

Scribe Adapter for Dynamics CRM

“I don’t see how we could possibly have rolled out Dynamics CRM as quickly as we did and gained all this added value without Scribe Insight.”

–Tim Nugiel, Manager of Business Systems, Equinox Fitness

Scribe provides data integration and migration software solutions to help people within an organization share critical customer data, to better focus – and take action – on critical business events. Scribe recognizes that no two customers’ integration requirements are the same... even if they are integrating the same packaged business applications.

Scribe’s unique approach, configurable integration software, enables mid-market and large businesses alike to achieve enterprise-class integration; with very limited budgets and small IT staffs.

The Scribe product family is comprised of Scribe Insight, Scribe Adapters and Scribe Templates.

Scribe adapters allow you to connect to a data store using its security model. Adapters present the schema information, including object properties and relationships, as well as field properties such as data types, lengths, restrictions, defaults, and pick list values. The schema information from all types of adapters is presented in the same graphical user interface. So whether you are connecting to an enterprise application or a text file, it is in a familiar Scribe user interface. Having this information available to the designer enables them to do their job of designing the integration without coding.

There are two types of Scribe adapters, application adapters and connectivity adapters.

The Scribe Adapter for Dynamics CRM is an application adapter.

Application adapters work with vendor approved interface methods including Web services interfaces, OLE DB providers, XML messaging, or proprietary APIs. Scribe offers adapters for Microsoft Dynamics CRM and Dynamics GP, Salesforce, and SalesLogix. These application adapters are sold as add-ons to the Scribe Insight tool. Key features include:

- ▶ Automation of common tasks such as assigning primary ID values, setting default values, validating input data, and setting object relationships; all designed to eliminate run-time errors and provide for greater data integrity.
- ▶ Dynamic discovery of objects or fields that present the unique configuration of each application or database instance to the Scribe Console and Workbench without requiring recoding or recompiling.
- ▶ Integration of application and database messages to provide detailed exception handling and reporting from the Scribe Console’s single point of management.
- ▶ Some application adapters include a publishing component that pushes changes in the application’s data to a message queue as XML.

The Scribe Adapter for Dynamics CRM is an Application adapter. The Scribe Adapter for Dynamics CRM is certified by Microsoft and simplifies data loading into Dynamics CRM by utilizing the Web services API. Key features include:

- ▶ Support for all deployment options available with Dynamics CRM 4.0; customer deployed, partner hosted, or CRM Live.
- ▶ Assignment of primary ID and default field values, validation of input data, automatic population of summary and join tables.

- ▶ Support for custom entities, attributes, and relationships.
- ▶ The Scribe Publisher for Dynamics CRM creates XML messages from changes that happen in Dynamics CRM. In the publisher’s user interface you configure the entities that you want published without writing code.
- ▶ Support for Microsoft CRM Workflow.
- ▶ Picklist viewer and picklist validation for Dynamics CRM drop-down lists. Set any picklist field by its internal value or its user friendly name.
- ▶ A query builder that can join objects, filter, and order when connecting to Dynamics CRM as a source.
- ▶ Support for “fuzzy” matching when looking for Account duplicates via the Scribe Company Match component, an optional Dynamics CRM customization.
- ▶ A troubleshooting feature that captures the request and response communication between the adapter and the Dynamics CRM server as XML files.

Scribe also provides application adapters for ACT!, GoldMine, Exchange, and QuickBooks that support one-way migrations to CRM and ERP applications.

Connectivity adapters complement the application adapters by providing a wide variety of connections to the varied applications and data stores. Connectivity adapters include XML, ODBC, OLE DB, and SQL Server. These connectivity adapters are included in the core Insight tool. See the Scribe Insight data sheet to learn more about connectivity adapters.

Technical Requirements:

Scribe Insight version 6.0.5 or higher. Microsoft CRM version 1.2, Dynamics CRM version 3.0, 4.0, or CRM Live