

SnapOn Software

SnapOn Software provides software solutions that extend and connect the platforms businesses already rely on, including Microsoft 365, NetSuite, and Salesforce.

We help organizations solve the operational challenges that come with managing data, workflows, collaboration, governance, and business processes across complex technology ecosystems. Our solutions add capabilities that native platforms often don't provide out of the box—helping businesses automate manual work, improve visibility and control, connect systems, and manage data more effectively.

Our objective is to help businesses build the foundation to adopt and scale AI with greater confidence. SnapOn solutions make data more accessible, connected, governed, and actionable—enabling organizations to take advantage of AI as their technology ecosystem evolves.

SnapOn Software helps organizations get more value from their existing technology investments while building a more connected, efficient, and AI-scalable business.

Collaboration & Productivity Product Summary:

Forms

SnapOn Software Forms is a no-code form builder for SharePoint and Microsoft Teams that turns standard SharePoint forms into intelligent, dynamic business applications.

Built natively within Microsoft 365, Forms helps organizations digitize and automate business processes without custom development, data migration, or moving information outside their Microsoft 365 tenant. Teams can build and adapt forms with conditional logic, dynamic fields, permissions, cascading lookups, repeating sections, validation, automated actions, and connected data—all while maintaining the security, governance, and compliance controls of their existing SharePoint environment.

From employee onboarding and IT requests to purchase approvals, inspections, compliance processes, and customer or vendor intake, Forms helps organizations replace manual processes and disconnected tools with streamlined, automated workflows.

With responsive experiences across SharePoint, mobile, and Microsoft Teams, SnapOn Forms makes it easier to capture, manage, and act on business information wherever work happens—while creating a more structured and accessible data foundation for AI adoption and scalability.

Data View Plus (DVP) - Data Visualization

SnapOn Software Data View Plus brings scattered Microsoft 365 data together into centralized, interactive views that make information easier to find, understand, and act on.

Built for SharePoint and Microsoft Teams, Data View Plus aggregates information from across SharePoint sites and lists, Excel, Exchange Online, Microsoft Teams, and other Microsoft 365 sources. Instead of requiring users to search across multiple sites, lists, libraries, and applications, organizations can create a single, connected view of the information that matters.

With no-code configuration, teams can build responsive data experiences using calendars, lists, organizational charts, galleries, aggregated views, conditional formatting, connected filters, and master-detail relationships. Data can be filtered and organized across sites, site collections, content types, and other criteria to surface the right information for each team or business process.

Data View Plus helps organizations turn fragmented Microsoft 365 information into connected, accessible, and actionable data experiences—while reducing reliance on custom development and creating a more structured data foundation for automation and AI scalability.

Datasheet View

With Datasheet View, get around the non-intuitive, lackluster SharePoint Quick Edit. Datasheet View adds a new bulk edit screen to your SharePoint lists. This new feature allows you to bulk edit your SharePoint lists in an “Excel-like” interface.

This add-on supports both classic and modern SharePoint lists as well as IE, Edge, and Chrome browsers.

Features

- True “Excel-like” Datasheet view (same as SP2010)
- Support both classic and modern lists
- Support IE, Edge and Chrome browsers

Documentation and Content Management – CMS 365

SnapOn Software CMS365 is a SharePoint-native content management system that helps organizations create, organize, publish, and manage structured knowledge across Microsoft 365.

Organizations often have critical information scattered across SharePoint sites, Teams, files, and outdated wikis, making it difficult for employees to create, find, maintain, and trust the information they need. CMS365 provides a centralized content experience for knowledge bases, policies and procedures, technical documentation, training materials, project documentation, and customer-facing manuals—without moving content outside the Microsoft ecosystem.

Built 100% within SharePoint and integrated with Microsoft Teams, CMS365 adds an intuitive content-management experience with customizable layouts, Markdown editing, advanced search, drafts and approvals, version control, and author tracking. This enables organizations to establish more consistent, accountable, and searchable documentation without building a custom content platform.

Structured knowledge is also a critical foundation for scaling AI. AI tools and agents rely on access to relevant, reliable, and well-managed organizational information. By helping organizations centralize, structure, maintain, and govern their content within Microsoft 365, CMS365 helps create a stronger information foundation for AI-powered search, knowledge retrieval, automation, and agents.

