

SMART 365

Samples

CRM 2013/2015/2016/365 (ONPREMISE-ONLINE)



Version 7.5

<https://smartxrm.microsoftcrmportals.com/en-US/SmartEIABus/>

Smart Process 2018-08-29

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Reviews and Approvals

Review Smart Process

Date	Author	Version	Role
2018-08-29	Mauricio Molina	V1 R1	Comercial
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Aprobaciones Internas

Date	Name	Version	Role

CONFIDENTIAL

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1 INTRODUCTION

Smart Process company focused on Microsoft Dynamics CRM, introduces an integration product based on the Dynamics platform to cover all the needs of an organization. This document shows the basic examples of smart 365 product integration refer to the document Smart 365 Operation Manual for its understanding

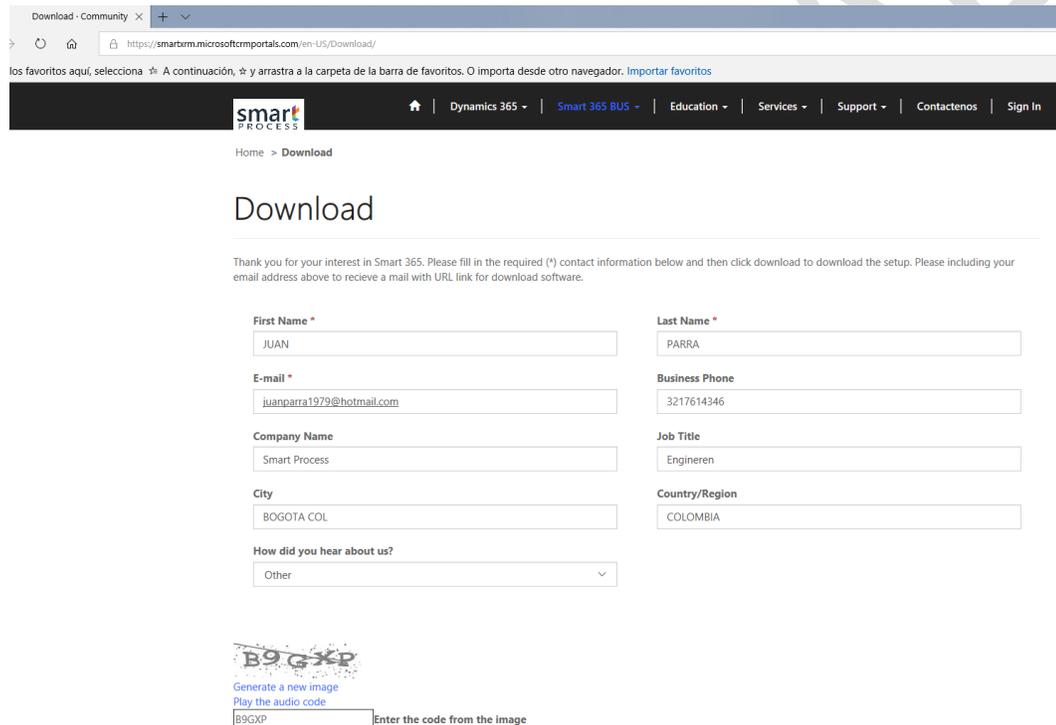
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2 SAMPLES

In this section we will perform an samples integration, for this we will follow the following steps:

2.1 Download Smart 365 App

Go to the following link <https://smartxrm.microsoftcrmportals.com/en-US/Download>, Fill in the data as shown in Img-1, and press submit, wait for a moment that will automatically load the file



The screenshot shows a web browser window with the URL <https://smartxrm.microsoftcrmportals.com/en-US/Download/>. The page title is "Download" and it contains a form for requesting the software. The form fields are filled with the following information:

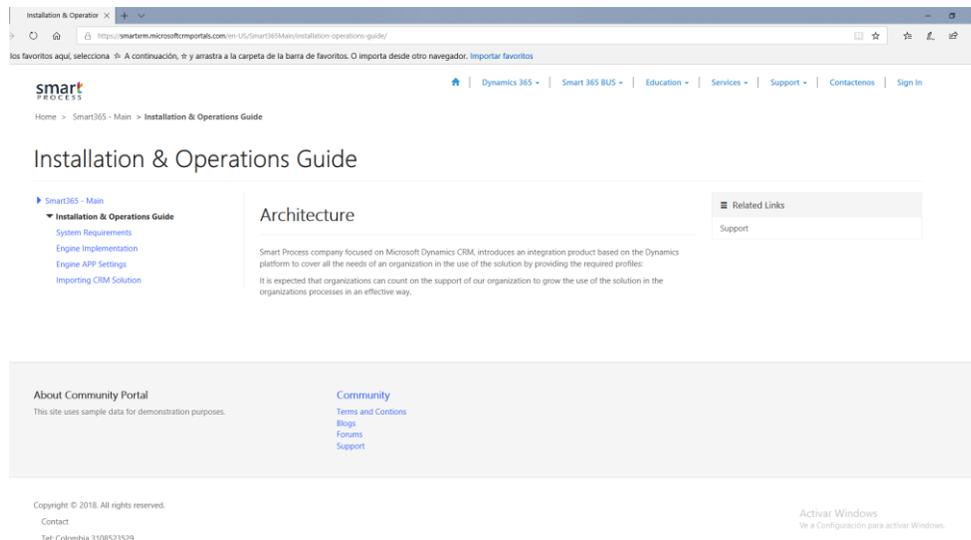
First Name * JUAN	Last Name * PARRA
E-mail * juanparra1979@hotmail.com	Business Phone 3217614346
Company Name Smart Process	Job Title Engineren
City BOGOTA COL	Country/Region COLOMBIA
How did you hear about us? Other	

Below the form is a CAPTCHA image with the code "B9GXP". The text "Enter the code from the image" is visible next to the CAPTCHA input field.

Img-1

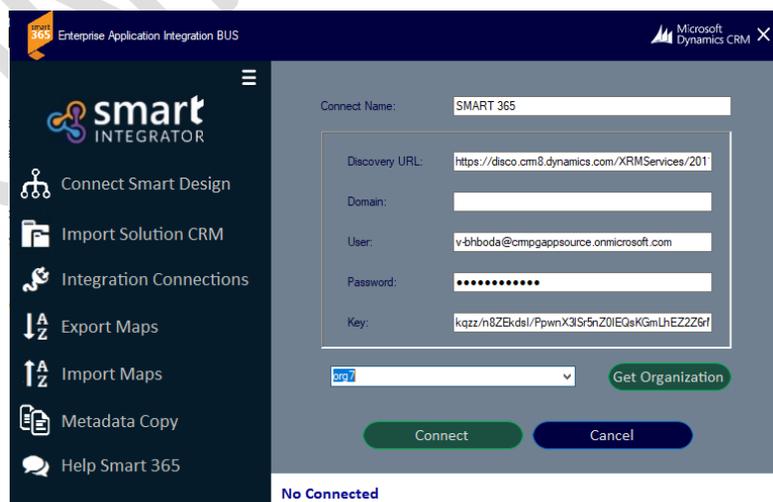
2.2 Install Smart Engine and Smart Designer

Proceed with the installation of the Smart Engine, for more information see the following link <https://smartxrm.microsoftcrmportals.com/en-US/Smart365Main/installation-operations-guide>, there you will find the step by step in the statement as shows the Img-2 or refer to the document Smart 365 Operation Manual.



