



SUCCESS STORY

LEADING SPECIALIST IN COOLING AND HEATING SYSTEMS USES CB DYNAMICS CRM – SHAREPOINT PERMISSIONS REPLICATOR

About ICS Cool Energy

ICS Cool Energy is temperature control specialist company with **over 25 years of international experience**. Its customers range from smaller companies up till large international brands. They offer solutions together with servicing and maintenance for **temperature control requirements** for customers in wide variety of industries such as Food, Beverage, Chemical, Pharmaceutical, Healthcare, Plastics, Rubber, as well as HVAC solutions for Data Centres, Server Rooms, Factories, Facilities, Hotels and Leisure. ICS Cool Energy has offices in UK, Germany, Switzerland, Austria, Poland, Italy, France and the Netherlands and resellers in 4 continents.

The Challenge

ICS Cool Energy uses **Dynamics CRM online** alongside **Office 365** to produce Word quotations. These documents are all stored in **SharePoint online**. They use Dynamics CRM to register leads, opportunities, quotes and orders. They also have their full price list within Dynamics CRM to speed up the pricing. ICS Cool Energy has 140 licensed Dynamics CRM users. They store quote documents, together with any related documents used to build up their projects. All together it was over 80,000 existing documents over time which were not properly protected in SharePoint for misuse. These documents represented a big value for the company and there was a need to protect them.

Product

CB Dynamics CRM –
SharePoint Permissions
Replicator

Industry

Cooling & Heating

Organization size

230 employees

Country

United Kingdom
+ 7 additional countries



ics cool energy

www.icscoolenergy.com



www.connecting-software.com

Phil Cole project managed the CRM project within ICS Cool Energy, he was recommended the CB replicator by their CRM partner. He was surprised how well it mirrored the full range of permissions within CRM into SharePoint.

The Solution

ICS Cool Energy got in touch with their partner eBECS. eBECS is a leading Microsoft partner in the UK with vast experience in CRM and ERP systems. They recommend the CB Dynamics CRM – SharePoint Permissions Replicator from Connecting Software to help to solve the challenge. Already during the trial period they found out that **software was running smoothly and it was stable**. Replicator has correctly fixed all the permissions so they decided to give it a go. Since this time all historic and new documents in the database of ICS Cool Energy are secured, protected and safe.

Communication with Connecting Software was smooth and easy. ICS Cool Energy didn't have any problems. All questions were easily and quickly solved by the Connecting Software support team which was rarely needed because of the good quality of the documentation. ICS Cool Energy had also few Lync/Skype session with the support team which were painless and very helpful.

"The CB Dynamics CRM – SharePoint Permissions Replicator secures our documents and I can recommend it to other companies."

Phil Cole

Group Business Systems Analyst & Project manager for CRM, ICS Cool Energy



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