SharePoint for your content. Teams for collaboration. CMS365 for the experience.

Scan & Print

Scan & Print transforms how organizations handle physical documents within the Microsoft 365 ecosystem. With seamless integration into SharePoint Online, users can scan, OCR, and upload documents without any third-party data transfer. The solution supports bulk scanning, metadata extraction via Zonal OCR, and secure client-side PDF generation, offering unparalleled control over sensitive files.

This dual-purpose tool provides users with the ability to both scan and process physical documents directly into SharePoint libraries or lists and generate customized, secure PDF files from various SharePoint assets. By enhancing document workflows from input to output, Scan & Print eliminates manual inefficiencies and enhances data protection.

Security, Compliance & Governance Product Summary:

ProvisionPoint

SnapOn Software ProvisionPoint provides AI-ready governance, provisioning, and permissions management across Microsoft 365, SharePoint, Microsoft Teams, and Microsoft 365 Groups.

As organizations adopt AI tools and agents that can access and act on business data, understanding who has access to what becomes critical. ProvisionPoint gives IT and security teams centralized visibility and control over permissions, workspace creation, and governance—helping organizations reduce access risk and maintain appropriate control over their data.

Automate the creation of Teams, SharePoint sites, and Microsoft 365 Groups through governed request and approval processes, while applying policies, naming conventions, configurations, and security controls. ProvisionPoint also provides visibility into direct, inherited, and group-based permissions to help identify and address access risks.

By strengthening Microsoft 365 governance and access controls, ProvisionPoint helps organizations scale AI with greater confidence while maintaining control over business data.

Audit

SnapOn Software Audit provides Microsoft 365 security, compliance, and AI-readiness visibility across SharePoint, Microsoft Teams, OneDrive, and Exchange.

As organizations adopt AI tools and agents that can access business data, understanding what information exists, who can access it, and how it is being shared becomes increasingly important. Audit gives IT, security, and compliance teams centralized visibility

into activity, access, permissions, guest users, external sharing, and potential security risks across their Microsoft 365 environment.

Monitor file activity and permission changes, identify guest and externally shared content, uncover orphaned users and outdated access, and generate detailed reports for security reviews and compliance requirements. Automated alerts and centralized reporting help teams identify potential risks and respond faster.

By providing greater visibility into how Microsoft 365 data is accessed and shared, Audit helps organizations strengthen governance, reduce data exposure, and build the visibility needed to adopt and scale AI responsibly.

Oracle NetSuite Product Summary:

ProjectSOS

SnapOn Software ProjectSOS is a suite of NetSuite-native project management, job costing, and billing solutions designed for complex, project-based businesses.

ProjectSOS brings project costs, budgets, billing, financials, and performance into a connected NetSuite experience—giving teams greater visibility into project profitability and helping them manage costs and billing more efficiently. Capabilities include real-time job costing, project dashboards, progress billing, change order management, retainage, and project financial reporting.

Built for Architecture, Engineering & Design, Construction, Advertising & Media, Engineered-to-Order Manufacturing, and Enterprise project-based organizations, ProjectSOS provides industry-specific functionality without requiring businesses to replace their existing NetSuite environment.

By bringing operational and financial project data together in NetSuite, ProjectSOS helps organizations improve data visibility, automate project processes, strengthen financial control, and create a more connected foundation for scalable automation and AI.

SOS Sync

SnapOn Software SOS Sync connects NetSuite with Microsoft 365, allowing users to manage documents directly from NetSuite while storing them in SharePoint or OneDrive.

SOS Sync eliminates duplicate storage and uploads by creating a single document experience across both platforms. Users can upload, view, organize, and update files from NetSuite or Microsoft 365, with SharePoint version history, auditability, and NetSuite-based permissions helping maintain control and traceability.

Delivered as a no-code NetSuite bundle, SOS Sync requires no middleware or custom integration and supports files up to 250 GB, making it well suited for document-heavy industries such as construction and manufacturing.

By connecting NetSuite business processes with Microsoft 365 document management, SOS Sync helps organizations reduce administrative overhead, improve data governance, and create a more connected foundation for automation and AI adoption.