Img-2

On the left side you will find the requirements of the system, the implementation of the engine, the configuration of the Smart Engine with the Smart Designer, and the import of the CRM solution.



Img-3

2.3 Creating Connections for Samples

After installed and configured, proceed to create two integration connections, the first is a flat file type connection and the second a CRM type connection (page 25 manual operations), as well as choose to create another type of connection. connection, for the example we will use these two, the purpose of this example is to take information from a flat file (.csv, xls, xlsx) to the CRM account entity.

- On the site map go to **Integration -> Integration Connections** and press the button **+ New**
- The connection form is displayed, and fill in the following information:

Connection name: CONNECTION FLAT FILE ACCOUNTS

Connection type: Flat File(csv, excel)

CRM attachment archive: No

File Type: Excel 2007(*.xlsx, xml)

File Location: Local Directory

File directory: C:\Program Files (x86)\Smart Process\Smart 365\Files\Docs

Nota: Es la ubicacion donde se instalo el SMART APP, alli se encuentran archivos para la demo

FileName: DemoAccounts.xlsx

Press **SAVE & CLOSE**

The screenshot shows a web form for creating a new integration connection. The form is titled "INTEGRATION CONNECTION : INFORMATION" and "New Integration Connection". It has a header with "Name" (CONNECTION FLAT FILE ACCOUNTS) and "Creation date". The form is divided into sections: "general", "Archive", and another "General" section. The "general" section contains fields for "Connection name" (CONNECTION FLAT FILE ACCOUNTS), "Connection type" (Flat File (Csv, Excel)), "Key" (x3vdj75EpWp9yu3KlQNbG490OqqRw54rmWTb6N+DkToE2Rlg/Rlv8Z1n5qy8phtLWwF/60pu/kDmzT0TmRj+vj/Tt), and "Owner" (Juan Carlos Parra). The "Archive" section has a "CRM Attachment Archive" field set to "No". The second "General" section contains "File type" (Excel 2007 (*.xlsx, xml)), "File Location" (Local Directory), "File Directory" (C:\Program Files (x86)\Smart Process\Smart 365\Files\Docs), and "File Name" (DemoAccounts.xlsx).

Img-4

- c) Return to the step a. to create another connection record in **+ New** and fill in the following data

Connection name: CONNECTION FLAT FILE CONTACTS

Connection type: Flat File(csv, excel)

CRM attachment archive: Yes

File Type: Csv

Delimiter: |

In Tab **GLOBAL SETTING** section **Coding**

Encoding Type: UTF8

Note: This feature is used for special characters, regularly in flat files of type csv.

Press **SAVE & CLOSE**

INTEGRATION CONNECTION : INFORMATION

CONNECTION FLAT FILE CONTACTS

Name CONNECTION FLAT FILE CONTACTS

Creation date 8/22/2018 4:59 PM

general

Connection name * CONNECTION FLAT FILE CONTACTS

Connection type * Flat File (Csv, Excel)

Key * x3vdj75tEpWp4yu3KIUNbG490OqgRwS4mmWTb6N+Dk1oEzRLg/RivBZ1h1Soj/BpHLNWF/60pu/kOmzTOImRj+J/TtS

Owner * Juan Carlos Parra

Archive

General

CRM Attachment Archive * Yes

File type * Csv

Delimiter * |

Notes and Attachments

ACTIVITIES

NOTES

All | Add Phone Call Add Task ...

Img-5

- d) Return to the step a. to create another connection record in **+ New** and fill in the following data

Connection name: CONNECTION CRM DESIGNER

Connection type: Dynamics CRM

Embedded Integration: Yes

Note: Where smart designer is installed

Press **SAVE & CLOSE**

The screenshot shows the 'INTEGRATION CONNECTION : INFORMATION' page for 'CONNECTION CRM DESIGNER'. The form is divided into two sections: 'general' and 'Dynamics CRM'. In the 'general' section, the 'Connection name' is 'CONNECTION CRM DESIGNER', the 'Connection type' is 'Dynamics CRM', and the 'Owner' is 'Juan Carlos Parra'. In the 'Dynamics CRM' section, 'Embedded Integration' is set to 'Yes'. There are also fields for 'Implementation Type', 'Discovery URL', 'Domain', 'Password', 'Organization', and 'User', which are currently empty.

Img-6

- e) First create a CRM Dynamics trial on the Microsoft page <https://dynamics.microsoft.com/en-us/>, Return to the step a. to create another connection record in **+ New** and fill the data of the created trial or external CRM

Connection name: CONNECTION CRM EXTERNAL

Connection type: Dynamics CRM

Embedded Integration: No

Implementation type: Online

Discovery Url: <https://disco.crm2.dynamics.com/XRMServices/2011/Discovery.svc>

Note:

<https://community.dynamics.com/crm/b/crmmitchmilam/archive/2017/05/15/current-list-of-dynamics-365-online-regions>

Organization: orga34eff9a

Note: the Organization is located in settings->Customizations->Developer Resources

User: admin@xxxxxxx.onmicrosoft.com

Password: XXXXXX

Press **SAVE & CLOSE**

INTEGRATION CONNECTION : INFORMATION

CONNECTION CRM EXTERNAL

Name * CONNECTION CRM EXTERNAL Creation date 8/22/2018 5:20 PM

+general

Connection name *	CONNECTION CRM EXTERNAL	Connection type *	Dynamics CRM
Key *	x3vd75tEpWpQyq3KlQNbG49OoqRw5ArmWTb6N+Dk1e2RLg/RhBZ1nISoj8pHLNWF/60pu/kDmzTOmRj+J/TH	Owner *	Juan Carlos Parra

+Dynamics CRM

Embedded Integration	No	Implementation Type	On-line
Discovery URL	https://disco.crm2.dynamics.com/XRMServices/2011/Discovery.svc	Organization	orga34eff9a
Domain	User	admin@smartedu2.onmicrosoft.com
Password	Prueba2018		

Img-7

+ NEW DELETE EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL IMPORT DATA CHART PANE VIEW ...

