



Installation Manual

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IMPORTING THE SOLUTION

NOTE: A user must be assigned System Administrator Role before trying to install SharePoint Security Sync.

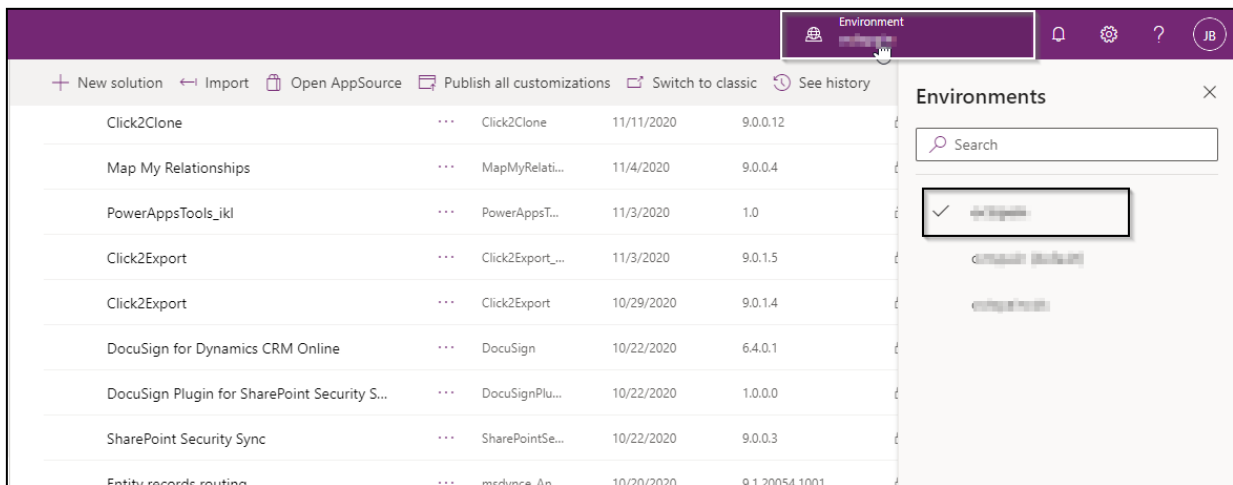
Import the SharePoint Security Sync managed solution downloaded from the Website or AppSource. This can be done in the following two ways:

- Using Power Apps UI
- Using Classic UI

Using Power Apps UI

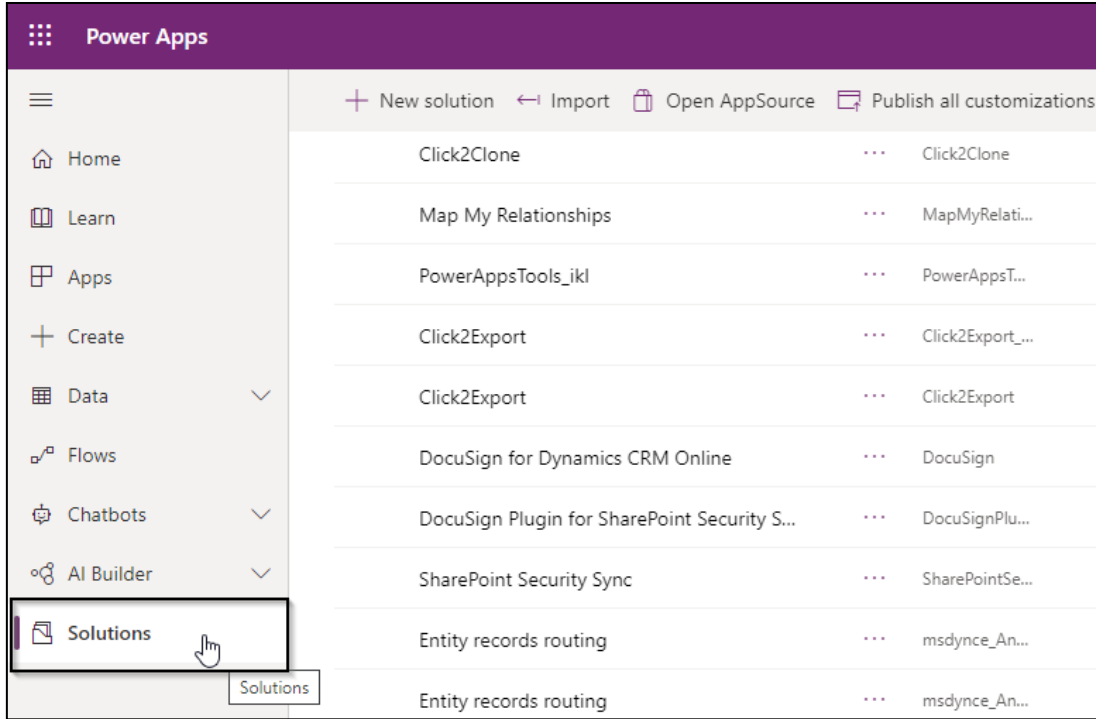
To import a solution:

