Znode®

relevant ecommerce™

TECHNICAL

ZNODE CONNECT FOR SCRIBE

Within this technical guide you will find information on connecting the Znode platform to your database using Scribe.

October 2015

Using Scribe

©2015, Znode LLC. All Rights Reserved

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: September 2015 in USA

Table of Contents

Part 1 Purpose of this Document 4

Part 2 About Scribe 5

1 System Requirements 6
2 What is Scribe? 7
3 How Does It Work? 8
4 How Scribe Makes eCommerce Easier 9

Part 3 How to Install Scribe 10

1 Installing Scribe 11

Part 4 How to Create the Scribe Connection 15

1 Creating the Scribe Connection 16
2 Reasons Why the Connection Might Be Unsuccessful 21

Part 5 How to Create the Database Connection 22

1 Creating the Database Connection 23

Part 6 How to Create a Scribe Solution 26

1 What is a Solution? 27
2 How Do Solutions Help You? 28
3 Creating the Solution 29

Part 7 How to Map Your Fields 33

1 Mapping Your Fields 34

Part 8 How to Schedule Your Data Sync 35

1 Scheduling Your Data Sync 36

Part 9 Running Your Data Sync 38

©2015 Znode LLC. All Rights Reserved

1 Purpose of This Document

This document will discuss the following topics:

- The System Requirements for Scribe
- What is Scribe?
- How Scribe
- Works Installing Scribe
- Creating a Scribe
- Connection Creating a
- Scribe Solution Mapping
- your Fields Scheduling Your Data Sync

©2015 Znode LLC. All Rights Reserved

2 About Scribe

What's in this chapter?

- System Requirements
- What is Scribe?
- How does it Work?
- Making eCommerce Easier

©2015, Znode LLC. All Rights

2.1 System Requirements

Operating System and Software Support

- Windows XP or higher
- Current security patches and critical updates for Microsoft operating
- systems. Microsoft Word 2003 or higher
- Current security patches and critical updates for Microsoft Word, Microsoft Office.

Hardware Support (PC Only)

- Pentium 400MHz or higher
- 512MB RAM for XP
- 1GB or higher for Vista
- 2GB or higher Windows 7
- 150MB free hard drive space or higher

Web Browser Support*

- Internet Explorer 7.0 or higher

Connectivity

- Cable, DSL or T1 Equivalent
- Dial-up may function in an emergency but is not supported for normal operations.

At the minimum level performance may be slow or the system may run out of memory when operating the browser. Please refer to the Microsoft websites for information on optimal browser performance.

** While Scribe does not endorse specific products, it is important for full platform functioning that the Anti-Virus software installed allows the user or network administrator to adjust script blocker settings. If you have questions regarding your brand of Anti-Virus software, please contact the publisher of the software for more information.

©2015, Znode LLC. All Rights

2.2 What is Scribe?

Scribe Online is an cloud-based data integration platform. Scribe brings together critical business applications in the cloud, on-premise or anywhere in between. But with your Znode API, we'll be using the cloud-based version.

For businesses, Scribe Online is an easy-to-use interface for mapping data fields between platforms. It's an intuitive way of replicating, integrating, and synchronizing services through a wizard-based interface.

For partners, Scribe Online is a platform that features a multi-tenant architecture (where a single a server serves multiple clients). It has a scalable infrastructure and a collaborative work environment that's compatible with widely used CRM environments like MS Dynamics and SalesForce.

©2015, Znode LLC. All Rights

2.3 How Does It Work?

Scribe Online Synchronization Services synchronizes your CRM application data with critical business applications such as billing, ERP, sales and marketing. Updates to customer information are captured and reflected in both the CRM system and the corresponding back-end systems, ensuring the information is current and accurate across the organization.

How Does it Help You?

- Provides native access to nearly all data types in your CRM system, Web service endpoints, or SQL based endpoints.
- Offers an intuitive wizard-based interface to guide synchronization set-up.
- Enables partners to build repeatable solutions without the complexity of custom code.
- Integrates and provisions operational data in real time to support low-latency data synchronization
- needs. Offers flexible scheduling options to integrate operational data from real time to batch
- Matches, "de-dupes," and cleanses data before synchronizing
- Provides features such as encrypted data transfer and role based permission management to protect data security
- Enables collaboration so you can work on projects anytime/anywhere together with colleagues and
- partners
- Provides pre-built solutions to help get you started or to save and re-use with any project or
- organization

©2015, Znode LLC. All Rights

2.4 How Scribe Makes eCommerce Easier

How does Scribe make e-commerce easier for your business?

- It provides connectivity to a broad range of business
- applications
  It has an affordable monthly cost.
- Its intuitive interface gives you a "no-coding-required" experience.
- You'll get regular upgrades, real-time monitoring, and real-time scheduling of your data's synchronization.

©2015, Znode LLC. All Rights

3 How to Install Scribe

What's in this chapter?

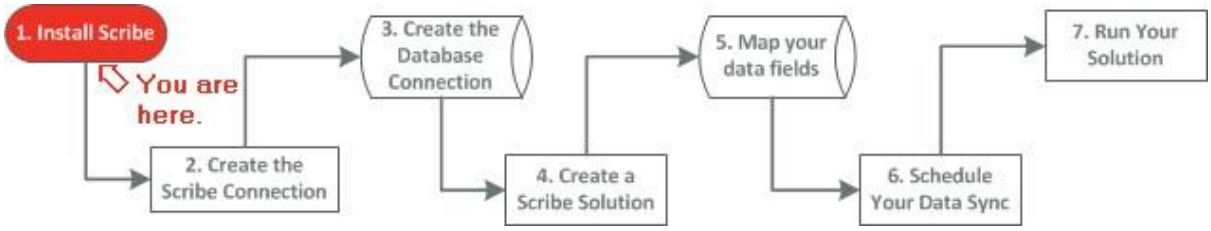
- Installing Scribe

©2015, Znode LLC. All Rights

3.1 Installing Scribe

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Installing Scribe

Installing Scribe is the first step in creating your Scribe solution.

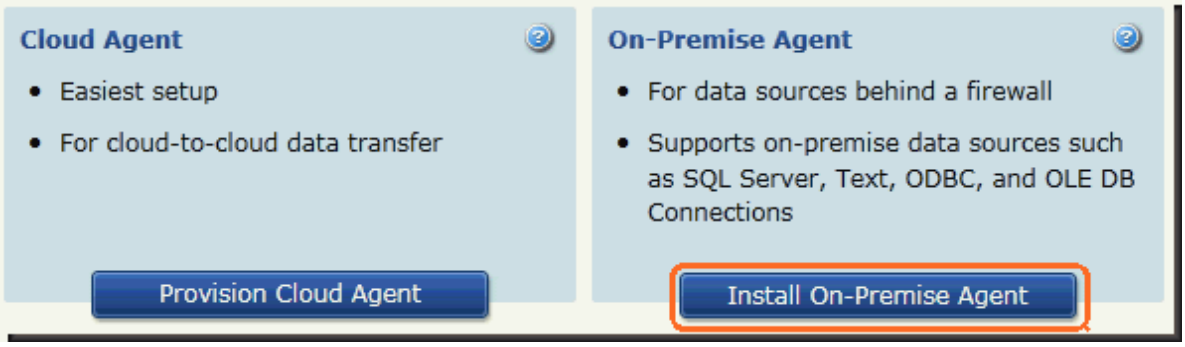
1. Go to https://online.Scribesoft.com and create a new account (if you haven't done so already). This process works best with Microsoft Internet Explorer.
2. Once you've created a new account, go ahead and log in.

