sim $\overline{\uparrow}$ Upload \sim	🖉 Quick edit 🖙 Sh	are 👁 Copy	ink ಢ Sync 🛓 Download	🖷 Export to Excel	•••		nts \vee	V	0	2
Account > Fyzher Techologies_C738BE243B	47EA11A812000D Modified ~	03AF02CD4 Modified By >	+ Add column \vee							*
A2D and SSS.docx	2 hours ago	Sam Richard								
💼 🦷 Kanban Board Article.docx	2 hours ago	Sam Richard								
👜 ŠMaplytics Website Content_1.docx	About a minute ago	Rhea P								
Maplytics Website Content_2.docx	About a minute ago	Rhea P								
Maplytics Website Content_3.docx	About a minute ago	Rhea P								

Authenticate

After the Connector record is created the connector credentials need to be authenticated.

To authenticate the connector, **Authenticate** button is provided on the command bar. This button is visible only to users with SharePoint Security Sync Administrator role.

	Dynamics 365 $ \smallsetminus$	SharePoint S	Security Sync	SharePoint Security	y Sync 〉 Connectors	> SharePoint_1
≡		(Click on	Authenticate butt	on to authenticate	the connector.	
ഹ	Home	+ New	🔓 Deactivate	e 🕅 Delete	⊘ Authenticate	C Refresh

After the Connector is Authenticated, create Entity Configuration record.

If Connector is authenticated successfully, the following success pop up will appear:



If Connector authentication fails, then the following error pop up will appear:



And to see the what exactly the error is, navigate to **'Logs Entity'**, check the error and retry the authentication.

=	🗋 Deactivate 📋 Delete 🖒 Refresh 🔗 Assign 🖻 Share 🖾 Email a Link 🖉 Flow \vee 🖷 Word Templates \vee 🗐 Run Report \vee								
命 Home	777C576F-7754-EA11-A812-000D3A33F94A John David	I.,							
🕒 Recent 🗸 🗸	og Owner								
🖈 Pinned 🗸 🗸	General File Details Related								
Attach2Dynamics	A Record Id 777C576F-7754-EA11-A812-000D3A33F94A								
ି Connectors	△ Entity Configuration								
Entity Configurations	A Deleted On	-							
Security Templates		_							
Bulk Migration Jobs	A Deleted By								
🖏 Logs	A Information Please verify the credentials for Connector in CRM.								
License Registration									
	A Record URL https://trial2020feb.crm.dynamics.com/main.aspx?etn=ikl_connector&extraqs=&id=(777C576F-7754-EA11-A812-000D3A33F94A)&pagetype=entityreco	rd							

Entity Configuration

Disclaimer: In order to synchronize security for {EntityName} in SharePoint, we'd have to break the inheritance of permission for the record folder within the respective Document Library in SharePoint. If ever you wish to restore the original state, it needs to be done manually and **Inogic does not take any responsibility of restoring it to the original state**.

For 'Entity Configuration' go to SharePoint Security Sync → Entity Configuration.

	Dynamics 365 $\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$	SharePoint Security Sync SharePoint Security Sync > Entity Configurations
=		Image: Show Chart + New Image: Delete > \circlearrowright Refresh Image: Log In Image: Email a Link > p^{P} Flow >
ሴ	Home	Active Entity Configurations \sim
Ŀ	Recent 🗸	
\$	Pinned 🗸	✓ Entity Name ∅ Connector ∅ Folder Path ∅ Folder Path Schema
Sha	rePoint Security Sync	
ക	Connectors	
10	Entity Configurations	
ô	Security Templates	
	Bulk Migration Jobs	
Ę	Logs	No data available.
6	License Registration	

Entity Configurations can be created from the Connector form too, just click on Entity Configuration Tab on Connector page and click on **"+ New "** button.

	Dynamics 365 SharePoint Security Sync							
≡		\leftarrow	📑 🔚 Save	🛱 Save & Close	+ New	Deactivate	🗊 Delete	⊘ Authenticate
ŵ	Home	Sp_Sha	repoint - Saved	ł				
Ŀ	Recent \checkmark	Connector	•					
Ś	Pinned 🗸	General	Credentials	Additional Settings	Entity	Configurations	Related	
Sha	rePoint Security Sync							
ශ	Connectors							
1	Entity Configurations	0	Entity Name $ \smallsetminus $	Co Co	nnector \smallsetminus		Folder Path	\sim
	Security Templates	0	enel	Se	Surgeon t		Janual Alex	Amondo -
	Bulk Migration Jobs	0	contract.		alanson			
<u>∎</u> ⊗	Logs	0	Appairie and	1	Deservation			
0	License Registration							

	Dynamics 365	harePoint Security Sync
≡		← 🗉 🗗 Save & Close + New 🕞 Deactivate 🗊 Delete 🖒 Refresh
ណ៍	Home	account - Sp Sharepoint - Saved
Ŀ	Recent 🗸	Entity Configuration
\$	Pinned 🗸	General Create Custom Folder Structure Email Configuration Related
Sha	rePoint Security Sync	
ආ	Connectors	Connector * 🏠 Sp_Sharepoint
0	Entity Configurations	Entity Name * Account
	Security Templates	Attachment Action Move
	Bulk Migration Jobs	
Ē.	Logs	Override Files
0	License Registration	

General:

- a) Connector: Select the Connector for which you want to configure the Entity.
- b) Entity Name: Mention the Entity for which you are configuring.
- c) Attachment Action: You can either Copy or Move the attachment.
 - i) **Copy:** If you Select **Copy**, the attachment will be copied to SharePoint and its cloud storage path will be stored against the record.
 - **ii) Move:** If you Select **Move**, the attachment will be moved/migrated to SharePoint and its cloud storage path will be stored against the record.
 - iii) None Selected: If you don't select any option then the Attahcment will not be moved to SharePoint but you will still able to use the Attach2Dynamcs document management UI for the respective entity.
- **d) Override files:** If checked, means trying to upload file with same name will be overridden. If unchecked, then a new file with number appended is created and uploaded in SharePoint.
- e) Auto Create Folder: By default 'No' is selected for this field. If 'Yes' is selected then folder will be created in SharePoint for the respective entity automatically.

Create Custom Folder Structure:

SharePoint Security Sync gives provision to create your own folder structure within SharePoint for storing documents/attachments. With this tab, you can customize both the library structure as well as the record folder structure in SharePoint site. This tab is divided into two sections – **Create Library Structure** and **Create Record Folder Structure**.

The 'Create Library Strucure' section can be set as follows:

- Library Structure: This is an optionset field with following options By Period, By Starting Character and Custom. Select either one of these options. Based on the option selected, further fields will be made available.
 - By Period: If this option is selected then the document library stucture will be created based on certain period. To be precise, the period is based on 'createdon' date of record. In order to define the period additional fields are required to be populated. These fields include:
 - Period Type: This is yet another optionset field with the following options Daily, Weekly, Monthly, Quarterly, Yearly, X Month and X Year.
 - Duration: This is a numerical field. It appears when 'X Month' or 'X Year' option is selected in 'Period Type'.
 - Select Date Format: This is also optionset field with numerous options. Select any one format for the date.

For example, suppose if user has set **'Period type'** to **'X Month'** and **'Duration'** to **'6'**. Now based on this setting a half yearly document library will be created in SharePoint for whichever record created for that particular period.

account - Sp_Sharepoint - Saved Entity Configuration								
General	Create Custo	m F	older Structure	Email Configuration	Related			
Create	Library Struct	ure						
Libra	ry structure		By Period					
Perio	d type	*	X Month					
Dura	tion	*	6					
Selec	t date Format *		МММ уууу					



- **By Starting Character:** If this option is selected then the document library structure will be created based on the starting character of the chosen field name. Once this option is selected, the following additional field needs to be populated:
 - Document Library Format: Here, logical name of the field is to be entered within brace brackets {}. And the field type should be either Single.Text, Optionset or Lookup.

account - Sp_Sharepoint - Saved Entity Configuration						
General	Create Custon	n Folder Structure	Email Configuration	Related		
Create Libra	Library Structu	re By Starting chara	cter			
Docu Form	ument Library nat	* {primarycontactic	}			

- Custom: With this option, you can create document library structure based on the full name of any chosen field. Once this option is selected, the following additional field needs to be populated:
 - Document Library Format: Here, logical name of the field is to be entered within brace brackets {}. And the field type should be either Single.Text, Optionset or Lookup.

account - Sp_Sharepoint - Unsaved Entity Configuration							
General	Create Custo	om F	older Structure	Email Configuration	Related		
Create	Library Struc	ture					
Libra	ry structure		Custom				
Document Library * Format		{preferredcontact	methodcode}				

The 'Create Record Folder Strucure' section can be set as follows:

• Folder Format: Here, you can either use logical name or any text to name the folder. Further, you can also use combination of both logical name and text.

