

# CB Dynamics 365 to SharePoint Permissions Replicator

Secure your Dynamics 365 documents stored in SharePoint with one powerful solution



## What is CB Dynamics 365 to SharePoint Permissions Replicator?

CB Dynamics 365 to SharePoint Permissions Replicator is a small yet powerful application that monitors privilege changes for Dynamic 365 data items in the background and automatically synchronizes these changes to respective items in SharePoint. Thus, the proper privileges from Dynamics 365 apply to SharePoint items – automatically and instantaneously, securing data items and documents all the time.

## Why is it important

A major problem of storing Dynamics 365 documents in SharePoint is the missing synchronization of privileges and permissions. This allows unauthorized SharePoint users to access private documents and sensitive data even if they don't have CRM privileges to do so. CB Dynamics 365 to SharePoint Permissions Replicator is the only out-of-the-box solution that remedies this issue by automatically synchronizing Dynamics 365 permissions with SharePoint privileges.

## Why customers use CB Dynamics 365 to SharePoint Permissions Replicator:

- To leverage the highest level of Dynamics 365 access rights in SharePoint.
- To increase compliance with data protection regulations.
- The most complete solution in the market, well-established and stable.



## Testimonials

*"In cooperation with Connecting Software we have received a perfect product to solve the dilemma of two independent permission models of Dynamics and SharePoint. The cooperation was very constructive, which we greatly appreciated."*

*"The most important issue we solved was limiting access to confidential documents via Dynamics security roles and entities. Not needing to manage SharePoint rights has simplified the overall process and allowed us to implement a more complex security model."*

*"A core part of GDPR is data access and privacy. So replicating our user access management policies across all solutions is key for managing our obligations to our customers and employees. ..."*



RAPHAEL SICK  
Project Manager at ZF



PETER LUKSCHANDERL  
Head of Applications, IT at  
Liebherr Tower Cranes

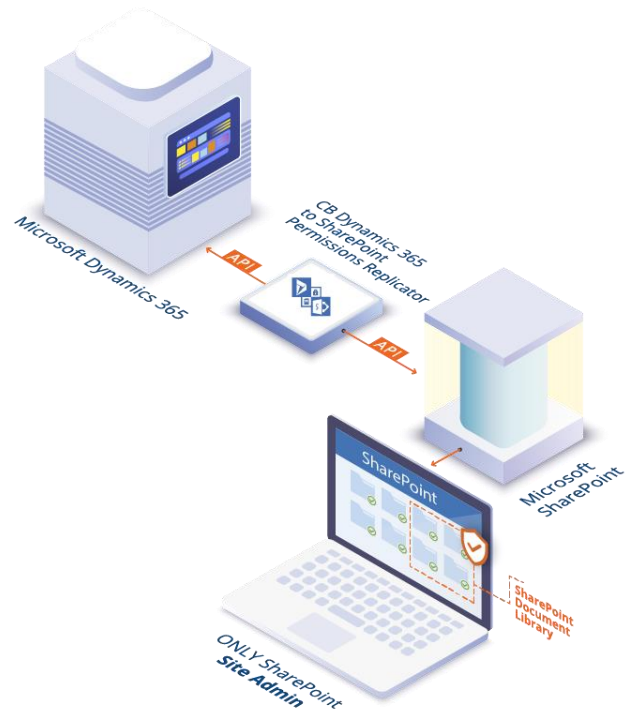


ANTHONY CROOK  
Head of Client Business Solutions  
at Compass Group PLC

# The current way

Without CB Dynamics 365 to SharePoint Permissions Replicator, after changing account privileges in Dynamics 365, you need to manually set up permissions for each SharePoint document related to that account as well.

- Dynamics 365 permissions ARE NOT being replicated into SharePoint
- Sensitive documents are exposed and unprotected in SharePoint
- Organization risks financial and reputational losses



# How it should be

With CB Dynamics 365 to SharePoint Permissions Replicator, every time certain privileges are granted in CRM/Dynamics 365, they are automatically replicated into SharePoint.

Confidential documents like salaries, contract values, etc. are available in SharePoint only to those who have been granted access in Dynamics 365.

After installation, the solution runs in the background and from this moment, it is fully automated and does not require any user interaction.

