Connect SharePoint & CRM

with the DMS Connector for SharePoint with Dynamics 365 CRM by TSO-DATA

TSO DATA Unternehmensgruppe

dms connector
SharePoint × Dynamics 365 CRM

The solution

With the DMS Connector, we bring together Dynamics 365 and SharePoint's document management capabilities. Documents such as invoices, quotations, emails, or images can be clearly named, structured, and stored in SharePoint's DMS and shared with colleagues or partners as needed.

Unlike the standard solution, the DMS Connector provides greater flexibility in how documents are organized in SharePoint. Alphanumeric, difficult-to-understand folder paths that are created by default when storing data from Dynamics 365 in SharePoint are replaced by a clearly structured document filing system.

Feature	DMS Connector	Standard
Folder creation	✓ Custom naming, metadata folders & flexible hierarchies	• Standard names & limited hierarchy
Folder structure	✓ Dynamically configurable	✗
Drag & Drop	✓ Store & move files ✓ Edit metadata ✓ Flexible integration	✗
Metadata	✓ Automatically generated from freely definable fields	✗
Permission management	✓ Flexible permissions for users, teams & groups	✗
SharePoint groups	✓ Automatically manage groups & members	✗
Rename folders	✓ Manually or automatically when field values change	✗
Merge & migrate folders	✓ Automatically merge & migrate folder structures	✗

Feature	DMS Connector	Standard
Libraries	Create automatically & flexibly, including content types and views	• Manual creation for selected standard entities
Rename libraries	Manually or automatically when field values change	✗
Automatic file upload	Automatically upload, rename & link attachments	✗
Deletion	Automatically delete unused folder s tructures in a controlled manner	✗
Dedicated Dynamics 365 app for admins	No need to customize your own sitemaps	✗
Auto-numbering plugin	Flexible sequential or random numbering automatic adjustments at year/month changes	• Create alphanumeric random numbers for selected entities only
OneNote integration	Copy, rename & directly integrate templates	✗
Additional features	Replace special characters & automatically shorten folder names	✗

Why choose the DMS Connector?

- Extensive functionality compared to the standard solution
- Continuous development & new features
- Flexibility
- Custom enhancements available on request

Note: Additional features that are not included in the current scope can be developed and added as needed.

Contact me for a no-obligation consultation:

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