

Product Manual

SmartConnect 21



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SmartConnect 21 Info and Help

The SmartConnect 21 user manual is intended to be used as a reference for any window or field a user can interact with in the product. The manual is structured in a way that matches the menus and layout of the current SmartConnect 21 interface.

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SmartConnect 21 – Install and Configuration

The install and configuration process for SmartConnect 21 is considerably different from earlier versions of the product. The installer itself has been slimmed down to provide a quicker install process, while a configuration tool has been added to give users additional setup options and control over the SmartConnect deployment.

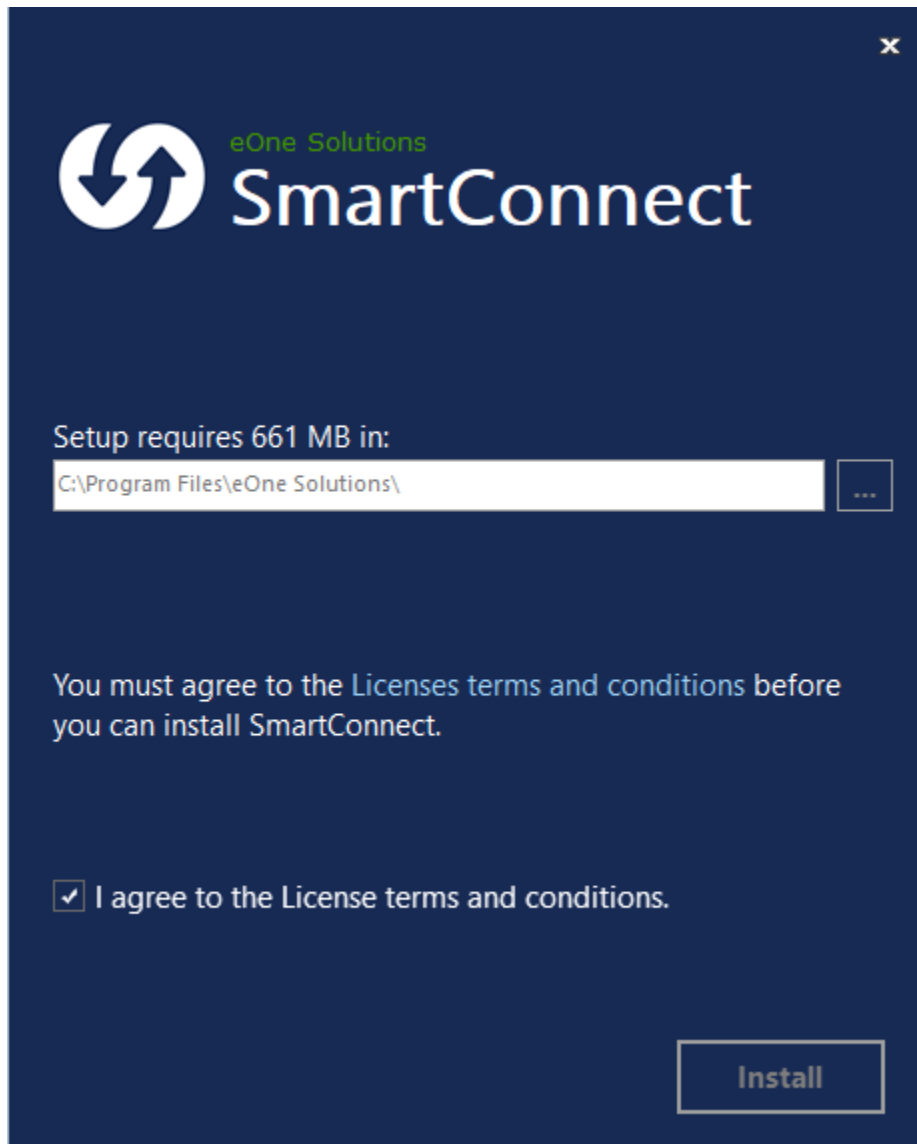
System Requirements

For SmartConnect to properly function, there are a few base requirements that must be met:

- A 64-bit operating system is required, Windows 8.1 or Server 2012 or later.
- .Net 4.7.2 or higher for any workstation running any component of SmartConnect.
- IIS 8.0 or higher on the workstation running the API service.
- Microsoft SQL Server 2012 or more recent release, or SQL Server Express.
- An internet connection is required during the configuration process. Perpetual licenses do not require an internet connection until the configuration process is ran again, subscription licenses will always require an internet connection for use of the product.

Install

When the SmartConnect 21 installer is launched, it has one screen to set the installation directory and all components will be installed.



Each component provides different functionality:

- SmartConnect
 - o The main user interface for the integration platform.
 - o Should be installed on any machine where users will need to access SmartConnect itself.
- Windows Service
 - o This process handles any scheduling requirements within SmartConnect. This includes scheduled integrations, change data source cleanup routines and error log cleanup.
 - o Should be installed on a server or workstation that will remain active.

- API Service
 - This process is used anytime a call is made to the SmartConnect web service.
 - Real-time data sources, the Excel add-in, and Excel templates all utilize the API service.
 - In order to successfully install and configure the API service, IIS is required to be enabled on the server.

- Rest API Service
 - In order to successfully install and configure the Rest API service, IIS is required to be enabled on the server.
 - Business Central real-time data sources utilize the Rest API Service and will require it to be bound to a valid SSL certificate.

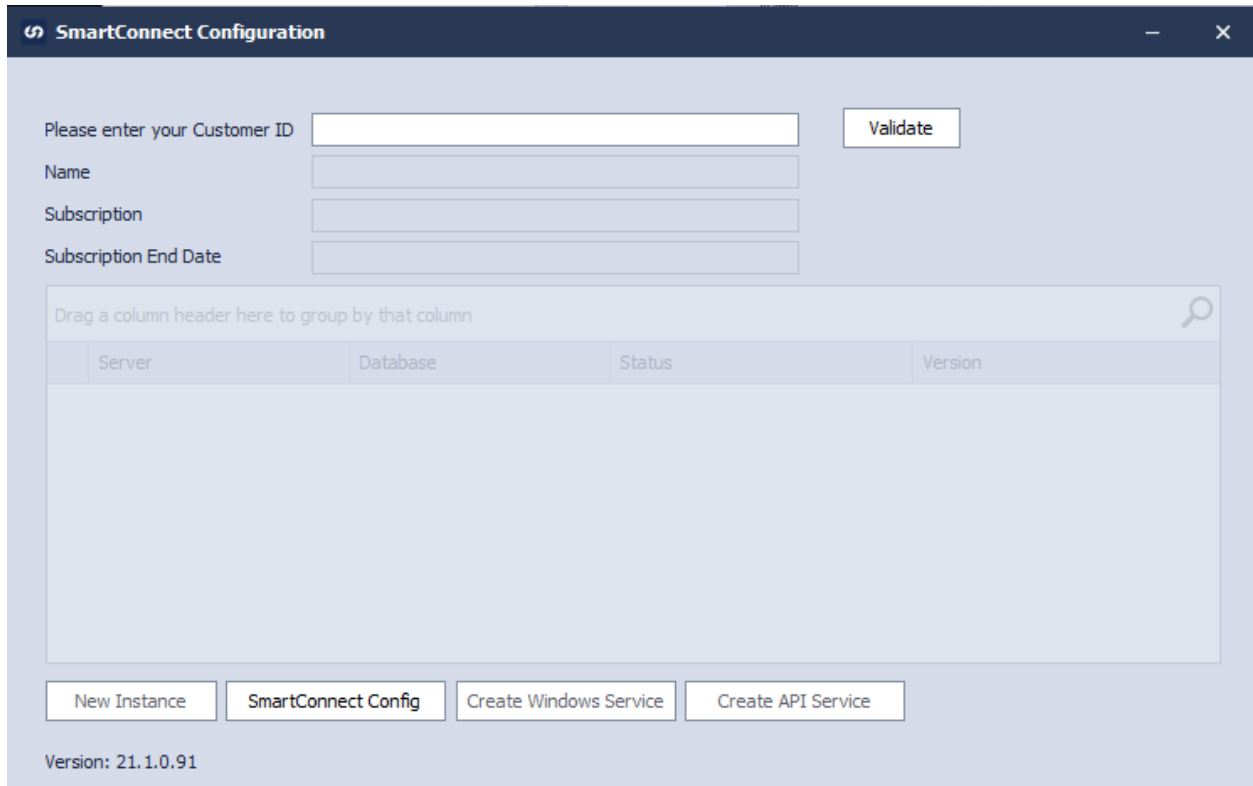
- Upgrade SmartConnect 2018
 - A utility to upgrade a SmartConnect 2018 database.

Clicking Install will perform the installation of SmartConnect. When complete, the installer can be closed. Before launching the SmartConnect interface, the SmartConnect configuration process must be completed on the workstation.

Configuration

After the installer is complete, the eOne.SmartConnect.Config.exe will need to be launched as an admin from the C:\Program Files\eOne Solutions\SmartConnect directory.

When the configuration tool is launched for the first time, it will not have any information displayed yet.

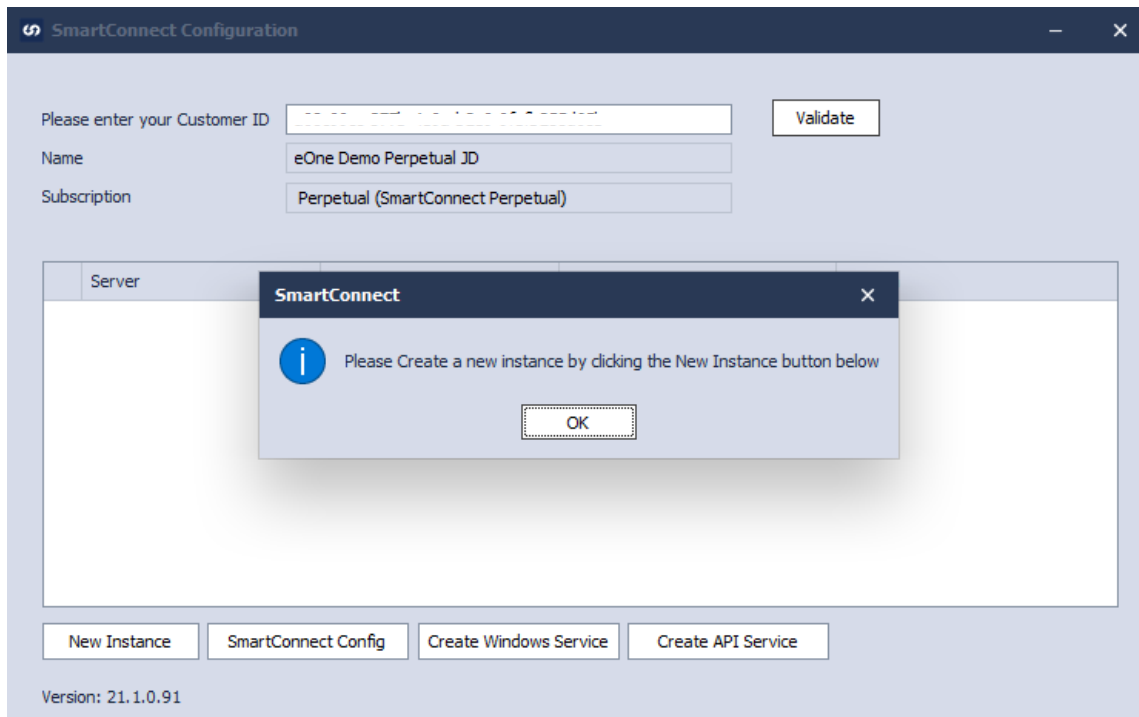


The image shows the 'SmartConnect Configuration' application window. It has a dark blue title bar with the application name and standard window controls. The main area is light blue and contains several input fields and buttons. At the top, there is a 'Please enter your Customer ID' label followed by a text box and a 'Validate' button. Below this are three more text boxes labeled 'Name', 'Subscription', and 'Subscription End Date'. A large, empty rectangular area with a light blue background and a search icon in the top right corner is intended for displaying data. At the bottom, there are four buttons: 'New Instance', 'SmartConnect Config', 'Create Windows Service', and 'Create API Service'. The version number 'Version: 21.1.0.91' is displayed in the bottom left corner.