3. Click Agents.

©2015, Znode LLC. All Rights

4. Click New.

5. Select Install On-Premise Agent.

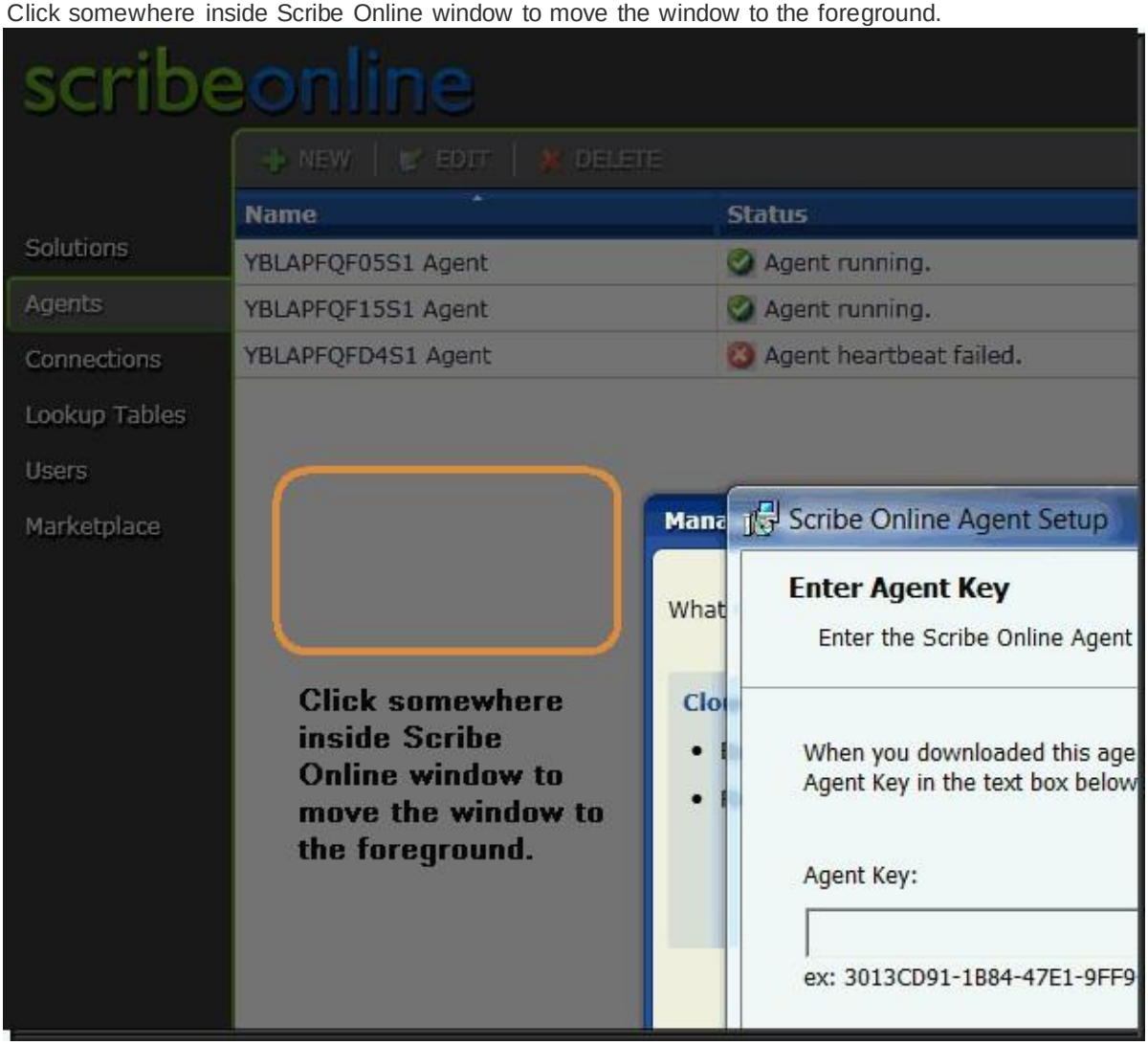


The File Download Window opens.

6. Click Save. The Save As window opens.
7. Select the desired location (if needed), and click Save again.
8. Click Run. The Scribe Configuration Check window opens.

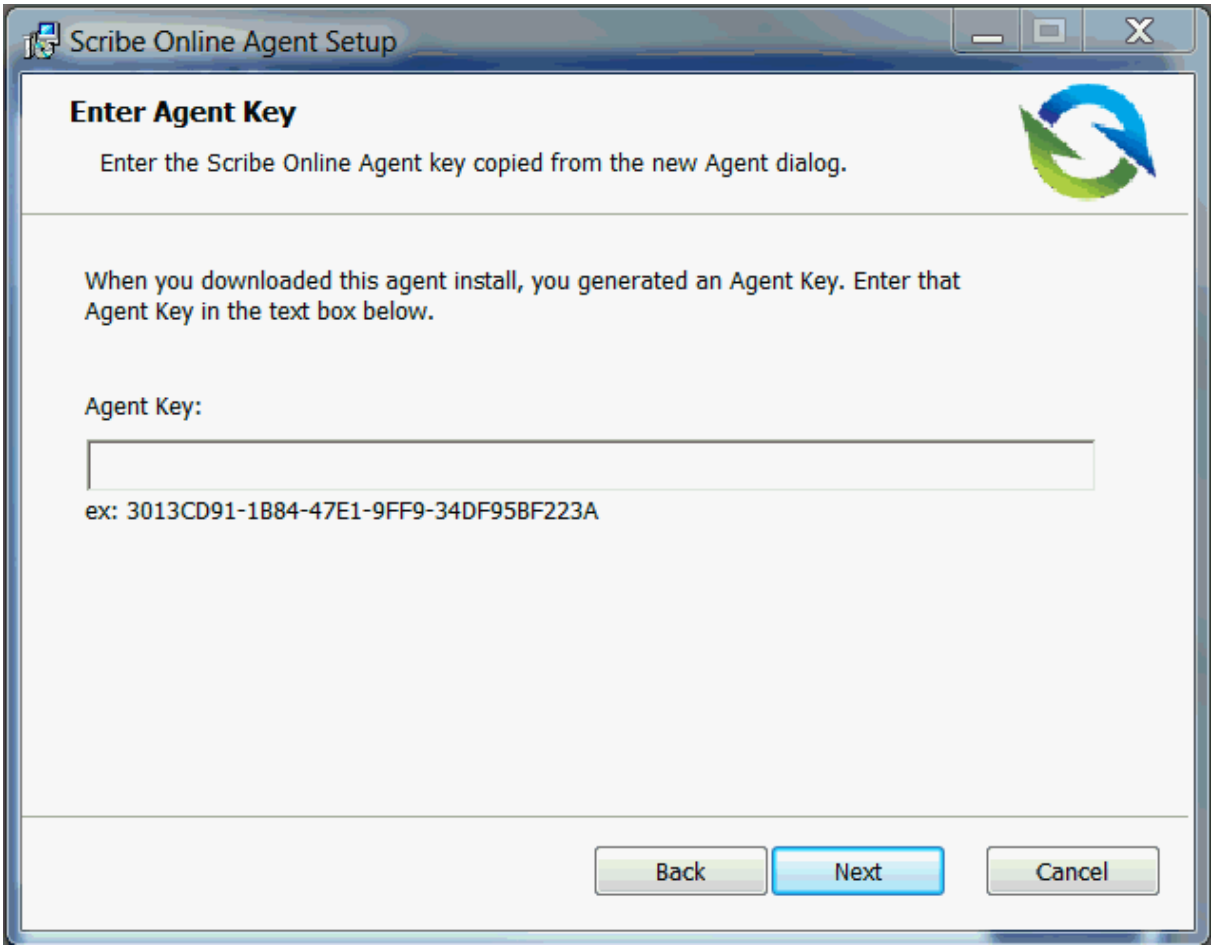
©2015, Znode LLC. All Rights

9. Click somewhere inside Scribe Online window to move the window to the foreground.



10. Click Copy so your Agent Key is copied to the clipboard.
11. Click Yes to allow the application to access your clipboard.
12. Click inside the Agent key box and paste your Agent Key.

©2015, Znode LLC. All Rights



13. Click Next.
14. Click Install Agent.

©2015, Znode LLC. All Rights

4 How to Create the Scribe Connection

What's in this chapter?

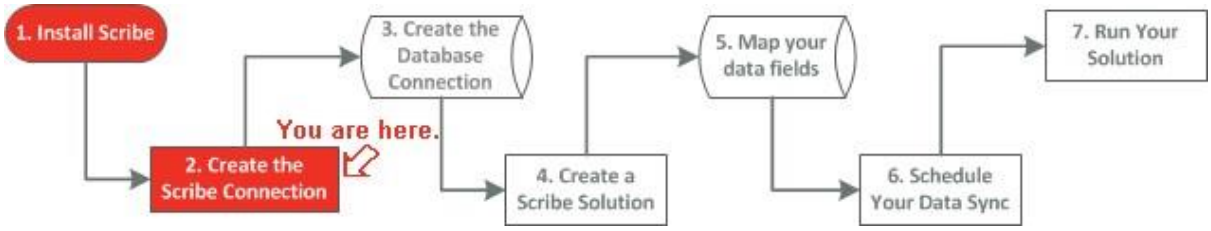
- Creating the Scribe Connection
- Reasons Why the Connection Might Be Unsuccessful

©2015, Znode LLC. All Rights

4.1 Creating the Scribe Connection

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Creating the Scribe Connection

