



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.



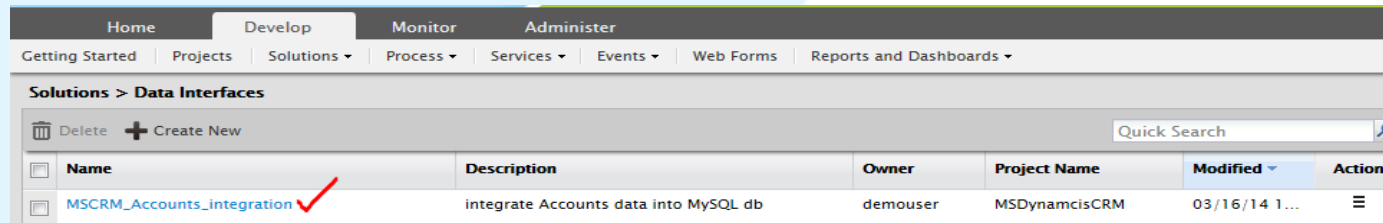
Example



ADEPTIA

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



Name	Description	Owner	Project Name	Modified	Action
MSCRM_Accounts_integration ✓	Integrate Accounts data into MySQL db	demouser	MSDynamicsCRM	03/16/14 1...	

Edit Data Interfaces: MSCRM_Accounts_integration

Source Schema Type: Database Schema

Source Schema Name: MSDynamics_Account (Account Schema) ✓

Source Type: Database Source

Source Name: MSCRMDynamics (MS Dynamics CRM)

Target Type: Database Target

Target Name: BenefitsTarget (Benefits Target)

Target Schema Type: Database Schema

Target Schema Name: BenefitsDataSchema (table schema) ✓

Mapping: CrMAccounts_map (Mapping step to convert Accou...)

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

Deploy Properties

Event Type*: Calendar Event

Event Name*: BatchEvent_Accounts (new trigger)

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) ✓

Source Type: Database Source

Source Name: MSCRMDynamics (MS Dynamics CRM)

Target Type: Database Target

Target Name: BenefitsTarget (Benefits Target)

Target Schema Type: Database Schema

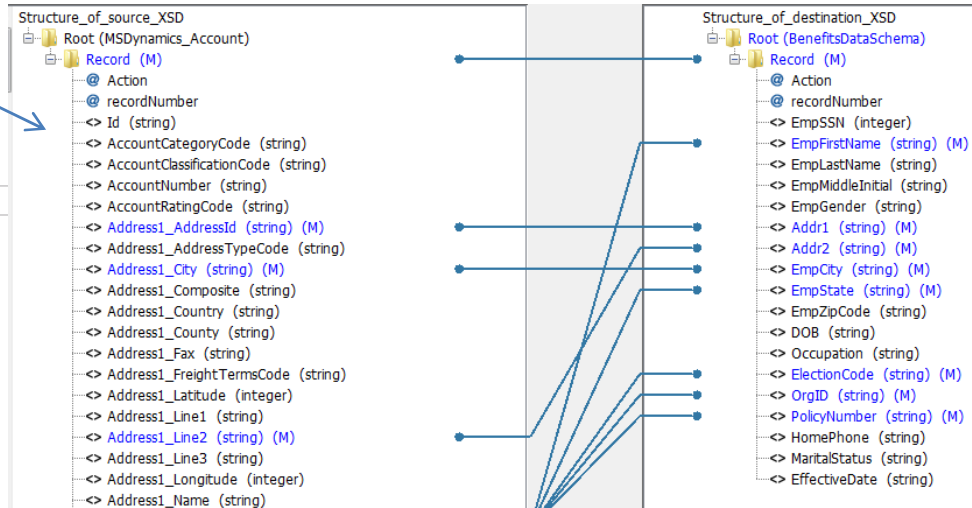
Target Schema Name: BenefitsDataSchema (table schema) ✓

Mapping: CrMAccounts_map (Mapping step to convert Accou...)

Deploy Properties

Event Type*: Calendar Event

Event Name*: BatchEvent_Accounts (new trigger)