⇄ Connections active

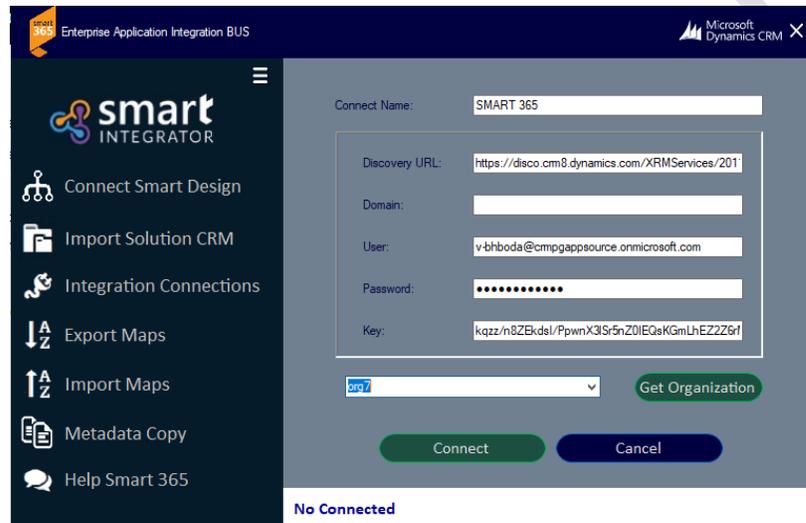
<input type="checkbox"/>	Name ^	Connection type	Update Titles ...	Editor	Status	Creation date
<input type="checkbox"/>	CONNECTION CRM DESIGNER	Dynamics CRM	No		Active	8/19/2018 7:29 PM
<input type="checkbox"/>	CONNECTION CRM EXTERNAL	Dynamics CRM	No		Active	8/22/2018 5:20 PM
<input type="checkbox"/>	CONNECTION FLAT FILE ACCOUNTS	Flat File (Csv, Excel)	No		Active	8/19/2018 7:27 PM
<input type="checkbox"/>	CONNECTION FLAT FILE CONTACTS	Flat File (Csv, Excel)	No		Active	8/22/2018 4:59 PM

Img-8

2.4 Creating Metadata Structure

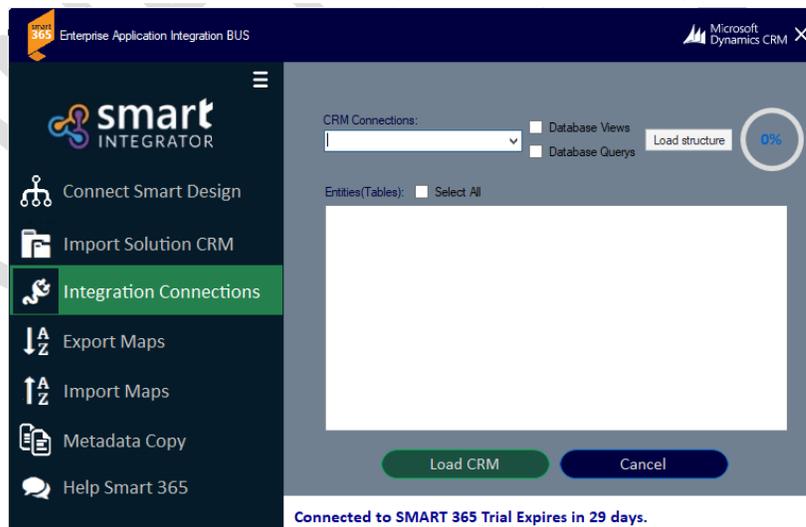
The next step is to create the data structures of the entities to be integrated in each connection, in order to do so, run the Smart 365 program again, and connect to Smart Designer (Img-9).

C:\Program Files (x86)\Smart Process\Smart 365\Files\Smart integration.exe o search smart 365 in windows



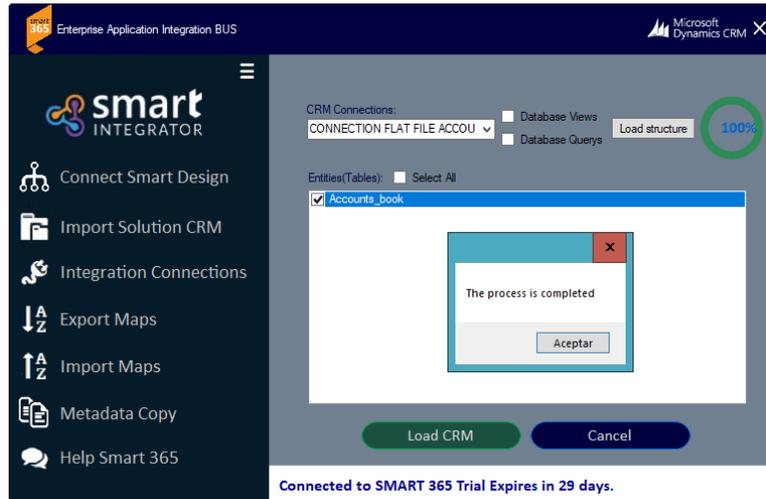
Img-9

Then in the menu on the left side go to Integrations Connection (Img-10)



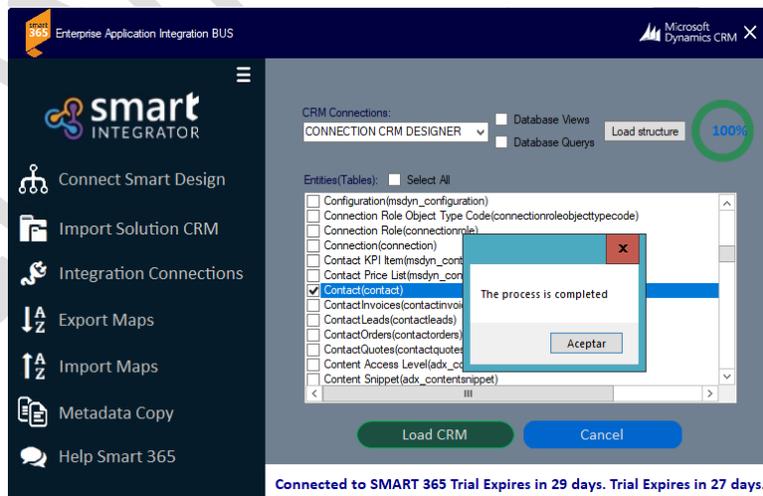
Img-10

In the CRM Connections drop-down list, choose the connection (**CONNECTION FLAT FILE ACCOUNTS**) and click **Load structure**, select **Accounts_book** and press **Load CRM** and wait for it to the process is completed(Img-11).