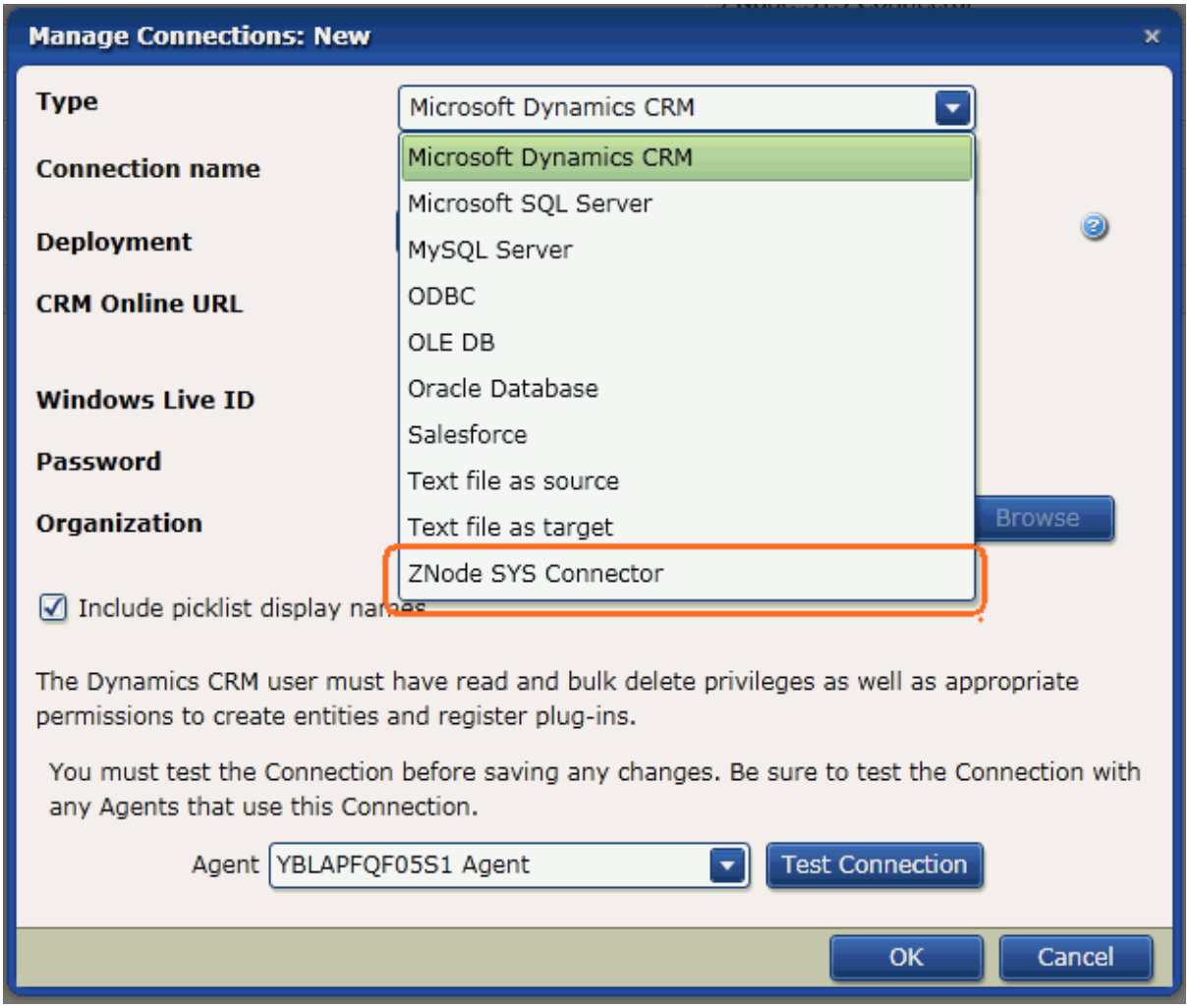
1. Click Connections.

2. Click New.

©2015, Znode LLC. All Rights

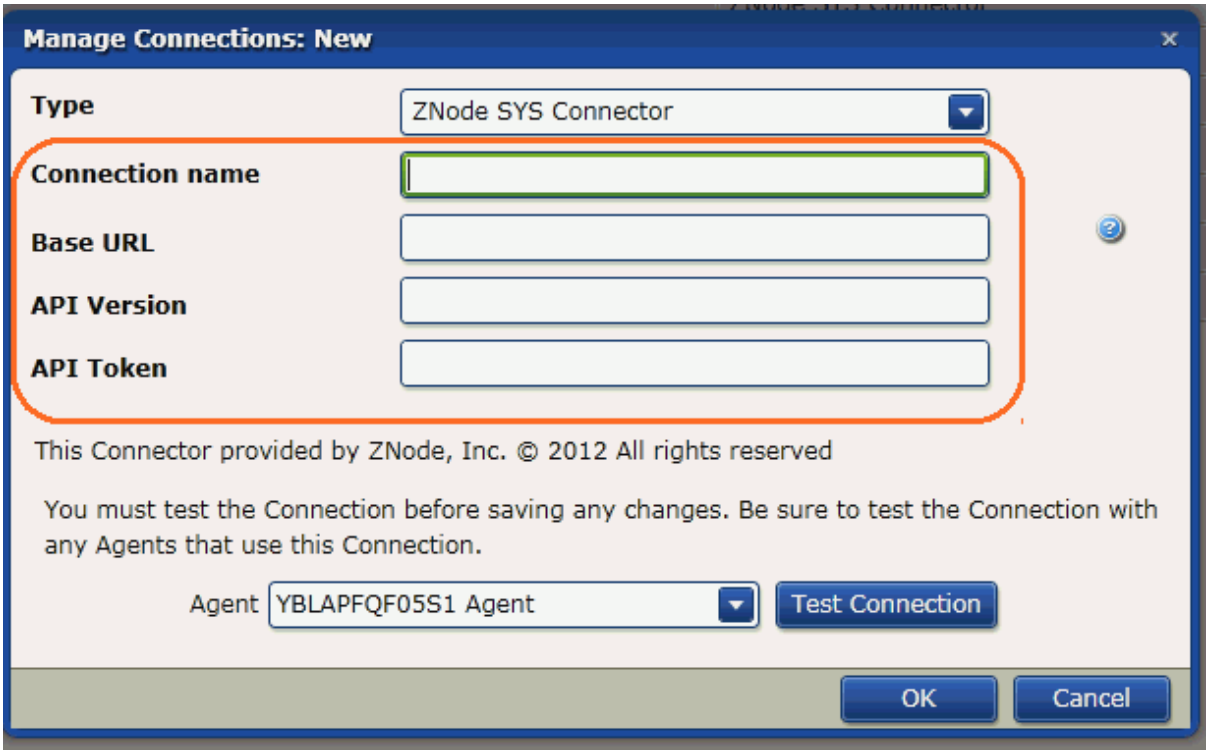
3. Select Znode Sys Connector and click OK.

©2015, Znode LLC. All Rights



4. Enter the following information:
   The desired Connection Name.
   The Base URL, which is the URL for your Web API. The API Version.
   And enter na for the API Token since it is currently not required.

