Leading the **Integration** Revolution

Your business problems have changed.
Why hasn't your integration solution?

ADEPTIA

Using Adeptia

Use Case: Integration with MS Dynamics CRM

Use Case: Integration with MS Dynamics CRM

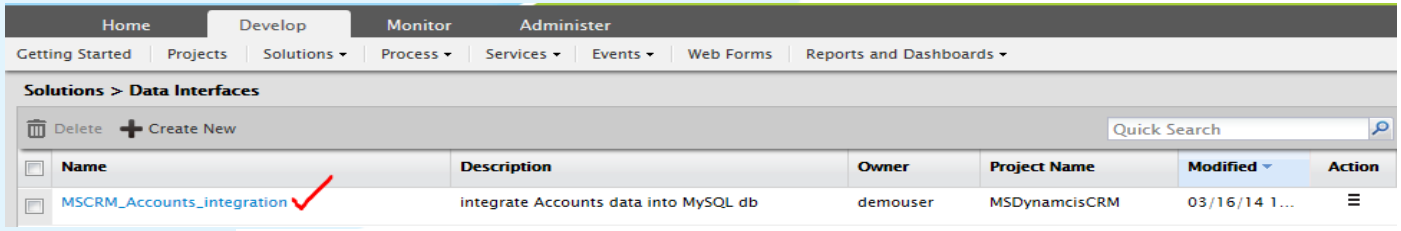
Adeptia's MS Dynamics CRM connection consists of 4 simple steps:

1. Provide connection parameters of MS Dynamics CRM (on-premise or cloud)
2. Select the data that needs to be captured, updated or created, such as Accounts, Contact, Leads etc.
3. Use Mapper to auto-map or apply additional data conversion rules
4. Apply Event rules to trigger the transactions automatically or on-demand basis.

