

# DMS Connector for Dynamics 365 for Customer Engagement

We connect CRM-Dynamics 365 with Microsoft SharePoint



**With the DMS Connector** we connect Dynamics 365 and the document management functions of SharePoint. Documents such as invoices, quotations, e-mails or images can be clearly named and structured in the SharePoint DMS and shared with colleagues or partners as required.

In comparison to the standard, the DMS Connector makes the structure with which documents are organized in SharePoint more flexible. Folder paths with alphanumeric, unclear names, which are standard when Dynamics 365 saves data in SharePoint, are being replaced by structured data storage.

DMS Connector	Standard
<b>Folder system</b> <ul style="list-style-type: none"> <li>Define any name</li> <li>Creation of document sets for metadata</li> <li>Hierarchical structure <u>in any width and depth</u></li> </ul>	<b>Folder system</b> <ul style="list-style-type: none"> <li>Standard name (Sample_GmbH_075ZHWKS568566JKSJ658)</li> <li>Hierarchical structure (<u>limited</u>)</li> </ul>
<b>Folder structur</b> <ul style="list-style-type: none"> <li>Dynamic design</li> </ul>	✘
<b>Rename folders</b> <ul style="list-style-type: none"> <li>Renaming of folders within a folder structure</li> <li>Automatically possible by changing a field, e.g. a last name in the folder name</li> </ul>	✘
<b>Integrate moved folders into CRM</b> <ul style="list-style-type: none"> <li>Manually moved folders can be reintegrated into Dynamics 365</li> </ul>	✘
<b>Metadata</b> <ul style="list-style-type: none"> <li>Automatic metadata creation for any defined fields (entity based), e.g. company name or address</li> </ul>	✘
<b>Permission management</b> <ul style="list-style-type: none"> <li>Break inheritance permissions</li> <li>Management of permissions of folders</li> <li>For single users, teams, SharePoint groups or Office365 groups</li> <li>Authorization from fields, related entities or sharing</li> </ul>	✘
<b>Libraries</b> <ul style="list-style-type: none"> <li><u>Automatic</u> creation of <u>any entities</u> in <u>any number</u></li> <li>Adding content types and views</li> <li>Dynamic library names by month and year</li> <li>Creating a library by using templates</li> </ul>	<b>Libraries</b> <ul style="list-style-type: none"> <li><u>Manual</u> creation for <u>certain standard entities</u> by administrators</li> </ul>
<b>Rename libraries</b> <ul style="list-style-type: none"> <li>Renaming of libraries with existing structures</li> <li>Automatically possible by changing the field (see folder)</li> </ul>	✘
<b>Delete</b> <ul style="list-style-type: none"> <li>Automated delete of unused folder structures</li> <li>Possibility to control the delete process, e.g. do not delete folders with documents</li> </ul>	✘
<b>OneNote Integration</b> <ul style="list-style-type: none"> <li>Copy and rename OneNote files from a template</li> <li>Direct integration into Dynamics 365</li> </ul>	✘
<b>Autonumbering plugin</b> <ul style="list-style-type: none"> <li>Create <u>sequential numbers</u> for all entities</li> <li>Free configuration of the format with alphanumeric prefix</li> <li>Automatic adjustment at year/month change possible</li> <li>Number assignment for already existing records</li> </ul>	<b>Standard autonumbering</b> <ul style="list-style-type: none"> <li>Create <u>alphanumeric random numbers, only for certain entities</u></li> </ul>

DMS Connector	Standard
<b>SharePoint groups</b> <ul style="list-style-type: none"> <li>Migrate CRM teams into SharePoint groups</li> <li>Create and delete groups</li> <li>Adding and removing members</li> <li>Permission management by groups</li> </ul>	✘
<b>Automatic file upload</b> <ul style="list-style-type: none"> <li>Upload note and e-mail attachments stored in Dynamics 365</li> <li>Replace the uploaded files with smaller HTML link files for direct opening</li> <li>Renaming of files before uploading</li> <li>Upload of a clickable URL file to any link, e.g. between two libraries or to the customer's website</li> </ul>	✘
<b>Own Dynamics 365 app for admins</b> <ul style="list-style-type: none"> <li>No more customization of your own sitemap</li> </ul>	✘
<b>Additional features</b> <ul style="list-style-type: none"> <li>Replace special characters</li> <li>Shortening of text values for folder names</li> </ul>	✘

## BENEFITS OF THE DMS CONNECTOR

- High functional range compared to the standard
- Constant advancements and new functions
- Flexibility
- Extensions on (customer-)request possible

### Note

Extensions, which are not yet included in the existing functionality, can be developed and added if required.