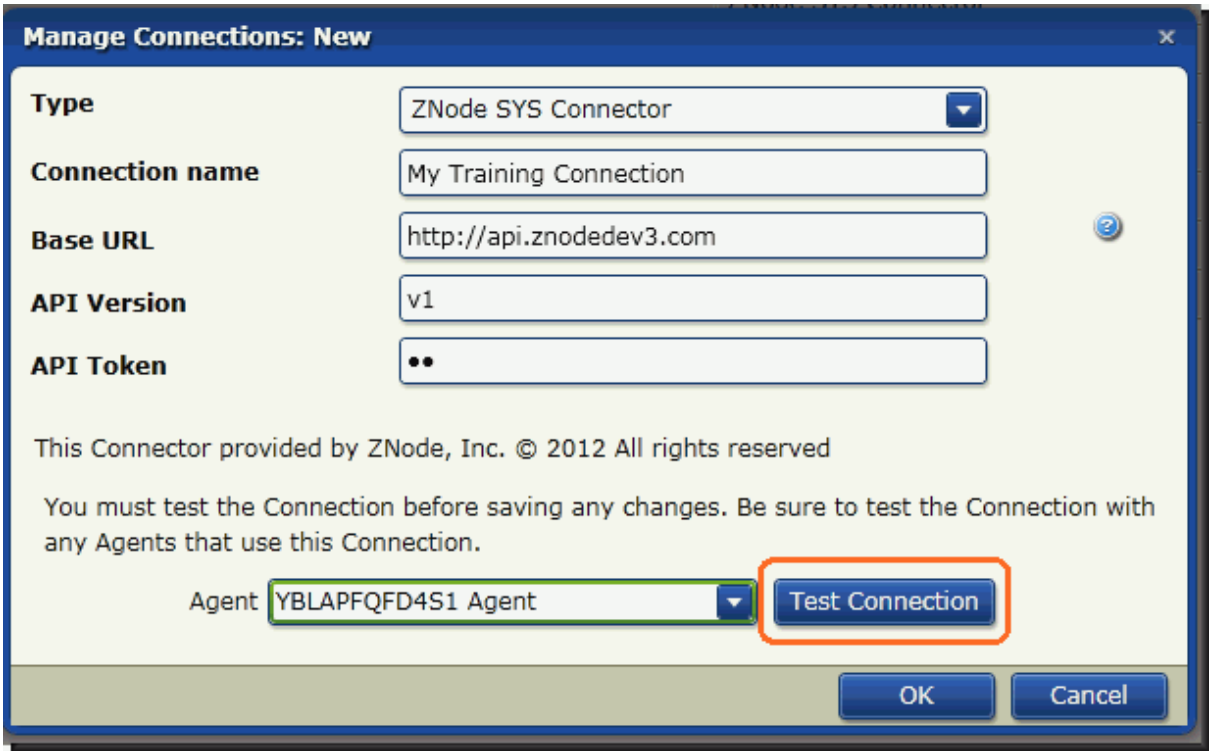
©2015, Znode LLC. All Rights



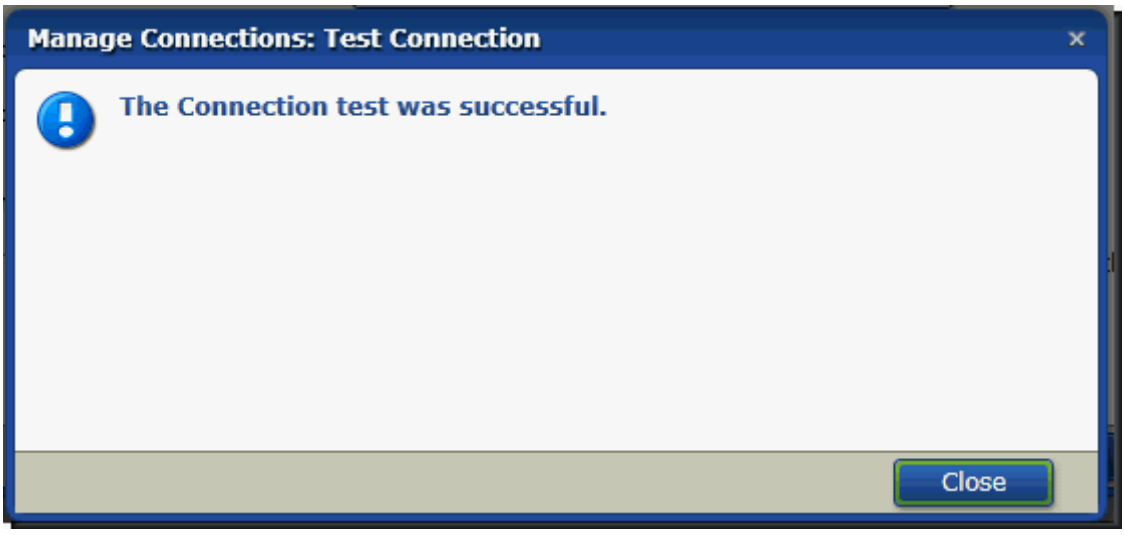
5. Select the Agent you just created.

6. Test your connection before you click OK.

©2015, Znode LLC. All Rights



A screen appears saying the test was successful.



WHAT IF YOUR CONNECTION WAS NOT SUCCESSFUL? See: Reasons why the connection might be unsuccessful.

7. Click OK when you are finished.

©2015, Znode LLC. All Rights

4.2 Reasons Why the Connection Might Be Unsuccessful

If your connection is not successful, here are some very common reasons why:

1. You might need to restart your Scribe service in the Control Panel.
2. Your firewall may prevent you from connecting.
3. Double check the information you entered into the fields for this screen.
4. Make sure your Web API is running by entering the API's URL into the browser.

©2015, Znode LLC. All Rights

5 How to Create the Database Connection

What's in this chapter?

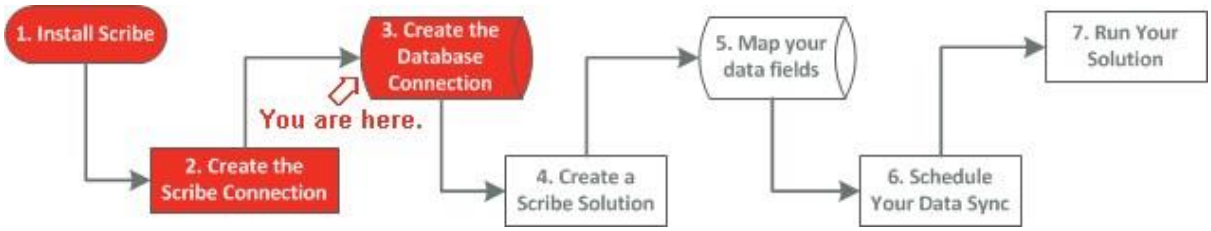
- Creating the Database Connection

©2015, Znode LLC. All Rights

5.1 Creating the Database Connection

Where are you?

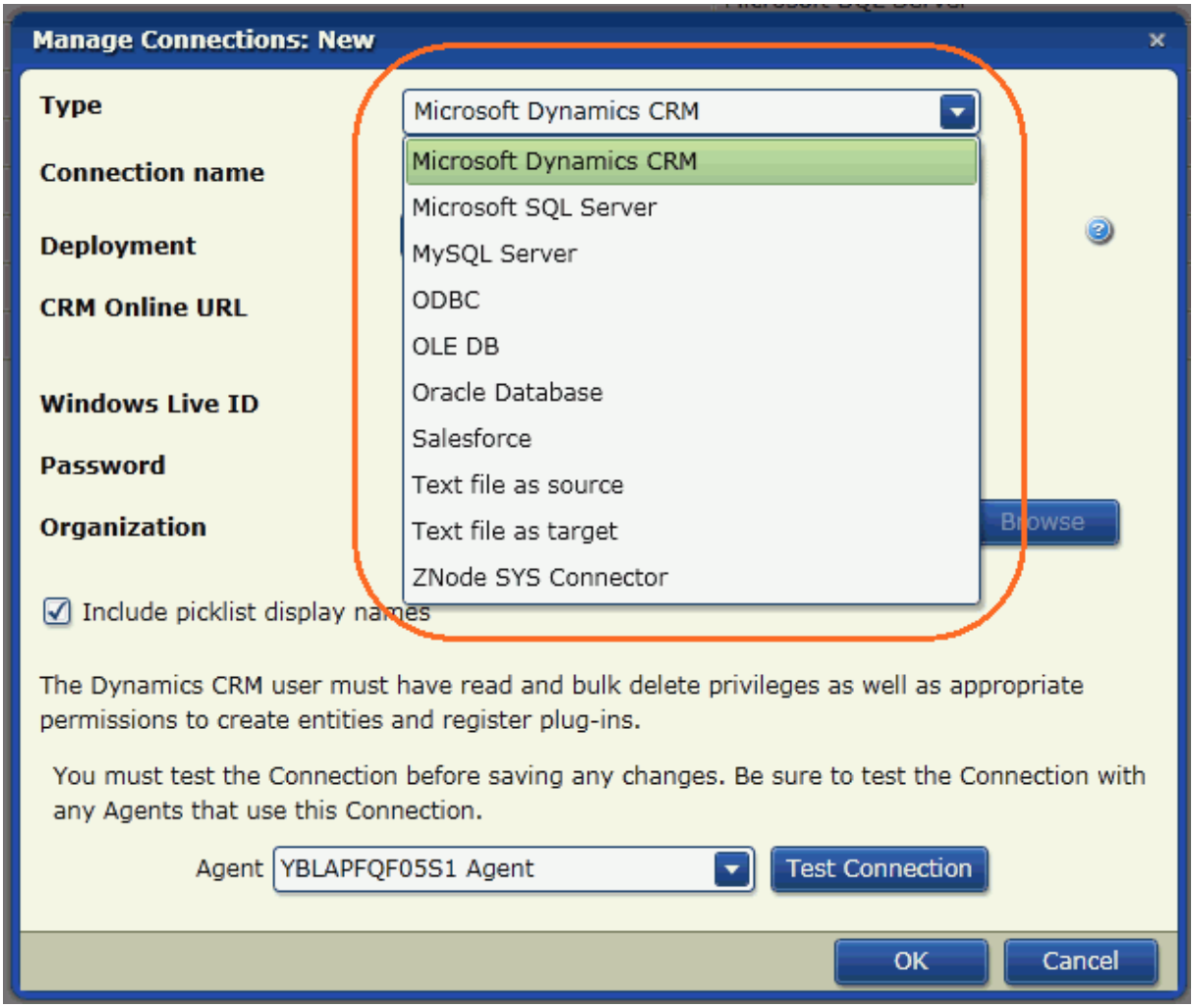
To set up Scribe, you must do these steps in order. Here's an overview of how the process works.



Creating the Database Connection

1. Click Connections, then click New.
   The Manage Connections screen appears.
2. Select Microsoft SQL Server (or the kind of database that you are using).