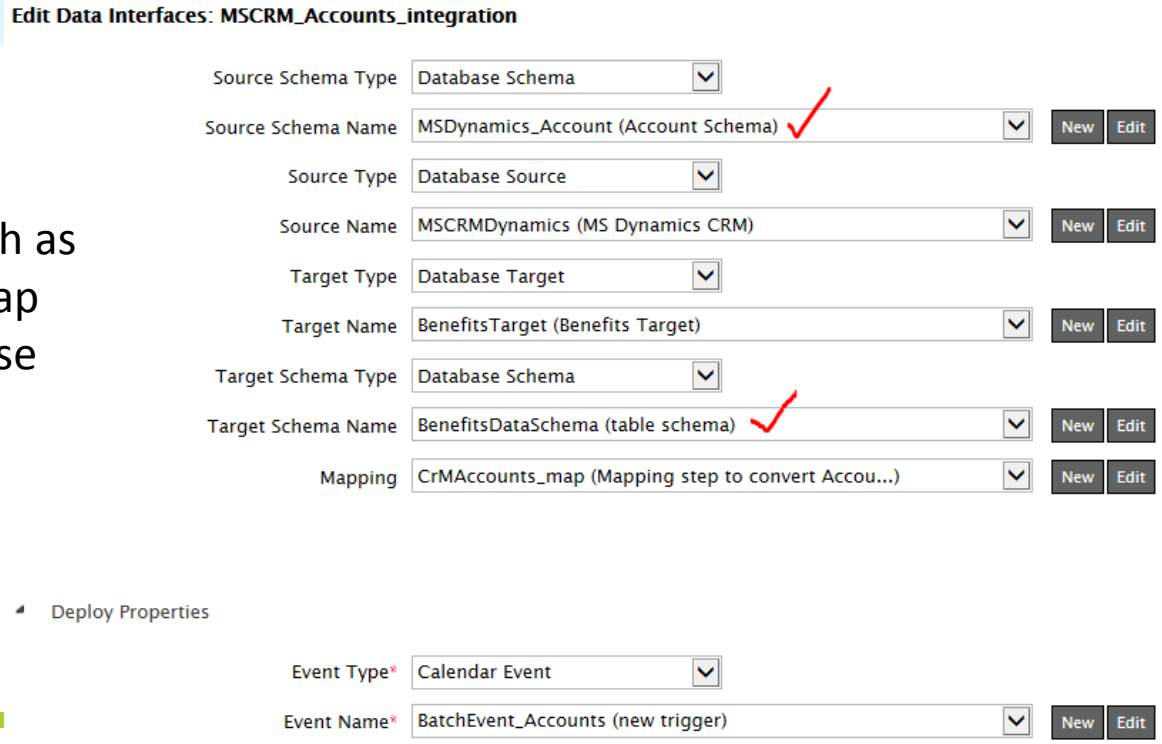
Example

Data Interface: Pull Accounts from MS Dynamics CRM

Suppose we want to pull Account records from CRM into a target MySQL database
Go to Develop > Solutions > Data Interfaces



Select your CRM data module such as Accounts and Map to Target database



Data Interface: Pull Accounts from MS Dynamics CRM

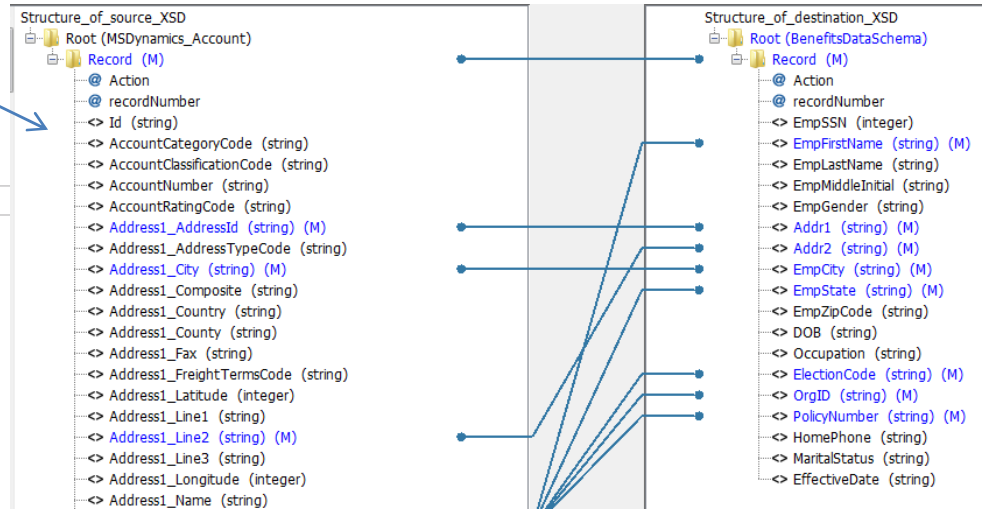
Create Mapping and use auto-map and additional functions to convert source to target

Edit Data Interfaces: MSCRM_Accounts_integration

Source Schema Type	Database Schema
Source Schema Name	MSDynamics_Account (Account Schema) ✓ New Edit
Source Type	Database Source
Source Name	MSCRMDynamics (MS Dynamics CRM) New Edit
Target Type	Database Target
Target Name	BenefitsTarget (Benefits Target) New Edit
Target Schema Type	Database Schema
Target Schema Name	BenefitsDataSchema (table schema) ✓ New Edit
Mapping	CrMAccounts_map (Mapping step to convert Accou...) New Edit

Deploy Properties

Event Type*	Calendar Event
Event Name*	BatchEvent_Accounts (new trigger)



