



CB Dynamics CRM to SharePoint Permissions Replicator

CRM Documents Are Secured From Unauthorized Access Within SharePoint

Connecting Software

Automatic permission replication helps top manufacturer keep customer records safe.



About the customer

Over the last 30 years, the New Jersey based Sabert has become a leading global manufacturer of innovative food packaging products and solutions.

www.sabert.eu

Business challenges of the customer

"We started storing Dynamics CRM 2013 documents outside of CRM, opting for SharePoint 2013 on premise. With the out-of-the-box Dynamics CRM – SharePoint integration, our salespeople had access to all the customer information. However, the downside was that anyone could access anything. And we needed a quick fix for that."

The problem with storing Dynamics CRM documents in SharePoint is the lack of synchronization of permissions and privileges. Due to this issue, unauthorized SharePoint users can access confidential documents without the required privileges in CRM, which often leads to disclosure of confidential and sensitive company data.

With customer information stored in CRM and relevant documents in SharePoint, Sabert needed a solution that would ensure adequate protection of confidential customer data, while enabling decision makers to reliably access key documents.

Solution & Result provided by Connecting Software

To solve this crippling issue, in July 2015 Sabert turned to Connecting Software. Our out-of-the-box CB Dynamics CRM – SharePoint Permissions Replicator enables them to seamlessly, automatically and precisely synchronize Dynamics CRM permissions into SharePoint, thus protecting confidential documents from unauthorized access.

CB Dynamics CRM – SharePoint Permissions Replicator is a small yet powerful application that monitors privilege changes for Dynamic CRM data items on the background and automatically synchronizes these changes to respective items in SharePoint. To access the end Dynamics CRM and SharePoint system, it utilizes our Connect Bridge platform.

Sabert can now pride itself with a secure integration that constantly – and instantly – enables business users to access relevant customer information, while enforcing appropriate CRM security roles in SharePoint. They gained peace of mind knowing that their most confidential data is safe.

Benefits and References

"With over 140 business users and six manufacturing plants in three countries, enforcing appropriate access rights to our customer data was a must."

Mike Freeman,

VP for Information Technology, Sabert