1. Sign into [Power Apps](#).
2. After signing in, select the instance on which you want to install the solution.

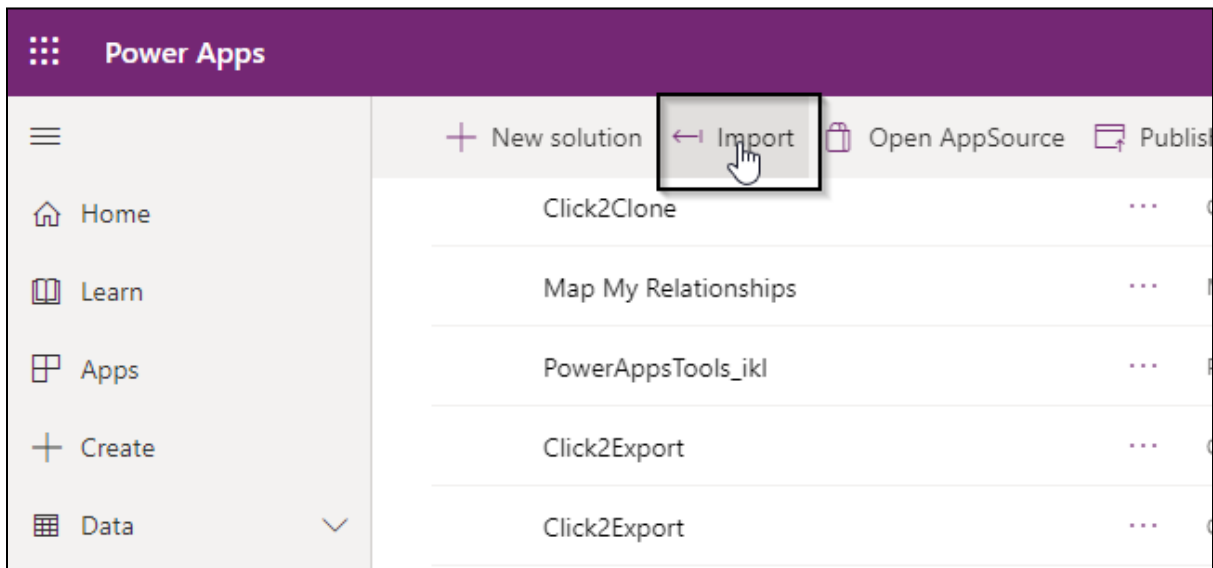


3. Next, select **Solutions** from the left navigation as shown in below screenshot:

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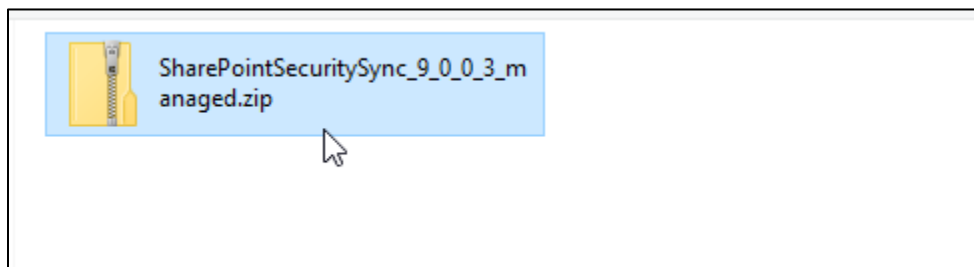
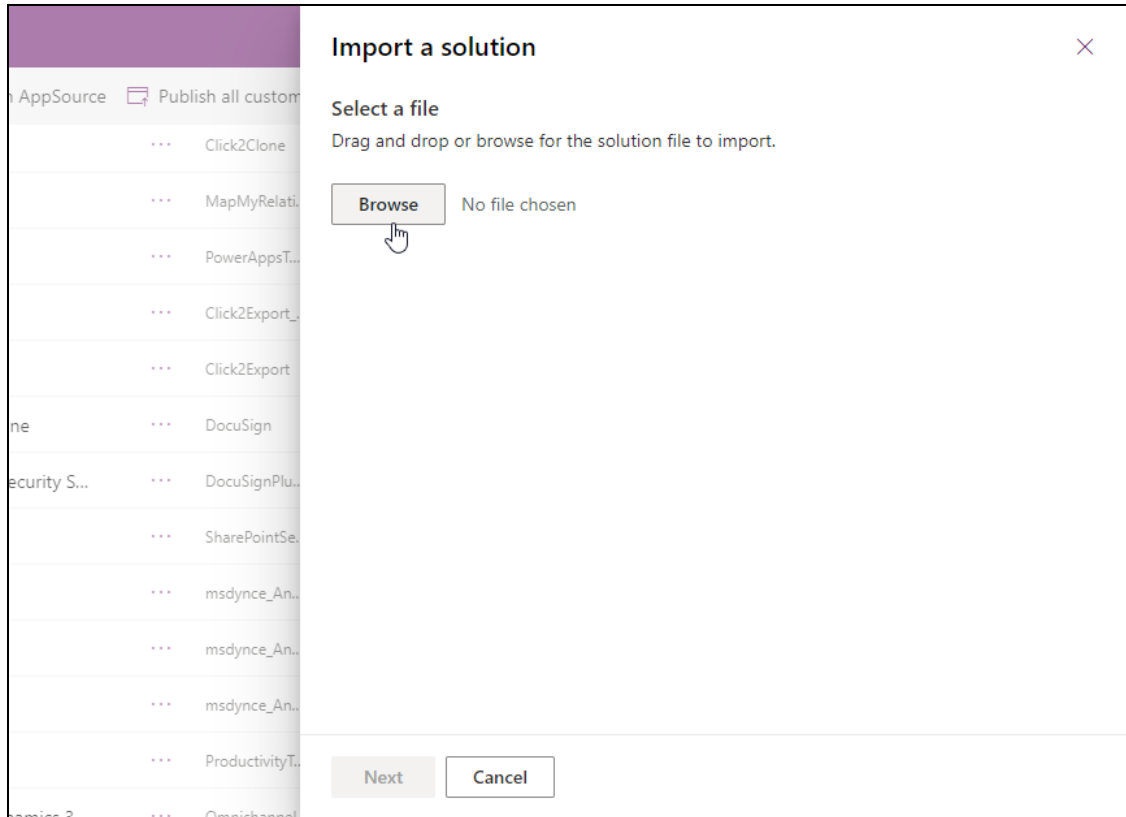