## Supported versions in any combination

- Dynamics CRM 2013, 2015, 2016, Online
- Dynamics 365 CE, Sales, Customer Service, Field Service
- SharePoint 2013, 2016, 2019, Online
- Office 365

1.

Reading from the logs of Dynamics 365 and taking all documents security information

3.

No direct access to backend database of SharePoint or Dynamics 365

5.

Access only using SharePoint Site Admin credentials

2.

Translating this information into appropriate SharePoint privileges on folder level

4.

Interaction with Dynamics 365 & SharePoint through APIs ONLY

6.

Secure Communication via SSL

# Add-ons



## CB Dynamics 365 Seamless Attachment Extractor

CB Dynamics 365 Seamless Attachment Extractor moves attachments from Dynamics 365 to a destination of your choice – SharePoint, Azure File Storage or Azure Blob Storage.

Many organizations look for a solution to move attachments to a document management / storage system and not store them in the CRM, which is not designed for that.

- Improved Dynamics 365 performance;
- Know where your documents are (data protection laws; audits).
- User experience is unaffected.
- Documents remain accessible the same way - no changes in workflows

[Learn More](#) →



## CB SharePoint Structure Creator

You can have up to 30,000,000 items or files in a SharePoint list or library. However, there is a much lower limit on the number of unique SharePoint permissions you can set: 50,000 items per list or library. Microsoft recommends not going over 5,000 unique permissions for the best performance results.

SharePoint Structure Creator can solve this for you by automatically creating or selecting document libraries in SharePoint.

SharePoint Structure Creator will put documents into distributed document libraries, which are created according to the business needs.

[Learn More](#) →



## CB Blockchain Seal for SharePoint

This add-on uses Blockchain technology to seal documents in SharePoint and enables verification from within SharePoint or online – quickly and for a fraction of the cost.

This accelerates data compliance and provides complete data auditability – faster and more cost-effective than traditional certificates and any other sealing technology.

Using Blockchain ensures the highest level of trust. Internal and external stakeholders will know that files have not been tampered with and will even be able to establish a timeline if they have two versions of a sealed file.

[Learn More](#) →



## Dynamics 365 CE connector

Do you have data on a database or legacy system that you want to get into your Dynamics 365 Online? Or do you have data in Dynamics that you need available in other systems?

Using this add-on, you can do a one-time migration or even an integration that keeps data in sync between Dynamics 365 and any database or legacy systems - even on-premises!

All you need is access to the relational database (Microsoft SQL Server, MySQL, or other) or access to the source code of the legacy system.

[Learn More](#) →

# Deployment Options

## SaaS

USA / EU

Software as a Service hosted  
by Connecting Software

Deployment Time	15 minutes
Data Secure Transfer	Yes
Increase of Users	Per 20 Users
Updates Cycles	Regularly
Business Model	Yearly Subscription



OR

[Buy on our Shop](#)

## Self-Hosted

Run it on premises or on your  
cloud servers/virtual machines

Deployment Time	1 hour or less
Data Secure Transfer	Yes
Increase of Users	Per 100 Users
Updates Cycles	Regularly
Business Model	One-time price or Pay-as-you-Go



OR

[Get a Price](#)

### No Risk & No Changes

- No access to the backend database, neither CRM nor SharePoint
- Interaction through APIs only
- Secure Communication via SSL

### Scalable and Fast

- Multi-tenant, multiple organizations, SharePoint's
- Unlimited number of users
- Ready to run in 15 minutes
- 24/7 nearly real time

### Covers the Whole Security Model

- Security roles, cascading behaviour
- Manager and Business unit hierarchy
- Access team templates, Record Ownership
- Certified for US Fed Government



## CB Dynamics 365 to SharePoint Permissions Replicator

Our promise to you:  
We will fix the missing permissions/  
privileges synchronization issue and  
keep your documents safe.

### Try First, then Decide:

- Take your free 15-day trial.
- For more info & to get your free trial please visit:  
[connecting-software.com](http://connecting-software.com)



### Why Connecting Software?

Connecting Software creates integration and synchronization solutions for any developer, any software, and any budget. Founded in 2004, Connecting Software is an award-winning Microsoft Partner specializing in Software App Development. Connecting Software is on the Microsoft Azure Marketplace and on Microsoft AppSource. In Canada, we are listed in the Government of Canada Software Licensing Supply Arrangement (SLSA).