

Scribe Adapter for Salesforce

“The great thing about Scribe Insight is how flexible and adaptable it is to handle our unique business needs.”

—Jack Sands, Chief Executive Officer, Intrep Auto Club Renewals

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 Salesforce is an application adapter.

Application adapters work with vendor approved interface methods, Web services interface, OLE DB provider, XML messaging, or proprietary API. 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 Salesforce utilizes the Apex Web Services application programming interface (API). This API provides access to Salesforce that is simple, powerful and secure. Key features include:

- ▶ Support of business rules and data validation, data transformation, data standardization, key management, multi-object inserts/updates, de-duplication on all objects, and complex object relationships insuring data quality.

- ▶ Support for “Upsert with Relationships”, enabling related data to be inserted into Salesforce based solely on the keys of the source system.
- ▶ Support of data compression and multi-record bulk operations to maximize performance.
- ▶ Management of relationships between objects, such as Account./Contact or Opportunity/Lead.
- ▶ A query builder that supports Salesforce SOQL and provides a non-programming interface for querying Salesforce to provide data for integrations.

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. Salesforce Professional Edition, Enterprise Edition, Unlimited Edition, or any Edition that supports the Apex Web Services API. Salesforce customer login (user name and password). The Publisher component has these additional requirements: Enterprise edition or Unlimited edition (outbound messaging). IIS v5.x or 6.x based Web server with .NET 2.0 installed, accessible via the Internet. Scribe recommends this server be issued a Server Certificate and be set up to support SSL connections (HTTPS).