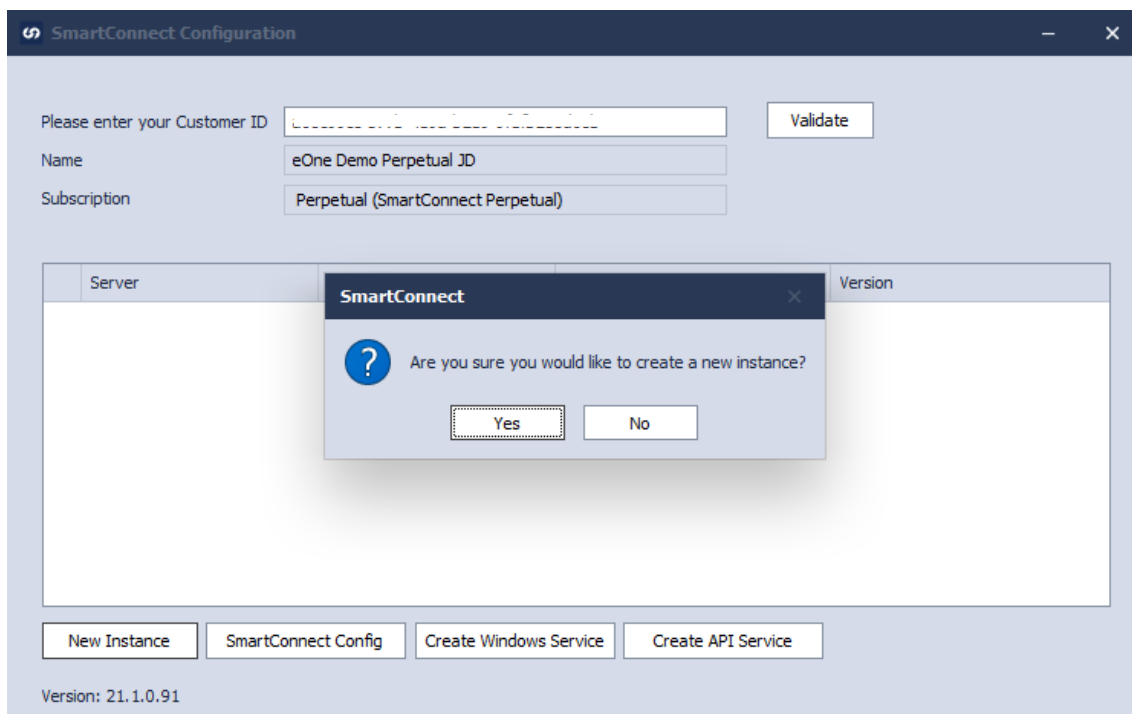
Server	Database	Status	Version
--------	----------	--------	---------

The Customer ID must be entered and validated to continue the configuration process. That ID can be retrieved from the eOne Solutions web site under the renewals and registration keys section for an account.

When a valid ID is entered, it will enable the server list and the New Instance button.



The server list will be empty for any Customer ID that has not had previous installs performed. If the ID has other installs (development, testing, or UAT environments, etc.) they will be present in the list. For new installs, the New Instance button should be clicked to create a SmartConnect database and instance that registers with the account.



New Instance

Save
 Cancel

SQL Server Details

MSSQL Server	HANSEL-PC\SQLEXPRESS
MSSQL User	sa
MSSQL Password	*****
<input type="button" value="Test Connection"/>	

SmartConnect Database

SmartConnect Database	SmartConnect_21_v3
SmartConnect User	SmartConnect_21_v3
SmartConnect Password	*****

SmartConnect User

Email	chris.hanson@eonesolutions.com
First Name	Chris
Last Name	Hanson
Password	*****

The New Instance window will create a new SmartConnect database and SQL user to connect to it, and if using a perpetual license, it will require that a user be created that will be used to log into SmartConnect once configuration is complete.

SQL Server Details

- MSSQL Server
 - The name of the SQL server and/or instance that the SmartConnect database will be installed to. - MSSQL User
 - The SQL user that will be used during the installation to create the SmartConnect database and user. This user must be a SQL user (not a windows account) and must have rights to create objects in the selected server.
- MSSQL Password
 - The password for the user entered for the MSSQL User.
- Test Connection
 - Validates the connection to the server using the credentials provided. Must successfully validate before completing the new instance setup.

SmartConnect Database

- SmartConnect Database
 - The name of the SmartConnect SQL database that will be created for this install instance.
- SmartConnect User
 - The name of the SmartConnect SQL user that will be created for this install instance.
- SmartConnect Password
 - The password that will be set for the SmartConnect SQL user.



SmartConnect User

- Email
 - The email for the first account that will be used to login to the SmartConnect application. A real email account should be used – password resets will be sent to that email address.
- First Name
 - The display first name for the user.
- Last Name
 - The display last name for the user.
- Password
 - The password for the email account that will login to the SmartConnect application. This password must be used on the first login to the application.

It is important to remember the email and password used for the first user on the SmartConnect instance. Those credentials will be used for the initial login to the application. Once in the application, additional users and logins can be configured. Passwords can also be reset while in the application.

The New Instance window changes slightly if the license type is a subscription rather than a perpetual license. An existing user can be used to complete the instance setup and login with that email and password that is already set, or a new user can be added.

New Instance

 Save  Cancel

SQL Server Details

MSSQL Server

hansel-pc\sqlexpress

MSSQL User

sa

MSSQL Password

Test Connection

SmartConnect Database

SmartConnect Database

SmartConnect_21_saas

SmartConnect User

SmartConnect_21_saas

SmartConnect Password

SmartConnect User

☒ Existing User ☐ Create New User

Existing User

jared.dux@eonesolutions.com

First Name

Jared

Last Name

Dux

When adding or using an existing user with a subscription license, the user email is stored in the online SmartConnect user database. This will allow for those users to have access to both the on-premise deployment of SmartConnect along with the SmartConnect.com environment that the subscription gives access to.

Once the New Instance window is saved, that instance will be added to the list in the main configuration window and will be marked as Active. At this point, the configuration window could be closed and the SmartConnect application would allow a login to that environment.

SmartConnect Configuration

Please enter your Customer ID

Validate

Name

eOne Demo Perpetual JD

Subscription

Perpetual (SmartConnect Perpetual)

	Server	Database	Status	Version
→	HANSEL-PC\SQLEXPRESS	SmartConnect_21	Active	21.1.0.91

New Instance

SmartConnect Config

Create Windows Service

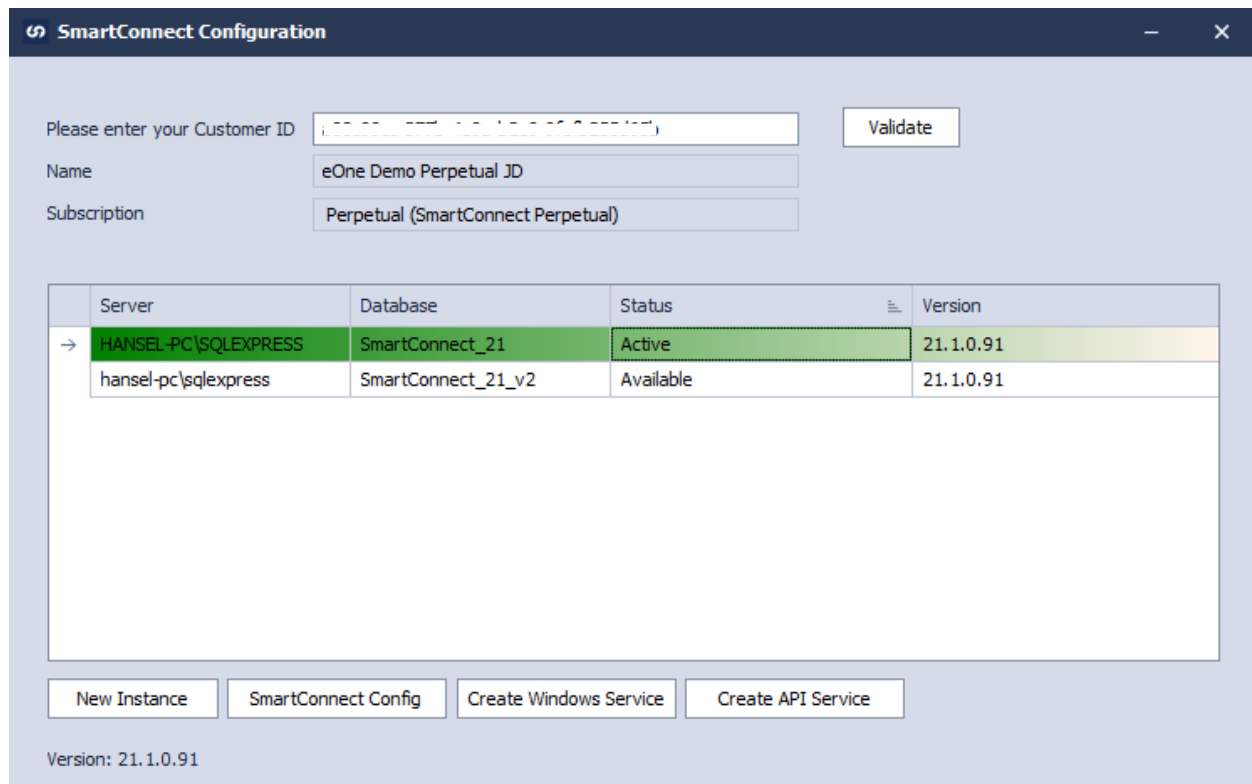
Create API Service

Version: 21.1.0.91

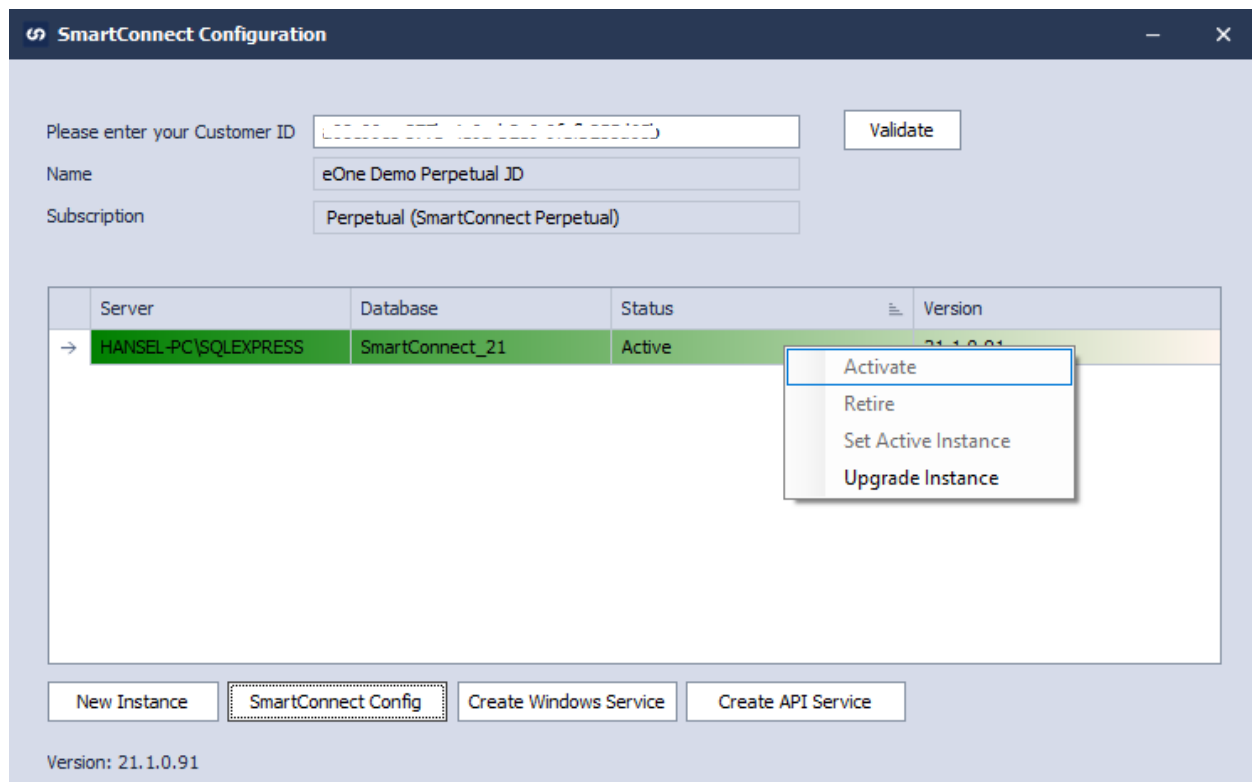
Additional setup can be performed around the windows and API service components, or other SmartConnect instances can be registered and configured. Those options will be detailed in the remainder of the document.

