

SharePoint Connector

TechnoMile’s SharePoint Connector integrates a client’s TechnoMile Growth and/or Contracts solutions that are deployed on Salesforce with their company’s online Microsoft SharePoint site. This enables companies to centralize all documents and files associated with an opportunity or contract into a single, online repository and saves their teams time by providing quick, convenient access to files directly from their Growth or Contracts solutions. In addition, the connector auto-generates standardized subfolder structures upon creation of each new opportunity or contract record, enforcing clean, consistent organization of files in SharePoint.

Easily Upload, Find, and Access Files

TechnoMile’s SharePoint Connector enables users of our Growth and/or Contracts solutions to easily upload, find, and access files, saving them time:

- An object (e.g., an opportunity or contract) in the client’s Growth or Contracts solution is linked to a corresponding document library in SharePoint
- Each record in Growth or Contracts then maps to a corresponding folder in SharePoint (e.g., the record for Opportunity-001 in Growth maps to an Opportunity-001 folder in SharePoint)
- A standard subfolder structure is auto-generated each time a new record and corresponding SharePoint folder is created (e.g., for each opportunity, subfolders are created for Solicitation, Capture, Proposal Management, Final Documents, and Lessons Learned)
- Users can then quickly upload files to SharePoint and view subfolders and file names without leaving their TechnoMile solution; with appropriate permissions, a user can link directly to the associated SharePoint document library to view/edit the contents of a specific file

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Search

- TM SharePoint_0065f00000Mi0u6
 - Capture (6)
 - Final Documents (0)
 - Lessons Learned (0)
 - Proposal Management (6)
 - Appendices (0)
 - Color Team Reviews (6)
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Sharepoint URL : https://technomileusa.sharepoint.com/sites/TMConnectorPSDemo/Opportunities/TM_SharePoint_0065f00000Mi0u6

Selected File/Folder from SharePoint: **Proposal Management (6)**

FILE/FOLDER NAME	URL	DATE MODIFIED	DATE CREATED	CHECKED-IN USER	VERSION	CHECKED OUT TO USER
Appendices	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Color Team Revi...	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Data Calls	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Graphics and Lo...	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Kick Off	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Past Performances	[Link]	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	