



## CB Dynamics CRM to SharePoint Permissions Replicator

CRM Documents Are Secured From Unauthorized Access Within SharePoint



# Freedom Graphic Systems breaks free with CB Replicator



### About the Customer

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

[www.fgs.com](http://www.fgs.com)

### Benefits and References

*"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

### Business challenges of the customer

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 an out-of-the-box expert solution.

### Solution & Result provided by Connecting Software

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.

*"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?""*

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.



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