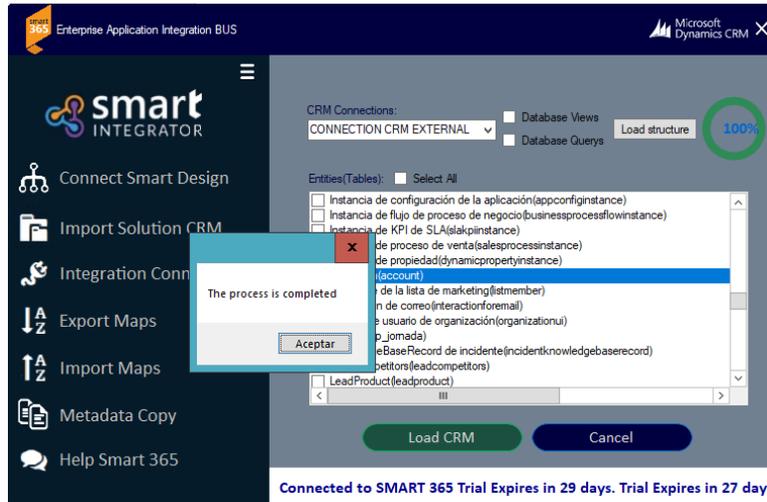
Img-11

In the CRM Connections drop-down list, choose the connection (**CONNECTION CRM DESIGNER**) and click **Load structure**, select **Account(account)** and **Contact(contact)** and press **Load CRM** and wait for it to the process is completed(Img-12).



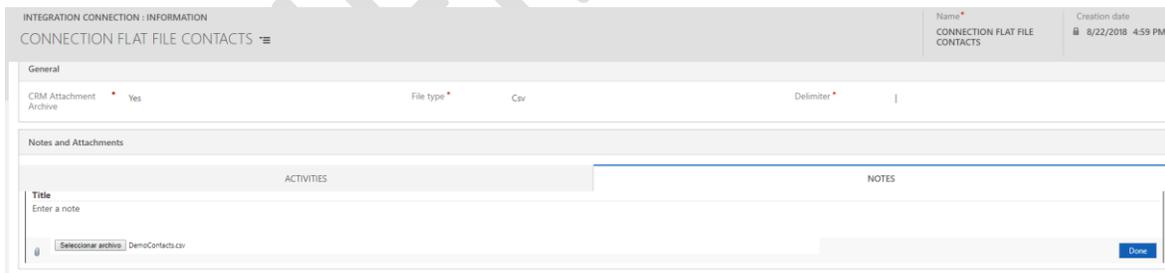
Img-12

In the CRM Connections drop-down list, choose the connection (**CONNECTION CRM EXTERNAL**) and click **Load structure**, select **Account(account)** and **Contact(contact)** and press **Load CRM** and wait for it to the process is completed(Img-13).



Img-13

For the connection **CONNECTION FLAT FILE CONTACTS** go back to the Dynamics crm designer and open the connection log there, attach the **DemoContacts.csv** file(C:\Program Files (x86)\Smart Process\Smart 365\Files\Docs) in the **Notes and attachments** section, the data structure will be automatically created(Img-14)



Img-14

Check the structure of the entities in **Integration -> Entities** and **Integration -> Attributes (Img-15)**

NEW
 DELETE
 EMAIL A LINK
 RUN REPORT
 EXCEL TEMPLATES
 EXPORT TO EXCEL
 IMPORT DATA
 CHART PANE
 VIEW
 ...

Entities active

Name	Logical Name	Object Code	Integration Connection	Total Attribut..	Metadata Id	Cod Import	Creation date
DemoContacts.csv	DemoContacts.csv	11	CONNECTION FLAT FILE CONTACTS	11		21	8/22/2018 5:51 PM
Zona de ventas	territory	2,013	CONNECTION CRM EXTERNAL		8ff0290d-50c1-48f6-9070-cd0758bdc602	20	8/22/2018 5:43 PM
Equipo	team	9	CONNECTION CRM EXTERNAL		eff432f7-2508-44cf-971a-cbe44562dc68	19	8/22/2018 5:43 PM
Instalaciones/equipamiento	equipment	4,000	CONNECTION CRM EXTERNAL		a7a0b367-219b-44de-9ee9-239e3b5c7a4e	18	8/22/2018 5:42 PM
Lista de precios	pricelevel	1,022	CONNECTION CRM EXTERNAL		e995200c-5fe8-4843-8325-80bd2a429d1e	17	8/22/2018 5:42 PM
Zona	sp_zona	10,623	CONNECTION CRM EXTERNAL		56865a54-23c0-4566-98d0-51ea708dd969	16	8/22/2018 5:41 PM
Cliente potencial	lead	4	CONNECTION CRM EXTERNAL		dc6574cb-92ce-446c-a5d6-885a75107d52	15	8/22/2018 5:39 PM
Localidad	sp_localidad	10,588	CONNECTION CRM EXTERNAL		6ce5088f-8752-4892-b79e-1765b8308487	14	8/22/2018 5:38 PM
Sector Censal	sp_sectorcensales	10,608	CONNECTION CRM EXTERNAL		ffe2b427-48cc-4e4d-a307-04fb80d4243b	13	8/22/2018 5:37 PM
Unidad de negocio	businessunit	10	CONNECTION CRM EXTERNAL		f01e8baa-c7f5-4ec3-b538-5a3eed8527f6	12	8/22/2018 5:36 PM
UPZ	sp_upz	10,620	CONNECTION CRM EXTERNAL		ba371c8a-5fda-4342-a574-85e867438ef2	11	8/22/2018 5:36 PM
Institución	account	1	CONNECTION CRM EXTERNAL		70816501-edb9-4740-a16c-6a5efbc05d84	10	8/22/2018 5:28 PM
Tax Code	msdyn_taxcode	10,196	CONNECTION CRM ACCOUNTS		7e116f12-f105-4cd0-88f7-21ec52f15e7f	9	8/19/2018 8:01 PM
Facility/Equipment	equipment	4,000	CONNECTION CRM ACCOUNTS		a7a0b367-219b-44de-9ee9-239e3b5c7a4e	8	8/19/2018 8:00 PM
Price List	pricelevel	1,022	CONNECTION CRM ACCOUNTS		e995200c-5fe8-4843-8325-80bd2a429d1e	7	8/19/2018 7:59 PM
Team	team	9	CONNECTION CRM ACCOUNTS		eff432f7-2508-44cf-971a-cbe44562dc68	6	8/19/2018 7:59 PM
Bookable Resource	bookableresource	1,150	CONNECTION CRM ACCOUNTS		e9669024-7945-4a2e-a81d-3cc7bef71d7e	5	8/19/2018 7:58 PM
Business Unit	businessunit	10	CONNECTION CRM ACCOUNTS		f01e8baa-c7f5-4ec3-b538-5a3eed8527f6	4	8/19/2018 7:57 PM

Img-15

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2.5 Creating Solution:

- On the site map go to **Integration -> Integration Solutions** and press the button **+ New**.
- The solution form is displayed, and fill in the following information:

Name: SOLUTION DEMO

Press **SAVE**

INTEGRATION SOLUTION : INFORMATION

SOLUTION DEMO

Status: Active

Reason for the status: Active

Creation date: 8/19/2018 8:08 PM

general

Name: SOLUTION DEMO

Global Integration Log: No

Create Uri Log in: No

Parallel Process: Yes

Description:

Maps

Integration Maps

Name	Connection Or...	Origin Entity	Destination Co...	Entity Destinat...	Operation	Processing All ...	Order of Execu...	Top	All Columns	Specify Order	Alternate Proc...	Operation Type	Tr
------	------------------	---------------	-------------------	--------------------	-----------	--------------------	-------------------	-----	-------------	---------------	-------------------	----------------	----

Img-16

2.6 SAMPLE 1

Simple integration with expressions and update key mapping

- a) In the **SOLUTION DEMO** register, go to the maps grid and add a map record (+).
- b) The Map form is displayed, and fill in the following information:

Name: MAP ACCOUNTS DEMO 1

Integration Solution: SOLUTION DEMO

Description: Demo Accounts Smart 365

Origin Connection: CONNECTION FLAT FILE ACCOUNTS

Origin Entity: Accounts_book

Process All Records: Yes

All Columns: Yes

Specify Order: No

Destination Connection: CONNECTION CRM DESIGNER

Entity Destination: Accounts

Operation: Insert/Update (Key)

Operation Type: Run

Alternate Process: No

Press **SAVE**.

INTEGRATION MAP : INFORMATION				Order of Execution*	Validate Execution P...	Create Relationship ...																																			
MAP ACCOUNTS DEMO 1				0	No	No																																			
<p>MAP ACCOUNTS DEMO 1</p> <p>Name* MAP ACCOUNTS DEMO 1 Integration Solution* SOLUTION DEMO</p> <p>Description Demo map Smart 365</p>																																									
<p>Map</p> <table border="1"> <thead> <tr> <th colspan="4">Origin</th> <th colspan="3">Destination</th> </tr> </thead> <tbody> <tr> <td>Origin Connection*</td> <td>Origin Entity*</td> <td colspan="2"></td> <td>Destination Connection*</td> <td>Destination Entity*</td> <td></td> </tr> <tr> <td>CONNECTION FLAT FILE ACCOUNTS</td> <td>Accounts_book</td> <td colspan="2"></td> <td>CONNECTION CRM ACCOUNTS</td> <td>Account</td> <td></td> </tr> <tr> <td>Process all records</td> <td>All Columns</td> <td>Specify Order</td> <td>Top</td> <td>Operation*</td> <td>Operation Type*</td> <td>Alternate Process</td> </tr> <tr> <td>Yes</td> <td>Yes</td> <td>No</td> <td>.....</td> <td>Insert / Update (Key)</td> <td>Run</td> <td>No</td> </tr> </tbody> </table>							Origin				Destination			Origin Connection*	Origin Entity*			Destination Connection*	Destination Entity*		CONNECTION FLAT FILE ACCOUNTS	Accounts_book			CONNECTION CRM ACCOUNTS	Account		Process all records	All Columns	Specify Order	Top	Operation*	Operation Type*	Alternate Process	Yes	Yes	No	Insert / Update (Key)	Run	No
Origin				Destination																																					
Origin Connection*	Origin Entity*			Destination Connection*	Destination Entity*																																				
CONNECTION FLAT FILE ACCOUNTS	Accounts_book			CONNECTION CRM ACCOUNTS	Account																																				
Process all records	All Columns	Specify Order	Top	Operation*	Operation Type*	Alternate Process																																			
Yes	Yes	No	Insert / Update (Key)	Run	No																																			

Img-17

- c) On the same form of the created map, go to the **Attributes grid** and add a map attributes attribute (+).
- d) The Map Attributes form is displayed, and fill in the following information:

Origin Attribute: Name

Destination Attribute: Account Name

It is required: Yes

Press **SAVE & CLOSE**

- e) Return to item c, and create another map attribute record and fill the record with the following data

Origin Attribute: NumberDoc

Destination Attribute: Account Number

It is required: Yes

Expression: Yes

Expression: =TRIM(NumberDoc)

Press **SAVE & CLOSE**

- f) Return to item c, and create another map attribute record and fill the record with the following data:

Origin Attribute: Phone

Destination Attribute: Main Phone

Minimum Value: 7

Maximum Value: 10

Error Message: Yes

Press **SAVE & CLOSE**

- g) Return to item c, and create another map attribute record and fill the record with the following data:

Origin Attribute: MobilePhone

Destination Attribute: Other Phone

Minimum Value: 7

Maximum Value: 10

Error Message: Yes

Press **SAVE & CLOSE**

- h) Return to item c, and create another map attribute record and fill the record with the following data:

Origin Attribute: Fax

Destination Attribute: Fax

Press **SAVE & CLOSE**

- i) Return to item c, and create another map attribute record and fill the record with the following data:

Origin Attribute: Address

Destination Attribute: Address 1: Street 1

Expression: Yes

Expression: =TOUPPER(Address)

Press **SAVE & CLOSE**

- j) On the form of the map in the **Keys grid** add a record with the following data:

Attibute: Account Number

Relation Attribute: NumberDoc-Account Number

Press **SAVE & CLOSE**

KEY : INFORMATION	Name	Cod Import	Creation date
Llave Account Number	Llave Account Number	1	8/19/2018 8:50 PM

General

Attribute*	Account Number	Relation Attribute*	NumberDoc-Account Number
Entity*	Account	Map*	MAP DEMO
Logical name	accountnumber	Field Type	14
		Owner*	Juan Carlos Parra

Img-18

- k) On the site map go to **Integration -> Integration Programming** and press button + **New**.
- l) The Integration Programming form is displayed, and fill in the following information:

Solution: SOLUTION DEMO

Specific Map: MAP ACCOUNTS DEMO 1

Record Status: Programmed

Description: Descripcion DEMO

Frecuency: Once

Start Date and Time: Today's date or before

Generate Tracking File: Yes

Select Mapping Trace, Expressions Trace.