Additional instances can be setup within the configuration tool for a specific account. Up to 3 (or 4, depending on region) instances can be created to support development, testing/UAT, and production environments. These additional instances can be setup on the same SQL server or can be created on entirely different SQL servers by running the install and configuration tool in a separate environment.

When multiple instances are setup, the list will contain each and have them defined as Active, Available or Retired in the status field.



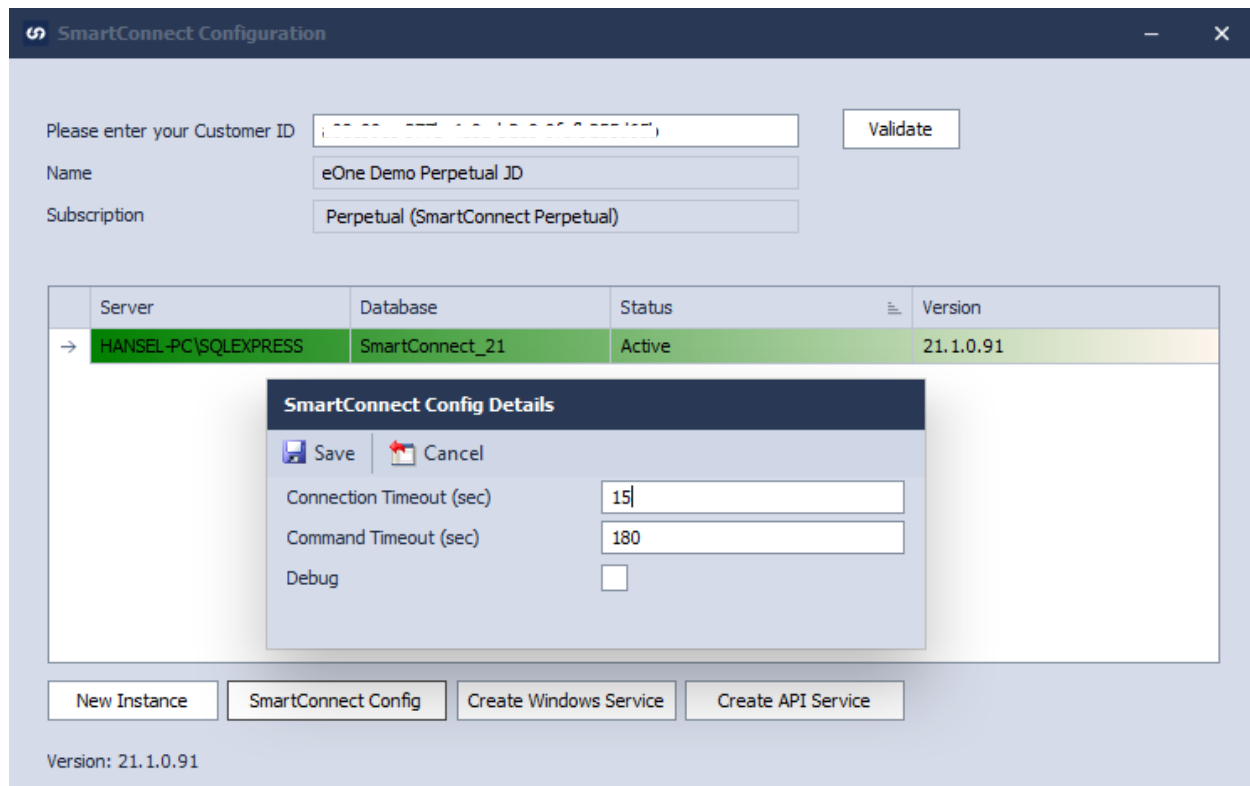
The configuration tool will then let you define which instance the SmartConnect application will connect to when a user launches it. Right-clicking on the instance in the list will bring up the available actions.



- Activate
 - If an instance is retired, this will re-activate the instance for use. This can only be done if account is not at the instance limit, and the configuration tool has access to that server and database from the current workstation.
- Retire
 - Removes the instance from use. Users will no longer be able to log into that instance through any application still connected to it, and automated integrations will no longer process. Effectively disables that instance from any production use. Most frequently used when migrating SmartConnect to a different server, or if multiple test environments are in use.
- Set Active Instance
 - Any instance listed as Available for the status and that the configuration tool can access from the current workstation can be set to the active instance. Only one active instance can exist at any given time on a workstation. This can be used to switch the application to log into a test, development, UAT instance without needing to have the application installed on multiple workstations.
- Upgrade Instance
 - Any active or available instance that the configuration tool can access from the current workstation will be updated to the version of the configuration tool (if more recent than the instance version). The next login to that instance through the application will complete the upgrade process by running system maintenance.

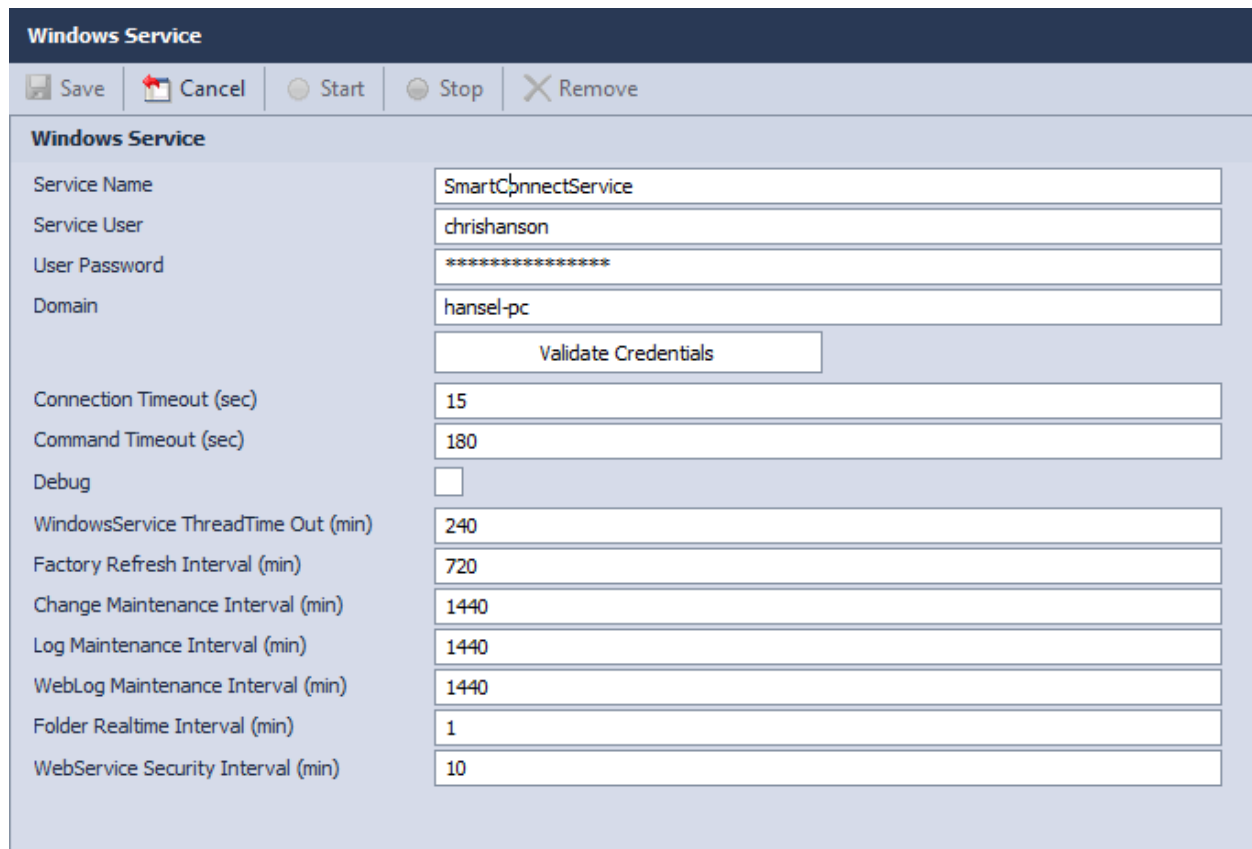
When performing a new instance in an environment that does not have an instance setup yet, the New Instance button should be used on the first workstation SmartConnect is installed on. If SmartConnect is installed on additional workstations that should be connecting to the same instance, the instance should simply be set to the active instance after entering the customer ID in the configuration tool on the additional workstations.

The buttons across the bottom of the configuration tool allow for additional components and settings to be enabled. The SmartConnect Config button allows for some basic application settings to be modified. For most clients, these settings should not have to be modified from their original values.



- Connection Timeout
 - o The length of time (in seconds) that the SmartConnect application will wait while trying to establish a connection.
- Command Timeout
 - o The length of time (in seconds) that the SmartConnect application will wait while trying to execute a command within an open connection.
- Debug
 - o This option will be flagged if the debug options are enabled in either the windows service or API service. This should not be left on for normal production use unless in the process of troubleshooting an issue for one of those components.

The Create Windows Service button will install and activate the SmartConnect windows service on the current workstation for the current active SmartConnect instance. This service handles any scheduling requirements from the SmartConnect application. The service should be installed on workstations that do not have much downtime, as the service can not execute integrations if the workstation is not active.



Windows Service	
Service Name	SmartConnectService
Service User	chrishanson
User Password	*****
Domain	hansel-pc
<input type="button" value="Validate Credentials"/>	
Connection Timeout (sec)	15
Command Timeout (sec)	180
Debug	<input type="checkbox"/>
WindowsService ThreadTime Out (min)	240
Factory Refresh Interval (min)	720
Change Maintenance Interval (min)	1440
Log Maintenance Interval (min)	1440
WebLog Maintenance Interval (min)	1440
Folder Realtime Interval (min)	1
Webservice Security Interval (min)	10

The majority of the settings on the Windows Service window should be left at the default values, unless working with a certified support team to modify them for a particular environment. Any option after the Validate Credentials button should generally be left at the default values.

The buttons across the top of the window will perform different actions based on the current settings.

- Save
 - o Saves the current configuration and creates the windows service if it is not present yet. Only available once the credentials have been validated for the service.
- Cancel
 - o Cancels any changes made to the window since opening it.
- Start
 - o Starts the current windows service the configuration is tied to for the active instance. Applies to the current workstation.
- Stop
 - o Stops the current windows service the configuration is tied to for the active instance. Applies to the current workstation.
- Remove
 - o Removes the windows service from the current workstation that the configuration is tied to.

The settings within the window allow for the service to be configured to install and run scheduled processes.

- Service Name
 - The name of the windows service. Can be changed to differentiate multiple services on one workstation from another in the scenario where multiple SmartConnect instances are switched between. For most scenarios, the default name can be left in place.
- Service User
 - The windows account that the windows service will run under. Must be an account with local admin rights to log any errors to the event viewer.
- User Password
 - The password for the account used to run the service.
- Domain
 - The domain for the account used to run the service.
- Validate Credentials
 - Will validate the account information entered can connect and create a windows service correctly. Validation must pass before the windows service can be saved and created.
- Connection Timeout
 - The length of time (in seconds) that the SmartConnect application will wait while trying to establish a connection.
- Command Timeout
 - The length of time (in seconds) that the SmartConnect application will wait while trying to execute a command within an open connection.
- Debug
 - Will enable debug logs to be written to the SmartConnect directory. Should not be left on for production environments unless troubleshooting an issue with scheduled processes.
- Windows Service Thread Timeout
 - How long the windows service will leave an integration running before terminating the process. Prevents integrations from becoming perpetually locked in the scheduler if something fails.
- Factory Refresh Interval
 - The period of time between the scheduler creating a new session with the SmartConnect database.
- Log Maintenance Interval
 - How frequently the service will check to remove log entries that should no longer be stored in SmartConnect.
- Web Log Maintenance Interval
 - How frequently the service will check to remove web service log entries that should no longer be stored in SmartConnect.