4. On the command bar, select **Import**.

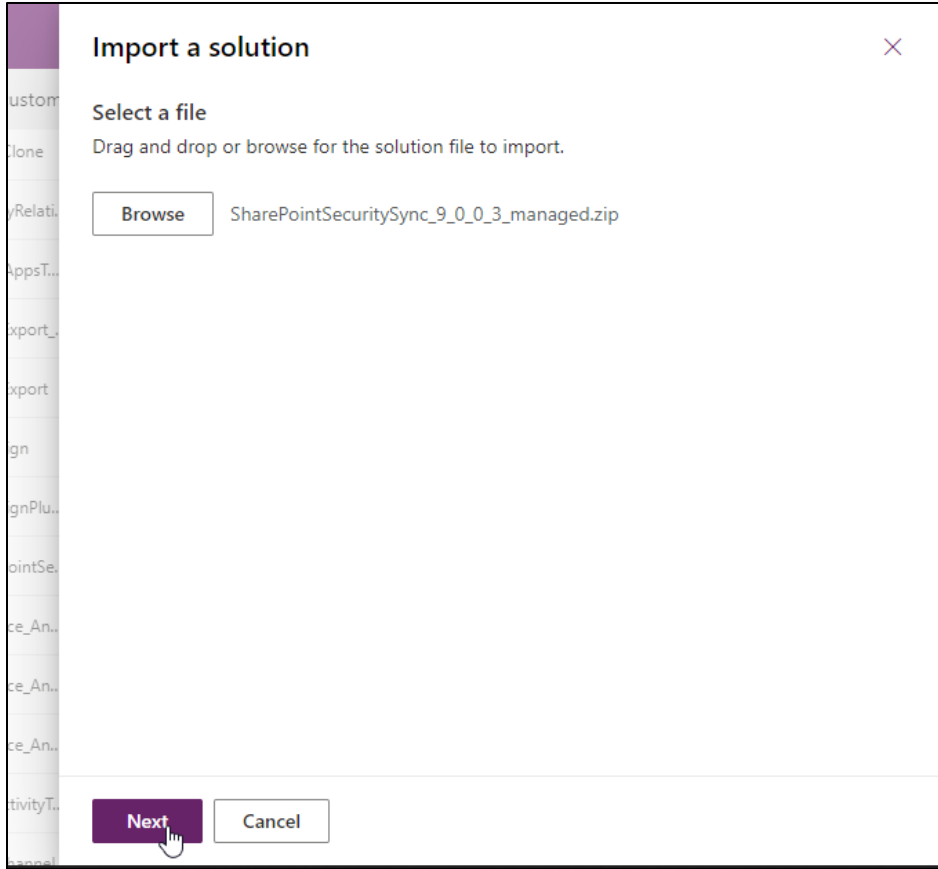


5. On the **Import a solution** page, select **Browse** to locate the compressed (.zip) file that contains the solution you want to import.

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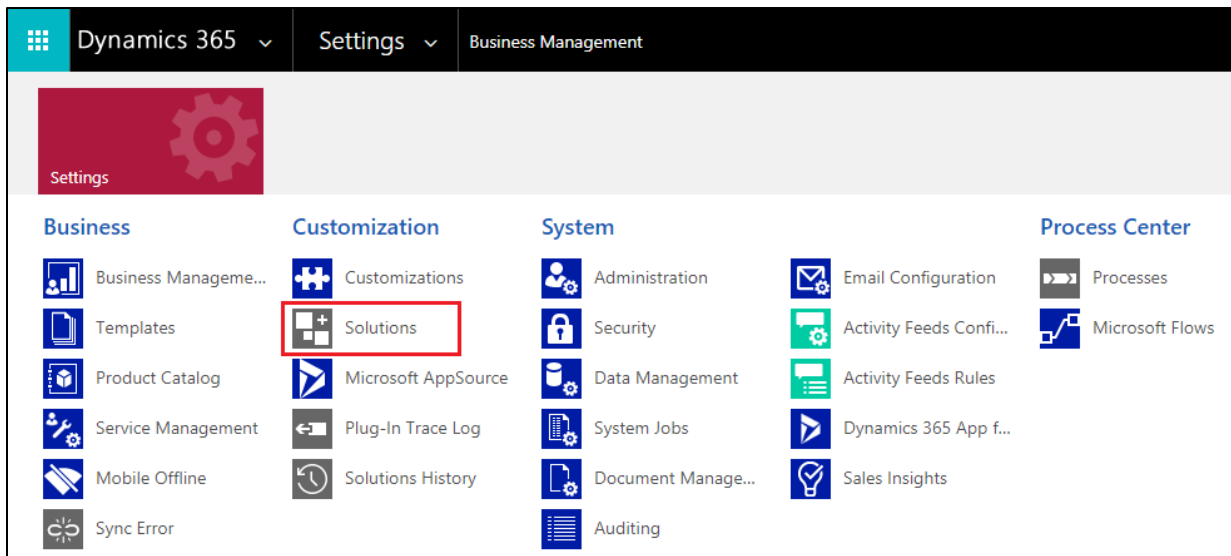