Note: Trace file created in the following location:

C:\Program Files (x86)\Smart Process\Smart 365\Files\Trace\Trace_YearMonthDay_Hour

Press **SAVE & CLOSE**

INTEGRATION PROGRAMMING : INFORMATION
PROG_MAP DEMO 8/19/2018 6:41:07 PM

Status: Active

general

Solution *	SOLUTION DEMO	Record Status *	Programmed
Specific Map	MAP DEMO	Description	Descripcion DEMO

Configuration

Frequency *	Once	Start Date and Time *	8/18/2018 8:00 AM
Owner *	Juan Carlos Parra		

Advanced Options

Generate Tracking File	Yes	Number of Attempts (Error)	0
------------------------	-----	----------------------------	---

Trace Options

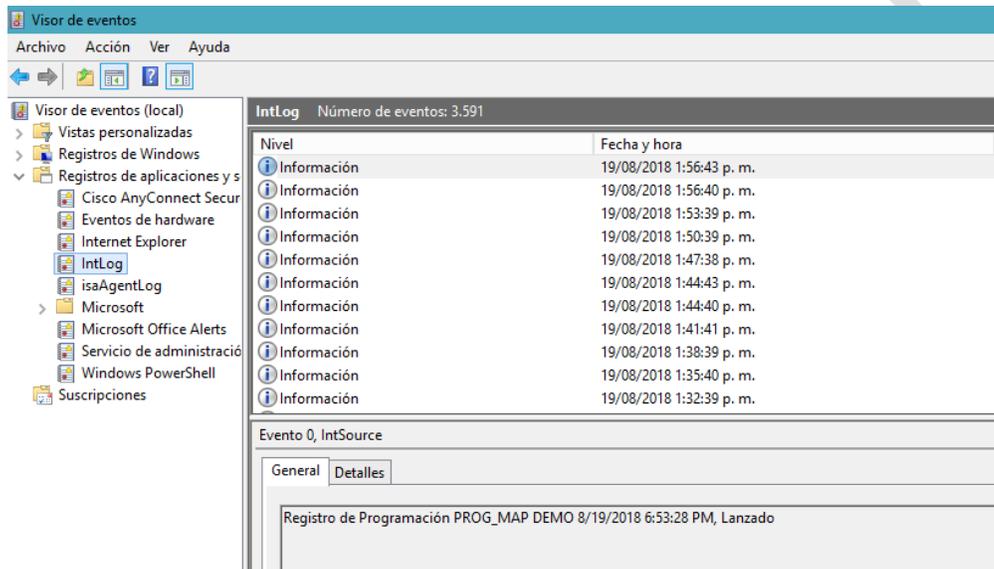
Mapping Trace	<input checked="" type="checkbox"/>	Alternative Process Trace	<input type="checkbox"/>	Expressions Trace	<input checked="" type="checkbox"/>	Trace Repositorio	<input type="checkbox"/>
---------------	-------------------------------------	---------------------------	--------------------------	-------------------	-------------------------------------	-------------------	--------------------------

Img-19

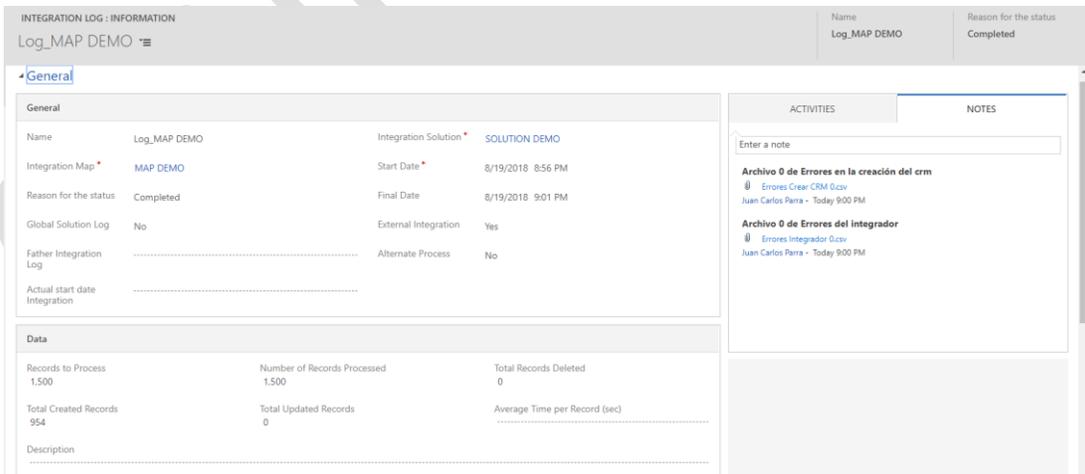
Note: Maximum trial version processes 2000 records

Check the event viewer to know what time it is running (img-68), Wait max 3 minutes while smart engine launches the integration at that moment generates an integration log record in **Integration -> Integration Log (img-20)** and trace file in:

C:\Program Files (x86)\Smart Process\Smart 365\Files\Trace\Trace_YearMonthDay_Hour



Img-20



Img-21

2.7 SAMPLE 2

Simple integration with multi keys, filters, order, table of equivalences and fields lookups.

- a) In the **SOLUTION DEMO** register, go to the maps grid and add a map record (+).
- b) The Map form is displayed, and fill in the following information:

Name: MAP CONTACTS DEMO 2

Integration Solution: SOLUTION DEMO

Description: Demo Contacts Smart 365

Connection Origin: CONNECTION FLAT FILE CONTACTS

Origin Entity: DemoContacts.csv

Process All Records: No

Note: Requires filters

All Columns: No

Note: Retrieves mapped columns only

Specify Order: Yes

Note: Requires orders

Top: 500

Note: Retrieve 500 records to integrate

Destination Connection: CONNECTION CRM DESIGNER

Entity Destination: Contact

Operation: Insert/Update (Key)

Operation Type: Run

Alternate Process: No

Press **SAVE**.

INTEGRATION MAP: INFORMATION
MAP CONTACTS DEMO 2

Order of Execution * 0 Validate Execution P... No Create Relationship ... No

General

Name * MAP CONTACTS DEMO 2 Integration Solution * SOLUTION DEMO

Description Demo Contacts Smart 365

Map

Origin				Destination		
Origin Connection *		Origin Entity *		Destination Connection *		Destination Entity *
CONNECTION FLAT FILE CONTACTS		DemoContacts.csv		CONNECTION CRM DESIGNER		Contact
Process all records	All Columns	Specify Order	Top	Operation *	Operation Type *	Alternate Process
No	No	No	500	Insert / Update (Key)	Run	No

Img-22

c) On the same form of the created map, go to **Filters grid** and add a filter (+).

d) The Filter form is displayed, and fill in the following information:

Attribute: TipoDocumento

Operator: Equal

Value: 1

Press **SAVE & CLOSE**

e) On the same form of the created map, go to the **Orders grid** and add a order (+).

f) The Order form is displayed, and fill in the following information:

Attribute: PrimerNombre

Order Type: Ascending

Order: 1

Press **SAVE & CLOSE**

- g) On the same form of the created map, go to the **Orders grid** and add a order (+).
- h) The Order form is displayed, and fill in the following information:

Attribute: Apellidos

Order Type: Ascending

Order: 2

Press **SAVE & CLOSE**

The screenshot shows two tables in a web interface. The top table is titled 'Filters' and contains one row with the following data:

Name ↑	Attribute	Operator	Value
FILTER1_TipoDocumento(1)	TipoDocumento	Equal	1

The bottom table is titled 'Order' and contains two rows:

Order ↑	Name ↑	Attribute	Order Type	Map	Entity	Reason for the...	Creation date
1	ORDEN 1_PrimerNombre ASC	PrimerNomb...	Upward	MAP CONTA...	DemoContac...	Active	8/22/2018 7:
2	ORDEN 2_Apellidos ASC	Apellidos	Upward	MAP CONTA...	DemoContac...	Active	8/22/2018 7:

Img-23

- i) On the same form of the created map, go to the **Attributes grid** and add a map attributes (+).
- j) The Map Attributes form is displayed, and fill in the following information:

Origin Attribute: PrimerNombre

Destination Attribute: Firts Name

It is required: Yes

Expression: Yes

Expression: =TOUPPER(PrimerNombre)

Press **SAVE & CLOSE**

- k) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: SegundoNombre

Destination Attribute: Middle Name

It is required: Yes

Expression: Yes

Expression: =TOUPPER(SegundoNombre)

Press **SAVE & CLOSE**

- l) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: Apellidos

Destination Attribute: Last Name

It is required: Yes

It is Expression: Yes

Expression:

\$VAR1=TRIM(Apellidos)

\$VAR2=CONCATENATE(\$VAR1,"","Demo")

=TOUPPER(\$VAR2)

Terms Separator: (,)

Press **SAVE & CLOSE**

- m) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: TipoDocumento

Destination Attribute: Employee

It is Expression: Yes

Expression: =TRIM(TipoDocumento)

Press **SAVE & CLOSE**

- n) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: NumeroDocumento

Destination Attribute: Government

It is Expression: Yes

Expression: =TRIM(NumeroDocumento)

Press **SAVE & CLOSE**

- o) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: EmpresaNumber

Destination Attribute: Account

Attribute to search: Account Number

It is required: Yes

Press **SAVE & CLOSE**

- p) Return to item i, and create another map attribute record and fill the record with the following data

Origin Attribute: Celular

Destination Attribute: Mobile Phone

It is required: Yes

Press **SAVE & CLOSE**

- q) Return to item h, and create another map attribute record and fill the record with the following data

Origin Attribute: Genero

Destination Attribute: Gender

Equivalence Table: Yes

Press **SAVE**

- r) On the same form of the created **map attribute relation**, go to the **Equivalence Table grid** and add a table equivalence **(+)**

- s) The Table of Equivalence form is displayed, and fill in the following information:

Source Value: Male

Value Destination : 1

Press **SAVE & CLOSE**

- t) Return to item r, and create another Equivalence Table record and fill the record with the following data

Source Value: Female

Value Destination : 2

Press **SAVE & CLOSE**

Press **SAVE & CLOSE** in form Map Attribute Relation

MAP ATTRIBUTE RELATION : INFORMATION

Genero-Gender

Name Genero-Gender				Cod Import 14	
Validation				Target Action	
It is required No	It's Mail Attribute No	Minimum value(characters, numbers, date)	Maximum Value (Characters, Cipher, Date)	It is created Yes	It updates Yes
Transformations				Errors and Warnings	
Expression No		Equivalence table Yes		Error message No	Warning message No
Name to Show Source Attribute					

↳ Equivalence table

Equivalences								
Name ^	Source Value	Value Destinat...	Creation date	Destination At..	Origin Attribut...	Integration M...	Relation Map	Cod Import
Genero_Female - gendercode_2	Female	2	8/22/2018 8:32 P...	gendercode	Genero	MAP CONTA...	Genero-Gen...	2
Genero_Male - gendercode_1	Male	1	8/22/2018 8:31 P...	gendercode	Genero	MAP CONTA...	Genero-Gen...	1

Img-24

- u) Return on the form of the map in the **keys grid** add a record with the following data:

Attibute: Employee

Relation Attribute: TipoDocumento-Employee

Press **SAVE & CLOSE**

- v) On the form of the map in the **keys grid** again add a record with the following data:

Attibute: Government

Relation Attribute: NumeroDocumento- Government

Press **SAVE & CLOSE**

INTEGRATION MAP: INFORMATION				Order of Execution	Validate Execution P...	Create Relationship ...																																																			
MAP CONTACTS DEMO 2				0	No	No																																																			
<table border="1"> <thead> <tr> <th>Name</th> <th>Attribute</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>FILTER1_TipoDocumento(1)</td> <td>TipoDocumento</td> <td>Equal</td> <td>1</td> </tr> </tbody> </table>				Name	Attribute	Operator	Value	FILTER1_TipoDocumento(1)	TipoDocumento	Equal	1	<table border="1"> <thead> <tr> <th>Name</th> <th>Attribute</th> <th>Entity</th> </tr> </thead> <tbody> <tr> <td>Liave Employee</td> <td>Employee</td> <td>Contact</td> </tr> <tr> <td>Liave Government</td> <td>Government</td> <td>Contact</td> </tr> </tbody> </table>			Name	Attribute	Entity	Liave Employee	Employee	Contact	Liave Government	Government	Contact																																		
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Order	Name	Attribute	Order Type	Map	Entity	Reason for the...	Creation date																																																		
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Method Records Query	File Name (Repository)																																																							
Search in Memory RAM																																																							

Img-25

w) As the origin connection is of the flat file type with the option CRM attachment archive in YES, to execute the integration it is done in the following way: On the site map go to **Integration -> Upload Files** and press button **+ New**.

x) The Upload files form is displayed, and fill in the following information:

Name: UPLOAD CONTACTS

Map: MAP CONTACTS DEMO 2

Type: Upload

Press **SAVE**

y) On the form of the Upload Files, Attach the DemoContacts.csv file located an the location:

C:\Program Files (x86)\Smart Process\Smart 365\Files\Docs

Note: Automatically an integration programming record is created to initiate the integration

UPLOAD FILE : INFORMATION

UPLOAD CONTACTS

• General

Name *	UPLOAD CONTACTS
Map *	MAP CONTACTS DEMO 2
Type	Upload
Owner *	Juan Carlos Parra

NOTES

Enter a note

DemoContacts.csv
Juan Carlos Parra - Today 12:22 AM

Img-26

CONFIDENCIAL

2.8 SAMPLE 3

Simple integration to pass data from an originating entity to a destination entity with the same attribute architecture, use this functionality to migrate data from one environment to another with the same entity architecture.

- a) In the **SOLUTION DEMO** register, go to the maps grid and add a map record (+).
- b) The Map form is displayed, and fill in the following information:

Name: MAP DEMO MIGRATION CONTACTS

Integration Solution: SOLUTION DEMO

Description: Demo Migration Contacts Smart 365

Connection Origin: CONNECTION CRM DESIGNER

Origin Entity: Contact

Destination Connection: CONNECTION CRM EXTERNAL

Entity Destination: Contact

Create Relationship Att: Yes

Press **SAVE**.