- Folder Real-Time Interval
 - o How frequently the service will check folder data source real time events to pick up new files for processing. Should not be set to less than 1 minute.
- Web Service Security Interval
 - o How frequently the service will check for alerts within the security logging for the SmartConnect API.

The Create API Service button will install and activate the SmartConnect API on the current workstation for the current active SmartConnect instance. The workstation must have the IIS feature enabled in Windows in order for SmartConnect to be able to create and publish the SmartConnect API. The SmartConnect API should only be installed on one workstation for any particular SmartConnect instance, and not across multiple workstations.

The SmartConnect API is used for any real-time data sources or triggers, any use of the Excel Add-in or Excel Templates that allow users to run integrations directly from Excel, or any third-party system that calls into SmartConnect to run an integration on demand.

API Service

Save Cancel Start Stop Remove

API Service

Service Name: SmartConnectWcf

Port Number: 5557

Service User: chrishanson

User Password: *****

Domain: hansel-pc

Validate Credentials

API Connection Timeout (sec): 15

API Command Timeout (sec): 180

API Debug: ☐

The buttons across the top of the window will perform different actions based on the current settings.

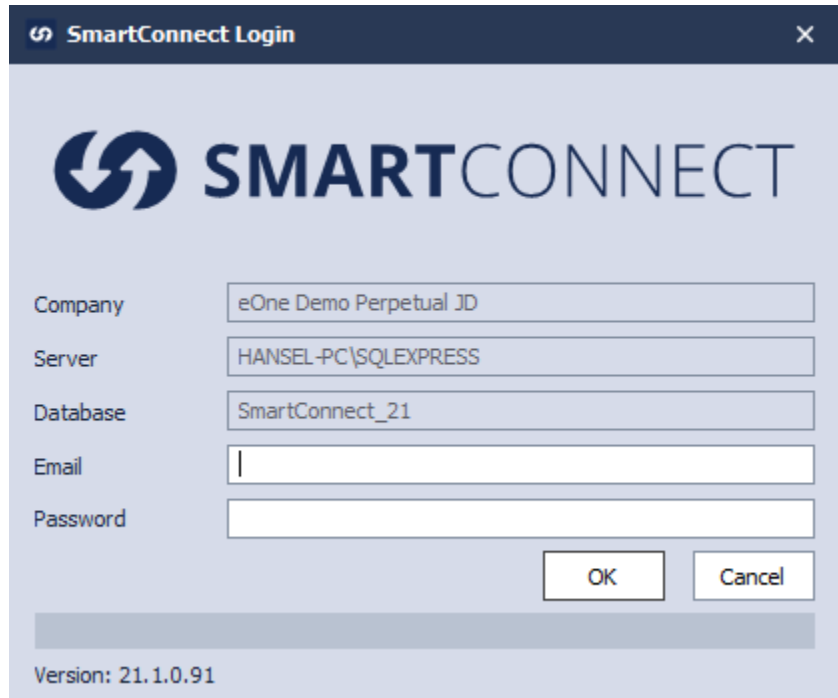
- Save
 - o Saves the current configuration and creates the web service (API) if it is not present yet. Only available once the credentials have been validated for the service.
- Cancel
 - o Cancels any changes made to the window since opening it.
- Start
 - o Starts the current web service (API) the configuration is tied to for the active instance. Applies to the current workstation.

- Stop
 - Stops the current web service (API) the configuration is tied to for the active instance. Applies to the current workstation.
- Remove
 - Removes the web service (API) from the current workstation that the configuration is tied to.

The different options allow the SmartConnect API to be configured during the setup process.

- Service Name
 - The name of the web service (API) that will be published. Can be changed to differentiate multiple services on one workstation from another in the scenario where multiple SmartConnect instances are switched between. For most scenarios, the default name can be left in place.
- Port Number
 - The port that the web service (API) will run under. Can be changed to any valid port within IIS and the environment. Useful for configuring a secure port for the API if opening to external access outside of the client network.
- Service User
 - The windows account that will create and managed the web service (API). Must be an account with local admin rights to log any errors to the event viewer.
- User Password
 - The password for the account used to run the service.
- Domain
 - The domain for the account used to run the service.
- Validate Credentials
 - Will validate the account information entered can connect and create a windows service correctly. Validation must pass before the windows service can be saved and created.
- API Connection Timeout
 - The length of time (in seconds) that the SmartConnect API will wait while trying to establish a connection.
- API Command Timeout
 - The length of time (in seconds) that the SmartConnect API will wait while trying to execute a command within an open connection.
- API Debug
 - Will enable debug logs to be written to the SmartConnect directory. Should not be left on for production environments unless troubleshooting an issue with API processes.

Once the configuration process is complete – at the bare minimum selecting an active instance to connect to for the workstation – the configuration window can be closed. The main SmartConnect application can then be launched, and users will be prompted for the account used on the instance for the initial login. Once logged in, additional users can be added and configured.



The image shows a 'SmartConnect Login' dialog box. It has a title bar with a logo and the text 'SmartConnect Login' and a close button. The main area features the 'SMARTCONNECT' logo. Below the logo are five input fields: 'Company' (containing 'eOne Demo Perpetual JD'), 'Server' (containing 'HANSEL-PC\SQLEXPRESS'), 'Database' (containing 'SmartConnect_21'), 'Email' (empty), and 'Password' (empty). At the bottom right are 'OK' and 'Cancel' buttons. At the bottom left, it says 'Version: 21.1.0.91'.

Company	eOne Demo Perpetual JD
Server	HANSEL-PC\SQLEXPRESS
Database	SmartConnect_21
Email	
Password	

OK Cancel

Version: 21.1.0.91

The Company, Server and Database will all default in from the active instance. If a login to another instance is needed, the application must be closed on that workstation and the configuration tool launched again. From there a new active instance can be set and the login will reflect the changes on the next launch of the application.

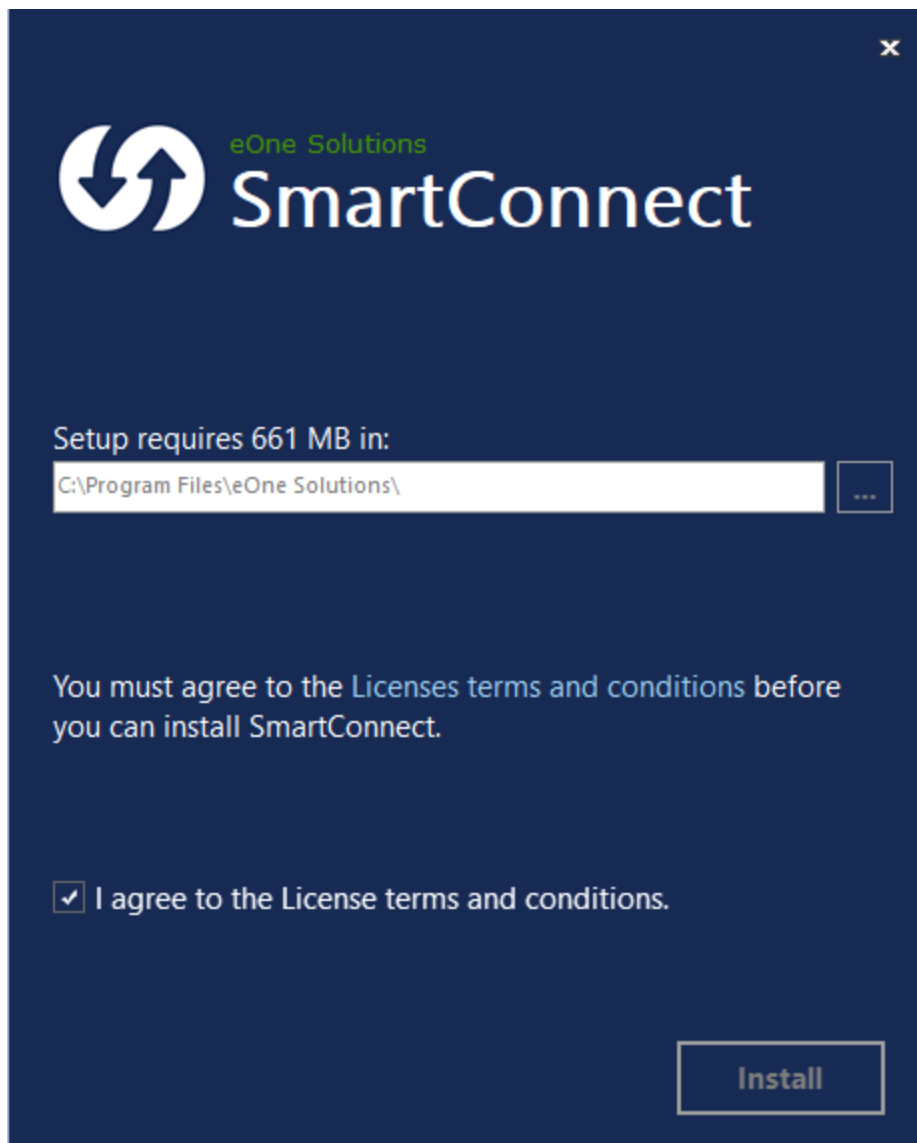
SmartConnect 21 – Upgrade process from 2018

The upgrade process from SmartConnect 2018 to SmartConnect 21 is a one-time process. You will need to be on SmartConnect 2018 version 20.18.1.49 or later to run the Upgrade Process. If you are not on this version, then you will need to upgrade to this version before running this process.

NOTE: Your SmartConnect 2018 Database will not change during the upgrade. You will be able to go back to your 2018 Database if needed.

Install

When the SmartConnect 21 installer is launched, the upgrade component will be automatically installed after choosing your install directory and clicking Install.



Configuration

After the installer is complete, the eOne.SmartConnect.Config.exe will need to be launched as an admin from the C:\Program Files\eOne Solutions\SmartConnect directory.

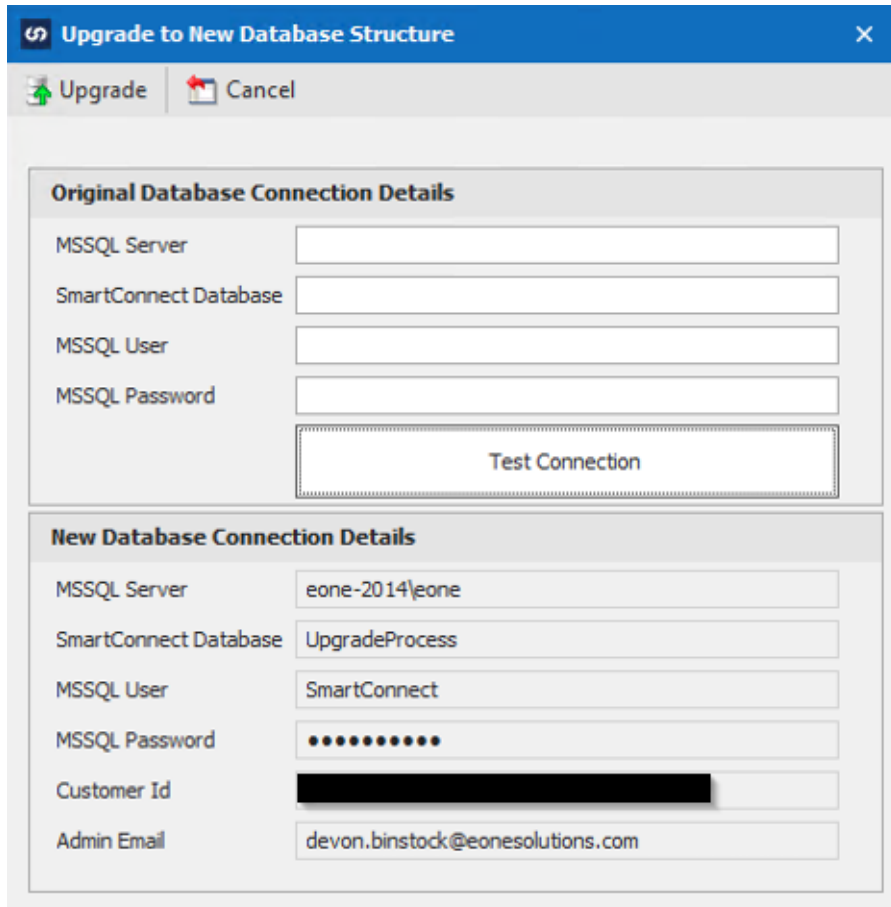
You can follow the steps, located in the [Configuration](#) section, on how to create a new instance that will be used for the upgrade process.

