

# CB Dynamics 365 to Sharepoint Permissions Replicator

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



Microsoft Certified Ready 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 Replicator is the only out-of-the-box solution that remedies this issue by automatically synchronizing Dynamics 365 privileges with SharePoint permissions.

## Why customers use CB D365 to SharePoint Permissions Replicator:

- To leverage highest level D365 access rights in SharePoint.
- To increase compliance with data protection regulation.
- To flexibly move to Azure in minutes to scale as needed.



Malacky Team

## 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



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Head of Applications, IT at Liebherr Tower Cranes



**ANTHONY CROOK**  
Head of Client Business  
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# The current way

**Without CB 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.

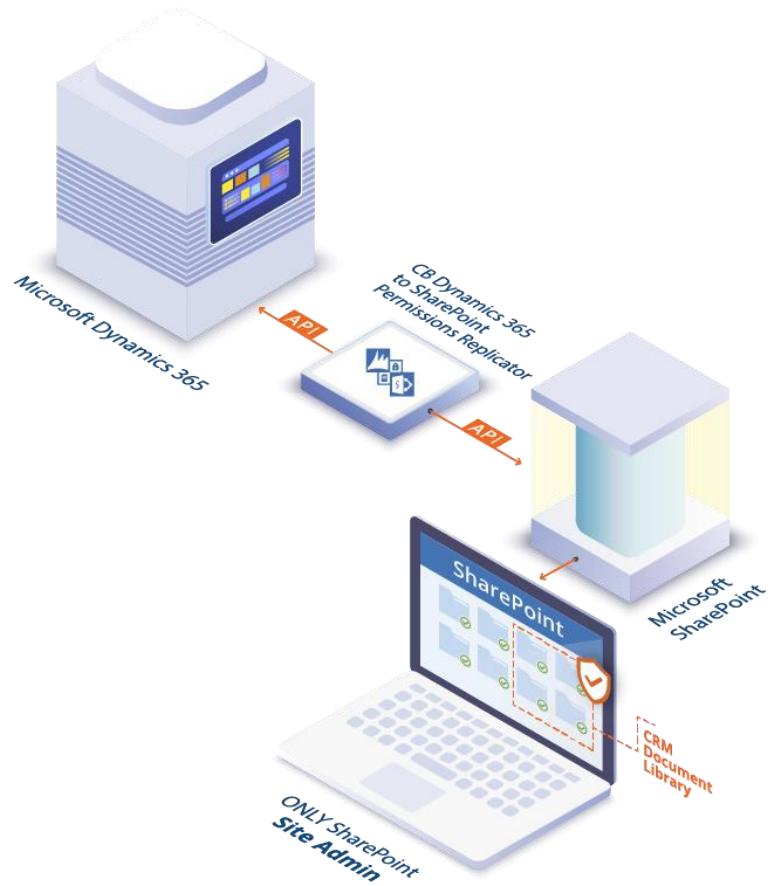
- Dynamics 365 permissions **ARE NOT** being replicated into SharePoint
- Sensitive documents are **exposed** and **unprotected in SharePoint**
- Organization risks financial and reputational losses

# How it should be

**With CB Replicator**, every time certain privileges are granted in CRM, 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 app **runs in the background** and from this moment it is **fully automated**.



## Supported versions in any combination

- **Dynamics CRM** 2011, 2013, 2015, 2016, Online
- **Dynamics 365** Sales, Customer Service, Field Service
- **SharePoint** 2010, 2013, 2016, 2019, Online
- **Office 365**

1.

Reading from the **logs of D365** 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

## 1. Seamless Attachment Extractor

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. Firstly, because a big database size decreases the speed of interaction and user experience; secondly, not all want to keep their important documents in the cloud (data protection laws; local audits)

### How it works

Service ensures live transfer of all attachments uploaded to Dynamics 365 to SharePoint, Azure Blob etc.

**User experience is unaffected. The service actions are transparent. And the files are not leaving your systems – no data breach.**

Documents remain accessible to users who have access to the respective record in Dynamics 365, without any modification of their workflows. Any changes to the Dynamics 365 files are projected to the configured external file storage, on-the-fly.

D365 Seamless Attachment Extractor moves attachments from **Dynamics 365** to a destination of your choice – **SharePoint, Azure File Storage or Azure Blob Storage**.

## 2. SharePoint Structure Creator

An add-on feature for CB Dynamics 365 SharePoint Permissions Replicator. It protects you from reaching a unique permission scope threshold, when documents stop being protected. It **automatically creates or selects document libraries** in SharePoint to avoid reaching the threshold (5k unique permissions per SharePoint Online and 50k for SharePoint 2013, 2016 and 2019, usually **reached within 1-2 years** for large organizations).

SharePoint Structure Creator will put documents into distributed document libraries which are created according to the rules you define.

**The solution is automatic – tested, proven it works and protecting from human factor**

### Supported systems:

- CRM 2011, 2013, 2015, 2016, Dynamics 365, Online
- SharePoint 2013, 2016, 2019, Online

## 3. Smart stamp document sealing with Blockchain technology

Data compliance and document storage is increasingly **expensive** and **complicated** for organizations across the globe ([regulations: HIPPA, SOX, GDPR, ISO 9000 etc.;](#) [routine audit](#)).

Our process **accelerates** data compliance and provides **full data auditability – faster** and **more cost-effective** than traditional certificates and any other sealing technology.

Blockchain is a **disruptive technology** but not many understand how to benefit from it. We leverage the technology via the apps of our expertise: **standard business software**.

The add-on **seals documents** in the systems you use every day and know like your five fingers: **CRM, ERP, DMS (SharePoint etc.)**, and enable verification – quickly and for a fraction of the cost.

Talk to us, and we will show you how to use the advantages of blockchain document sealing for your **business success** right now – for unbeatable price!

**Fully Auditable:** Easily verify if the data was manipulated in ERP, CRM or DMS systems, machine reports

**Data protection compliant:** No document leaves your systems, only the hash

**Easy to implement:** No digital wallet or blockchain expertise required, you operate the systems you know best

# Deployment Options



## SaaS

Software as a Service hosted by Connecting Software



## Microsoft Azure Marketplace and Appsource

Rent a Microsoft Azure virtual machine with the software ready to use



## Self-hosted

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

	SaaS	Microsoft Azure Marketplace and Appsource	Self-hosted
<b>Deployment Time</b>	30 minutes	30 minutes	1 hour or less
<b>Data Secure Transfer</b>	Yes	Yes	Yes
<b>Increase of Users</b>	Per any amount	Per 100 users	Per 100 users
<b>Updates Cycles</b>	Regularly	Every 3 months	Every 3 months
<b>Business Model</b>	Price per in advance	Pay per usage	One-time price

## CB D365 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)

**TRY IT FREE**



Madeira Team

### No Risk – No Changes

- No access to backend database, neither CRM nor SharePoint
- Interaction through API's only
- Secure Communication via SSL

### Scalable and Fast

- Multi-tenant, multiple organizations, SharePoint's
- For unlimited users size
- Ready to run in 15 minutes, 24/7 real time

### Covers Whole Security Model

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

### Why Connecting Software?

Connecting Software creates integration and synchronization tools 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 now on the Microsoft Azure Marketplace and on Appsource. In Canada, we are listed in Government of Canada Software Licensing Supply Arrangement (SLSA).