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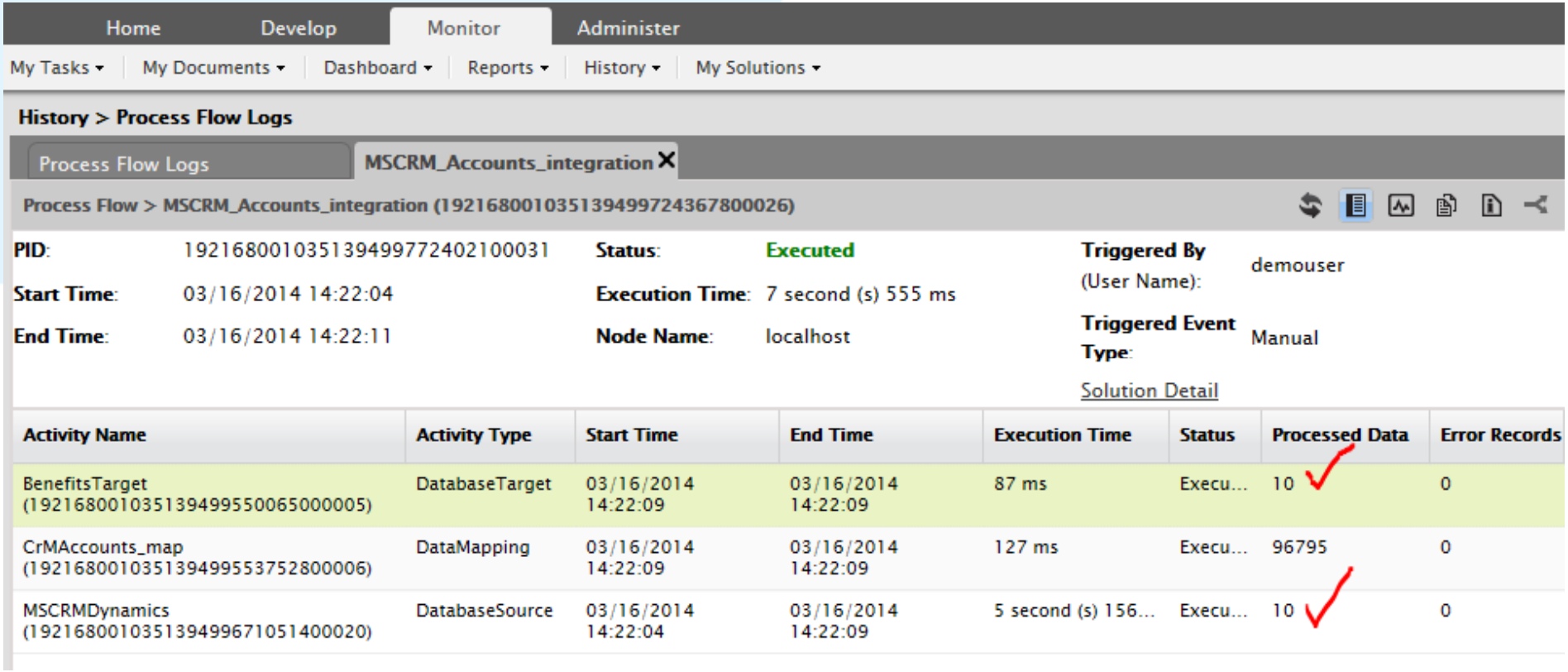
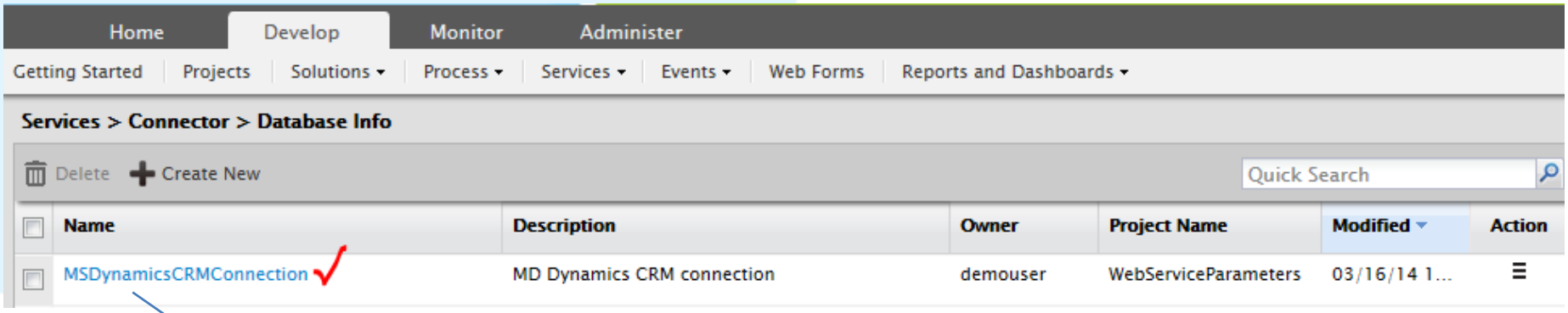
Data Interface: Monitor dashboard

