



ics cool energy



CB Dynamics CRM to SharePoint
Permissions Replicator

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

"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, ICS Cool Energy

About ICS Cool Energy

ICS Cool Energy is a temperature control specialist company with over 25 years of international experience. Its customers range from smaller enterprises to large international brands. They offer solutions together with service and maintenance of temperature control requirements for customers in a wide variety of industries such as Food, Beverage, Chemical, Pharmaceutical, Health care, Plastics, Rubber, in addition to HVAC solutions for Data Centres, Server Rooms, Factories, Facilities, Hotels and Leisure.

ICS Cool Energy has offices in the UK, Germany, Switzerland, Austria, Poland, Italy, France and the Netherlands, as well as resellers on 4 continents.

The Challenge

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.

The Result

ICS Cool Energy got in touch with their partner eBES. eBES 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.

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-software.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.