



CB Dynamics CRM to SharePoint Permissions Replicator

CRM Documents Are Secured From Unauthorized Access Within SharePoint

Connecting Software

Leading Specialist In Cooling And Heating Systems Uses CB Dynamics CRM –Sharepoint Permissions Replicator



ics cool energy

About the Customer

ICS Cool Energy is temperature control specialist company with over 25 years of international experience, with the offices in UK, Germany, Switzerland, Austria, Poland, Italy, France and the Netherlands and resellers in 4 continents.

Benefits and References

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

Phil Cole,

Group Business Systems & Project manager for CRM,

Business challenges of the customer

ICS Cool Energy uses Dynamics CRM online alongside Office 365 to create quotes for customers. These documents are all stored in SharePoint online. Moreover, they utilize Dynamics CRM to register Leads, Opportunities, Quotes and Orders and maintain their full price list within Dynamics CRM to speed up the pricing process.

ICS Cool Energy has 140 licensed Dynamics CRM users that store quote documents, together with any related documents used to build up their projects. Over time, the company found that more than 80,000 existing documents were not properly protected in SharePoint. These documents represent immense value for the company and there was an urgent need to protect them. Phil Cole manages the CRM project at ICS Cool Energy. The CB replicator was recommended to him by their CRM partner. He was surprised how well it replicated the full range of permissions within CRM into SharePoint.

Solution & Result provided by Connecting Software

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 that the software was stable and running smoothly. The replicator successfully fixed all the permissions so they decided to give it a go. Going forward, all records and new documents in the database of ICS Cool Energy are secured, protected and safe.

Communication with Connecting Software was smooth, easy and problem-free for ICS Cool Energy. All questions were easily and quickly solved by the Connecting Software support team, though this was rarely needed because of the high quality of the documentation. ICS Cool Energy also had a few Lync/Skype sessions with the support team which were painless and very helpful.



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