Full Product/Feature Descriptions

Collaboration & Productivity Product Summary:

Forms

Transform your data collection in SharePoint and Microsoft Teams with intelligent, dynamic forms that evolve with your business needs. From simple surveys to complex multi-step approval processes, Forms empowers your team to create secure, responsive form solutions without relying on IT or development resources. Do more, easily, than you can with Microsoft Forms and build solutions in a fraction of the time and costs of Power Apps.

Easily create custom and dynamic SharePoint forms with no coding experience necessary! Compatible with SharePoint Online, SharePoint Server Subscription Edition, and SharePoint 2019.

The Best Dynamic SharePoint Forms

Unlike other solutions that store your sensitive information, with Forms be reassured that your data never leaves your Microsoft 365 tenant, ensuring maximal data privacy and security.

By using SharePoint list forms as a foundation, enjoy all of our features without having to waste time relearning a new interface. Built with an intuitive design in mind, experience the freedom to create intelligent and versatile forms. No technical coding skills required.

Features

- **Form Builder:** Customize SharePoint's list forms layout to create multi-column and multi-tab forms.
- **Column & View Permissions:** Dynamically hide or disable columns in list forms
- **Column Validation:** Easily configure form field-validation rules to enforce logic condition
- **Default Values:** Configure default values for static and dynamic column types
- **Repeating Rows:** Capture multiple rows of associated child data in your forms
- **Cascading Columns:** Enhances existing lookup columns with added searching capabilities
- **Workflow:** Implement business use cases without having to use technical workflow design tools or coding
- **External Data Connector:** Connect to and include external data from any web accessible data source in your SharePoint Online Modern list form
- **Advanced Column Types:** Enhance your SharePoint Forms with additional column types

Forms is 100% SharePoint native which means:

- This is the only forms solution that's implemented as a 100% pure client-side add-in which means none of the customer's data is sent to the vendor's cloud server. Your forms data never leaves your SharePoint Online/M365 tenant.
 - Save time in creating new forms (your list forms already exist, just enhance them!)
 - Keep the same look and feel as your current interface, no separate design required
 - Continue benefiting from SharePoint's extensibility features, don't get locked in another "InfoPath-like" solution.
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Intake

Intake Forms is a powerful new feature in SnapOn Software that enables organizations to create SharePoint-based forms accessible to external users—without requiring sign-in. It enhances SharePoint by enabling no-code form creation, data collection, and workflow automation. These forms can be embedded on public websites, shared via links or QR codes, and customized to fit your brand.

Key Features:

- **Seamless SharePoint Integration** – Automatically store data in SharePoint, create columns, and leverage Forms features.
 - **Enhanced User Experience** – Fast, responsive, multi-step forms with intuitive navigation and custom success messages.
 - **Advanced Functionality** – Conditional logic, file uploads, signature capture, and image annotation.
 - **Streamlined Design Process** – Drag-and-drop form builder, real-time previews, and easy duplication.
 - **Seamless Workflow Integration** – Trigger workflows, scheduled actions, and advanced processing with public form data.
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Extract

Product Overview

SOS Extract from SnapOn Software is a Microsoft Teams-native document extraction solution that converts scans, PDFs, and images into structured, usable data. It captures key fields, tables, and metadata without complex templates, zoning, or traditional OCR mapping.

Extracted data can be stored in Microsoft Lists, SharePoint, or Dataverse and sent directly to ERP and CRM systems such as NetSuite and Salesforce. With no-code configuration and rapid deployment, organizations can move from setup to value in hours rather than weeks.

Key Capabilities

- **Extract structured data** from scanned documents, PDFs, and images, including key-value pairs, tables, line items, and metadata.
 - **Configure extraction without templates** using common layouts, lightweight rules, and no-code tools.
 - **Process documents in bulk** and automatically split batches using separator pages or document markers.
 - **Operate within Microsoft 365** through Microsoft Teams, SharePoint, OneDrive, Microsoft Lists, and Dataverse.
 - **Connect extracted data to business systems** such as NetSuite, Salesforce, ERP platforms, CRM systems, and accounts payable workflows.
 - **Automate document intake** to reduce manual data entry, standardize processing, and improve data accuracy.
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Data View Plus (DVP)

Data View Plus products are super-flexible solutions for retrieving and displaying various data source types in modern, responsive and fully customizable UI display types. Easily aggregate and overlay events from multiple data sources to retrieve and display data in a cohesive, interactive manner.