For example, suppose if user has used combination of logical and text for **'Folder Format'** like **'{name} KP.'** Now based on this setting the following record folder structure will be created in SharePoint.

acco Entity	ount - Sp_Sharep Configuration	ooint - Saved				
Gene	eral Create Custon	n Folder Structure	Email Configuration	Related		
Cr	eate Library Structu	re				
	Library structure	By Period				
	Period type	* X Month				
	Duration	* 6				
	Select date Format *	МММ уууу				
Cr	Folder Formet	Structure				
	Folder Format	{name} KP				
:::	SharaBaint			0.505	rah thia libran.	
•••	SharePoint			~ Sea	irch this library	
â	Co Co	ommunicatio	n site			
	Hon	ne Documents	Pages Site contents	Edit		
	+ New \sim	$\overline{\uparrow}$ Upload \lor \blacksquare	Edit in grid view 🖄 Sha	re 👁 Copy link	G Sync 🛓 Download	Add shortcut to OneDrive
Ľ						
	Account Jan 2	017 to Jun 2017	Blue Yonder Airlin	es KP_ACA19	CDD88DFE311B8E56C3	BE5A8B200
	D N	ame \vee	N	Nodified \smallsetminus	Modified By \smallsetminus	+ Add column \smallsetminus

Email Configuration:

The next is Email Configuration tab. With this tab you can send the documents as attachments/links through email to the required recipients. You can set this tab as shown in below screenshot.

itity Configi	uration			
eneral C	Freate Custom Folder	Structure Em	nail Configuration Related	
From	Me	\sim		
То	Users	~	× Brian B	
	00010		× bridin b	

- From The sender i.e. the person who sends the email
- To Recipient i.e. the person to whom the email is to be sent
- CC Carbon Copy i.e. the person to whom a copy of the email information is to be sent
- **BCC** Blind Carbon Copy i.e. the person you have kept in the loop and do not want the other recipients to see that particular contact
- Types of Email addresses to select from:
 - a. **Users** If you select Users then all the CRM users present in the environment will be enlisted while selecting the data.
 - b. **Queue** If you select Queue then all the queues present in the environment will be enlisted while selecting the data.
 - c. **Team** If you select Team then all the teams created in the environment will be enlisted while selecting the data.
 - d. **Dynamics** E.g. If you have selected quote as an entity then all the lookup fields on quote which are allowed to send email will be enlisted while selecting the data.
 - e. **Manager** E.g. If you have selected quote as an entity then, all the system-user lookup fields on quote entity will be enlisted while selecting the data, and recipient would be the manager of the selected data.

Note:

- **1)** To use SharePoint Security Sync functionalities on an **Entity** it is mandatory that you create an **Entity Configuration** record for the same.
- 2) Attachment Actions can be enabled only for one entity with one Connector.
- **3)** Connector and Entity Configuration are editable if user has SharePoint Security Sync Administrator role.
- **4)** SharePoint Security Sync User can only read the Connector and Entity Configuration.
- **5)** The security level privileges will start syncing once after creating entity configuration the user hits the File tab or Attach2Dynamics button.

Configuring Hierarchy Structure

Attachments/Documents of Dynamics 365 CRM records can be stored in SharePoint sites on the basis of hierarchy.

To achieve this, follow the steps given below:

1) Go to Advanced Settings \rightarrow Settings \rightarrow Document Management Settings.



2) Select Entities \rightarrow Enter the URL of respective SharePoint site.

Do	Document Management Settings - Google Chrome — 🗌 🗙									
â i	inogicd	emo.crm8.dynamics.com/WebWizard/V	VizardConta	iner.asp	ox?Wiza	ır				
D	Document Management Settings									
S. D	Select en Documen	tities t management will be enabled on the selected ent	ities.							
	Entities									
	Accounting Company									
	Action Card Regarding									
	Action Card Role Setting									
	Address									
		Al Builder Dataset File								
		Alert								
		Alerts4Dynamics Log								
		ApiSettings								
		Applied Transactions								
		Appointment			-					
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			Next	<u>(</u>	Cancel					

3) Enable the Checkbox 'Based on Entity' \rightarrow Select either of the entities, Account or Contact.

Document Management Setting	ıs - Google Chrome	_	- 🗆 X					
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Document Management	Settings		🕜 <u>H</u> elp					
https://inogicdemo.sharepoint.com/sites/teamhierarchy is a valid URL.								
Select folder structure								
To create a folder structure based on a specific entity, click the check box, and select an entity. Folders will be created on SharePoint in the context of your Microsoft Dynamics 365 records.								
Based on entity	Contact	•						
	Account							
	Contact							
	<u>B</u> ack	Next	<u>C</u> ancel					

4) Next, go to Entity Configurations \rightarrow Click on New.

	SharePoint Security Sync – User Manual					
🔚 Save	Bave & Close + New ∞ ^{2/®} Flow ∨					
New E	Intity Configuration					
General	Email Configuration					
Cor	nnector *					
Ent	ity Name *Select					
Att	achment Action					
Ove	erride Files					
Error	Logs					

- 5) Populate the following fields \rightarrow Click on Save.
 - a. Connector: Select the connector for the particular SharePoint site
 - b. Entity Name: Select the entity.
 - c. Attachment Action: Select either move or copy
 - d. **Override Files:** Enable the checkbox if required
 - e. **Folder Structure Fields:** This field appears on selection of the entity for which hierarchy structure is configured. In this field, customized entity with Account or Contact lookups will be populated. Select either of the entities.

portunity - Shar ity Configuration neral Email Configu	ePoint Hierarchy
Connector	* 玲 SharePoint Hierarchy
Entity Name	* Opportunity
Attachment Action	Move
Override Files	
Folder Structure Field	* Account

6) Now go to Opportunity → Select an opportunity → Click on Attach2Dynamics button → Drag and Drop required file.

Sales Hub			م	${}^{\odot}$	Ŷ	+	Л
\leftarrow	Attach2Dynamics					×	Lost
Înte	SharePoint						In F
Орро	SharePoint : SharePoint Connector				٩	- 1	Stat
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Active f	\uparrow upload – \downarrow download 🖋 rename 🖂 email – 🔗 copy lin	K ➡ + CREATE FOLDER				- 1	
Sumi	Name	Size (KB)	Modified Or	1		- 1	
-	Drop files	here.		Сан	ncel		atior see wh

 7) Next, go to SharePoint site. Here, the respective file will be stored in the following manner: Account > Account Name_guid > Opportunity > Opportunity Name_guid.

Cs	Communication site Home Documents Pages sss ssste	ool ssspatch Sit	e contents Edit		式 Not follow	ing i 오 Sh
+ New ~	T Upload ∨ 目 Edit in grid view 🖄	Share စာ Copy link DD3AF2185F > ၀ႏ	G Sync ⊻ Downlo opportunity > Inter	ad 🗟 Add shortcut to OneDrive ·	All Documents ~	∇ Ū
	Name \vee	Modified \vee	Modified By \smallsetminus	$+$ Add column \vee		
	^{-S'} INOGIC EULA_Signed.docx	A few seconds ago	Sam Smith			

Activity Entity Configuration

To create entity configuration for Activity Entities, follow the steps given below:

• Navigate to SharePoint Security Sync App --> Entity Configurations.

	9	SharePoint Securi	ty Sync – User Manua	I	
III Dynamics 365	harePoint Security Sync				+ ۵ ¢
=	← 🖾 Show Chart	+ New 🗊 Delete ~	🕐 Refresh 🛛 🕅 Email a Link	✓ Ø Flow ✓ I Run	n Report 🤟 🖉 Excei Templat
A Home	Active Entity C	onfigurations ~			E Y Search
S Pinned ∨	✔) Entity Name ~	Connector 🛩	Folder Path 🗸	Folder Path Schema 😔	Attachment Action 🗸 🛛 Or
SharePoint Security Sync Connectors Entity Configurations Security Template Entity Bulk Migration Jobs Logs Ucense Registration	Configurations		No data i	available.	
	<u>A0</u> # A B	C D E F	G H I J K L	M N O P Q	i RSTUV
	0-0of0				

• Click on +New.

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SharePoint Security Sync																				
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	0-00	of 0																		

• Enter the required details to create Entity Configuration for Email --> Click on Save.

	Dynamics 365 S	harePoint Security Sync	م ر	Q -	+
■ @ © ☆ Shi G 10 @ ■	Dynamics 365 S Home Recent Pinned Connectors Entity Configurations Security Templates Bulk Migration Jobs Logs	Image: Security Sync Image: Save & Close Image: Save & Cl	P. Assign	Share	+
U	License Registration	Override Files Auto Create Folder No			

• For example - If an Account record is set as a Regarding for an Email record then create an entity configuration for the **Account** entity as shown in the below screenshot. Make sure to select either **Copy or Move** as an attachment action while configuring the entity record.

	Dynamics 365 St	sarePoint Security Sync	م	Q
=		Check Access	R. Assign	🖻 Share
ଇ	Home	account - Sales_SharePoint - Saved		
0	Recent 🗸	Entity Configuration		
\$	Pinned 🗸	General Create Custom Folder Structure Email Configuration Related		
Sha	rePoint Security Sync			
Ģ	Connectors	Connector Sales_SharePoint		
102	Entity Configurations	Entity Name * Account		
	Security Templates	Attachment Action Copy		
	Bulk Migration Jobs			
5	Logs	Override Files		
6	License Registration	Auto Create Folder No		

• Once the Email is **Sent or Received**, the attachments will get migrated to SharePoint and the email attachment would be uploaded inside an email folder present in the regarding record folder as shown in the below screenshot:

	SharePoint	${\cal P}$ Search this library	₽ 0
@ 5)	Cs Communication site Home Documents Pages Sit	contents Edit	☆ Net following
9 0	+ New 🗸 👎 Uplead 🗠 🖽 Edit in grid	riew 🖻 Share 👁 Copylink 🎧 Sync 🛓 Download \cdots	🚍 All Documents \vee 🛛 🖓
	Account > Sales Account_3C3C88DCEEAf	EC119840000D3A8EA660 > Email Modified > Modified By < - Add column <	
	DusinessRequirement.txt	A few seconds ago	
		4	

• Similarly, if there are any other entity records as an email regarding then create an Entity configuration for those entities as well.