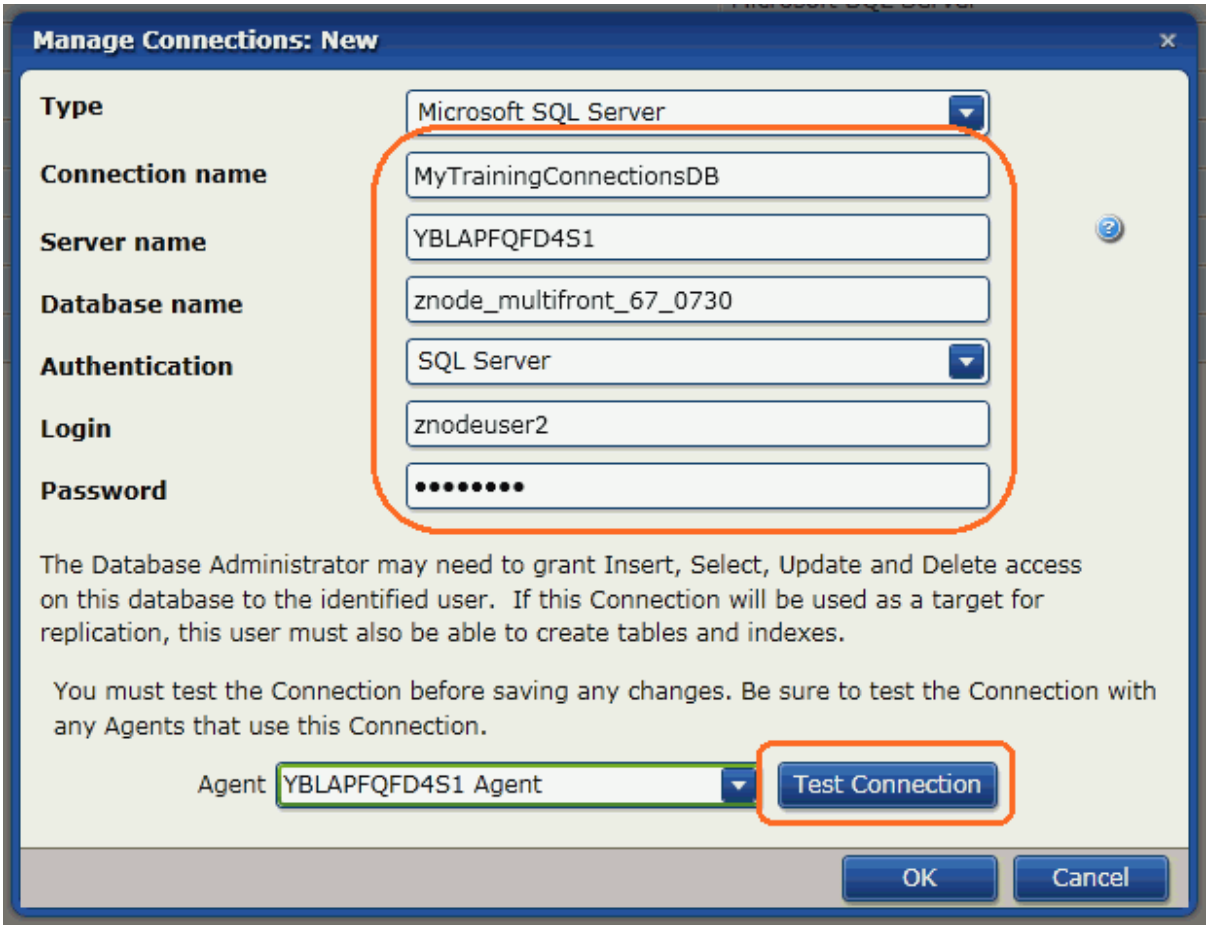
©2015, Znode LLC. All Rights



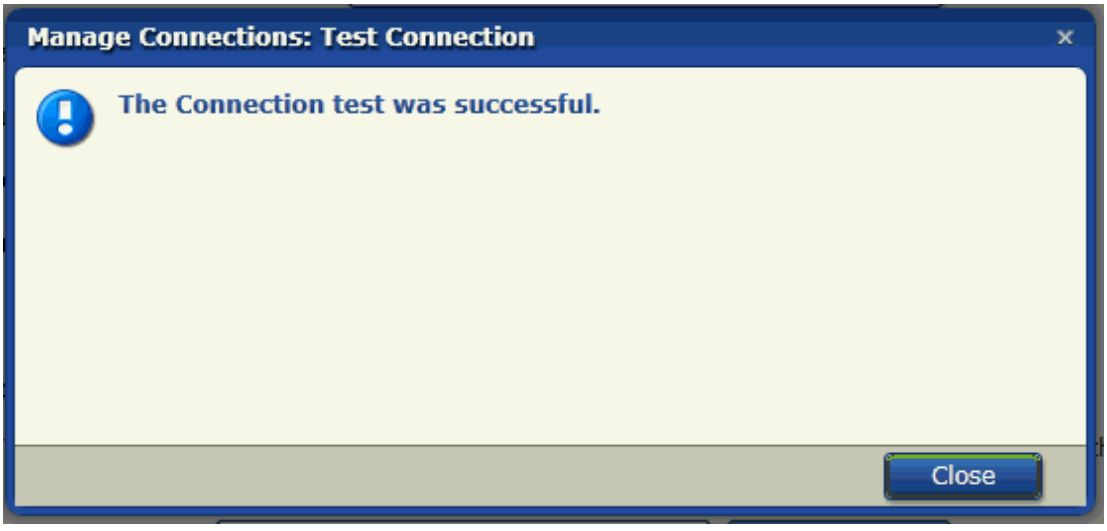
3. Enter the following information:

- The desired Connection Name.
- The Server Name.
- The name of your database.
- Select the desired Authentication type.
- Your Login and Password.

©2015, Znode LLC. All Rights



4. Test your connection.
5. Click Close.



©2015, Znode LLC. All Rights

6 How to Create a Scribe Solution

What's in this chapter?

- What is a Solution?
- How Do Solutions Help
- You? Creating a Solution

©2015, Znode LLC. All Rights

6.1 What is a Solution?

A Scribe solution is two databases joined together in Scribe and successfully exchanging data.

What does it do?

A Scribe solution helps you do the following:

- Access and analyze your source data with advanced reporting tools such as SQL Server Reporting Services
  (SSRS) or Crystal Reports.
- Quickly generate data cubes for use with business intelligence platforms such as GoodData and
- iAnalytics. Merge your source data with other information across your enterprise to allow you to see
- the entire picture. Deliver critical business intelligence to all key constituents across your business without requiring access to your source data.
- Create an archive of your customer data to meet compliance and governance requirements.

©2015, Znode LLC. All Rights

6.2 How Do Solutions Help You?

Here are just a few ways that Scribe can automate your business processes:

- Map your source and target data stores.
- Use drag-and-drop technology to create links between source and target fields.
- Create formulas to transform target fields with a rich set of functions and
- operators. Filter your source data.
- Use standard create, read, update, and delete operations when integrating your data.