Upgrade

After creating a new instance with the configuration tool, the eOne.SmartConnect.Upgrade.exe will need to be launched from the C:\Program Files\eOne Solutions\SmartConnect directory.

NOTE: The Upgrade application will only work if the database is empty. If you had already logged into SmartConnect and created data sources/integrations, then the Upgrade application will not work.

Once the Upgrade application has launched, you will need to connect to your SmartConnect 2018 database.



Upgrade to New Database Structure

Upgrade Cancel

Original Database Connection Details

MSSQL Server

SmartConnect Database

MSSQL User

MSSQL Password

Test Connection

New Database Connection Details

MSSQL Server

SmartConnect Database

MSSQL User

MSSQL Password

Customer Id

Admin Email

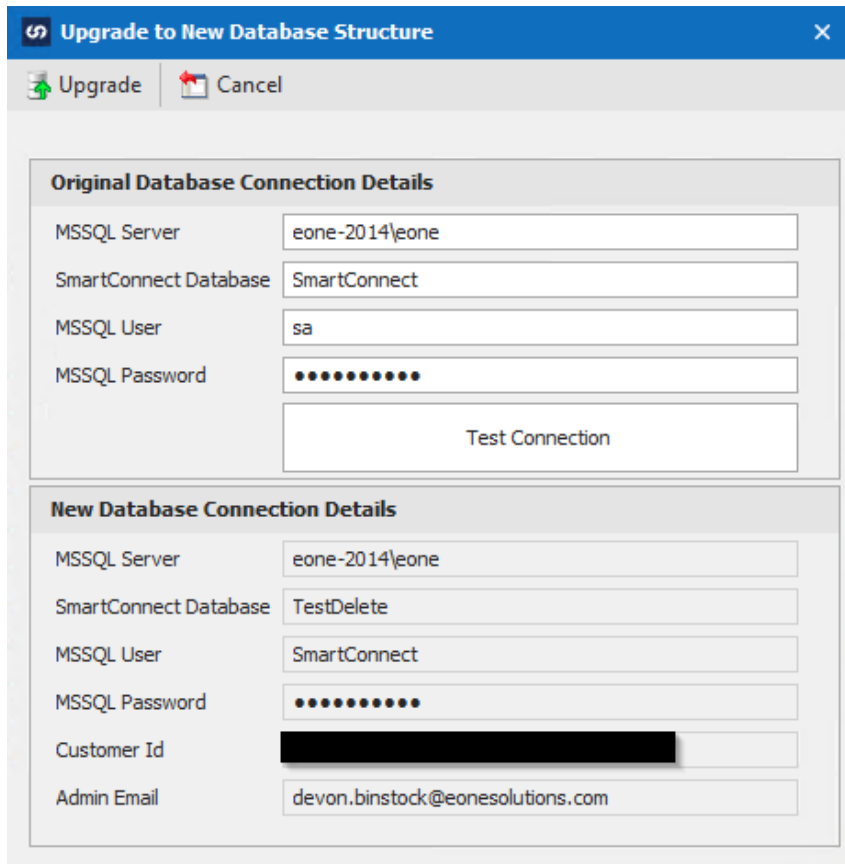
Original Database Connection Details

- MSSQL Server
 - o The name of the SQL server and/or instance that the SmartConnect 2018 database is located.
- SmartConnect Database
 - o The name of the SmartConnect 2018 database that you are upgrading.
- MSSQL User
 - o A SQL User that has access to the SmartConnect 2018 database.
- MSSQL Password
 - o The password for the user entered for the MSSQL User.

Click the “Test Connection” button once the credentials have been entered. A successful connection message will pop up, then click “OK”.

The New Database Connection Details are automatically populated from the configuration tool. You will not need to enter any values into these fields.

Click the “Upgrade” button to proceed to the next step.



Upgrade to New Database Structure

Upgrade Cancel

Original Database Connection Details

MSSQL Server: eone-2014\jeone

SmartConnect Database: SmartConnect

MSSQL User: sa

MSSQL Password: [Masked]

Test Connection

New Database Connection Details

MSSQL Server: eone-2014\jeone

SmartConnect Database: TestDelete

MSSQL User: SmartConnect

MSSQL Password: [Masked]

Customer Id: [Redacted]

Admin Email: devon.binstock@eonesolutions.com

Configure SmartConnect Users

The Configure SmartConnect Users window is used to upgrade users from SmartConnect 2018 to SmartConnect 21. Each user will now have an email address and password which is different than in SmartConnect 2018.

Upgrade	User	User Name	Reassign maps to	Admin	Email	Given Name	Last Name
<input checked="" type="checkbox"/>	demo\devon test	Devon Test		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\devon user2	Devon User2		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\devon user3	Devon User3		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\ Leone	eone		<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	eonedemo\ Leone	eonedemo\ Leone		<input checked="" type="checkbox"/>			

Temporary password for new users

On the left-hand side, check any users that you want to be upgraded. They will automatically be checked at the start.

If you plan to not upgrade a certain user, then you can uncheck the checkbox. Once you uncheck the checkbox, you will be asked to select an admin user that will be reassigned that users' integrations.

Upgrade	User	User Name	Reassign maps to	Admin	Email	Given Name	Last Name
<input checked="" type="checkbox"/>	demo\devon test	Devon Test		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\devon user2	Devon User2		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\devon user3	Devon User3		<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\ Leone	eone		<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	eonedemo\ Leone	eonedemo\ Leone		<input checked="" type="checkbox"/>			

Assign demo\devon test's Maps to an Admin User

Any maps assigned to demo\devon test must be assigned to someone else. Please choose an Admin user from the list below to assign demo\devon test's maps to.

- demo\ Leone
- eonedemo\ Leone

Temporary password for new users

After selecting what users to upgrade, enter the Email, First Name, and Last Name for each user that will be upgraded.

Upgrade	User	User Name	Assign maps to	Admin	Email	First Name	Last Name
<input type="checkbox"/>	demo\devon test	Devon Test	eonedemo\ Leone	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	demo\devon user2	Devon User2		<input type="checkbox"/>	Devon2@test.com	Devon2	Test
<input checked="" type="checkbox"/>	demo\devon user3	Devon User3		<input type="checkbox"/>	Devon3@test.com	Devon3	Test
<input checked="" type="checkbox"/>	demo\ Leone	eone		<input checked="" type="checkbox"/>	Demo@test.com	Demo	Test
<input checked="" type="checkbox"/>	eonedemo\ Leone	eonedemo\ Leone		<input checked="" type="checkbox"/>	Eonedemo@test.com	Eonedemo	Test

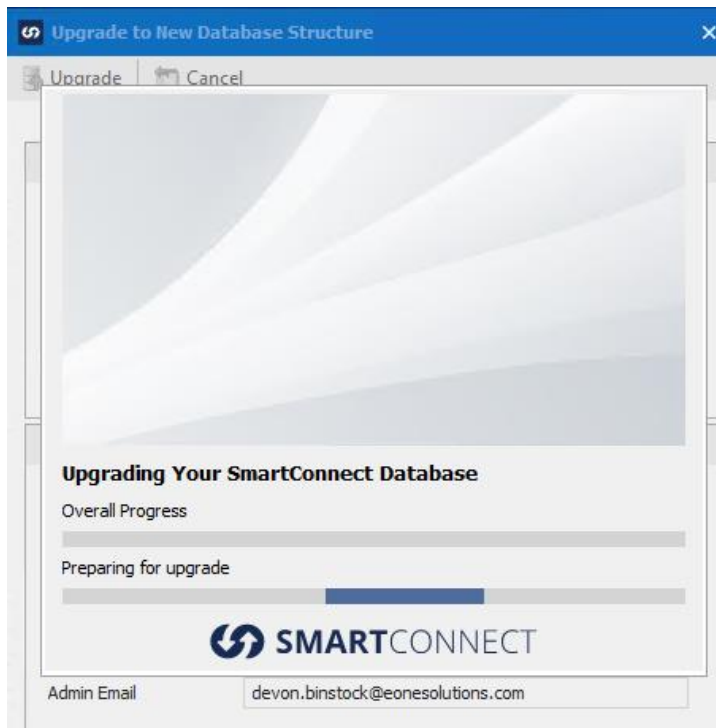
Temporary password for new users

These email addresses will be used to login to SmartConnect, so make sure that each email address is correct before continuing.

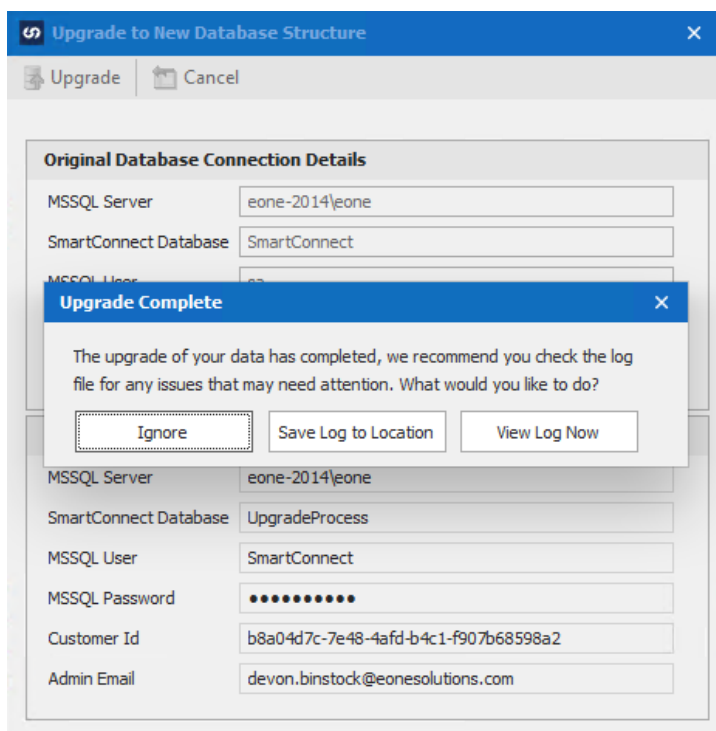
The last step on this window is to enter a temporary password for all users. This password will be used for all new users when logging in for the first time. They will be prompted to change the password after the first login.

NOTE: The temporary password will only be used for new users in the eOne system or local database. Any existing users will use their current passwords.

Click "OK" to start the upgrade process.



Once the upgrade has completed, you will have the option to view the log file for any issues that may need attention. You can also save the log file to your computer.

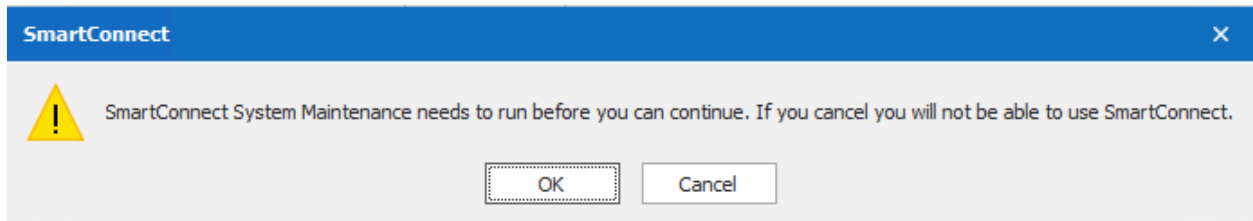


SmartConnect

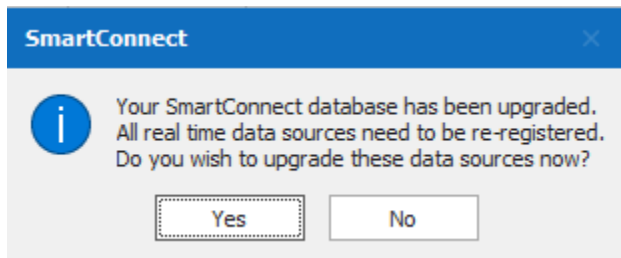
After the Upgrade Process has completed, launch the eOne.SmartConnect.UI.External.exe from the C:\Program Files\eOne Solutions\SmartConnect directory.