Security Templates

Security Templates Entity enables to control access given to the users over various features of Attach2Dynamics such as Upload, Download, Email, Copy Link, Rename etc. in SharePoint.

Note: If two records of security template are created for the same user then the user will get highest access permission from either of the records.

To configure Security Templates, go to SharePoint Security Sync App --> Security Templates --> Click on '+New' --> Fill the respective fields.

1. General

This section is where you define the name of record and the connector to SharePoint.

SharePoint Security Syn	nc – User Manual
ew Security Template	
eneral Permissions	lisors
Name * Connector *	05615

Populate the given fields and save the changes. After the changes are saved you need to select users to whom this security template should apply.

Access Level 1 Security Template		Sam P Owner
General Permissions Related		
Name * Access Level 1	Users	
Connector * 🐼 SharePoint 1		
	✓ Full Name î Site	Busi
	⊙ Sam P	сао
		,

2. Permissions

Next tab is **Permissions** which comprises of all the Attach2Dynamics features. To provide access to Attach2Dynamics features just enable the checkbox given against each and every feature.

arePoint security urity Template	/ template		
neral Permissions	Related		
All			
Upload File/Folder		Rename File/Folder	
Download Files/Folders		View Files	
Create Folder		Copy Link	
Delete Files		Email	
DocuSign			

After filling the respective fields, click on 'Save'.

Note:

- If no template is created for a user, then all the features would be enabled except the Delete feature.
- For Delete feature a Security Template is must.

Share and Assign Record

The security role privileges are synced when a record is shared or assigned to another user. For e.g. when a User A (Sam) owns a record and other User B (Rhea) has only user level access, then Rhea won't be able to see the records owned by Sam in SharePoint.

For instance, records visible to Sam are:

iii SharePoint	Q 🚳	? SP
Cs Communication site Home Documents Pages Site contents Edit	🖈 Not following	🖻 Share
	\equiv All Documents \lor ∇	0 Z
Account		
☐ Name ∨ Modified ∨ Modified By ∨ + Add column ∨		
Moussem Enterprises_43FFE777BE48EA11A A few seconds ago Sam P		

Records visible to Rhea:

III SharePoint	Д (3 2	?	RP
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P Search Account + New ∨ ↑ Upload ∨ Quick edit G Sync G Export to Excel PowerApps ∨ P ^a Flow ∨ ···	\equiv All Documents \vee	7	0	2
Account				•
□ Name ∨ Modified ∨ Modified By ∨ + Add column ∨				

Now Sam shares the record with Rhea.

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4	II Accounts \	/							년 Share			P
~	Account Nam	e 🗸		Main	Phone \checkmark	Address 1: City \smallsetminus	Primary Contact	~	_{Er} 🖾 Email a Link		>	
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									🛧 Unfollow			
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After the records are shared with Rhea she will be able to view the records owned and shared by Sam in SharePoint.

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P Search Account + New	\equiv All Documents \vee 5	7 0	2
Account			*
□ Name ∨ Modified ∨ Modified By ∨ + Add column ∨			
Moussem Enterprises_43FFE777BE48EA11A 6 minutes ago Sam P			

Now due to some business requirement Sam assigns the record to Rhea.
	SharePoint Security Sync – User Manual							
Image: Dynamics 365 v Image: Dynamics 365 v Image: Dynamics 365 v	Sales Hub Sales > Accounts R Show Chart Califier III My Active Accounts	Deactivate 🖗 Attach2Dynamics 🧃	🖞 Delete \vee 👍 Merge	ాల లేపి Open Org Chart 🛛 🦁 Gec	v ⊤ v & © Code ≒ Add to Marketing List … Search for records	? 8		
© Recent ∨	Account Name Moussem Enterprises	↑ ♀ Main Phone	Address 1: City	♥ Primary Contact	♥ Email (Primary Contact)	7		
My Work Dashboards Activities Activities Auto capture (preview) Activity suggestio Contact suggestio Customers Accounts Accounts Accounts Sales Sales Leads		Assign Account You have selected 1 Account like to assign it? Assign to U User or team O	X .To whom would you ser or team A Rhea P Assign Cancel					
Opportunities	All # A B C D	EFGHIJ	K L M N	O P Q R S	T U V W X	Y Z		
Sales	1 - 1 of 1 (1 selected)							

The record will not be visible to Sam anymore and will be assigned and visible to Rhea in SharePoint.

Visibility of records to Sam after record is assigned to Rhea:

Communication site Home Home Documents Pages Stearch Account Account + New < T Upload < Quick edit Sync Export to Excel PowerApps < e ^a Flow < ··· Flow < ··· All Documents < T I All Documents T I I Account Modified By < + Add column Modified By < + Add column	SharePoint		Q 🚳 ? SP
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Account Name ∨ Modified By ∨ + Add column ∨	✓ Search Account	$+$ New \vee $\overline{\uparrow}$ Upload \vee \mathscr{O} Quick edit $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	\equiv All Documents \lor \forall \bigcirc \checkmark
Drag files here	Account □ Name ∽	Modified V Modified By V + Add column V	

Now that record is assigned to Rhea, visibility of record to her:

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Account	
Moussem Enterprises_43FFE777BE48EA11A 6 minutes ago Sam P	

Modify Security Role

Apart from sharing and assigning records, we can also modify the security roles in Dynamics 365 which will be replicated in SharePoint. To understand this better, we have created two Business Units apart from root business unit that are: Marketing and Sales. Sales is the parent business unit of Marketing and in this example, we are working with Account entity.

Now, Sales BU has two users, James and Rhea. James is salesperson who has user level read/write access and Rhea as a Sales Manager has Business Unit read/write access.

Marketing BU has one user Joe who is Marketing Manager and has organization level read/write access.

Scenario 1 Visibility:

James: With user level access, he can see only his records.

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🗋 🛛 Name 🗠		Modified \checkmark	Modified By $ \smallsetminus $	+ Add column $ \smallsetminus $					
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Rhea: With BU level access, she can see records of James and her own.

SharePo	oint						?	RP
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	Name \checkmark		Modified $ \smallsetminus $	Modified By $ \smallsetminus $	+ Add column $ \smallsetminus $			
	Fyzher Techr	nologies_414F675DC748EA11A	10 minutes ago	James P				
	Linkin Chain	s_F5D1E604C748EA11A812000	A few seconds ago	Rhea P				

Joe: With org level access he can see all records.

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, \wp Search Account + New \lor $↓$ Upload \lor $∂$ Quick edit \bigcirc Sync d Export to Excel $ര$ PowerApps \lor $₀$ ^d Flow \lor …	\equiv All Documents \vee	70	D ,	2
Account				
Name Modified Modified By + Add column				
Fischer Technologies_FF992F3EC948EA11A 8 minutes ago Joe P				
Fyzher Technologies_414F675DC748EA11A 21 minutes ago James P				
Linkin Chains_F5D1E604C748EA11A812000 11 minutes ago Rhea P				

Scenario 2 Visibility: Now we change the access level of Rhea to Parent Child Business Unit, and keep the security level access of Joe and James the same. With this Rhea will be able to see the records of both Joe and James.

III SharePoint	Q @ ? RP
Cs Communication site Home Documents Pages Site contents Edit	☆ Not following 🖄 Share
P Search Account + New ∨ ↑ Upload ∨ 2 Quick edit G Sync 4 Export to Excel PowerApps ∨ P ^a Flow ∨ ···	\equiv All Documents \lor \forall \bigcirc \checkmark
Account	
Fischer Technologies_FF992F3EC948EA11A 23 minutes ago Joe P	
Fyzher Technologies_414F675DC748EA11A 35 minutes ago James P	
Linkin Chains_F5D1E604C748EA11A812000 26 minutes ago Rhea P	

P a g e 39 of 88

Apart from these modifications the user level access comes into action even when a security role is associated/dissociated to/from a user/team or a member is added/removed from a team or security role deleted.

Bulk Migration Jobs

Bulk Migration Job Entity enables users to configure the bulk movement of the attachments from CRM to SharePoint and also it shows the details and status of the **migrating Emails, Notes and Sales Literature Attachments.**

Note:

- Users are advised to do the migration during off business hours for minimum interruption as there may be bulk of data to be moved.
- Only the Entities where the Attachment Action is defined as Move or Copy in the Entity Configuration will be considered for Bulk Migration.

To configure Bulk Migration Job, go to SharePoint Security Sync App --> Bulk Migration Jobs --> Click on '+New' --> Fill the respective fields.

1. General

This section is where you define the period and Email/Note/Sales Literature attachment we are moving to SharePoint.