Data Interface: Monitor dashboard

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

Home Develop **Monitor** Administer

My Tasks ▾ My Documents ▾ Dashboard ▾ Reports ▾ History ▾ My Solutions ▾

History > Process Flow Logs

Process Flow Logs MSCRM_Accounts_integration X

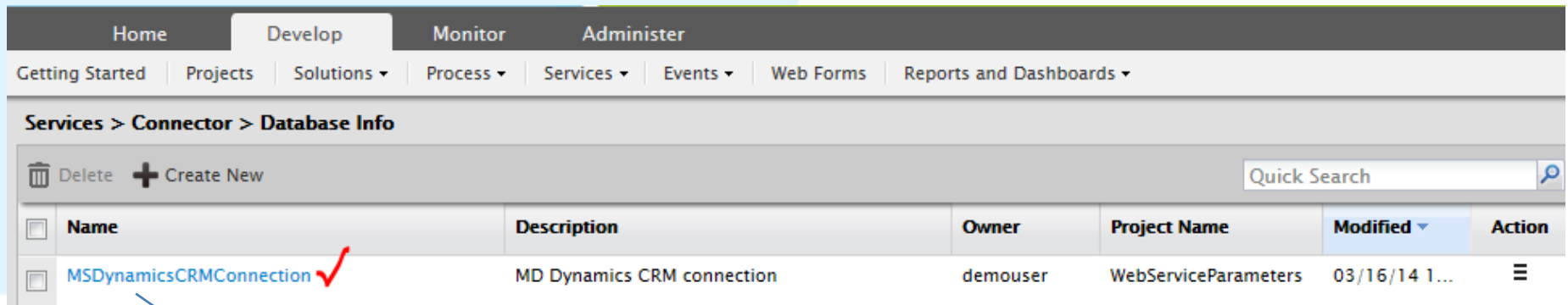
Process Flow > MSCRM_Accounts_integration (192168001035139499724367800026)

PID: 192168001035139499772402100031 **Status:** Executed **Triggered By** demouser
(User Name):
Start Time: 03/16/2014 14:22:04 **Execution Time:** 7 second (s) 555 ms
End Time: 03/16/2014 14:22:11 **Node Name:** localhost **Triggered Event** Manual
Type:
[Solution Detail](#)

Activity Name	Activity Type	Start Time	End Time	Execution Time	Status	Processed Data	Error Records
BenefitsTarget (192168001035139499550065000005)	DatabaseTarget	03/16/2014 14:22:09	03/16/2014 14:22:09	87 ms	Execu...	10 ✓	0
CrMAccounts_map (192168001035139499553752800006)	DataMapping	03/16/2014 14:22:09	03/16/2014 14:22:09	127 ms	Execu...	96795	0
MSCRMDynamics (192168001035139499671051400020)	DatabaseSource	03/16/2014 14:22:04	03/16/2014 14:22:09	5 second (s) 156...	Execu...	10 ✓	0

Setting MS Dynamics CRM Connection

Go to Develop > Services > Connector > Database Info



Home Develop Monitor Administer						
Getting Started Projects Solutions ▾ Process ▾ Services ▾ Events ▾ Web Forms Reports and Dashboards ▾						
Services > Connector > Database Info						
Delete + Create New		Quick Search <input type="text"/>				
<input type="checkbox"/>	Name	Description	Owner	Project Name	Modified ▾	Action
<input type="checkbox"/>	MSDynamicsCRMConnection ✓	MD Dynamics CRM connection	demouser	WebServiceParameters	03/16/14 1...	⋮

Name* X

Description*

Select JDBC Driver* ▾

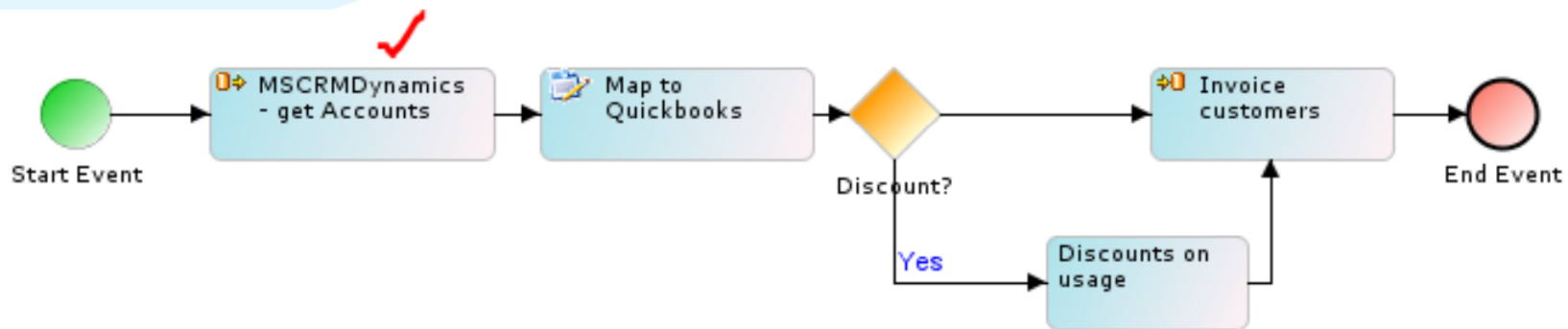
Server URL* [Help](#)

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!