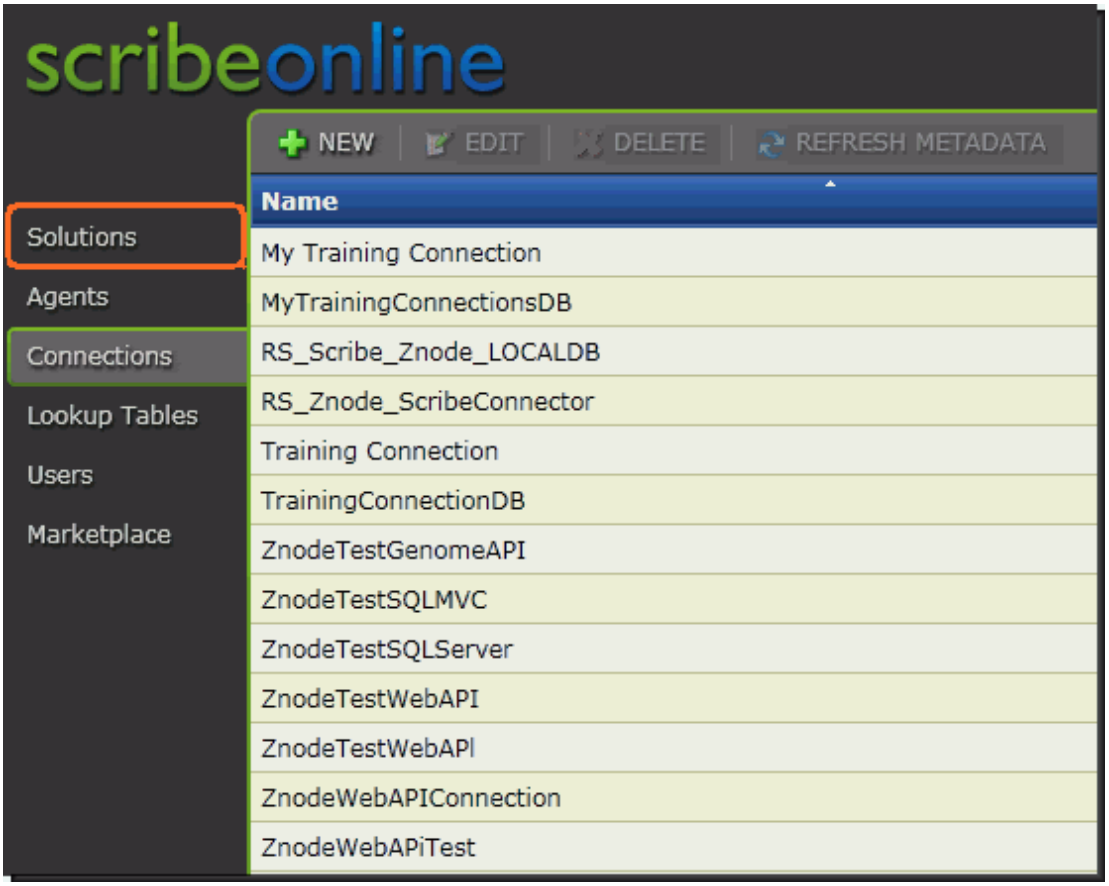
©2015, Znode LLC. All Rights

6.3 Creating the Solution

Where are you?