N3			Scheduled Sam P Status Reason Owner
Bulk Migration Job Status Related			
* Emails	Select Duration Criteria	* Last X Weeks	
*	Value	* 2	
* 14-11-2019 🛗 16:00 🕓			
* Move			
	Bulk Migration Job Status Related * Emails * \$ \$ \$ SharePoint_1 * 14-11-2019 * Move	Bulk Migration Job Status Related * Emails Select Duration Criteria * \$\op\$ SharePoint_1 Value * 14-11-2019 16:00 * Move	Bulk Migration Job Status Related * Emails Select Duration Criteria * \$\Phi\$ SharePoint_1 * 14-11-2019 * 16:00 * Move

- 1. For?: This specifies whether we are doing Bulk Migration for Emails, Notes or Sales Literature.
- 2. Connector: In this field we specify the connector support i.e. SharePoint.
- 3. Schedule Date: Scheduled date keeps track of the date from which the migration job will start.
- 4. Attachment Action: In this field we specify the action ie. Copy or Move.

- 5. Select Duration Criteria: In this field we specify the period for which we have to migrate Note/Email Attachment/Sales Literature Attachments to SharePoint. Here, X represents Numeric Value. For e.g. Last 10 days, Last 3 weeks, etc. where the number 10 and 3 specify the Value.
 - a) Last X Days: Specify data of how many(X) days have to be migrated to SharePoint.
 - b) Last X Weeks: Specify data of how many(X) weeks have to migrate to SharePoint.
 - c) Last X Months: Specifies data of how many(X) months have to be migrated to SharePoint.
 - d) Last X Years: Specifies data of how many(X) years has to be migrated to SharePoint.
 - e) Older Than: This moves all the Notes/Email attachments prior and inclusive of the date SharePoint.
 - f) **Custom:** This specifies the period **Process From** date to **Process Till** date between which the data is to be moved to SharePoint.

Note: The Notes and Sales Literature Attachments will be moved to their corresponding record folder and Email attachments will move to a common folder named **Email Attachment or Regarding Folder**.

2. Information

BULK MIGRATION Emails - Las A Read only		Status Reason Completed	Owner 이 ᆺ John Sam	
General Information	Bulk Migration Job Status R	Related		
Total Records Processed	161			
Last updated:	08-09-2019 14:37			
Total Succeeded Records	160		Total Succeeded Size (KB)	46,234.85
Last updated:	08-09-2019 14:37		Last updated:	08-09-2019 14:37
Total Ignored Records	1		Total Ignored Size (KB)	0.89
Last updated:	08-09-2019 14:37		Last updated:	08-09-2019 14:37
Total Failed Records	0		Total Failed Size (KB)	0.00
Last updated:	08-09-2019 14:37		Last updated:	08-09-2019 14:37

The next tab is **Information** that comprises the details of processed records.

- 1) **Total Records Processed:** Total number of Emails/Notes/Sales Literature attachment that are processed.
- 2) Total Succeeded Records: Total number of records that have successfully migrated to SharePoint.
- 3) Total Ignored Records: Number of records that were ignored.
- 4) Total Failed Records: Total number of records that failed in the process of migration.
- 5) **Total Succeeded Size (KB):** The size of records that were moved to SharePoint. This tells the Dynamics 365 CRM user how much space he has freed from the CRM.

- 6) **Total Ignored Size (KB):** This is the size of files that were ignored while migrating to SharePoint.
- 7) **Total Failed Size (KB):** Size of failed files while uploading to SharePoint.

Sync Button

Sync button is visible only if there are failed sync records. In such a case just click on the 'Sync' button to complete the syncing process.

🔡 Dynamics 365 🗸	SharePoint Security Sync Administration > Entity Configurations > account - SharePoint	م	ଷ	0	+ 5	7 0	?	R
=	+ New 🗋 Deactivate 📋 Delete 🗿 Sync 🖸 Refresh 🖧 Assign 🖻 Share 🗔 Email a Link 🖋 Flow 🗸	纪 Word	d Templa	tes 🖂	🗐 Run	Report ~	4	
ᢙ Home③ Recent ∨	account - SharePoint Entity Configuration					Owner	-	~
🖈 Pinned 🗸 🗸	General Sync Status Related							
SharePoint Security Sync	Connector * 🗇 SharePoint							1
Connectors	Entity Name * Account						\sim	
 Entity Configurations Security Templates 	Attachment Action							
Bulk Migration Jobs	Override Files							
Logs Ucense Registration								
	Logs		Ű R	lefresh	🗐 Run	Report 🗸		
	✓ Record Id Entity Configuration Information Record URL			9	Created On	1		
	Dia available.							
	E Active						5	a Save

Visibility of Attach2Dynamics button

Attach2Dynamics button is visible only if;

- 1) Logged in User is either has SharePoint Security Sync User or Administrator role
- 2) Entity Configuration record exists for that entity and is in active state.

Use of Attach2Dynamics

Once Entity Configuration record is created user can start using Attach2Dynamics. Let's take an example of Account entity. Suppose Entity configuration record for Account entity with SharePoint connector is created.

accou Entity Co	account - SharePoint_1 Entity Configuration						
Genera	I Sync Status	Email Configuration	Related				
Co	nnector	* 🍄 SharePoint_1					
En	tity Name	* Account					
At	tachment Action						
Ov	verride Files						

Attach2Dynamics button will be seen in the Command bar.

\cdots Dynamics 365 \vee	Sales Hub Sales > Accounts > Alpine Ski House	,	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~
=	⊙ + New 🖧 Open Org Chart 🚺 Deactivate	ିର୍ Connect │ ∨ ः≕ Add to Marketing List ରି, Assi	gn 🖾 Email a Link 볩 Delete 😶
	As Alpine Ski House Account - Account - Summary Project Price Lists Details Field Se	ervice Scheduling Files Related	Attach2Dynamics Refresh Process >
My Work 한 Dashboards	ACCOUNT INFORMATION Account Name * Alpine Ski House	Timeline + 𝔅 ··· Enter a note ∅	 Ø Geo Code I
 Activities Customers 	Phone +43-1-12345-0 %	Phone Call from Amy Al 12-11-2019 & Discuss high level plans for future collaboration	rd ^a Flow > 喧 Word Templates >
Accounts	Fax	AS Phone Call from Alpine S 12-11-2019	100 Run Report >

On Click of the button, Attach2Dynamics window opens.

ttach2Dynamics			
SharePoint			
SharePoint : Sales SP App			
Adventure Works_A8A19CD	Adventure	Works_A8A19CDD88DFE3	11B8E56C3BE5A8B200
🕇 UPLOAD 🗝 🦊 DOWNLOAD 🆋 RENAME 🖾 EMAIL 👻	Ø COPY LINK → + CREAT	E FOLDER	
Name		Size (KB)	Modified On
Customer Order Form - SharePoint Security Sync.doc	x	28.02	3/17/2021 6:38 PM
Inogic Partner Program.pdf		586.99	3/17/2021 6:53 PM
Partner Order Form - SharePoint Security Sync.docx		27.74	3/17/2021 6:39 PM
Summary.docx		18.91	3/17/2021 6:53 PM
	Drop files here		

Below are the features:

a) Sync Privileges SharePoint Security Sync auto-syncs Dynamics 365 CRM security privileges with that of SharePoint. Any changes made to the security role of a user in Dynamics 365 CRM will be replicated in SharePoint with the help of this SharePoint Security Sync feature.

See	curity Role: S	Sales Mar	nager									Working on sol	ution: Default Solution
Details	Core Records	Marketing	Sales	Service	Busin	ness Management	Service	e Management	Customizatio	n Mis	sing Entities	Business Process Flows	Custom Entities
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For example, here in CRM the user can only see a particular record **'Abby Production House'** in Account entity.



With SharePoint Security Sync, the user will have the same privileges in SharePoint also i.e., the user will only be able to see **'Abby Production House'** record of Account entity in SharePoint site.

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Abby Prod	uction House_17C4CCA0FA10EA	Modified ~ 15 minutes ago	Modified By \sim Abby Williams	+ Add column ∨					

b) Drag and Drop Files and Folders: Users can drag and drop multiple files and folders at one time to SharePoint.

Note: Drag & Drop of files and folders is not supported in IE.

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c) Upload: Users can upload multiple files and single folder at a time using the solution. They get user-friendly UI to see the list of files uploaded on SharePoint against the current record. Upload Folder through button is not available on IE.

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d) Download: Users can get access to all documents of required storage system and download them. Bulk download of files is possible. Download of folder is not supported for SharePoint.

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e) Rename: Users have the option to rename the documents by selecting the required files and folders.

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f) Copy Link: Users can simply copy and paste the generated link for the selected document using this option when required to be sent outside the Dynamics 365 CRM.

If only **View** is selected then the document is available in read only mode whereas, if **Edit** mode is selected then the document is available for editing.

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g) Create Folder: Users can create folders in SharePoint as per requirement.

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h) Deep search Tab: Users can deep search for files/folders related to the entered keyword in the search tab and obtain all the documents with the search name in the enlisted file area. Deep search allows you to search for files or folders based on your current path. If you are currently in a "/A.Datum/Sample" path and if there are more folders/files inside that path, if you search for any keyword it'll scan till the last file and folder and return the result.