6. Select **Next** → Select **Import** and proceed to import the solution.

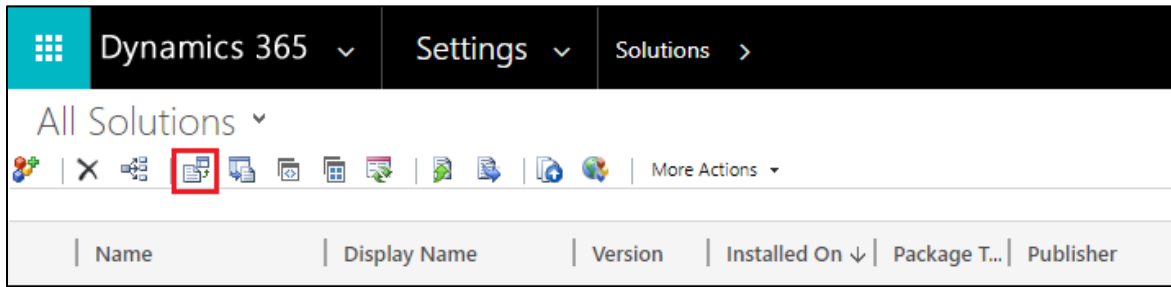


Using Classic UI

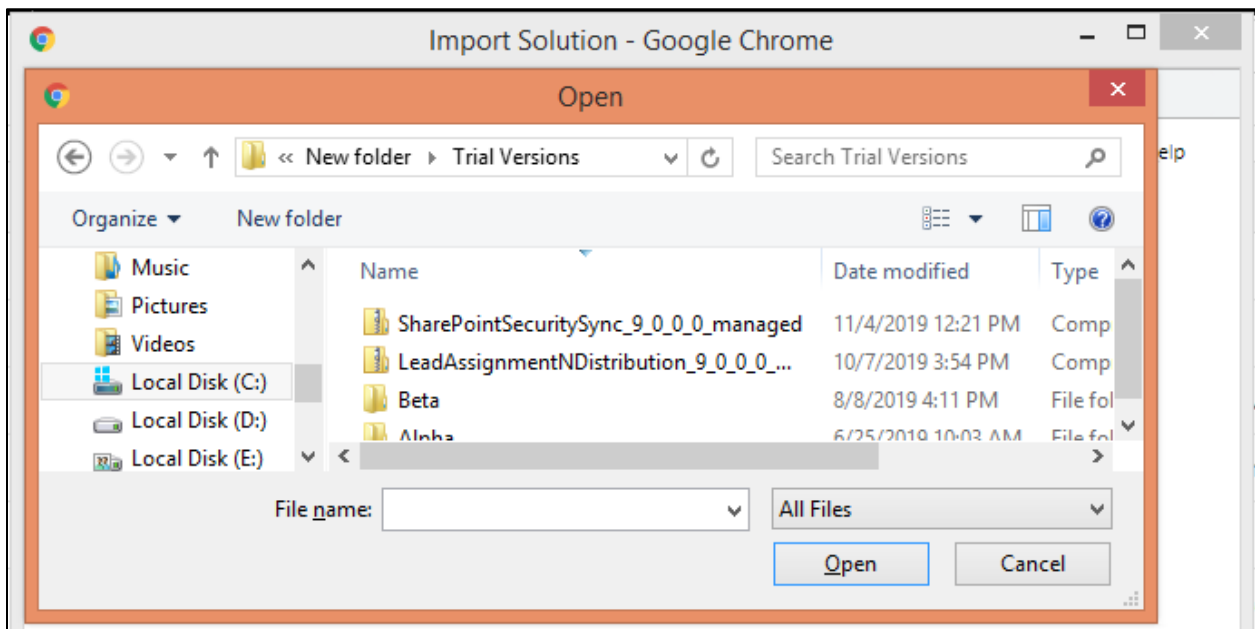
1. To import the solution, navigate to **Settings-->Solutions**.



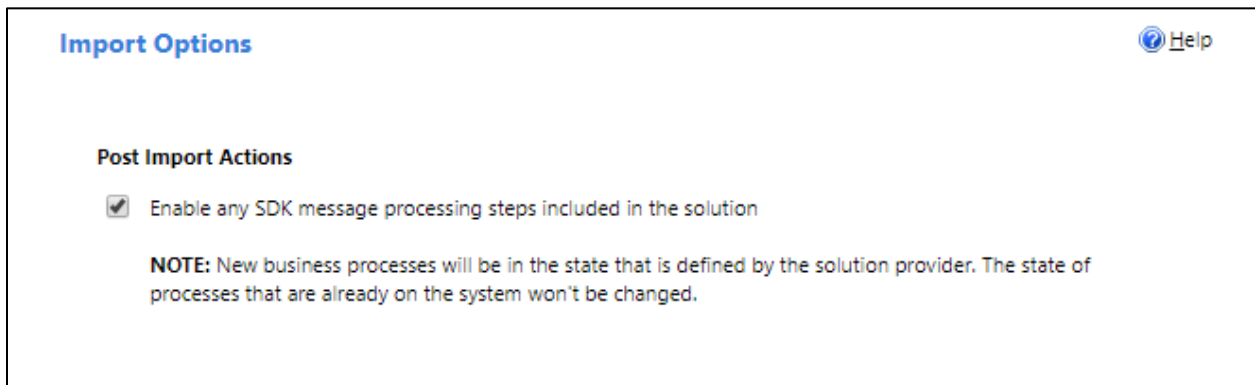
2. Click on **Import** button.



3. **Browse** the downloaded file.



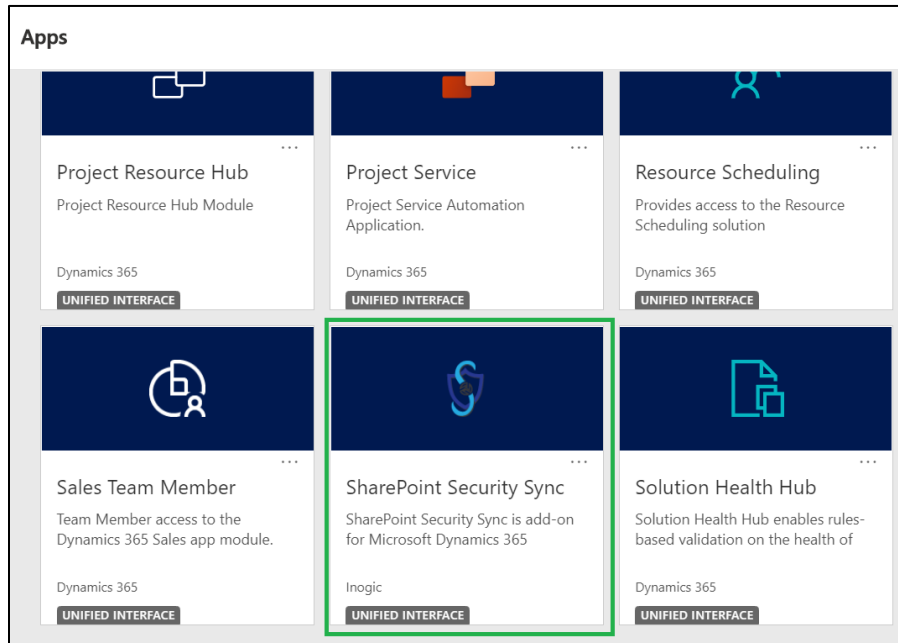
4. While importing the Solution, check **'Enable any SDK message processing steps included in the solution'** as shown in the screenshot below.