Login to SmartConnect using the new email addresses and temporary password. You will be prompted to change the password for any user using the temporary password.

Run System Maintenance after logging in the first time.



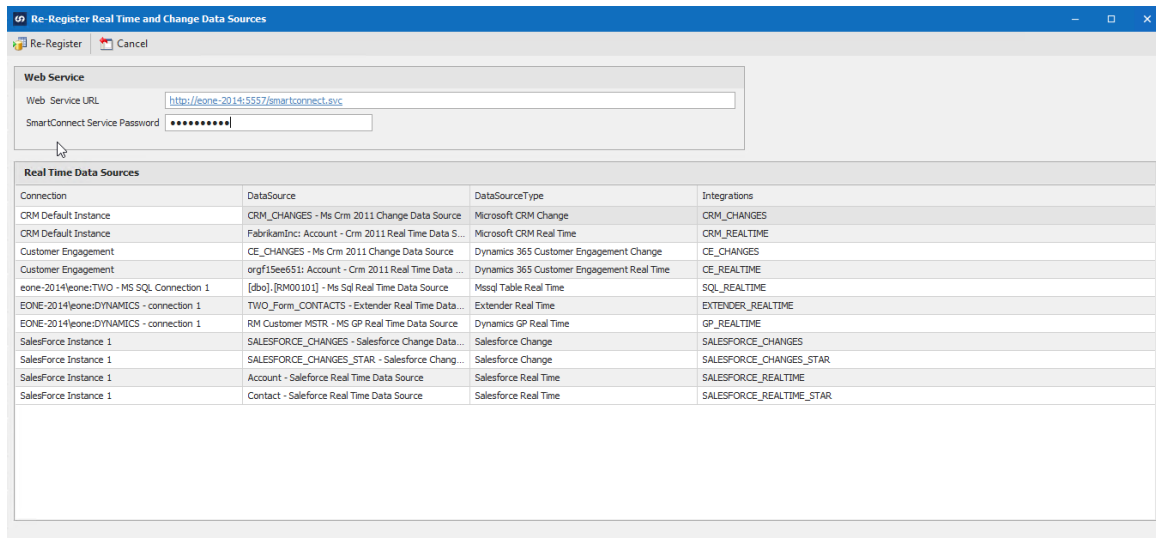
After the maintenance has completed, you will be prompted to re-register Realtime and Change data sources. You can either run the re-register process now or run it later. If you choose to run it later, then select "No" on the window. You can either go to File > Maintenance > Re-Register Real Time to find the window or you will be prompted again on your next launch.



NOTE: If you choose to re-register your real time and changes data sources at this time, they will no longer work in SmartConnect 2018.

Re-Register Sources

Enter the SmartConnect Service Password on this window and click “Re-Register” to run the process. It may take a few minutes to run through this process.



Connection	DataSource	DataSourceType	Integrations
CRM Default Instance	CRM_CHANGES - Ms Crm 2011 Change Data Source	Microsoft CRM Change	CRM_CHANGES
CRM Default Instance	FabrikamInc: Account - Crm 2011 Real Time Data S...	Microsoft CRM Real Time	CRM_REALTIME
Customer Engagement	CE_CHANGES - Ms Crm 2011 Change Data Source	Dynamics 365 Customer Engagement Change	CE_CHANGES
Customer Engagement	orgf15ee651: Account - Crm 2011 Real Time Data ...	Dynamics 365 Customer Engagement Real Time	CE_REALTIME
eone-2014\jeone:TWO - MS SQL Connection 1	[dbo].[RM00101] - Ms Sql Real Time Data Source	Mssql Table Real Time	SQL_REALTIME
EONE-2014\jeone:DYNAMICS - connection 1	TWO_Form_CONTACTS - Extender Real Time Data...	Extender Real Time	EXTENDER_REALTIME
EONE-2014\jeone:DYNAMICS - connection 1	RM Customer MSTR - MS GP Real Time Data Source	Dynamics GP Real Time	GP_REALTIME
SalesForce Instance 1	SALESFORCE_CHANGES - Salesforce Change Data...	Salesforce Change	SALESFORCE_CHANGES
SalesForce Instance 1	SALESFORCE_CHANGES_STAR - Salesforce Chang...	Salesforce Change	SALESFORCE_CHANGES_STAR
SalesForce Instance 1	Account - Salesforce Real Time Data Source	Salesforce Real Time	SALESFORCE_REALTIME
SalesForce Instance 1	Contact - Salesforce Real Time Data Source	Salesforce Real Time	SALESFORCE_REALTIME_STAR

After the Re-Register process has completed, you will be able to start using SmartConnect 21.

Click [here](#) to see how SmartConnect 21 differs from SmartConnect 2018.

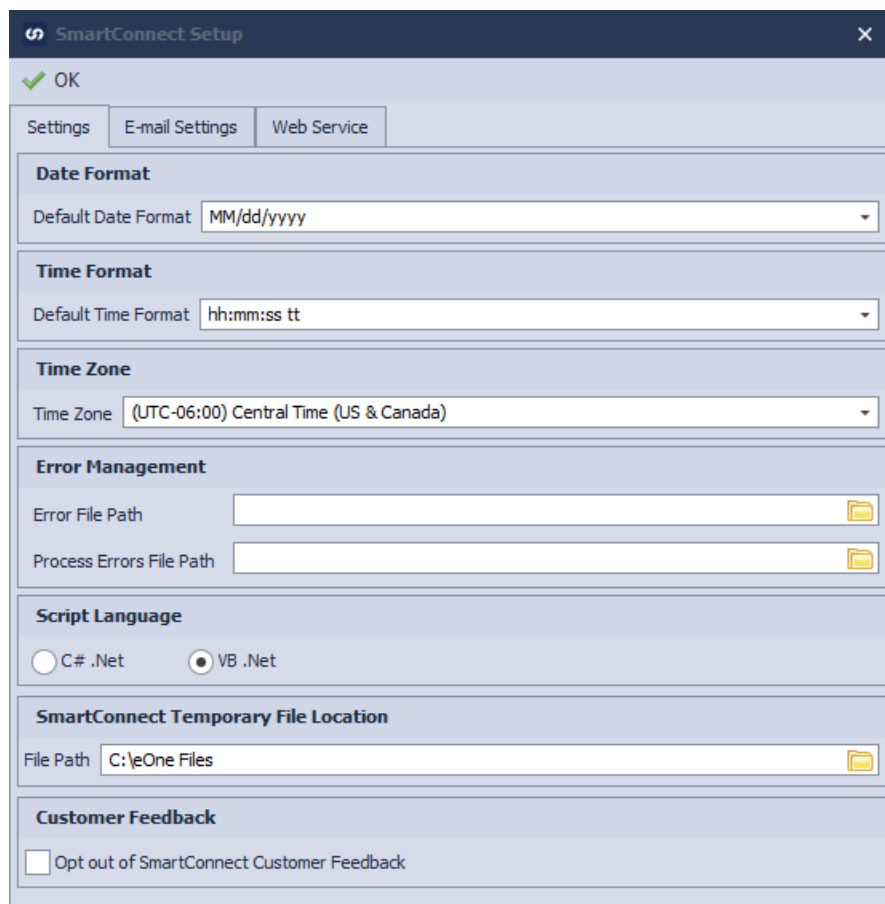
File – Maintenance

System – Setup

SmartConnect Setup – Settings

The Settings tab has options that will apply across the entire application.

Default Date Format	Set the UI date format.
Default Time Format	Set the UI time format.
Time Zone	Select the time zone.
Error File Path	Set the path where errors will be saved.
Process Errors File Path	Set the path where process errors will be saved.
Script Language	Set the default script language. This can per changed per integration. Once an integration has scripts setup, changing this setting will not convert any scripts.
SmartConnect Temporary File Location	Select a directory where SmartConnect will have access for temporary files. Required to import integrations.
Customer Feedback	Check to disable sending feedback to eOne Solutions.



The image shows a screenshot of the 'SmartConnect Setup' dialog box. The 'Settings' tab is selected, and the 'OK' button is highlighted. The dialog box contains several sections for configuration:

- Date Format:** A dropdown menu showing 'MM/dd/yyyy'.
- Time Format:** A dropdown menu showing 'hh:mm:ss tt'.
- Time Zone:** A dropdown menu showing '(UTC-06:00) Central Time (US & Canada)'.
- Error Management:** Two text input fields for 'Error File Path' and 'Process Errors File Path', each with a folder selection icon.
- Script Language:** Two radio buttons for 'C# .Net' and 'VB .Net', with 'VB .Net' selected.
- SmartConnect Temporary File Location:** A text input field for 'File Path' showing 'C:\eOne Files', with a folder selection icon.
- Customer Feedback:** A checkbox labeled 'Opt out of SmartConnect Customer Feedback'.

SmartConnect Setup – E-mail Settings

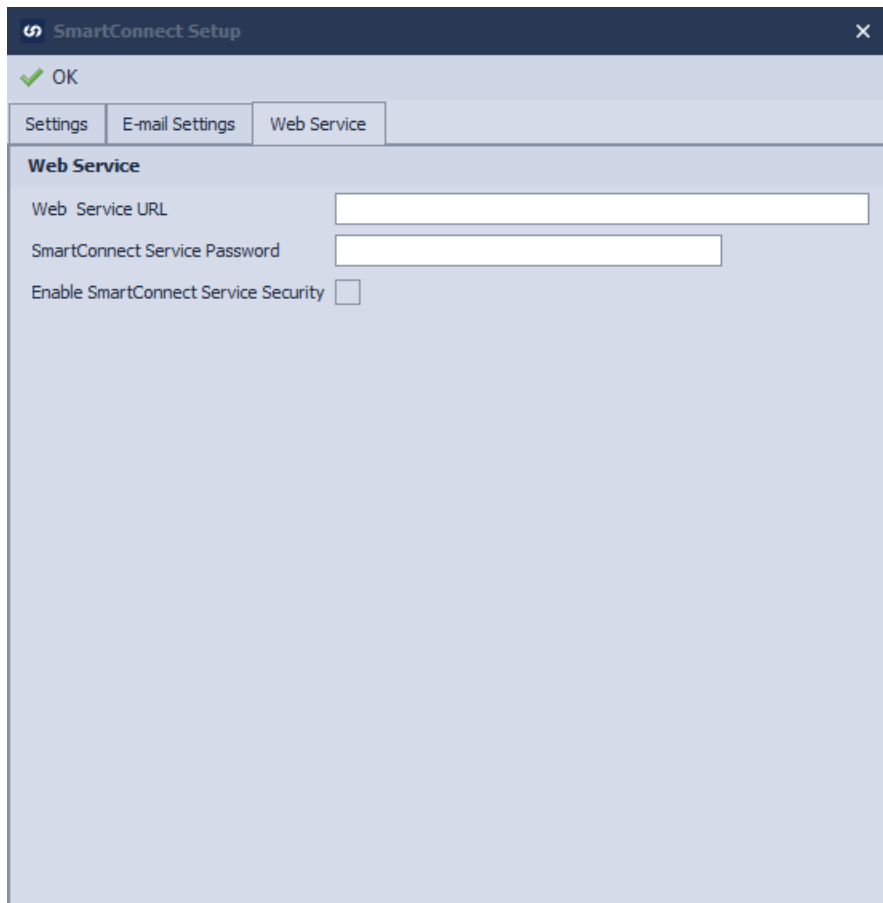
SMTP Server	Server address for the email server.
Port	Set which port is used for email server.
Use Ssl	Check box if SSL is required for the email server.
Username	Username for the desired email account.
Password	Password for the email account.
Domain	Domain name for the email account. This can be left blank if not used.
Test Email	Button used to test email settings. Enter a from and to address to test the above settings are correct.