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- i) Move/Copy Dynamics 365 CRM Attachments: Users can move/copy Dynamics 365 CRM Notes Attachments/Email Attachments and Sales Literature Attachments to SharePoint.
 - a. Notes:

If enabled, it'll move/copy the Note Attachments to the respective entity folder and leave a a hyperlink of the path in Note Body.

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Move:



b. Email Attachments:

If enabled, it'll move/copy the Email Attachments to a common folder called Email Attachments or Regarding folder and leave a hyperlink of the path in Note Body.

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c. Sales Literature Attachments:

If enabled, it'll move/copy the Sales Literature Attachments to the respective Sales Literature folder and leave a hyperlink of the path back in Cloud Storage Links section.



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j) Document Location: For a record, we can have multiple Document Locations within SharePoint Site. With the help of Attach2Dynamics, you can select which folder (Document Location) you want to upload the file in an easy to use UI.

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k) Email: Users also have an option to send an email. There are two options for this – send as Link or Attachment.

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1) Links: On selecting this option you can insert the file's/folder's link in the email body. The below window opens on choosing the option 'Link' with link of file in email body.

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2) Attach Documents: On selecting this option you can attach the file itself in the email body. The below window opens with file as attachment by choosing 'Attach.'

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Note: Email can be sent only with files and not folders. Also, multiple files can be sent in single mail.

I) Support for uploading files from Home Page: Upload files from home page directly for the selected records.

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8	Contacts		~	Wide World Imp	porters			+90-211-001-12	34	Istanbul		Sean Cha	эі			info@v	videworld	import	ters.com
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::: Dynamics 365 🗸	Sales Hub	Sales > Accounts	୦ ୪ ୪	Q +
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A Contacts	~	Open Cancel		
Sales	~			
& Leads		Drop files here.		
Opportunities				
R Competitors	All			Close

m) Delete: Users can delete files from SharePoint.

Attach2Dynamics	
SharePoint	
SharePoint : SharePoint Connector	۹
A-Datum_041FE3E08E81EB1 🗹	A-Datum_041FE3E08E81EB11A812000D3AF2185F
🕇 UPLOAD 👻 🕹 DOWNLOAD 🖋 RENAME 🖾 EMAIL 👻 🔗 COPY LIN	K - + CREATE FOLDER
Name	Size (KB) Modified On
epportunity	3/10/2021 5:45 PM
INOGIC EULA Signed.docx	45.00 3/10/2021 5:56 PM 💼
Drop files	here.
	Cancel

account - SP	
General File Details	Related
A Record Id	041FE3E0-8E81-EB11-A812-000D3AF2185F
A Entity Configuration	l account - SP
🖞 Deleted On	3/10/2021
습 Deleted By	⊙ A Sam Smith
A Information	Deleted Permanently.

n) View Files: User can preview necessary files with a single click before downloading it.



o) DocuSign: Users are given the provision to use the features of DocuSign to electronically sign documents/attachments stored in SharePoint.

Once the DocuSign option is enabled, the DocuSign button will be displayed on Attach2Dynamics UI. Users can now select a document and use the **'Get Signature'** functionality or **'Sign Document'** feature by clicking on the respective button.

Note: To use this feature both DocuSign solution and SharePoint Security Sync solution must be installed.

::: Dynamics 365	Sales Hub			م	Ø	Q	+	∇	ନ୍ଦି
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My Work	AC	Name	Get signat	ure nont In					
<u>⊫≡</u> इल् Dashboards		C 💼 Order Forms	u sign docu	3/17/2021	8:08 PM				
🖄 Activities		Customer Order Form - SharePoint Security Sync.docx	28.02	3/17/2021	6:38 PM				
		Inogic Partner Program - Adventure Works.pdf	586.99	3/17/2021	7:57 PM			ıder	
Customers		Partner Order Form - SharePoint Security Sync.docx	27.74	3/17/2021	6:39 PM				
Accounts							2	lue at 8:00 pint Secur) am ity Syn
A Contacts									
Sales									
🌾 Leads		Drop files here.							
U Opportunities							L C	ct	
R Competitors	•				Can	cel		nitrascu	

Note : The entity for which you want to use the DocuSign feature should be enabled for notes.

After Clicking on the button, a Pop-up will open containing the selected document.

Please review and sign your documer	8	I	RECIPIENT PREVIEW	NEXT
Add Documents to the Er	velope			
1.2.2.2.1.1.1.1.2.2.4				
	UPLOAD			
EPP-P-	USE A TEMPLATE			
Workflow to update fields 1	GET FROM CLOUD +			

Users can switch to Fullscreen/default screen mode using the highlighted icon in the below screenshot.

Construction and the second	4		ACTIONS . RECIPHIN	T PREVIOW NEET
	Carlons Unit of the Cloude +			
Add Recipients to the En	velope av if the company: America		ADD TROW CONTACTS	To screep proces
		at some second of the second of		

Note: It may take time to load the DocuSign UI.

p) Open Folder: User can open the record folder present on SharePoint site directly from Attach2Dynamics document management UI by clicking on the icon highlighted below:

SharePoint : SharePoint_App_Comm 🔻	
A Datum Corporation_A168	A Datum Corporation_A16B3F4B1BE7E6118101E0071B6AF2
↑ UPLOAD - ↓ DOWNLOAD > Open Folder EMA	NL $- \delta^{\rho}$ Copy link $- +$ create folder
Name	Size (KB) Modified On
🗌 🗖 Emails	2/5/2021 6:46 PM

After the clicking on the **Open Record** icon a new tab will be opened which will be redirected to the record folder.



Note: This feature is available only for SharePoint.

q) Create Custom Folder Structure

Users can now create a customized folder structure within SharePoint for storing and managing CRM documents/attachments. Users can customize the **Library Structure** and the **Record Folder Structure** within SharePoint as per their requirements.

Library Structure: Using this feature, users can customize the library structure in the following ways:

 By Period: Using this option user can create datewise, daywise, monthwise and yearwise document library structure within SharePoint. It comes handy for maintaining daily, monthly, quarterly sales or financial data in SharePoint. In the below screenshot, configuration of custom folder structure by period for Account entity is shown:

neral Creat	e Custom F	older Structure	Email Config	juration	Related	
Create Library	Structure					
Library struct	ıre	By Period				
Period type	*	X Month				
Duration	*	6				_
Select date Fo	ormat *	МММ уууу				
SharePoint			♀ Search the provide the provided of the p	nis library		
Cs Co Hom	mmunicati Documents	on site Pages Site contents	Edit			
+ New V	T Upload ∨	Edit in grid view 🔒 Syr	nc 👌 Add shortcut to	OneDrive 💶 Ex	(port to Excel 🛞	Power Apps

ii) **By Starting Character:** Using this option user can create document library structure based on the starting character of any chosen field. This comes handy for segregating folders alphabetically. In the below screenshot, configuration of custom folder structure by starting character for Account entity is shown:





	SharePoint \checkmark Search this library
â	Communication site
\oplus	CS Home Documents Pages Site contents Edit
	+ New \checkmark \checkmark Upload \checkmark \blacksquare Edit in grid view \bigcirc Sync \circlearrowright Add shortcut to OneDrive \checkmark
۵	Account C
	$\begin{tabular}{lllllllllllllllllllllllllllllllllll$
	Coho Winery_B0A19CDD88DFE311B8E56C3 A few seconds ago Sam Inogic

iii) Custom: Using this option users can create document library structure based on any field name. This comes handy for segregating folders on the basis of primary contacts, contact method, address, etc. In the below screenshot, configuration of custom folder structure by a particular field type for Account entity is shown:





Record Folder Structure: With this feature, users can customize the record folder structure in SharePoint by using **logical name, text** or **a combination of both logical name and text**.

ieneral	Create Cust	om Folder Structure	Email Configu	iration	Related	
Create L	ibrary Struc	ture				
Library	structure	By Period				
Period	type	* X Month				
		* 6				
Duratio	חו					
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Duratio Select Create R Folder	date Format * ecord Folde Format	MMM yyyyy er Structure {name} KP				
Create R Folder	date Format * ecord Folde Format	MMM yyyyy er Structure {name} KP		his library		
Create R Folder	date Format * ecord Folde Format Commu _{Home Doc}	MMM yyyyy er Structure {name} KP nication site	Search t	his library		

r) Auto Create Folder

This feature allows users to create folder structure in the respective SharePoint Site with the help of workflow. The **'Auto Create Folder'** field on the entity configuration form serves this purpose.

account - SharePoint - Saved Entity Configuration					
General Create Custo	m Folder Structure	Email Configuration			
Connector	* ゆ SharePoint				
Entity Name	* Account				
Attachment Action	Сору				
Override Files					
Auto Create Folder	No				

By default the field is set to 'No'. The user has to select 'Yes' from the dropdown of Auto Create Folder to create folder structure in SharePoint Site. To create the folder automatically, the user has to first create a workflow or can use Power Automate as well and call the **AutoCreateFolderStructure** action. Follow the steps given below to create a workflow.

• Navigate to Advance settings --> Processes --> Select '+New'.