Next, you need to configure the app.

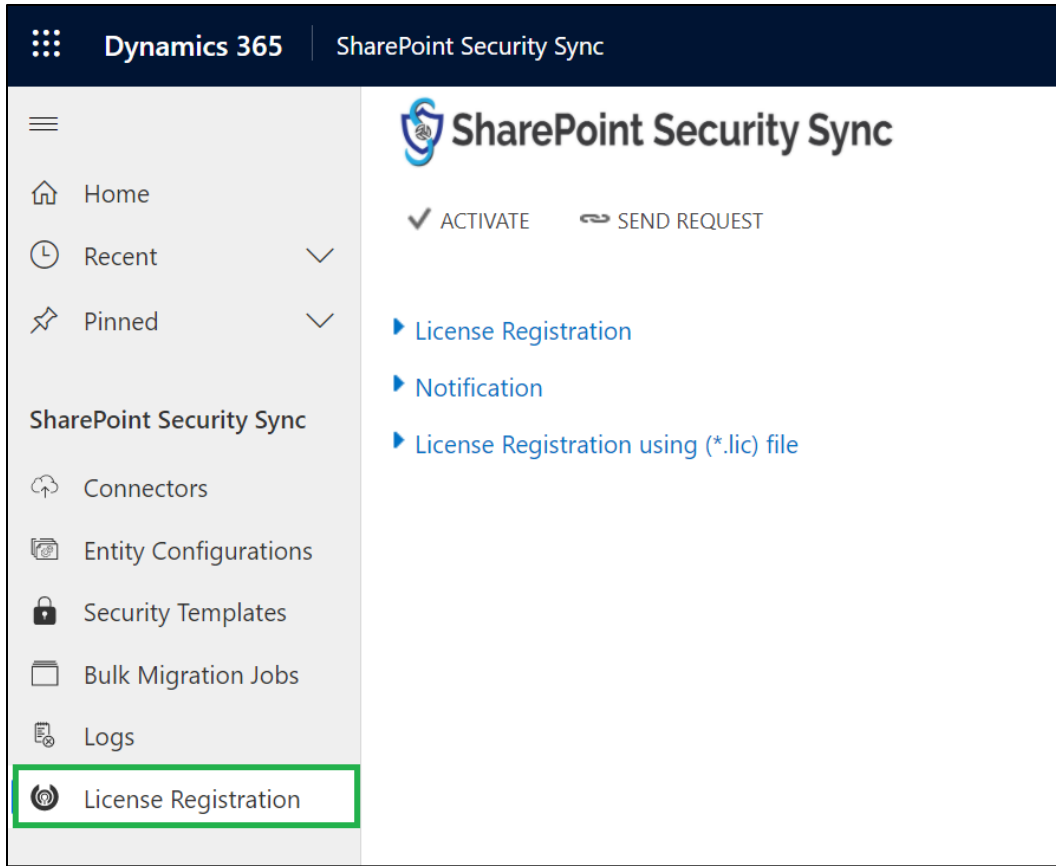
LICENSE REGISTRATION

- Navigate to **Apps** --> **SharePoint Security Sync** app.



- Go to **License Registration**.

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- Fill the fields: First Name, Last Name, Company Name, Email, Website, and Main Phone --> Click on **ACTIVATE**.

The screenshot shows the 'ACTIVATE' form in the Dynamics 365 SharePoint Security Sync interface. The 'ACTIVATE' button is highlighted with a green box. The form contains the following fields and sections:

- Personal Information:** First Name, Last Name, Company Name, Email, Website, Main Phone.
- CRM Details:** CRM URL, Organization, CRM Version, User License.
- Notification Details:** (Notify User and Inogic about issues regarding licensing.)
From: [Field], To: [Field]
Notify To Inogic:
Notification Inte...: Once a day, Once a week, Once a month
- License Registration using (*.lic) file:** [Link]

- If you want to purchase or extend the trial, click on **SEND REQUEST** --> Enter all details --> Click again on **SEND REQUEST** and send the email to Inogic.

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✓ ACTIVATE **SEND REQUEST**

First Name * Last Name *
Company Na... * Email *
Website * Main Phone *

CRM Details

CRM URL * Organization *
CRM Version * User License *

▶ Notification

Notification Details
(Notify User and Inoic about issues regarding licensing.)

From To
Notify To Inoic Notification Inte... Once a day Once a week Once a month

▶ License Registration using (*.lic) file

Alternate method to complete License Activation

Follow the below steps to complete registration through the 'License Registration using (.lic) file' section.