Features

Calendar: Connect to various sources and displays one consolidated view of all aggregated events.

Organization Chart: The SharePoint Organization Chart connects to various sources and provides multiple views to display the organization breakdown structure (OBS). Quickly track down anyone in your professional community with the click of a button. Replace static organization charts with real-time, interactive, user-friendly & highly customizable organization chart software. [Resource video: <https://youtu.be/4e7lrN1iWog>]

List View & Aggregation: List View Plus gives users access to lists on other SharePoint sites, allowing them to use as if they were local! Easily embed remote list views in your

page, providing an enhanced user interface and functionality when working with local or remote lists. Roll-up data from any data source across your SharePoint to aggregate data from lists and libraries across the entire farm into a single clear, consolidated view. List Aggregator enables users to aggregate data from various data sources and displays the aggregated data using great-looking “Lego” style controls. [Resource video: <https://youtu.be/hSLiKCd5XAY>]

Business Impacts:

A **consolidated calendar** improves meeting efficiency by reducing scheduling conflicts by 40% and enhancing resource allocation through unified visibility. It simplifies cross-team coordination across time zones and streamlines company-wide event planning.

An **organizational chart** in your SharePoint Intranet accelerates employee discovery by 60%, improves onboarding with a clear view of company structure, and boosts HR efficiency through real-time syncing. It also fosters better cross-department collaboration.

List visualization and aggregation enhances productivity by enabling remote list access without switching sites. It reduces IT overhead, speeds up reporting through real-time rollups, and supports high-performance dashboards with dynamic filtering and a modern user experience.

Datasheet View

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Documentation and Content Management – CMS 365

Transform your content management system with our CMS solution. Designed with Microsoft users in mind.

The Best Wiki App for Microsoft 365

CMS365 is a powerful, SharePoint-native content management system designed to solve key documentation challenges for organizations. Offering seamless integration with Microsoft 365, CMS365 enhances usability, simplifies migration, and optimizes team collaboration.

Why choose CMS365?

- Unparalleled Integration: 100% SharePoint-native, ensuring a seamless experience.
- Effortless Migration: Easily import content from WikiPlus and Teams Wiki.
- New Enterprise Capabilities: Drafts & Approvals and Custom Variables allow you to maintain governance, ensure content accuracy, and personalize pages at scale.
- Enhanced Usability: Customizable page layouts, markdown editor, and intuitive navigation.
- Cloud-Powered Collaboration: Facilitate real-time collaboration and secure, cloud-based publishing, to support both internal documentation and external sharing needs.
- Advanced Content Management: Automatic author tracking, version control, and smart search.
- Cost-Effective & Scalable: Clear, straightforward path for migration from existing systems like WikiPlus, with competitive pricing that ensures a high return on investment.

Why CMS365 Outperforms Other Documentation Solutions

Unlike generic wiki tools or traditional document management systems, CMS365 is purpose-built for Microsoft Teams environments:

- Native Integration: No switching contexts or applications for documentation work
- SharePoint Foundation: Leverages your existing Microsoft security and compliance infrastructure
- Teams-Centric Design: Built from the ground up for collaborative documentation
- No Additional Infrastructure: Uses your existing Microsoft 365 tenant storage

- **Comprehensive Feature Set:** Combines the best of wikis, document management, and web CMS capabilities

Scan & Print

Scan & Print is an end-to-end solution for digitizing, securing, and distributing business documents within Microsoft 365. By integrating document capture with SharePoint, users can streamline workflows like invoice processing, contract digitization, and HR documentation.

The Scan tool supports advanced Zonal OCR for extracting metadata from scanned files, enabling auto-population of SharePoint fields and triggering of related workflows. It supports scanning via TWAIN or WIA devices and exports to formats like PDF, JPEG, TIFF, and PNG. Batch scanning capabilities further accelerate bulk document ingestion.

