**FREEDOM** GRAPHIC SYSTEMS

CB Dynamics CRM to SharePoint Permissions Replicator

# Freedom Graphic Systems breaks free with CB Replicator

## About Freedom Graphic Systems

*"We analyzed the development effort on our side to do something similar. We realized it would be a large development and financial investment to get at least one quarter of the functionality."*

**Brian Hunsaker**, Director of Application Development, Freedom Graphic Systems

Based in Aurora, Illinois, **Freedom Graphic Systems** is a leading provider of one-to-one direct mail, mailing and logistics solutions.

## The Challenge

With sales and business opportunities on the rise, Freedom Graphic Systems had to abandon their original spreadsheet-based processes and implement a CRM platform coupled with Office 365 and SharePoint online to store documents, as CRM storage was cripplingly expensive.

Their CRM system is used by both sales representatives to manage customer relations and the management to get insight into business opportunities and progress. With such two strictly defined user groups, they needed to enforce the clear-cut cascading permissions of Dynamics CRM in SharePoint to ensure proper access levels.

Housing seven skilled in-house developers, they considered a custom integration solution. Yet, upon analyzing the inherent costs and risks, they decided to go for out-of-the-box expert solution.

## The Solution

They chose CB CRM – SharePoint Permissions Replicator, as it offered to fulfill all their needs out-of-the-box. Also, to minimize the risks and up-front expenses, they opted for the SaaS model, ensuring ongoing and seamless support.

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# The Result

*"One of the biggest joys to CRM Replicator was the ease of implementation. We pointed it to our CRM instance, we pointed it to our SharePoint instance. Then we let it do its job, as we expected it to. To date, we have not had any incidents. It's never done anything that made us scratch our heads and ask ourselves 'why did it do that?'"*

Brian Hunsaker

This small background application constantly monitors permission changes in Dynamics CRM and precisely replicates them in SharePoint, thus ensuring correct access levels for all data items, while requiring no manual maintenance on the client side.

*"The CRM Replicator tool itself is not spectacular. Nothing about it is awe inspiring. There is no glitz or glamour. The spectacular thing is that we don't have to go into it – I mean ever. It requires no ongoing maintenance on it at all. If it weren't for this conversation, I doubt any of us would have thought about it again until it was time to renew... and then we would just renew",* Brian concludes.

Brian and his team can now rest assured that their key business documents are protected just as well as their CRM entities and focus on improving business value for their organization.

## Why Customers Use CB Dynamics CRM to SharePoint Permissions Replicator:

### Covers Whole Security Model

- **Security roles, cascading behavior**

- Manager and Business unit hierarchy

- Access team templates, Record Ownership

*"Even our complex document access rules are covered"*

Customer, Healthcare Sector

### Scalable and Fast

- **Multi-tenant, multiple organizations, SharePoint's**

- For unlimited users size

- Ready to run in 15 minutes, 24/7 real time

*" It runs and runs and runs"*

Customer, Finance Sector

### No Risk - No Changes

- **No access to backend database, neither CRM nor SharePoint**

- Interaction through API´s only

- Secure Communication via SSL

*"Awesome! fast service and maintenance"*

Customer, Industry Sector

## For More Information

To learn more about the Connecting Software solutions featured in this case study, visit the following webpages:

Customer stories:
*https://www.connecting-software.com/category/customer-stories/*

CB Replicator:
*https://www.connecting-sofware.com/dynamics-crm-sharepoint-permissions-replicator/*

## Our promise to you

We will fix the missing permissions/ privileges synchronization issue and keep your documents safe. Any combination from Dynamics CRM 2011/13/15/16 and Dynamics 365 with SharePoint 2010/2013/2016; O365 and SharePoint Online; either on-prem or in the cloud or hybrid is available.

**Try a FREE Trial now**: *https://www.connecting-software.com/permissions-replicator-sign/* Free license is valid for one month. It has full functionality and comes with 100 users.

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