- Request .lic file from Inoic --> Save file --> Go to SharePoint Security Sync app --> License Registration --> Click 'Choose File' to locate the file with the extension .lic

☰ Dynamics 365 | SharePoint Security Sync

☰

Home
Recent
Pinned

SharePoint Security Sync

Connectors
Entity Configurations
Security Templates
Bulk Migration Jobs
Logs
License Registration

SharePoint Security Sync

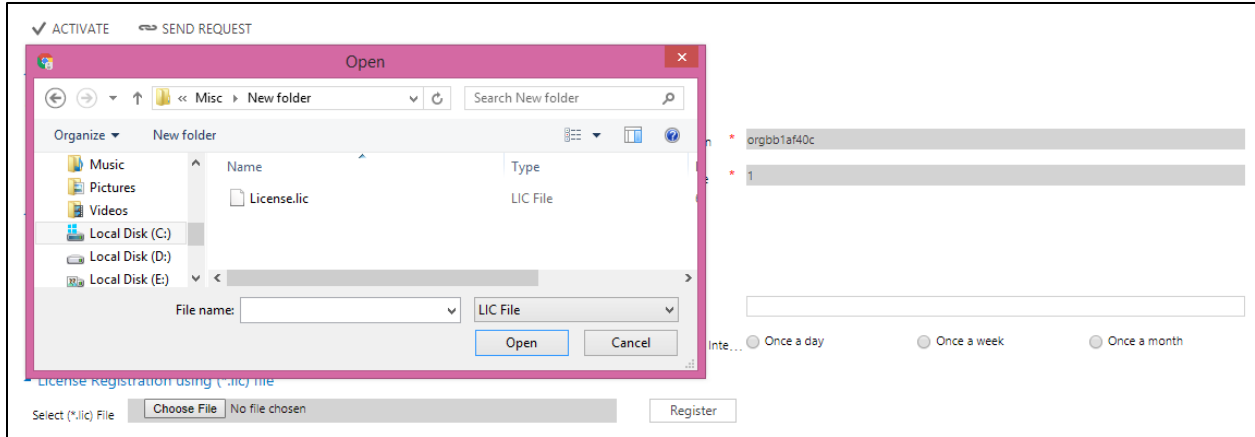
✓ ACTIVATE **SEND REQUEST**

▶ License Registration
▶ Notification
▶ License Registration using (*.lic) file

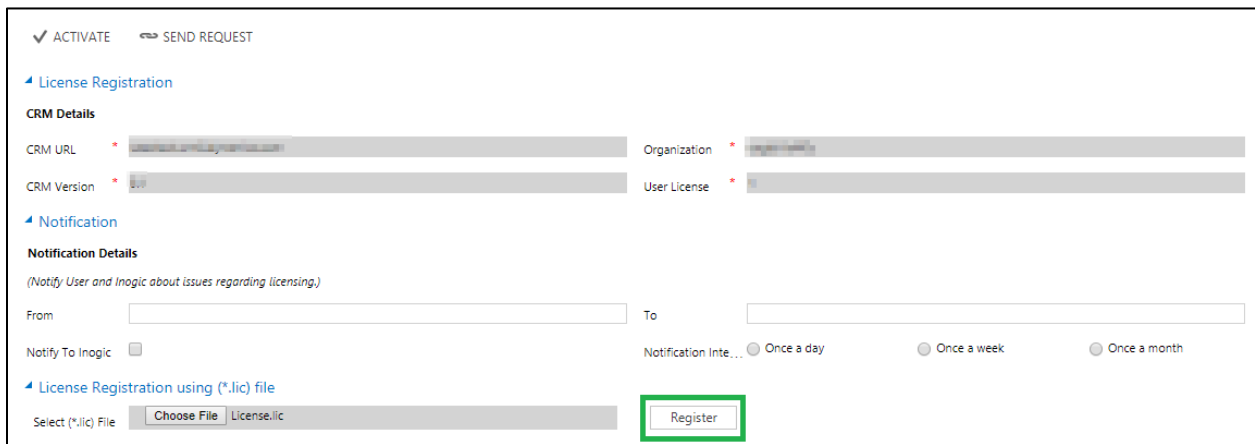
Select (*.lic) F... No file chosen

- Select the file --> Click 'Open.'

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- Click on **'Register'** to complete the License Registration.



ASSIGNING THE SHAREPOINT SECURITY SYNC SECURITY ROLES

Two new security roles, particularly for **SharePoint Security Sync**, come along with the solution.

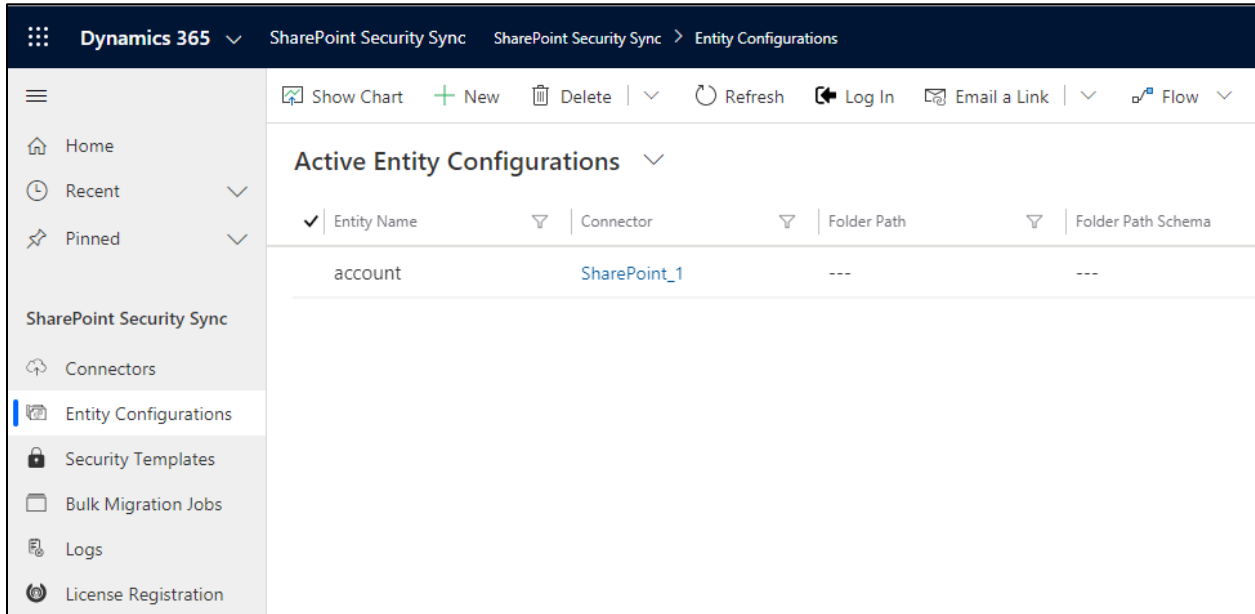
1. **SharePoint Security Sync Administrator** – The **SharePoint Security Sync Administrator** is given the privilege either to create or modify Entity Configurations, Connector entity records, Security Templates and Bulk Migration Job.
2. **SharePoint Security Sync User** – The **SharePoint Security Sync User** is given only the privilege to **'Read'**. Further they can create Bulk Migration Job and utilize all the Attach2Dynamics features in SharePoint such as Upload, Download, Create, Delete, etc.