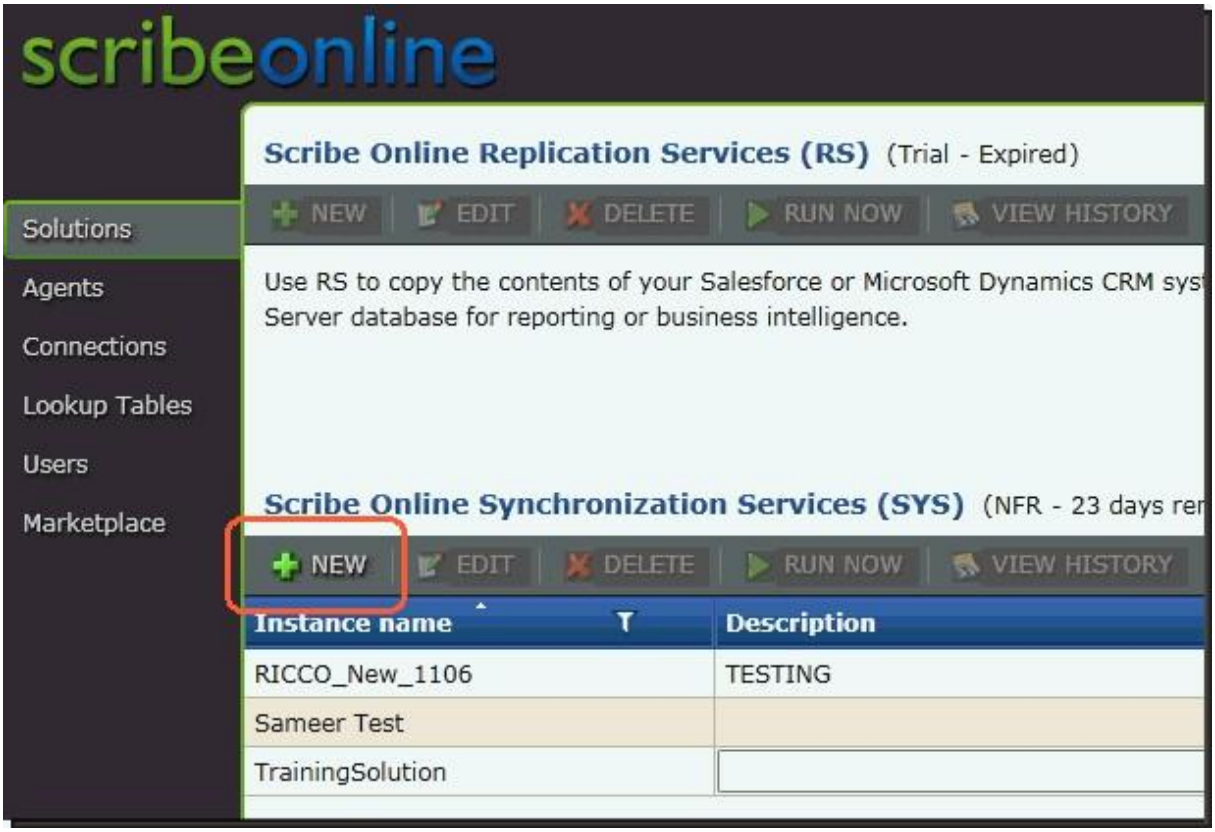
Creating the Solution

1. Click Solutions.

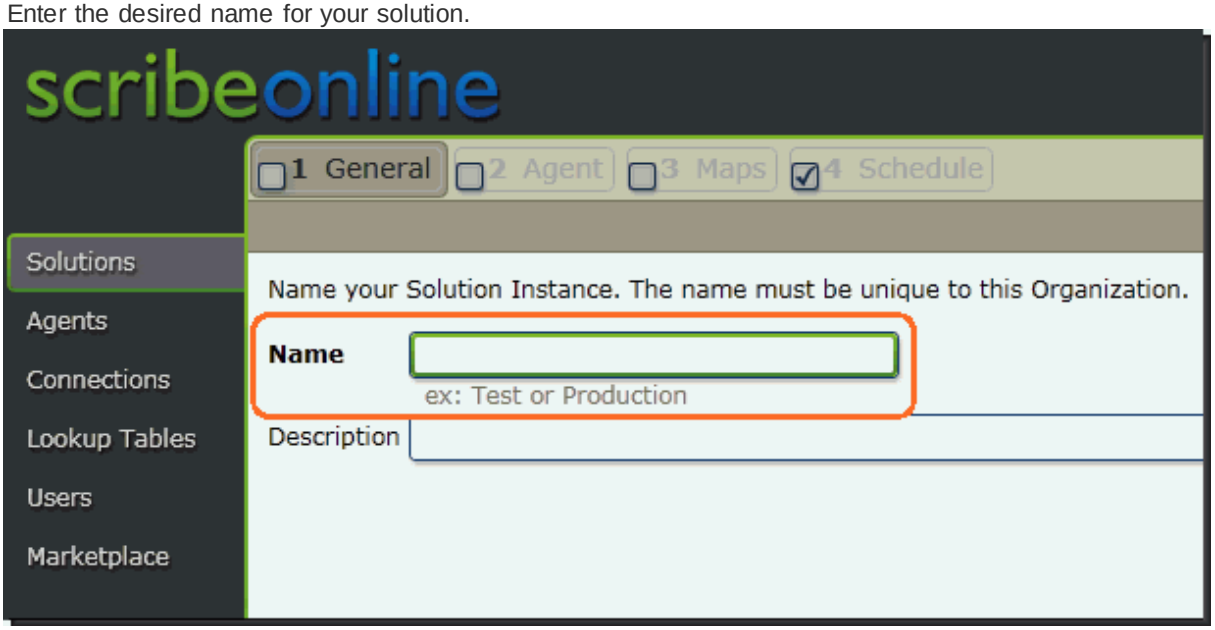


2. Click New.

©2015, Znode LLC. All Rights

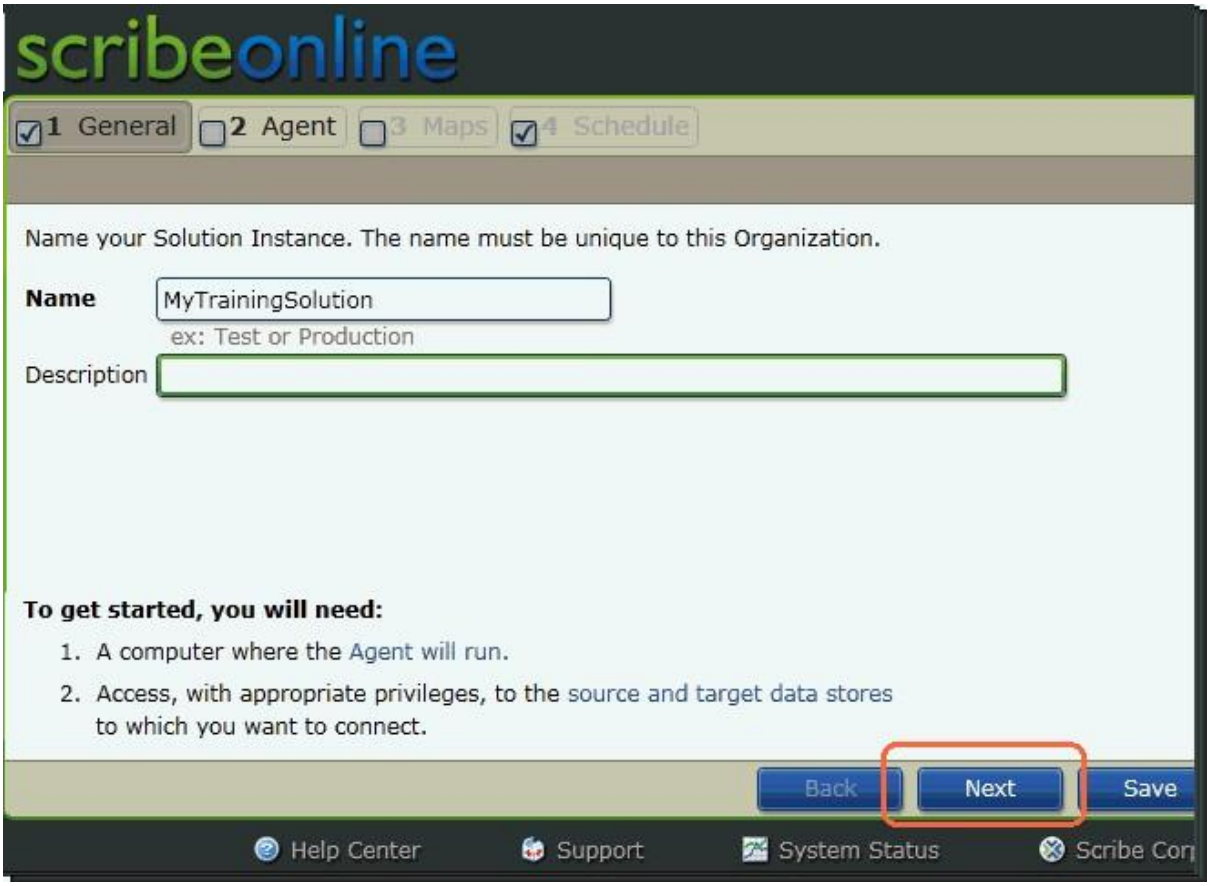


3. Enter the desired name for your solution.



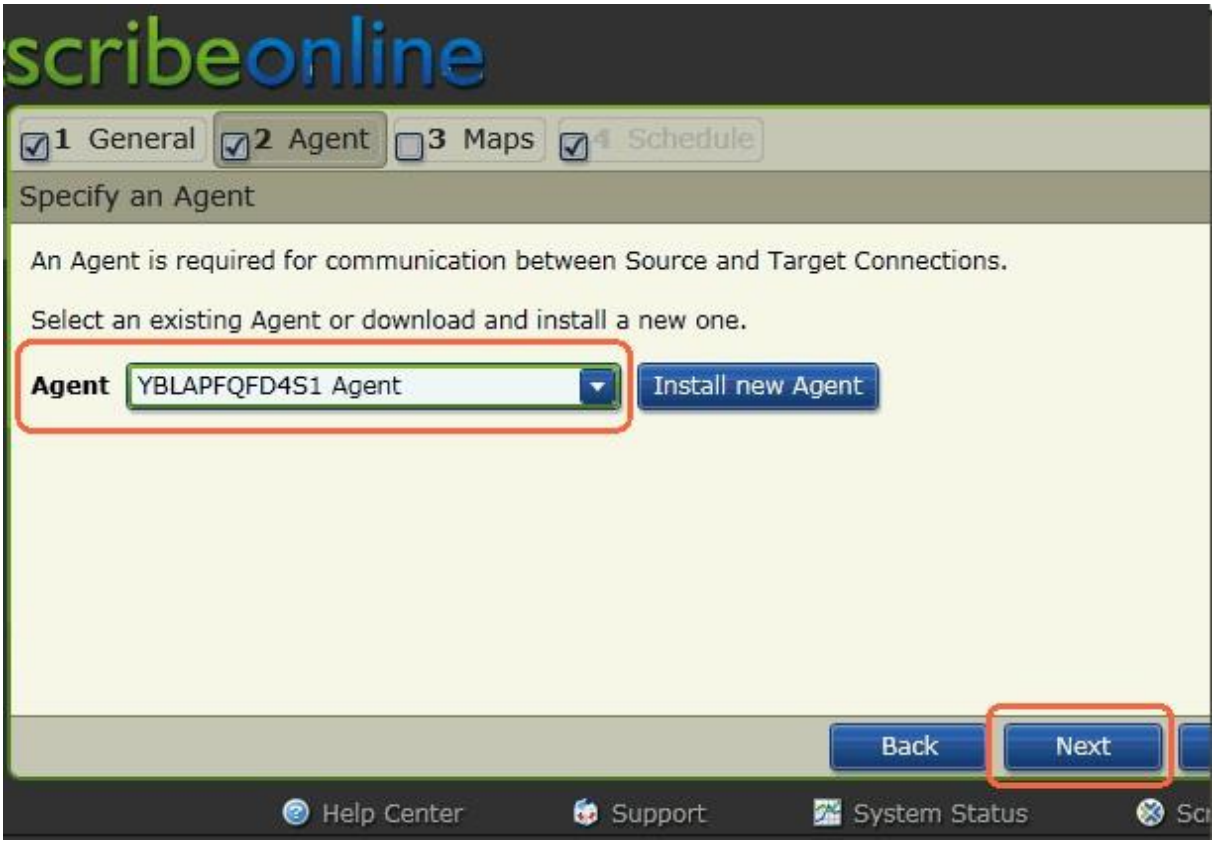
4. Click Next.

©2015, Znode LLC. All Rights



5. Select the Agent you just created from the drop-down menu.

©2015, Znode LLC. All Rights



6. Click Next.

©2015, Znode LLC. All Rights

7 How to Map Your Fields

What's in this chapter?

- Mapping Your Fields

©2015, Znode LLC. All Rights

7.1 Mapping Your Fields

Where are you?

Mapping Your Fields

1. Click New.
2. Give your connection a name.
3. Select the Connections to your database.
4. Select the desired connection.
5. Select the desired entity.
6. Click the Fields tab and map your fields.
7. Link the desired fields by simply dragging the desired source field to the desired target field.
8. Click OK when you are finished.

IMPORTANT: Make sure both fields (the source and the target fields) are the same data type: text fields, numeric fields, etc.

©2015, Znode LLC. All Rights

8 How to Schedule Your Data Sync

What's in this chapter?

- Scheduling Your Data Sync

©2015, Znode LLC. All Rights

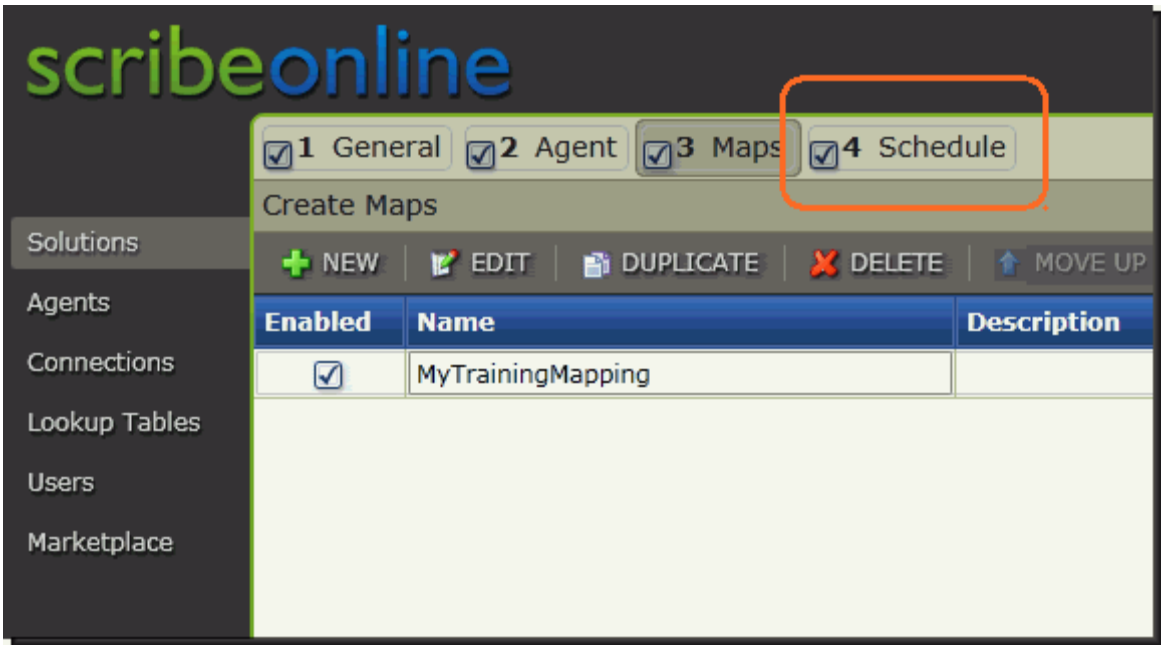
8.1 Scheduling Your Data Sync

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.