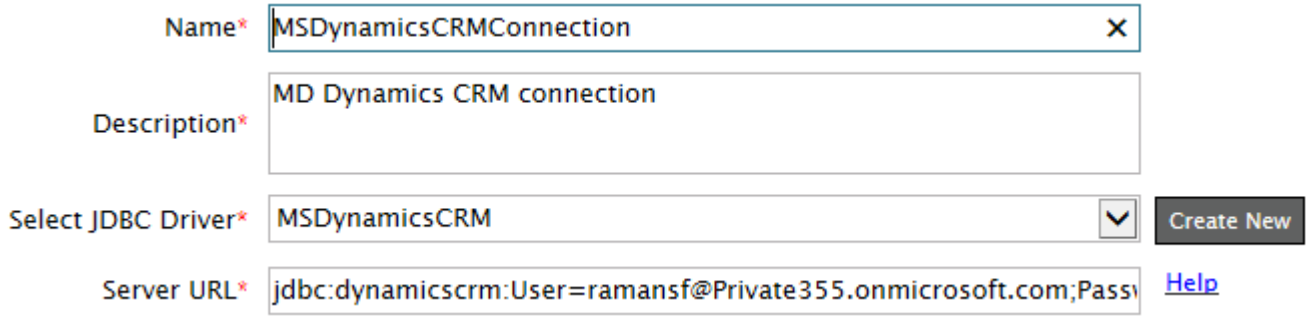
Run-time logs can be monitored by going to Monitor > Dashboard > Events



Setting MS Dynamics CRM Connection

Go to Develop > Services > Connector > Database Info



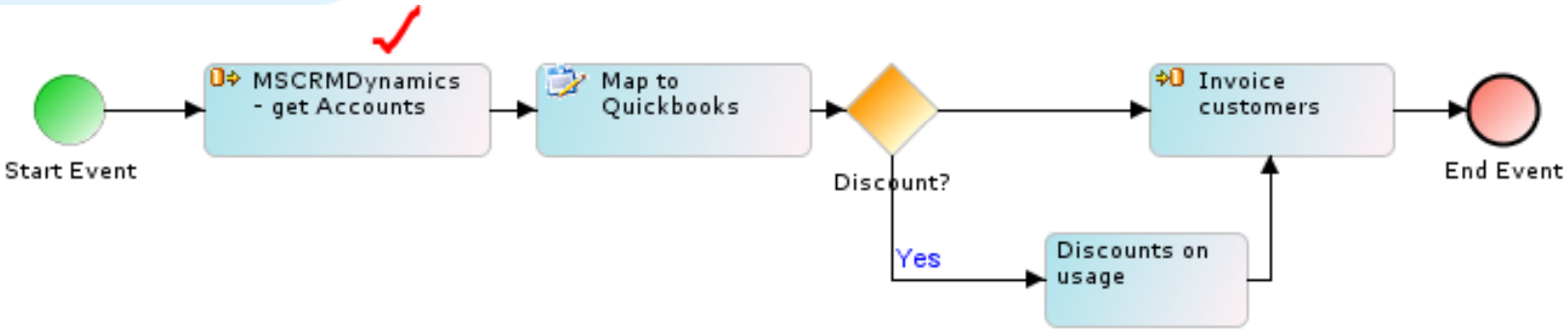


To get the MS Dynamics CRM JDBC driver license please contact >> sales@adeptia.com

Additional Use Cases with Process Designer

Use Adeptia's process designer interface to automate Accounts Payable, Invoicing, Bill-Pay and other business processes.

Example of a Billing process orchestration



Thank you!