	Dynamics 365 Settings ~ Processe	s >	
+	NEW 🛅 DELETE 🛛 🖛 LOG IN 🖙 EMAIL A LINK 🗍 🖛	⊿⁄ ^a Flow ▼ 💐 Export to e	XCEL │ ▼ 🖷 VIEW 🗔 NEV
	⊳ -¤ My Processes ▼		
	□ Process Name ↑	Category	Primary Entity
	AutoCreateFolderStructure	Action	
	Batching - Sync Status	Workflow	Batching
	Bulk Migration - Move Email Activity Mime Attac	Workflow	Bulk Migration Job Status
	Bulk Migration - Move Notes	Workflow	Note
	Bulk Migration Job - Set Name	Workflow	Bulk Migration Job
	Bulk Move Attachments	Workflow	Bulk Migration Job

Give an appropriate name to the workflow --> For **'Category'** select **'Workflow'** --> Choose the entity for which you want to create folders automatically --> Click on **Ok**.

Process name: *	AutoCreateFolder_Account		
Category: *	Workflow 🗸	Entity: * Account	~
Run this workfl	ow in the background (recommended)		
We recommend usi	ng <u>Microsoft Flow</u> instead of background w	orkflows. <u>Click here</u> to start building F	lows!
Туре:	New blank process New process from an existing templation	ate (select from list):	
Templat	te Name ↑	Primary Entity	Owne
4			÷.

As per business requirement this workflow can be run for different events.

Entity	Account
Category	Workflow
Options for A	utomatic Processes
Scope	Organization 🗸
Start when:	Record is created
	Record status changes
	Record is assigned
	Record fields change Select
	Record is deleted

Next, select Perform Action step.



Then from the dropdown select the **AutoCreateFolderStructure** action as shown below:

	Concert Administration Nator	
▲ Common	General Administration ivoles	
🚼 Information		Record is deleted
Audit History		
🍓 Catalog Assignments		
PM Recordings	Add Step ▼ ∃*≡Insert ▼ X Delete this step.	
🍐 Comments	Type a step description here.	
🍓 Agent script steps	Auto Casto Falder Standard M. Faller, Mana Alaba M. M. Cat Barandia	
🍓 Macro Run Histories	Action Autocreateroiderstructure entity None (global)	
🍓 Entities		
🍓 Entities		
Workflow Triggers		
🖂 Messages		
🖂 Messages		
🖾 Messages		
🛞 Notify Workflow Failure		
📰 User Adoption Entity		
🍓 Chatbot subcompone		
▲ Process Sessions		
📰 Process Sessions		
	Ν	

Click on Set Properties --> Select Account and Record URL(dynamic) in the 'Look for' section --> Click on Save and Close.

	SharePoint Secu	rity Sync – User Manual	
File Save and Clos	ie -		@ <u>H</u> elp ▼
Process: AutoCrea	ateFolder_Account CREATEFOLDERSTRUCTURE input	pro"	Working on solution: Default Solution
Property Name	Data Type Required	Value	Form Assistant
RECORD URL	Single Line of Text Optional	/Record LIRL (Dynamic)(Account 🚔	Dynamic Values
			Operator:
			Set to 🗸
			Look for:
			Account
			Add

Activate the workflow.

Power Apps			
File	🖳 🕼 🖸 Activate 🔚 Convert to a real-time workflow 🖏 Show D	Dependencies 🛛 🚆 Solution Layers 🛛 🐁 Actions 🗸	
Process: AutoCreateFold	er_Account		Working on solution: Default Solution
We recommend using Microsoft Flo	w instead of background workflows. <u>Click here</u> to start building Flows!		
 Common Audit History Audit History Catalog Assignments PM Recordings Comments Agent script steps Macro Run Histories Entities Entities Workflow Triggers Messages Messages 	General Administration Notes Hide Process Properties Process Name * AutoCreateFolder_Account Activate As Process Available to Run Run this workflow in the background (recommended) As an on-demand process As a child process Workflow Job Retention I Automatically delete completed workflow Jobs (to save disk space)	Entity Account Category Workflow Options for Automatic Processes Scope User Start when: Record is created Record status changes Record lields change Select	, ,
Messages Notify Workflow Failure User Adoption Entity Chatbot subcompone Process Sessions Process Sessions	Add Step ▼ ∃ □ ● Type a step description here. Action AutoCreateFolderStructure ♥ Entity None (global)	Record is deleted Set Properties	

Once the workflow is activated, based on the triggering event the record would be created in SharePoint. By Auto Create folder feature user will be able to create folder in the SharePoint without hitting the **Attach2Dynamics button** or **Documents tab**.

How to remove GUID?

When a document is uploaded to the SharePoint using Attach2Dynamics or using OOB Documents tab in SharePoint, a folder with record name is created in the SharePoint. But along with the name, GUID (Unique ID of the record) is also added in the SharePoint folder name as shown in the below screenshot this GUID:

Cs Communication site Home Documents Pages Site contents Edit							
+ New \checkmark $\overline{\uparrow}$ Upload \lor \boxplus Edit in grid view \bigcirc Sync	🗟 Add shortcut to One	eDrive 🗴 Export to Excel 🛞 Power Apps 🗸					
Account							
$ ho$ Name \checkmark	Modified \vee	Modified By \checkmark + Add column \checkmark					
○ [▲] [✓] A-Datum <u>166F576BCF50EB11A</u> ピ 局 :	20 hours ago	Shafali Verma					

The Appended GUID (Numbers) are irrelevant to the end user.

To remove the GUID you first need to change the organization settings of CRM. To change the settings, please follow the steps given below:

• Navigate to the <u>link</u> and download the **'OrganizationSettingsEditor'** solution file by clicking on the name as shown in the below screenshot.

SharePoint Security Sync – User Manual					
Why GitHub? ~ Team	Enterprise Explore - Marketplace Pricing -				
seanmcne / OrgDbOrgSe	ettings				
↔ Code ③ Issues (1) 11	Pull requests 💿 Actions 🔄 Projects 💿 Security 🖂 Insights				
Releases Tags					
(Latest release) © v1.0.2011.1201 -0- BaSc144 Verified Compare •	st release) 2011.1201 D- aasc144 Verified Impare • MailAppWindowsIntegratedAuthEnabled MailAppWindowsIntegratedAuthEnabled				
	Assets 3 OrganizationSettingsEditor_8.0_Managed_1.0.2011.1201.zip				
	Source code (zip)				
	(J) Source code (tar.gz)				

- Once the solution is downloaded, import it into your environment.
- Click on the gear icon --> Select Advanced Settings.

		۲	?
	Personalization Settings		Filt
	Advanced Settings		
	Toast Notification Display T		
	About		
	Privacy & Cookies		
	Software license terms		
nics 365	App for O		de la

• Navigate to Settings --> Solutions --> Click on 'Import solution' button.
Business	Customization Syste	er
Business Manageme	🕂 Customizations	A
Templates	Solutions	s
Product Catalog		C
Service Management	↔ Plug-In Trace Log	s
	Solutions History	Ç
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All Solutions Image: Constraint of the second s		>

msdynce_CRMHub

• Please choose the downloaded 'OrganizationSettingsEditor' solution file and click on the 'Next' button to proceed.

Crm Hub

lect Solution Pack	age		@ Help
Select the comp	essed (.zip or .cab) file that contains the solution you	want to import and click	
Choose File	OrganizationSettingsEditor_8.0_Managed_1.0.2011.1201	.zip	
		-	
		and the second se	
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Solution Information Name: Publisher: Package Type: View solution packa	n Organization Settings Editor (Dynamics 365 Sean McNellis (PFE)(SeanMcNellis) Managed ge details	Back Next	<u>Cancel</u> <u>Cancel</u> <u>Cancel</u>
Solution Information Name: Publisher: Package Type: View solution packa	on n Organization Settings Editor (Dynamics 365 Sean McNellis (PFE)(SeanMcNellis) Managed ge details	Back Next	<u>Cancel</u> <u>Cancel</u> <u>Cancel</u>

• After the solution is successfully imported, open the solution and navigate to the Configuration page and search for 'CreateSPFoldersUsingNameandGuid'.

	Dynamics 365 🐱	Settings ~ Solutions >					
0 •	ynamics 365 for Outlook Deprecated	There are users in your organization still using Dynamic	cs 365 for Outlook, w	hich is retired as of Oct. 1	, 2020 and is no	ionger supported	Learn
All	Solutions •						Search
9 I I	× 4 I B B B B B	🗿 📑 🔞 🏶 More Actions •					
1	Name	Display Name	Version	$ $ Installed On \downarrow $ $	Package T	Publisher	
1	Name OrganizationSettingsEditor	Display Name Organization Settings Editor (Dynamics 365)	Version	Installed On ↓ 11/25/2020	Package T Managed	Publisher Sean McNellis (P	PFE)
	Name OrganizationSettingsEditor OmnichannelPrimeOutbound	Display Name Organization Settings Editor (Dynamics 365) Omnichannel – Outbound for Dynamics 365	Version 1.0.2011.1201 1.5.11.815	Installed On ↓ 11/25/2020 10/30/2020	Package T Managed Managed	Publisher Sean McNellis (P Microsoft Dynan	PEE) nics 365

• By default, the 'Current Value' of 'CreateSPFoldersUsingNameandGuid' is set to true, to change it, and click on the edit button.