Note: Automatically the attribute relations are created (Img-28) and the key is created in the map (Img-27), if you want to modify any attribute relationship you can do it, for that it is just go to the registry and apply the changes that are require

INTEGRATION MAP: INFORMATION

MAP DEMO MIGRATION CONTACTS

Order of Execution: 0 | Validate Execution P...: No | Create Relationship ...: Yes

General

Name: MAP DEMO MIGRATION CONTACTS | Integration Solution: SOLUTION DEMO

Description: Demo Migration Contacts Smart 365

Map

Origin

Origin Connection: CONNECTION CRM DESIGNER | Origin Entity: Contact

Process all records: Yes | All Columns: No | Specify Order: No | Top: Top

Destination

Destination Connection: CONNECTION CRM EXTERNAL | Destination Entity: Contact

Operation: Insert / Update (Key) | Operation Type: Run | Alternate Process: No

Filters

No Integration Filters found for this Integration Map. Select Add (+).

Keys

Name	Attribute	Entity
llave Contacto	Contacto	Contact

Img-27

Attributes

Search for records

Name	Origin Attribute	NL Source Attr...	Datatype (Origin Attribute)	Destination Attrib...	NL_Action attri...	Datatype (Destination Attribute)	It is required	Warning mes...	Error message	Origin Entity	NL_Entity of O...	Destination En...	NL_I
Address 1: Address Type-Dirección 1: tipo de ...	Address 1: Addre...	address1_ad...	Option Set	Dirección 1: tipo ...	address1_ad...	Option Set	No	No	No	Contact	contact	Contact	cont
Address 1: City-Dirección 1: ciudad	Address 1: City	address1_city	Text	Dirección 1: ciud...	address1_city	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Country/Region-Dirección 1: país ...	Address 1: Count...	address1_co...	Text	Dirección 1: país ...	address1_co...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: County-Dirección 1: condado	Address 1: County	address1_co...	Text	Dirección 1: con...	address1_co...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Fax-Dirección 1: fax	Address 1: Fax	address1_fax	Text	Dirección 1: fax	address1_fax	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Freight Terms-Dirección 1: condic...	Address 1: Freig...	address1_fre...	Option Set	Dirección 1: con...	address1_fre...	Option Set	No	No	No	Contact	contact	Contact	cont
Address 1: ID-Dirección 1: id.	Address 1: ID	address1_ad...	Guid	Dirección 1: id.	address1_ad...	Guid	No	No	No	Contact	contact	Contact	cont
Address 1: Latitude-Dirección 1: latitud	Address 1: Latitu...	address1_lati...	Floating Point Number	Dirección 1: latit...	address1_lati...	Floating Point Number	No	No	No	Contact	contact	Contact	cont
Address 1: Longitude-Dirección 1: longitud	Address 1: Longi...	address1_lon...	Floating Point Number	Dirección 1: long...	address1_lon...	Floating Point Number	No	No	No	Contact	contact	Contact	cont
Address 1: Name-Dirección 1: nombre	Address 1: Name	address1_na...	Text	Dirección 1: nom...	address1_na...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Phone-Dirección 1: teléfono	Address 1: Phone	address1_tel...	Text	Dirección 1: telef...	address1_tel...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Post Office Box-Dirección 1: apart...	Address 1: Post ...	address1_po...	Text	Dirección 1: apar...	address1_po...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Primary Contact Name-Dirección ...	Address 1: Prima...	address1_pri...	Text	Dirección 1: nom...	address1_pri...	Text	No	No	No	Contact	contact	Contact	cont
Address 1: Shipping Method-Dirección 1: mo...	Address 1: Shipp...	address1_shi...	Option Set	Dirección 1: mod...	address1_shi...	Option Set	No	No	No	Contact	contact	Contact	cont
Address 1: State/Province-Dirección 1: estado...	Address 1: State/...	address1_sta...	Text	Dirección 1: esta...	address1_sta...	Text	No	No	No	Contact	contact	Contact	cont

Img-28

- c) On the site map go to **Integration -> Integration Programming** and press button + **New**.
- d) The Integration Programming form is displayed, and fill in the following information:

Solution: SOLUTION DEMO

Specific Map: MAP DEMO MIGRATION CONTACTS

Record Status: Programmed

Description: Descripcion DEMO

Frecuency: Once

Start Date and Time: Today's date or before

Generate Tracking File: Yes
Select Mapping Trace, Expressions Trace.

Note: Trace file created in the following location:

C:\Program Files (x86)\Smart Process\Smart 365\Files\Trace\Trace_YearMonthDay_Hour

Press **SAVE & CLOSE**

Img-29

Note: Wait for the Smart engine to launch the integration, check the integration log (**Integration -> Integration Log**)(**Img-30**) and wait for the integration to complete, go to the destination CRM and verify that the contacts have successfully migrated.

Active Integration Log

Name	Integration Map	Start Date	Final Date	Records to Process	Number of Records Pr...	Total Created Records	Total Updated Records	Total Records Deleted	Total Warnings	Total errors	Error Detail
Log_MAP DEMO MIGRATION C...	MAP DEMO MIGRATI...	8/29/2018 6:45 PM	8/29/2018 6:47 PM	560	560	512	0	0	0	48	

Img-30

2.8.1 ERRORS

If in the log of integrations Logs in the Total Errors attribute is different to 0, open the log log, go to the attached files and download the csv file delimited by |, open it in excel and check the last column that is the detail of the error (Img-32).

INTEGRATION LOG - INFORMATION

Log_MAP DEMO MIGRATION CONTACTS

Name	Reason for the status
Log_MAP DEMO MIGRATION CONTACTS	Completed

General

Name: Log_MAP DEMO MIGRATION CONTACTS
 Integration Solution: SOLUTION DEMO
 Integration Map: MAP DEMO MIGRATION CONTACTS
 Start Date: 8/29/2018 6:45 PM
 Reason for the status: Completed
 Final Date: 8/29/2018 6:47 PM
 Global Solution Log: No
 External Integration: Yes
 Father Integration Log:
 Alternate Process: No
 Actual start date Integration:

Data

Records to Process	Number of Records Processed	Total Records Deleted
560	560	0
Total Created Records	Total Updated Records	Average Time per Record (sec)
512	0

ACTIVITIES

NOTES

Enter a note

Archivo 0 de Errores en la creación del crm

Errores Clear CRM Csv

Juan Carlos Parra - Today 6:46 PM

Img-31

Microsoft Excel spreadsheet showing a list of integration errors. The columns include W, X, Y, Z, AA, AB, AC, AD, AE, AF, AG, AH, AI, AJ, and AK. The 'Detalle del Error' column contains various error messages such as 'Account With Id = bf60035-d4cf-e711-8b33-0003ac0b6c2 Does Not Exist' and '2 is not a valid status code for state code ContactState.Active on contact with Id 7c31e45f-56ea-e711-8b33-0003ac0b6c2f'.

Img-32

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