

## 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

Powered by **TECHNOMILE**

- TM SharePoint\_0065f00000Mi0u6
  - Capture (6)
  - Final Documents (0)
  - Lessons Learned (0)
  - Proposal Management (6)
    - Appendices (0)
    - Color Team Reviews (6)
    - Data Calls (0)
    - Graphics and Logos (0)
    - Kick Off (0)
    - Past Performances (0)
  - Solicitation (4)

Sharepoint URL : [https://technomileusa.sharepoint.com/sites/TMConnectorPSDemo/Opportunities/TM SharePoint\\_0065f00000Mi0u6](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	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Color Team Revi...	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Data Calls	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Graphics and Lo...	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Kick Off	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	
Past Performances	<a href="#">[icon]</a>	7/11/2023, 11:47	7/11/2023, 11:47	Sachin.Addulwar	1.0	