III Power Apps							
Dynamics 365 for Outlook Dep	precated There are users in your organization still using Dynamic	nics 365 for Ou	tiook, which is n	etired as of	Oct. 1, 2020 a	and is no	o longer supp
File Sicse 프 이런 Sho	w Dependencies 🛛 📩 Actions 🕶						
Solution: Organization Se	ttings Editor (Dynamics 365)						
You cannot directly edit the comp Solution Organization Settings Ed.	onents within a managed solution. If the managed properties for	r solution comp	onents are set f	o allow cu	stomization, ye	ou can e	dit them in th
solution organization settings eu	Crick a setting row for more details at the bottom of the page.	NOTE you she	Concept Malan	ovisening	without navin	g a spe	cific reason to
92 Information *	Activate & dd Kees / Defrech Of Mark for Conditions	faire	Current value	Type w	in max	Action	V22601227
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Comparation	ActivityRollupChildRecordLimit	50000	not set	Number1	50000	Add	KB 2691237
Components	AddressBookMaterializedViewsEnabled	true	not set	Boolean-	[Add	K82691237
Entities	AllowClientMessageBarAd	true	true	Boolean-		Edit	Organization
Option Sets	AllowParamsNoEquals	faise	not set	Boolean-	-	Add	KB 2691237
Client Extensions	AllowPromoteDuplicates	false	not set	Boolean -	-	Add	None
Web Resources	AllowRoleAssignmentOnDisabledUsers	False	false	Boolean-	-	Edit	KB 2691237
党 , Processes	AllowSaveAsDraftAppointment	false	not set	Boolean-	-	Add	KB 2691237
• Plup-in Assemblies	AlwaysCheckTraceLogDeletePrivilege	false	not set	Boolean-	-	Add	KB 2691237
11 Stik Mercane Processio	appointmentricheditorexperience	false	false	Boolean-	-	Edit	Organization
Canica Endonistr	AuditRetentionPeriod	30	30	Number-1	3650	Edit	KB 2691237
and perfection points	AutoCreateContactOnPromote	true	not set	Boolean-	-	Add	KB 2691237
Dashooards	AutoTrackSentFolderItems	false	not set	Boolean-	-	Add	KB 2849744
[::] Dialog Boxes	BackgroundSendBatchSize	10	not set	Number1	255	Add	KB 2691237
Reports	BPFInstanceDaysModifiedForOfflineSync	365	not set	Number0	30	Add	KB 2691237
Connection Roles	BUIdsCountBeforeUsingSubqueryForPostsSecurity	500	not set	Number1	2100	Add	KB 2691237
Article Templates	CanCreateApplicationStubUser	Faise	false	Boolean-	-	Edit	KB 2691237
Contract Templates	ChangeDoubleQuoteToSingleQuote	faise	not set	Boolean-	-	Add	KB 2849744
Email Templates	CleanInheritedAccessWhenReparentOrShareCascadingNone	false	not set	Boolean-	-	Add	KB 2691237
S Mail Merce Templater	ClearSystemUserPrincipalsWhenDisable	true	not set	Boolean-		Add	<u>K82691237</u>
Co Consider Dalas	ClientDisableTrackingForReplyForwardEmails	0	not set	Number ₀	1	Add	<u>K82691237</u>
Security Holes	ClientUEIPDisabled	false	not set	Boolean-		Add	KB 2691237
B Field Security Profiles	and the second	false	not set	Boolean-	-	10.00	18 2691237
J* Routing Rule Sets	CreateSPFoldersUsingNameandGuid	true	true	Boolean-	-	Edit	82691237
D Record Creation and U				-		and the second second	

• Enter 'false' (lower case) in 'CreateSPFoldersUsingNameandGuid' field --> Click on 'Update' button --> Click on 'OK' button from the confirmation pop-up.

	Name	Default V	alue Current Value	Type M	in Max	Action	n Support Url
information	ActivateAdditionalRefreshOfWorkflowConditions	faise	not set	Boolean-		Add	K82691237
Configuration	ActivityConvertDigCampaignUnchecked	true	not set	Boolean-		644	KB 2691237
Companyate	ActivityRollupChildRecordLimit	50000	not set	Number1	50000	Add	K8 2691237
- Companying	AddressBookMaterializedViewsEnabled	true	not set	Boolean-		Add	K82691237
C Drubes	AllowClientMessageBarAd	true	true	Boolean-		Edit	Orpanization entity attributes
Option Sets	AllowParamsNoEquais	faise	not set	Boolean-		Add	KB 2691237
Client Extensions	AllowPromoteDuplicates	faise	not set	Boolean-		Add	None
Web Resources	AllowRoleAssignmentOnDisabledUsers	Faise	false	Boolean-		East	K8 2691237
🚼 Processes	AllowSaveAsDraftAppointment	faise	not set	Boolean-	1	Add	KB 2691237
-Ca Plug-in Assemblies	AlwaysCheckTraceLogDeletePrivilege	faise	not cat	Ennisen		14.44	V8 3461317
Stik Messane Processin	appointmentricheditorexperience	faise	Frank and the second seco			· · · · · · · · · · · · · · · · · · ·	
Canica Enteniete	AuditRetentionPeriod	30		awang nam	ear ood o	Tarse	
A Destablished	AutoCreateContactOnPromote	true	Update	Reset Def	ault Re	move S	etting Cancel
Deshooards	AutoTrackSentFolderitems	faise	Transfer Time	country Con	aDn of talk		the format of Namela IGUD
(III) Dialog Boxes	BackgroundSendBatchSize	10	Ealse Creates	CharePoint 6	niders using	List the	na muara handt formet.
Reports	BPFinstanceDaysModifiedForOfflineSync	365	Distance in a subsection			Tan na	
19 Connection Roles	BUIdsCountBeforeUsingSubqueryForPostsSecurity	500	not set	Number1	2100	Add	KB 2691237
Article Templates	CanCreateApplicationStubUser	False	false	Boolean-	543) - 143	Edit	KB 2691237

Note: SharePoint Folders created after applying the above settings will be created without GUID, the history folders in SharePoint which are created before the above settings will remain with GUID as shown in the below screenshot.

Cs Communication s Home Documents Page	ite es Site contents Edit	
+ New ✓ ↑ Upload ✓ 目 Edit i	in grid view G Sync 🗔 Add shortcut to	OneDrive 🗴 Export to Excel 🛞 Power Apps 🗸
Account	Modified \vee	Modified By \sim $+$ Add column \sim
○	🖄 🔄 🕴 A few seconds ago	Shafali Verma

Sharing SharePoint Site

If you want to share the SharePoint site with the users who doesn't have access to the SharePoint site then, follow the steps given below. These are the steps taken from the point of view of user who is the SharePoint Site Owner.

• Open the SharePoint site for which the user doesn't have access --> Click on the Site contents tab.

SharePoint Securit	y Sync –	User Manual
--------------------	----------	-------------

ShareP	sint		Search	
Cs	Communication Home Documents P	site ges Site contents Edit	t:	
Contents	Subsites			
O Num	2	Turne	Items	Modified

• Click on the Setting button on the top which is highlighted in the below screenshot --> Click on the Site Permissions.

🔎 Search			ą	٢	?	KP
		☆ Not following ♀ 1 member	Settings SharePoint			×
	a Site usage 🔿 Site workflows 🛞 Site settin	gs 🛍 Recycle bin (0)	Add a page Add an app Site contents Site information Site permissions Site usage Change the look Site designs			
Туре	Items Modified					

• Next, click on the Advanced permissions settings.

	Permissions ×
🛧 Not following	Manage site permissions or invite others to collaborate
R 1 member	Invite people
cflows 🔅 Site settings 🗻 Recycle bin (0)	✓ Site owners
	Site members
	imes Site visitors
	Site Sharing
	Change how members can share
Modified	Advanced permissions settings
2/18/2021 1:01 AM	
2/14/2021 11:27 PM	

• Now you will find three option from which you need to select the option {YourSiteName} Members.

::: SharePoint				
BROWSE PERMISSIONS				
Grant Permissions Group	e User isions Check Permissions	Permission Levels Image: Access Request Settings Image: Site Collection Administrators		
Grant Modify	Check	Manage		
Home	Name		Туре	Permission Levels
Conversations	🗌 🗆 SalesT	eamSite Members	SharePoint Gro	up Edit
Documents	🗌 🗆 SalesT	eamSite Owners	SharePoint Gro	up Full Control
Notebook	🗌 🗆 SalesT	eamSite Visitors	SharePoint Gro	up Read
Pages				
Recent				
Work Order Service Task				
Work Order Service				
Work Order Product				

• Click on the New button dropdown --> Select Add Users Add users to this group.

5	 FDIT LINKS People and Groups Communication s
Groups	New - Actions - Settings -
Communication site Members	Add Users About me
Communication site Visitors	There are no terms to show in group view of the "User Information List" list.
Communication site Owners	
ddvfvfevfevr	
More	

• Now enter 'Everyone except external users', you will automatically get the suggestion please select it.

Share 'Communication site'	Х
Invite people Shared with Everyone except external users Showing 1 result All Users (per Tenant) SHOW OPTIONS	
After selecting the option, click on the Share button.	

