

**Findango Finance** uses **SharePoint Security Sync** for syncing permissions between Microsoft Dynamics 365 CRM and SharePoint to keep documents safe and secure.



**inogic**



*It's really a great solution, it works perfectly, resolving a very complex issue, how to sync permissions between SharePoint and Dynamics using a very intuitive solution that is very easy to implement. A special thanks to the outstanding support team, who have been attending to our requests constantly. SharePoint Security Sync will undoubtedly be included in our solution ecosystem.*

**- Gilberto Florez  
(CTO)**

## Company Overview

### About Findango Finance:

Findango Finance, a Limited Company established and led by Mar Turrado, specializes in offering finance services to small and midsize firms in Spain. These services encompass loans, lines of credit, and discounted products, presenting alternatives to the conventional credit options available through banks. The company was created to help businesses that were having trouble getting money from regular banks or getting enough funds to keep growing. With Findango Finance, businesses can get access to diversified financing sources, addressing their unique financial needs and facilitating their growth and development. More information can be found at [www.findangofinance.com](http://www.findangofinance.com).

**FIN  
DAN  
GO**

Industry: Financial Services

**Specialties:** Findango is popular for providing financial products like, Promissory Note Discount, Advance Invoice, Advance Contracts, Confirming, and Business Loans.

## Business Challenge

Findango combines Microsoft Dynamics 365 CRM with SharePoint for its document and storage management capabilities. Both systems have security features to control access to confidential information, such as contracts, prospects, and private data. However, the native SharePoint integration does not sync permissions from Dynamics 365 CRM to associated record folders on SharePoint, putting the security and confidentiality of the documents stored on SharePoint at risk. They needed to safeguard confidential documents and prevent unauthorized users from accessing them.

## Conclusion

In conclusion, Findango Finance's success with SharePoint Security Sync is a testament to the effectiveness and ease of implementation of the solution. Security Sync App helped Findango Finance limit access to confidential files by synchronizing Dynamics 365 CRM security privileges to SharePoint. By seamlessly syncing permissions between Microsoft Dynamics 365 CRM and SharePoint, they successfully addressed complex document security challenges and ensured the confidentiality of their stored documents. The exceptional support provided by Team Inogic further contributed to the smooth implementation and integration of the solution.

## Solution

SharePoint Security Sync, a document security solution by Inogic, helps Findango Finance in the following ways:

- Automatically syncing permissions from Microsoft Dynamics 365 CRM to SharePoint.
- Saving time on manually replicating permissions and enhancing document security.
- Enabling them to create customized folder structures in SharePoint on the basis of Time Periods, Starting Characters, and Custom names.
- Providing a seamless document management experience by allowing users to upload, download, rename, or mail files and folders stored on SharePoint directly from Microsoft Dynamics 365 CRM.

The solution allows Findango Finance to maintain data confidentiality, securely share data, and control and limit access to associated document folders on SharePoint. It seamlessly integrates Dynamics 365 CRM and SharePoint to provide a user-friendly document management experience and also saves storage space and costs.

[Click here](#) to get 15 days fully functional trial for free!  
Or Try From Microsoft AppSource



[www.inogic.com](http://www.inogic.com)

Wish to have a live demo? Contact us on [crm@inogic.com](mailto:crm@inogic.com)



@inogic



@inogicindia



@inogicindia



@inogic



[inogic.com/blog](http://inogic.com/blog)



@inogic



@docs