



CB Dynamics CRM to SharePoint
Permissions Replicator

Automatic permission replication helps top manufacturer keep customer records safe.

About Sabert

"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

The world has changed immensely since 1983, when Albert Salama, the founder of Sabert Corporation, sold his first plastic trays out of his apartment in New York. Over the last 30 years, the New Jersey based Sabert has become a leading global manufacturer of innovative food packaging products and solutions. To enable further growth, they needed to integrate the rich CRM capabilities of Microsoft Dynamics CRM with the flexible document management features of Microsoft SharePoint, while maintaining security and trust.

The Challenge

"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.

The Solution

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.

The Result

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 from prying eyes.

Mike Freeman, the VP of Information Technology in Sabert is very happy about the end-result: *"It's one of those software products which you don't have to think about once you set them up. I don't have to check in on it, since I know it is working... It does what it says it will do. There are other software companies that say a lot, but don't do what they say they will do."*

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/>