SCRIBE

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Scribe Adapter for SalesLogix

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 limited budgets and small IT staffs.

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

Scribe Adapters enable the Scribe Insight tool to communicate with a variety of data stores including applications, databases, messages, and files.

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 SalesLogix 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, Dynamics GP and Dynamics NAV, 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 presents 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 SalesLogix simplifies data loading into SalesLogix by using its OLE DB provider, and encapsulating the business rules of SalesLogix so data integrity is assured. Key features include:

▶ Management of relationships between objects, such as Account/Contact.

▶ A picklist viewer that shows both the value and description of items in the picklist. Any picklist field can be set by its internal value or its user friendly name.

▶ Maintaining data integrity by optionally checking field values against their domain tables. Some key fields are validated such as SecCodeID, UserID, and AccountManagerID. If the field value fails validation, an error is generated and processing fails.

▶ Supports SalesLogix sync logging for data changed by the adapter.

▶ Supports for custom tables and fields.

▶ Support for "Fuzzy" matching when looking for Account duplicates via the Scribe Company Match component, an optional SalesLogix customization.

▶ Virtual fields enable easier understanding of the SalesLogix data schema.

▶ Support for private accounts and contacts.

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 or higher (Scribe recommends using the latest version). This must be installed before installing the Adapter for SalesLogix. SalesLogix version 5.2 or higher.