Note: In order to use **SharePoint Security Sync app** it is necessary to assign **SharePoint Security Sync User** role to the users.

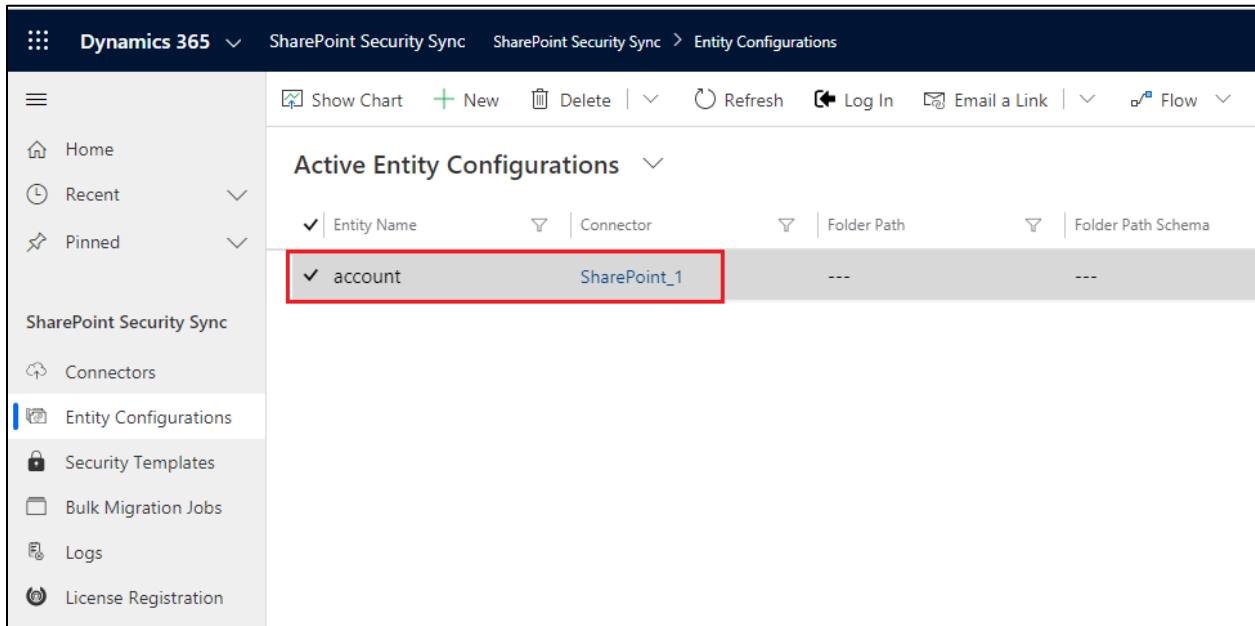
UNINSTALLING SHAREPOINT SECURITY SYNC

In order to uninstall SharePoint Security Sync, first it is necessary to delete all the records of Entity configuration.