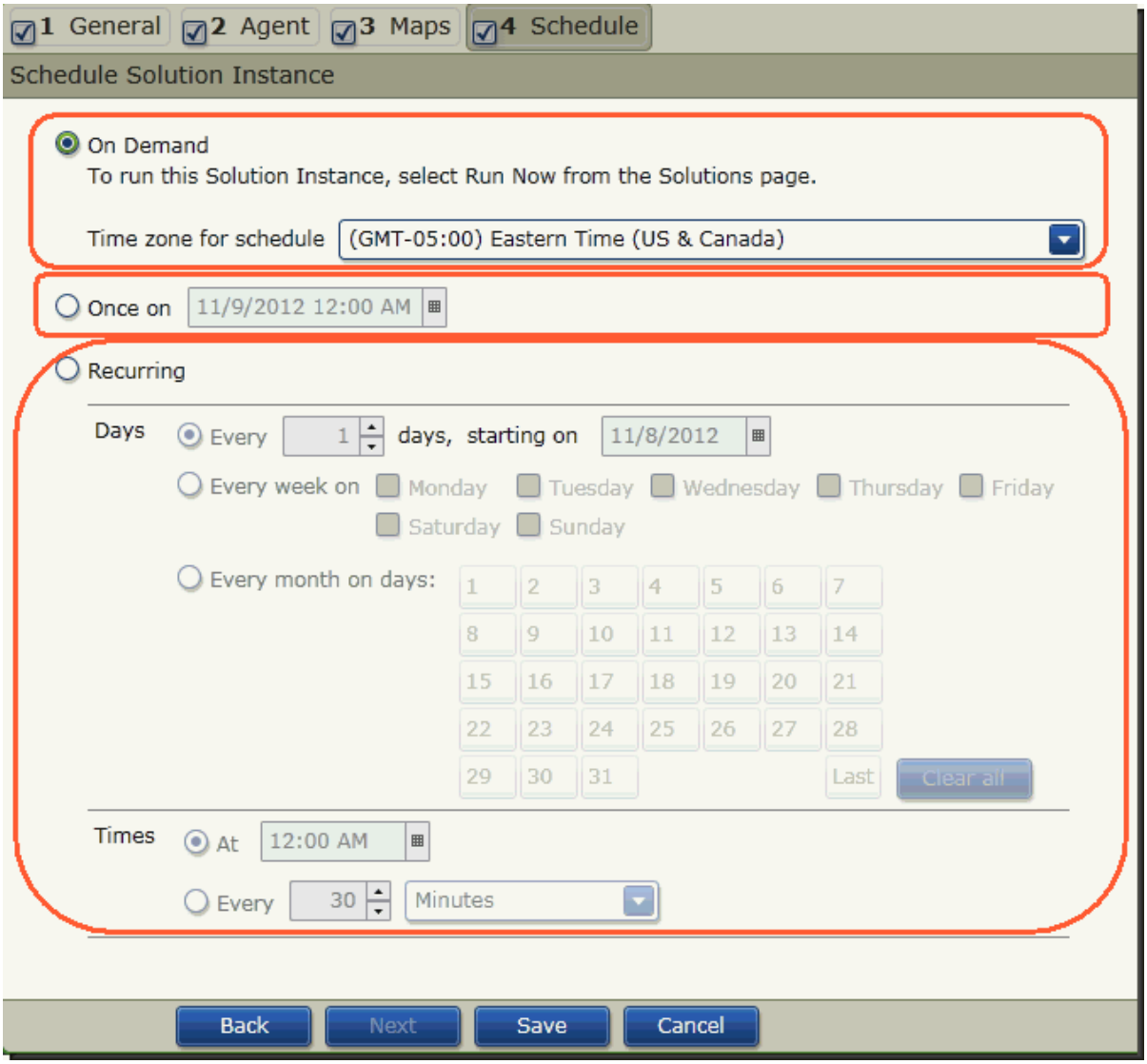
Scheduling Your Data Sync

1. Click the schedule tab.



2. Select the desired schedule type.
   - On Demand is a one-time-only data sync that you do not schedule. You would click Run Now from the Solutions page.
   - Once on is a one-time data sync that you can schedule.
   - Recurring is a data sync that occurs on a day-and-time interval that you define.

©2015, Znode LLC. All Rights

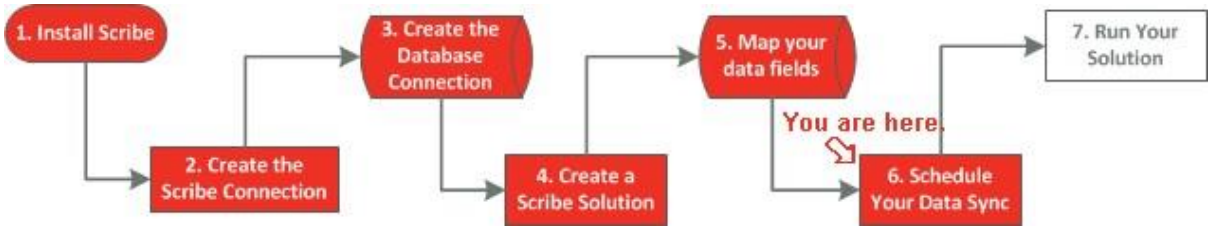


©2015, Znode LLC. All Rights

9 Running Your Data Sync

Where are you?

To set up Scribe, you must do these steps in order. Here's an overview of how the process works.

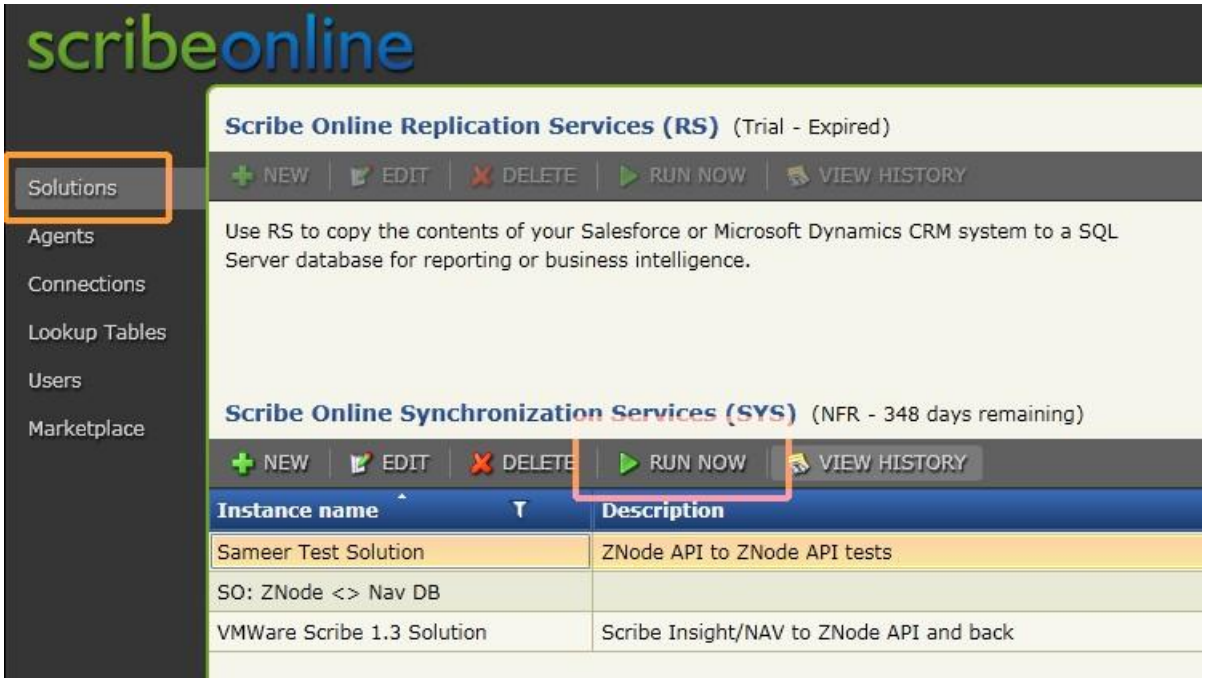


©2015, Znode LLC. All Rights

Running Your Data Sync

If you have already scheduled your data sync, it will run based on the settings you have defined.

But if you want to manually run your data sync, you can always click Run Now from the Solutions tab. See below.



©2015, Znode LLC. All Rights

©2015, Znode LLC. All Rights Reserved
Printed: October 2015 in USA.

©2015, Znode LLC. All Rights