The screenshot shows a window titled "SmartConnect Setup" with a close button (X) in the top right corner. Below the title bar is a status bar with a green checkmark and the text "OK". Below that is a tabbed interface with three tabs: "Settings", "E-mail Settings", and "Web Service". The "E-mail Settings" tab is selected. The main area of the dialog is titled "E-mail Settings" and contains the following fields and controls:

- SMTP Server**: A text input field.
- Port**: A spinner control showing the value "25".
- Use Ssl**: A checkbox.
- Username**: A text input field.
- Password**: A text input field.
- Domain**: A text input field.
- Test Email**: A button located to the right of the Domain field.

SmartConnect Setup – Web Service

Web Service URL	Enter the SmartConnect web service URL.
SmartConnect Service Password	Set the password for the SmartConnect service user. Users accessing the web service will use their own email/password combination.
Enable SmartConnect Service Security	Check this box to enable security options. Security is then available on the main Setup tab under Web Security. See Security – Web Security for more information.



The image shows a screenshot of the 'SmartConnect Setup' application window. The title bar at the top reads 'SmartConnect Setup' with a close button on the right. Below the title bar is a status bar with a green checkmark and the text 'OK'. The main content area has three tabs: 'Settings', 'E-mail Settings', and 'Web Service'. The 'Web Service' tab is currently selected. Under this tab, there are three configuration items: 'Web Service URL' with a text input field, 'SmartConnect Service Password' with a text input field, and 'Enable SmartConnect Service Security' with an unchecked checkbox.

System – Running Servers

The Active SmartConnect Servers window will list any servers that have a component of SmartConnect installed and running on them. This includes the user interface, the windows service, and the API/web service.

Active SmartConnect Servers			✕
✓ OK			
Running Servers			
	Server Name	Server Type	Current Version
→	HANSEL-LAPTOP	User Interface	21.1.0.447

Globals – Global Variables

User global variables can be created using this window. Default values can be set for any user global variable as well.

Global variables will retain any value stored in them for the duration of an integration execution. If a default value is set, the global variable will have that value stored in it when the integration begins processing. If no default value is set, the global variable will begin as an empty string.

Once the integration has finished processing, the global variable will revert to its default value or empty string if no default value has been set.

Manage User Global Variables

Save Cancel

New Global Variable

Variable Name

Global Variable Defaults

Variable Name	Default Value
→ GBL_EONEACCOUNTS	
GBL_MANUAL	1
GBL_SCHEDULED	0
GBL_SHIPSTATIONCREATEDATE	
GBL_SHIPSTATIONORDERDATE	
GBL_SHIPSTATIONORDERSTATUS	
GlobalAdministratorAddress	
GlobalBCCAddress	
GlobalCCAddress	
GlobalFileName	
GlobalFilePath	

Globals – Secure Global Variables

Secure global variables can be created using this window. Default values can be set for any secure global variable as well. The main differences between secure global variables and user global variables are that secure global variables have their values masked in the interface and encrypted in the SmartConnect database.

Secure global variables will retain any value stored in them for the duration of an integration execution. If a default value is set, the global variable will have that value stored in it when the integration begins processing. If no default value is set, the global variable will begin as an empty string.

Once the integration has finished processing, the global variable will revert to its default value or empty string if no default value has been set.

Manage Secure Global Variables

Save Cancel

New Global Variable

Variable Name: GBL_ Add

Global Variable Defaults

Variable Name	Default Value
GBL_USERNAME	*****
→ GBL_USERPW	*****

Globals – Global Rolling Columns

Global rolling columns can be setup to allow integrations to generate a custom next document number for each record. Global rolling columns will increment by 1 for each record that is processed and can be used across multiple integrations safely.

Name	The ID of the global rolling column.
Description	The description used to help identify the global rolling column.
Next Number	The incrementing value to be initially used by the global rolling column. This will also display the current value of the next number.

It is important to leave room for the number to “roll over” as it increments. The total length of the value will never change so 0’s have to be left within the number to allow it to increment. For example, the value IMPORT0099 will generate the next number of IMPORT0100 the next time a record is processed.

Global Rolling Columns

Save

Cancel

Name

Add

Description

Next Number

Existing Global Rolling Columns

	Name	Description	NextNumber
→	CUSTOMENTRY	Custom Number Scheme 1	IMPORT00000000132
	SALESNUMBER	Sales Transaction Next Number	SCSOP0000012

Delete

Globals – Script Namespaces

The Default Script Namespaces window allows additional namespaces and DLL's to be loaded into SmartConnect for using in custom scripting windows.

Load From GAC	If the DLL is registered in the Windows GAC, then this option should be used to complete the setup.
Load From File	If the DLL is located elsewhere in a directory, this option should be used to complete the setup.
Assembly Name	Only visible if “Load from GAC” is selected. The DLL name should be entered here.
Assembly	Only visible if “Load from File” is selected. The full path to the DLL should be entered here.
Namespace(s)	The namespaces defined in the DLL loaded from the prior steps. One or more can be selected to load into the stored namespaces in SmartConnect.
Add Selected	Adds the highlighted namespaces from the namespace list.
Remove Selected	Removes the selected namespaces from the Current Namespaces list. None of the default namespaces should be removed from the list.

Default Script Namespaces

OK Cancel

Add Namespace

☐ Load From GAC ☒ Load From File

Assembly: C:\Program Files\eOne Solutions\SmartConnect\RestSharp.dll

Namespace(s):

- Microsoft.CodeAnalysis
- RestSharp
- RestSharp.Authenticators
- RestSharp.Authenticators.OAuth
- RestSharp.Authenticators.OAuth.Extensions
- RestSharp.Deserializers
- RestSharp.Extensions

Add Selected

Current Namespaces

Assembly Path	Namespace
→ eOne.SmartConnect.Engine	eOne.SmartConnect.Engine
eOne.SmartConnect.RemoteLoader	eOne.SmartConnect.RemoteLoader
System	System
System.Data	System.Data
System.Data	System.Data.SqlClient
System	System.IO

Remove Selected

Setup – Translation Tables

The Translation Table Setup window allows different tables to be setup that contain a conversion from one value to another. When used in an integration, any incoming value that matches an existing value in the “From” column will be translated to the associated value in the “To” column.

Table Name	The ID of the translation table.
Table Description	The description used to help identify the translation table.
From	The value that is expected from the source data.
To	The value that will be output from the translation table if a match is found on the associated From value.

The screenshot shows the 'Translation Table Setup' window. At the top, there are buttons for 'Save', 'Clear', 'Delete', and 'Import'. Below these, the 'Table Name' is set to 'TRXTABLE' and the 'Table Description' is 'SOP Transaction Translations'. The main area is titled 'Translation Table' and contains a table with two columns: 'From' and 'To'. The table has 6 rows of data, with the last row 'Fulfillment Orders' highlighted and a right arrow next to it.

From	To
Quote	1
Order	2
Invoice	3
Return	4
Back Order	5
→ Fulfillment Orders	6

Setup – Integration Groups

Integration groups can be created using this window. Integrations can be assigned to existing integration groups which allow for security to be set across the groups and for filtering on integration groups in the integration list dashboard.

Integration Groups

Create

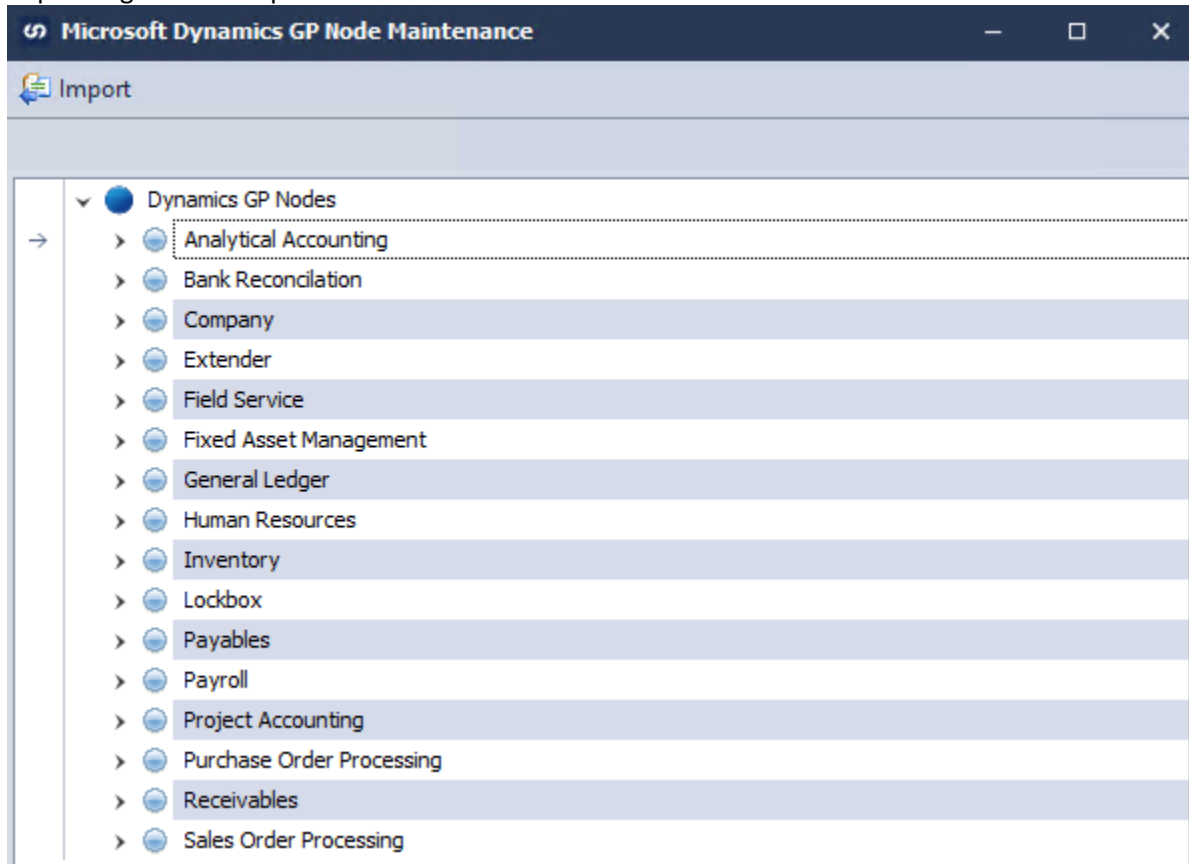
Delete

	Group Name
→	Accounting
	General
	Services
	Support
	Website

File – Additional Setup

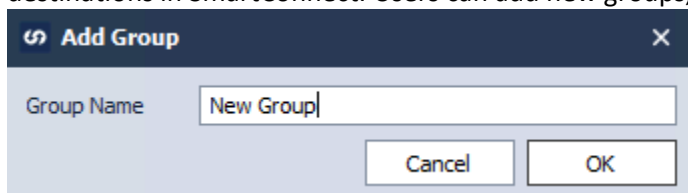
Dynamics GP – Node Maintenance

SmartConnect breaks eConnect nodes down into different groups, with each group pertaining to a different integration area. Nodes may be amended, re-grouped, created, and added to new groups depending on user requirements.



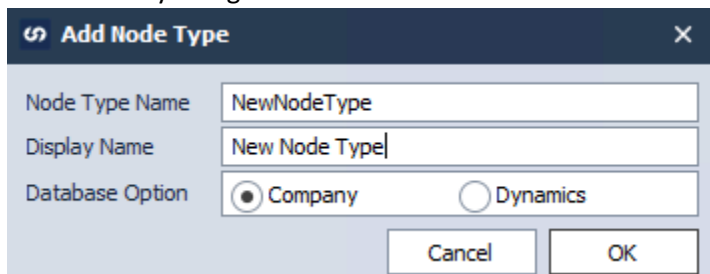
Node Groups

Node groups are used to arrange node types into functional groups. All the standard eConnect nodes have been placed into groups, and these groupings are what is used when selecting Dynamics GP destinations in SmartConnect. Users can add new groups, and re-group standard eConnect nodes.