- Navigate to **SharePoint Security Sync App** → **Entity Configurations**

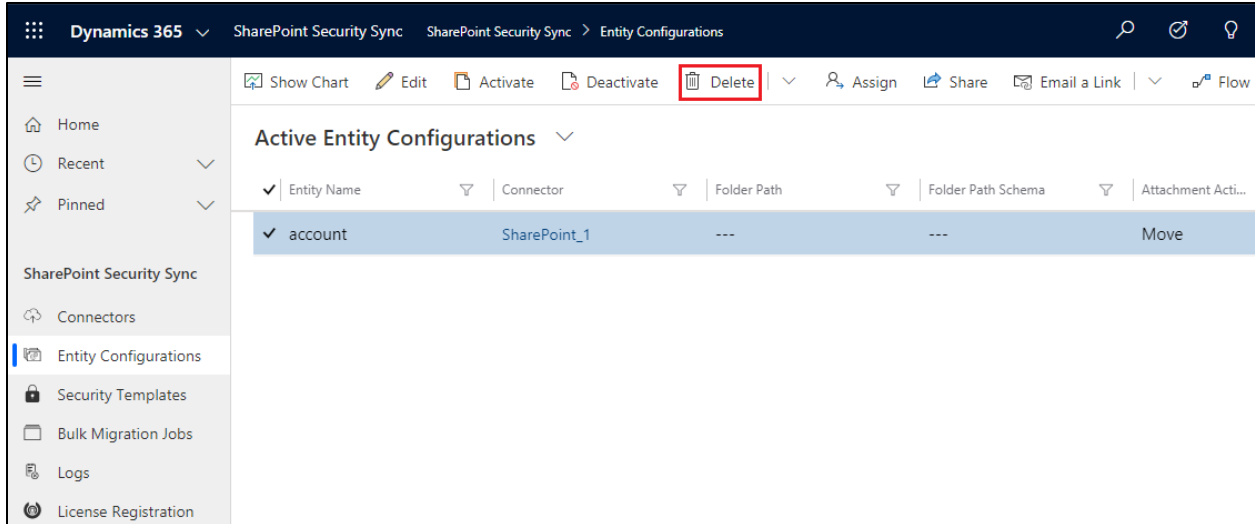


- Select all Entity Configurations



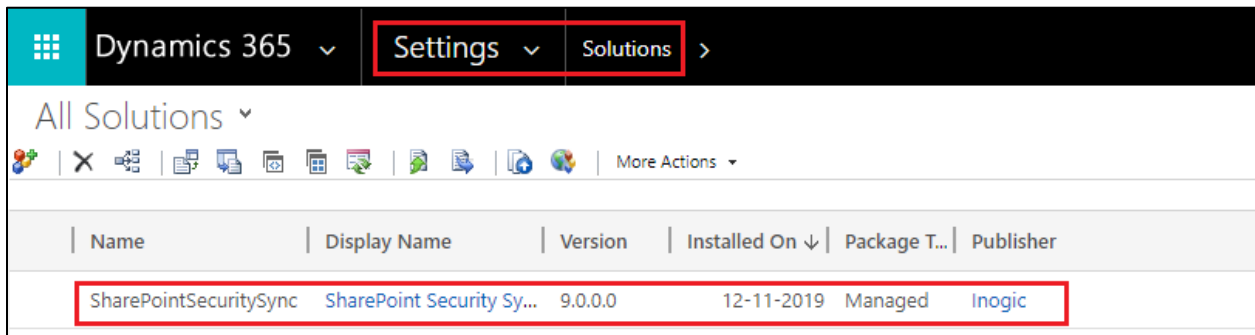
- Click on **Delete**.

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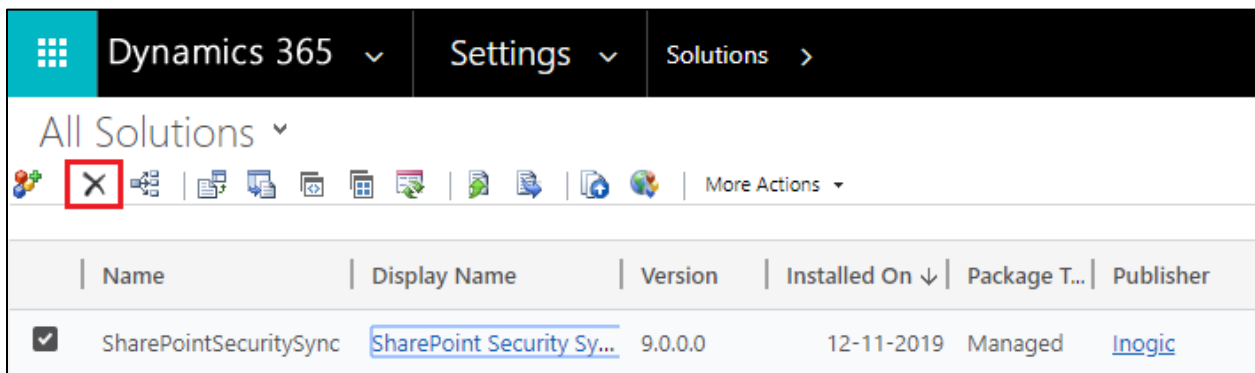


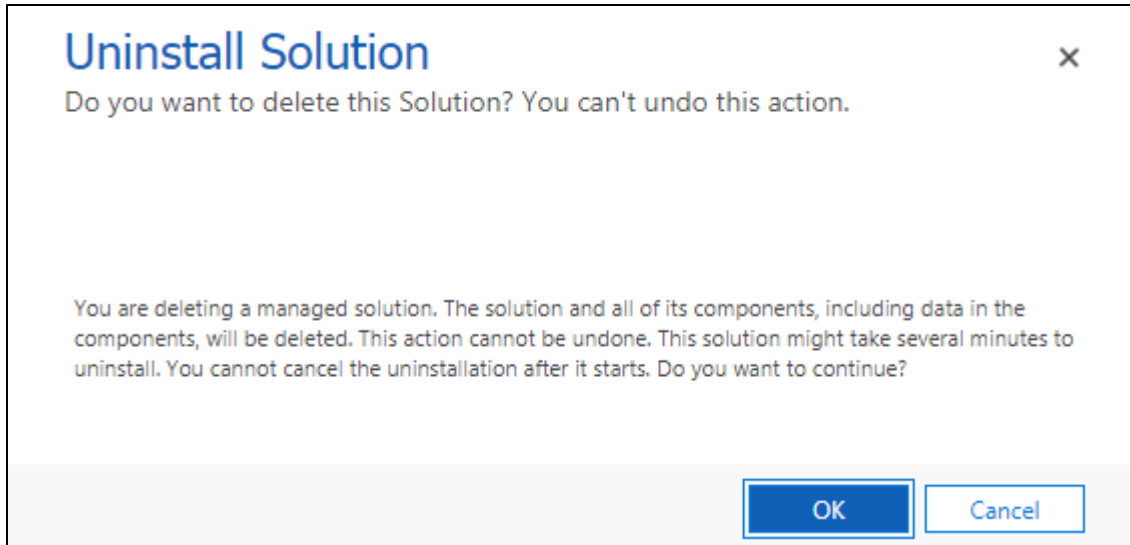
Now follow the steps given below to uninstall SharePoint Security Sync from your Dynamics 365 CRM.

Step 1: Navigate to **Settings** → **Solution** → Select **SharePoint Security Sync** solution.



Step 2: Click on delete button → click on OK button.





Refer to the User Manual of SharePoint Security Sync to know how the CRM add-on functions.

For any queries feel free to Contact Us.

CONTACT US

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