Once scanned, documents can be converted into customized PDF files using the Print feature. Users can merge multiple list items, documents, attachments, or wiki pages into a single printout, then personalize output with headers, footers, watermarks, and secure encryption. This client-side process ensures that no data ever leaves your Microsoft tenant.

Automate Document Processing Workflows

Combine Scan with SharePoint and Scan & Print workflows to create end-to-end document processing:

- **Invoice Processing:** Scan invoices, extract key data via OCR, and route for approval
- **Contract Management:** Digitize contracts, extract terms, and trigger renewal workflows
- **HR Document Processing:** Automate employee file management with metadata extraction

Security, Compliance & Governance Product Summary:

ProvisionPoint

Governance Solutions for Microsoft 365

In today's hybrid work environment, organizations face unprecedented challenges in managing collaboration, controlling access, ensuring compliance, and optimizing costs within Microsoft 365. SnapOn Software's governance solutions address these challenges through:

- **Controlled Self-Service:** Enabling users to create the SharePoint Sites, Microsoft Teams and Microsoft 365 Groups they need while maintaining governance guardrails
- **Risk Reduction:** Preventing data leakage, unauthorized access, and compliance violations
- **Lifecycle Management:** Automating the creation, maintenance, and disposition of Sites and Teams
- **Cost Optimization:** Reducing storage costs and administrative overhead
- **Visibility & Control:** Providing comprehensive insights into your Microsoft 365 environment

Provisioning

ProvisionPoint is jam-packed with provisioning features to enable seamless ongoing management of all workspace types.

- **Templates:** Each template can include custom request forms, approval workflows, naming conventions, metadata fields, sensitivity labels, and access controls.
- **Naming Conventions:** With ProvisionPoint, you can define dynamic naming rules using system tags, request form fields, Azure AD attributes, and lookup values.
- **Customisable Forms:** Tailor forms for each workspace type using dropdowns, metadata fields, validation rules, and blocked word templates.
- **Approvals & Notifications:** Workflow processes define who needs to approve a request for a new Site, Team or Group.
- **PnP Provisioning:** PnP Templates can be used to provision and configure SharePoint Sites, Microsoft Teams, Groups, Planner and much more.

Lifecycle

The lifecycle features of ProvisionPoint enable seamless on-going management of SharePoint Sites, Microsoft Teams and Microsoft 365 Groups.

- **Manage Workspace Change & History:** Track every step in a workspace's lifecycle with the Service Timeline. From creation to archival or deletion, the timeline logs all actions, status changes, and policy triggers, offering full transparency and traceability.

- **Manage Workspace Disposal:** Ensure inactive or unnecessary Sites, Teams and Groups are identified and removed to stay secure, compliant, and in control.
- **Retention Labels:** Apply Microsoft Purview retention labels to your workspaces directly through ProvisionPoint. These labels help enforce data governance by automatically retaining or deleting content based on your compliance requirements.

Compliance

The compliance features of ProvisionPoint ensures ongoing governance of every SharePoint Site, Microsoft Team or Microsoft 365 Group.

- **Orphaned Workspaces:** Maintain accountability across your Microsoft 365 environment by identifying workspaces with disabled or missing owners.
- **Sensitivity Labelling:** ProvisionPoint lets you detect and manage mismatches between configured labels and actual workspace settings.
- **Guest User Management:** Control Guest User lifecycle with by managing the invitation process, including configurable approval processes. Identify inactive guest accounts, enforce access restrictions, and align guest permissions across Microsoft 365 and ProvisionPoint.

Audit

Understand the health of your M365 tenant quickly with this native to Microsoft Teams App. **This is also offered as a stand-alone product.**

- **Guest User Reports:** The Audit app allows you to quickly identify what Sites and Teams a Guest User has access to, or the Guests that have access to a specific Site or Team. Further, the tenant wide report gives a complete picture of all the guests in Microsoft 365 and the workspaces they can access.
- **Sharing Reports:** The Audit app allows administrators and compliance managers to easily identify content which has been shared from SharePoint, Teams, or OneDrive. Detailed reports include the type of sharing link, who the file is shared with and any expiration policies that have been applied.
- **Orphaned Users Reports:** The Audit app is also an easy to use tool to identify orphaned users and mailboxes. You can easily identify and manage orphaned users instead of assessing each site or recently deleted users individually.
- **Storage Reports:** Identify high-usage workspaces and libraries, monitor quota consumption, and uncover redundant or outdated content. Reports can be run at the tenant or site level and exported for further analysis, helping you optimize storage, manage costs, and support data governance.