Share 'Communi	cation site' ×
Invite people Shared with	Everyone except external users x
	1 group will be invited. Show Include a personal message with this invitation (Optional).
	SHOW OPTIONS

After sharing the site, the users will be able to access the site and will not get the permission issue from the Attach2Dynamics UI.

SharePoint Security Sync Tool

SharePoint Security Sync Tool enables you to sync previous records in bulk. Syncing security privileges for records in bulk is a tedious and time consuming task. In such situation SharePoint Security Sync Tool can be used to carry out this huge task. It relatively takes less time to sync records with SharePoint Security Sync Tool.

Pre-requested - .NET Framework 4.6.2 or above.

SharePoint Security Sync Tool Installation

Download and Install SharePoint Security Sync tool in your system.

6	SharePointSecuritySync	- 🗆 🗙
Installing S	SharePointSecuritySync	
SharePointSecurity	ySync is being installed.	
Please wait		
	Cancel < Back	Next >

After installing the tool, follow the steps given below:

• Click on the SharePoint Security Sync Tool icon to open the tool.

	All Apps Documents Web More 🕶	R
	Best match	
	SharePoint Security Sync	Ś
	Apps	SharePoint Security Sync
	SharePoint Security Sync →	Арр
	Search the web	
	♀ sha - See web results >	□ ² Open
	Settings (4+)	Run as administrator
		Den file location
		-🏳 Pin to Start
		-🏳 Pin to taskbar
		🔟 Uninstall
PAGE 10		
	📼 💁 🖳 💶 🧕 🔤	💥 刘 🖉 🖬 🖌 💆 🔚 🧮

• Select deployment type as 'Office 365' and fill the following details in given fields.

- Display list of available organizations: Enable the checkbox in case of multiple organizations in CRM
- Online Region: Select the respective region
- Username: Use the CRM username
- **Password:** Use the CRM password

After filling all the details click on 'Login'.

\$	SharePoint Security Sync	? – ×
Login		
Deployment Type:	On-premises Office 365	
Sign in as cu Display list o Show Advan Advanced	rrent user f available organizations ced	
Online Region	► ~	
User Name	and the second state of the second second	
Password	•••••	
Login	Cancel	

SharePoint Security Sync Tool Functions

Once logged in, you will find details of all the configured connectors. Select any one of the connectors for which you want to sync the security privileges. If more connectors are added then click on 'Refresh' button on the top to update connector details.

Now let's go through the different functions of SharePoint Security Sync Tool.

- 1. First click on the respective SharePoint Site.
- 2. After clicking on respective SharePoint Site, **four** new tabs will be displayed **Security Groups**, **Folder Security, Failed Sync and Attachment management.**

>	SharePoint Security Sync						
+ CREATE NEW CO	ONNECTION	REFRESH					
Connector Name		SharePo	oint Site		User		
bell service by		100			and the owned	-	
Security Groups	Folder Security	Failed Sync	Attachment	Migration			
Entity Displa	y Name	,		Entity Logical N	lame		
Account				account			
Opportunity				opportunity			

 Now, click on first tab – Security Groups. Here, all the existing configured entities will be displayed. Select any entity. After selecting the entity, two buttons will appear – Sync and Delete Groups. Click on 'Sync' button to create groups against that entity. Click on 'Delete Groups' to delete all the existing groups against that entity.

	SharePoint Security Sync						
CREATE NEW CONNECTION	N 🧭 REFRESH						
Connector Name	SharePoint Site	User					
Test Connector #1	https://26nov.sharepoint.com	czer@26nov.onmicrosoft.com					
Security Groups Folder Secu	urity Failed Sync Attachment Migration						
Entity Display Name	Entity Logi	cal Name					
Account	account						
Contact	contact						
Account Contact Opportunity	contact opportunity	/					
Account Contact Opportunity	contact opportunity	/					
Account Contact Opportunity	contact opportunity	/					
Account Contact Opportunity	contact opportunity	/					
Account Contact Opportunity	contact opportunity	Sync Delete Groups					
 ✓ Account Contact Opportunity 	contact opportunity	Sync Delete Groups					

4. Next tab is **Folder Security**. With this tab you can sync/assign records for a selected period of time.

7				SharePoint Se	curity Sync			? -	
+ CF	REATE NEW C	ONNECTION	C REFRESH						
Conr	nector Name		SharePo	oint Site		User			
Test (Connector #1		https://2	26nov.sharep	pint.com	czer@26nd	v.onmicrosoft.com		
Secu	urity Groups	Folder Security	Failed Sync	Attachment	Migration				
	Entity Displa	ay Name	Entity Logical	Name	From Date		To Date		
	Account		account		08-12-2020	15	08-12-2020	1	5
\checkmark	Contact		contact		08-12-2020	15	08-12-2020	1	5
	Opportunity	r	opportunity		08-12-2020	15	08-12-2020	1	5
							Syn	c	

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5. The third tab is **Failed Sync**. Click on the **'Sync'** button to sync all the failed records.

\$	SharePoint Security Sync								
+ CREATE NEW CONNECTION 2 R	EFRESH								
Connector Name	SharePoint Site	User							
Test Statements In	The second second second second	the Britsheet States and							
Security Groups Folder Security Fai	led Sync Attachment Migration								
Sync records that are failed due to S	harePoint Security Sync app.								
		Sy	nc						
			Sync t	he sel					

- 6. The last tab is to perform the **Bulk Migration Job i.e. Move/ Copy** the past attachments from Dynamics CRM to SharePoint. You are required to fill the following fields for smooth migration of attachments:
 - For?: This specifies whether you are doing Bulk Migration for Emails, Notes or Sales Literature.
 - Entity: Select the entity for which you want to migrate attachments.
 - Action: Select either 'Copy' or 'Move'.
 - From: Enter the date from which you want to start the migration job.
 - **To:** Enter the end date till which you want to do the migration.

7	SharePoint Security Sync						
+ CREATE	NEW CONNECTION	REFRESH					
Connector	Name	ShareP	oint Site		User		
Test Conne	ector #1	https://	26nov.shar	epoint.com	czer@26nov.	onmicrosoft.com	
Security G	oroups Folder Security	Failed Sync	Attachmer	nt Migration			
For?	Emails v			From	01-09-2020		
101.					01 05 2020	15	
				_			
Entity	Account,Contact ~			То	08-12-2020	15	
Action	Сору ~						
						Proceed	

SharePoint Security Sync Use Case

To better understand how SharePoint Security Sync works let's consider a use case.

Consider there are 2 users – User A and User B. Here, User A has organizational level access. This provides User A access to all records in both Dynamics 365 CRM and SharePoint.

Access in Dynamics 365 CRM:

\leftarrow	🛱 Show Chart 🕂 New	🗓 Delete 🗸	🕒 Click2Export 💍 Refresh	🖾 Email a Link		Inogic
A	All Accounts ~					Sam Sam
~	Account Name ↑ ∨		Main Phone \checkmark	Address 1: City \smallsetminus	Primary Contact \smallsetminus	SS sam@inogictech.onmic
	Alpine Ski House		+43-1-12345-0	Vienna	Cathan Cook	View account
	Blue Yonder Airlines		555-0135	Sydney Brian LaMee		brian@blueyonderairlines.co
	City Power & Light Assem	nbly	425-555-7824	Seattle		
	Coho Winery		+1-674-555-0162	Santa Cruz	Cat Francis	Cat@cohowinery.com

Access in SharePoint:

Cs	Communication site Home Documents Pages Site content	s Edit			Inogic	Sam Sam			
+ New ~	New ✓ ↑ Upload ∨ ⊞ Edit in grid view 🚑 Sync 🗟 Add shortcut to OneDrive ն Export to Excel 🗞 Power Apps ∨ ⅔ Automate ∨								
	Name \vee	Modified \vee	Modified By \smallsetminus	$+$ Add column \vee					
	د 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						
	د Coho Winery_B0A19CDD88DFE311B8E56C3	About a minute ago	Sam Sam						

Now User B has only user level access. Here, User B will have access to only those records that are created by him/her.

Access in Dynamics 365 CRM:

\leftarrow	🛱 Show Chart 🕂 New	🗓 Delete 🗸	Click2Export	🖔 Refresh	🖾 Email a Link	~ 🔊 Flow ~	Inogic	S
All Accounts ~		Main Phone X		Addross 1: City > c	Brimany Contact V		Abby Williams	
•	Alpine Ski House		+43-1-12345-0		Vienna	Cathan Cook		View account

Access in SharePoint:

Cs Communication site Home Documents Pages Site contents Edit	Inogic Abby Williams abbu@inopictach.com				
+ New ✓ ↑ Upload ✓ ⊞ Edit in grid view 🤤 Sync 🖏 A	+ New 🗸 🔻 Upload \checkmark 🖽 Edit in grid view 🤤 Sync 🗟 Add shortcut to OneDrive 🦉 Export to Excel 🗞 Power Apps \checkmark \mathscr{P} Automate \checkmark				
\Box Name \vee Modified					
Alpine Ski House_AAA19CDD88DFE311B8E About a mir	nute ago Abby Williams				

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Log

View and track any errors occurred during the functioning of SharePoint Security Sync.

Contact Us

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