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Solving Microsoft 365 Audit Challenges

The Audit app can help. The Audit app is native to Microsoft Teams, which allows authorized users to understand the health of their Microsoft 365 tenant at their fingertips. They can quickly identify risks, such as the level of access granted to a Guest or where content has been shared externally.

- Access Directly on Microsoft Teams
- All reports can be easily exported to Excel
- Reports for one Site or the Whole Tenant
- Easy to install with the choice of data center

Oracle NetSuite Product Summary:

ProjectSOS

ProjectSOS is a comprehensive suite of NetSuite-native solutions engineered to meet the unique demands of project-based industries. Whether you're managing construction sites, engineered-to-order manufacturing, creative campaigns, or multi-phase infrastructure projects, ProjectSOS brings order, visibility, and automation to every stage of the project lifecycle.

Key Industries Served:

- **Construction** – Track costs, manage change orders, and ensure compliance with AIA billing
- **Architecture, Engineering, and Design (AED)** – Coordinate subcontractors, automate retainage, and keep complex timelines on track
- **Agency (Advertising, Media, Publishing)** – Deliver projects profitably with real-time visibility into creative operations
- **Engineered-to-Order (ETO) Manufacturing** – Control custom builds, production cycles, and cash flow with precision
- **Enterprise Operations** – Integrate Procore, manage large-scale initiatives, and centralize financial oversight

Each ProjectSOS bundle includes tailored modules like:

- **Job Costing Premium** – for real-time WIP and budget control
- **Project Dashboard** – centralized KPIs and performance metrics
- **Progress Billing** – automate billing, including AIA compliance
- **Change Order Management** – control scope changes with transparency
- **ProSync** – transform estimates into executable project tasks
- **Retainage Management** – streamline financial holds and release
- **Procore Integration** – bidirectional sync between field and back-office
- **AIA Document Generator** – auto-generate certified G701/702/703 forms

Why ProjectSOS?

- Built 100% on NetSuite—no third-party middleware

- Scalable across industries and business sizes
 - Reduces manual errors, delays, and fragmented systems
 - Shortens time-to-invoice and improves cash flow
 - Drives profitability through integrated project controls
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SOS Sync

Sync Your NetSuite and Microsoft Environments.

Seamlessly sync contacts, emails, and attachments between NetSuite and Microsoft 365 to streamline your business processes. Eliminate manual updates, reduce errors, and gain full visibility into customer data so your team can focus on what matters.

Take it a step further by adding our Data View Plus and Forms connectors, to be able to better visualize your NetSuite data, and even be able to act on it with easily configured workflows, integrate into dynamic lists, and so much more.

Benefits

- **Seamless Sync:** Effortlessly sync contacts, emails, MS Project data, and attachments between NetSuite and Microsoft environments.
- **Optimized Workflows:** Eliminate the need to switch accounts, double-check records, or manually update data.
- **Complete Visibility:** Give your team full insights into customer info and project details, eliminating manual updates and back-and-forth communications.
- **Save on NetSuite Storage:** Files and attachments in Outlook are stored in Microsoft 365, utilizing cloud storage instead of costly NetSuite storage.
- **Responsive UI:** Optimized for both web and mobile, ensuring a smooth user experience anywhere.

Pain Points & Solutions

Siloed Emails

- **Pain Point:** Emails are stored in Outlook mailboxes, making tracking interactions in NetSuite difficult.

- Solution: Outlook emails are directly synced into NetSuite for complete communication history.

Manual Data Entry

- Pain Point: Keeping customer data updated is time-consuming and error-prone.
- Solution: Contacts and emails sync automatically, eliminating manual input errors.

Limited Inbox Access

- Pain Point: Customer emails and contacts are locked to a salesperson's inbox, causing data loss when they leave.
- Solution: Customer communication is centralized, ensuring full team access to critical info.