Node Types

Node types are used to group each node group into further sub-groups. All standard eConnect nodes are automatically categorized within SmartConnect.

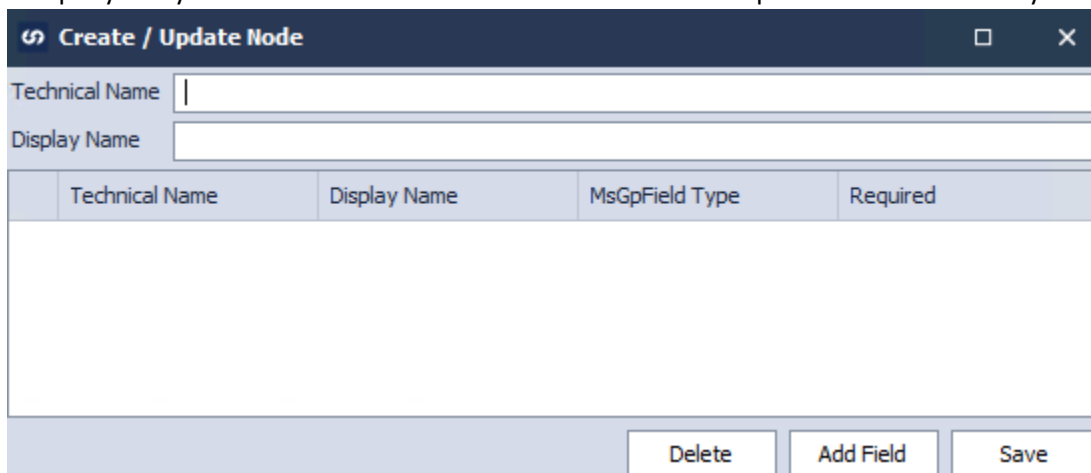


The 'Add Node Type' dialog box contains the following fields and controls:

- Node Type Name:** A text input field containing 'NewNodeType'.
- Display Name:** A text input field containing 'New Node Type'.
- Database Option:** Two radio buttons, 'Company' (selected) and 'Dynamics'.
- Buttons:** 'Cancel' and 'OK' buttons at the bottom right.

Nodes

Nodes are the objects within eConnect that are used to create / update or delete Dynamics GP transactions or reference information. Nodes may be added to allow integration with objects that eConnect does not support, or third-party products where data is stored inside the Dynamics GP company or Dynamics databases. To add a new node a stored procedure must already exist.



The 'Create / Update Node' dialog box contains the following fields and controls:

- Technical Name:** A text input field.
- Display Name:** A text input field.
- Table:** A table with 5 columns: 'Technical Name', 'Display Name', 'MsGpField Type', and 'Required'. The table is currently empty.
- Buttons:** 'Delete', 'Add Field', and 'Save' buttons at the bottom right.

List Options

Node list options within SmartConnect allow a list of selections to be predefined for a node field. This is useful in instances where a node stored procedure required a value that would be unknown by the end user. A label known to the end user can be shown and selected with the related code supplied to the stored procedure in the background. Set a field to List and click the ellipses button to define the list

items.

Field List Maintenance			
	Description	Value	Default
→	Sales Inventory	1	<input type="checkbox"/>
	Discontinued	2	<input type="checkbox"/>
	Kit	3	<input type="checkbox"/>
	Miscellaneous Charges	4	<input type="checkbox"/>
	Services	5	<input type="checkbox"/>
	Flat fee	6	<input type="checkbox"/>

Copy and Remove Nodes

Copying a node allows users to update the same node multiple times through a single map run. Right click a node and choose Copy.

Right click a node and choose Remove Node to delete a node.

File – Logs

Integration – Integration Log

Selecting the Integration Log under File>>Logs>>Integration Log or the View Log button on the integration progress window will open the View Integration Log window in SmartConnect.

View Integration Log

OK Delete Previous Next

Map

Run User

Run Data

Record Count	<input type="text"/>	Success Count	<input type="text"/>	Failure Count	<input type="text"/>
Start Time	<input type="text"/>	End Time	<input type="text"/>	Duration	<input type="text"/>

Run Detail

Web Service – Security Logs

All requests received by a SmartConnect WCF REST service that fail SmartConnect validation are automatically written to the SmartConnect service security log.

The following information is logged against each invalid request:

- Date - the date and time of the invalid request.
- Client IP address - the client endpoint address.
- Server IP address - address of the server that received the request.
- Rejection reason - the reason the request was rejected.
- Username - the username passed from the client.
- Serialized request - the request serialized to string.

View SmartConnect Web Service Security Logs

OK Refresh Delete Selected

Show All ☒

Log Date From To

Drag a column header here to group by that column

	Date	Client IP	Server	User	Rejection Reason
	12/21/2021 02...	10.1.2.6	http://qaeone.qa.eoneqa.com:5557...	jared.dux@eoneso...	Invalid Password for user jared.dux@eonesolutions.com to database b...
	12/21/2021 02...	10.1.2.6	http://qaeone.qa.eoneqa.com:5557...	jared.dux@eoneso...	Invalid Password for user jared.dux@eonesolutions.com to database b...
	12/21/2021 02...	10.1.2.6	http://qaeone.qa.eoneqa.com:5557...	jared.dux@eoneso...	Invalid Password for user jared.dux@eonesolutions.com to database b...

Count=3

Web Service – Activity Logs

Requests made to the SmartConnect web service may be logged in the SmartConnect web service activity log.

View SmartConnect Web Service Activity Logs

OK Refresh Delete Selected

Show All ☒

Status Successful ☒ Failed ☒

Integration Log Date From To

User Request Method(s)

Drag a column header here to group by that column

	Successful	Date	Integration	Request	User	Error
→	<input type="checkbox"/>	12/21/2021 02:16:57 PM	CELOOKUP	RunMap	jared.dux@eonesolutions.com	
	<input checked="" type="checkbox"/>	12/21/2021 02:16:46 PM	CELOOKUP	RunMap	jared.dux@eonesolutions.com	
	<input checked="" type="checkbox"/>	12/21/2021 02:15:30 PM		GetMapList	jared.dux@eonesolutions.com	

Count=3

Web Service – Request Logs

Requests made to the SmartConnect web service may be logged in the SmartConnect web service request log. All information pertinent to the request is stored in the log, and as such failed request may be re-run from this logging window.

View SmartConnect Web Service Request Logs

OK

Refresh

Re-Run Selected

Delete Selected

Show All

☒

Status

Successful

☒

Failed

☒

Integration

Log Date

From

To

User

Request Method(s)

Drag a column header here to group by that column

Successful

Date

Integration Id

User

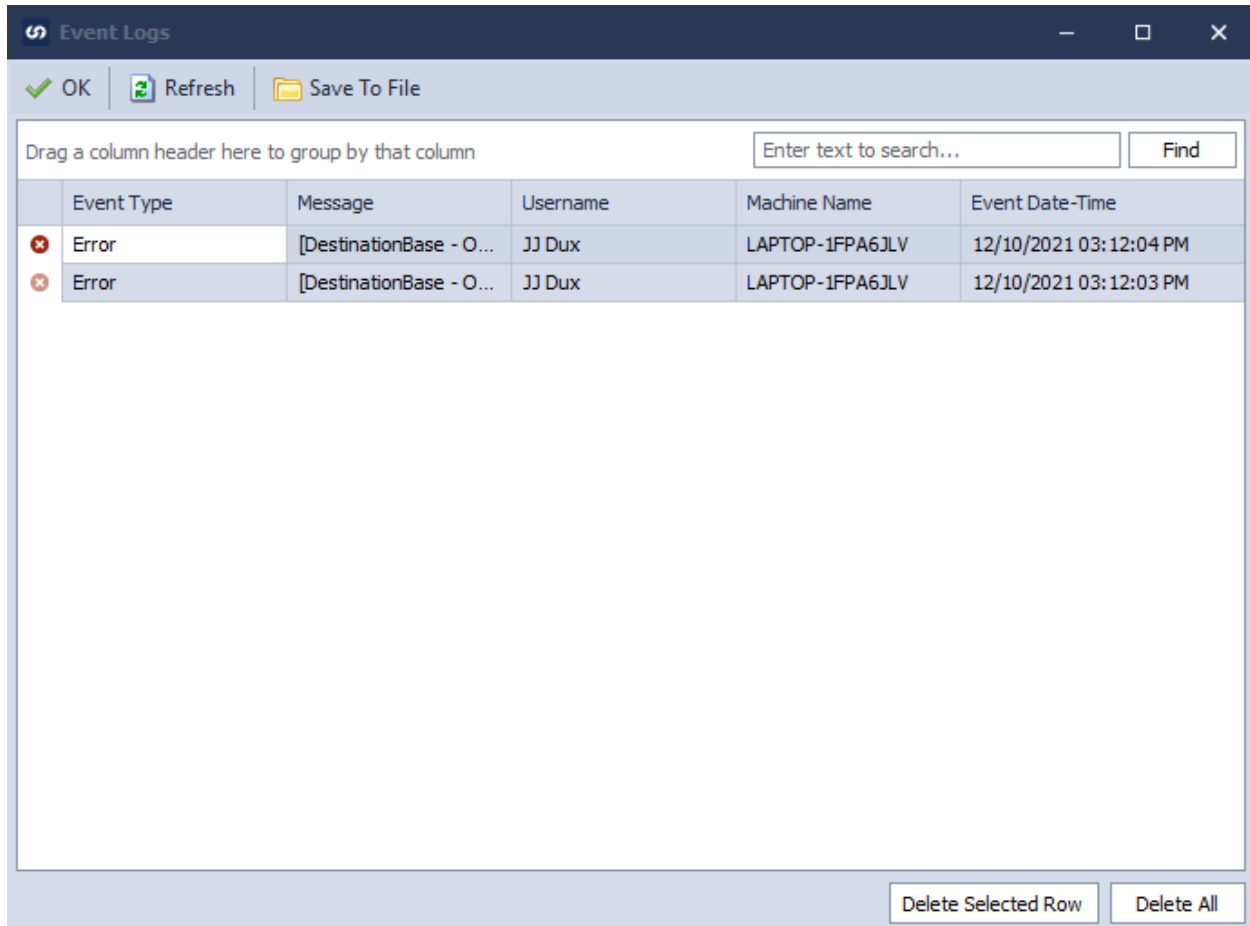
Request

<input checked="" type="checkbox"/>	12/21/2021 02:16:57 PM	CELOOKUP	jared.dux@eonesolutions.com	RunMap
-------------------------------------	------------------------	----------	-----------------------------	--------

Count=1

Event Logs – Event Logs

SmartConnect errors that are logged to the windows event log, are also logged to the SmartConnect database. This means that errors that have occurred on another server or client can be viewed centrally through the SmartConnect client. Only errors that occur in SmartConnect before SmartConnect has connected to the SmartConnect database are stored in the event log on the machine on which the error occurred.



	Event Type	Message	Username	Machine Name	Event Date-Time
✖	Error	[DestinationBase - O...	JJ Dux	LAPTOP-1FPA6JLV	12/10/2021 03:12:04 PM
✖	Error	[DestinationBase - O...	JJ Dux	LAPTOP-1FPA6JLV	12/10/2021 03:12:03 PM

Connections

Connections – Navigation – Create

Dynamics 365 Business Central ODataV4

Description	Name given to the new Connection.
Service URL	Enter your Service URL – this will be the base URL for OData services up to the /ODataV4/ portion of the URL (ie. <a href="https://api.businesscentral.dynamics.com/v2.0/<tenant-guid-here>/Production/ODataV4/">https://api.businesscentral.dynamics.com/v2.0/<tenant-guid-here>/Production/ODataV4/). Your tenant GUID will be unique for each BC tenant/instance.
Use OAuth	<p>If checked, the connection will need to be setup using the new OAuth process. Below is the link on how to setup that process. Connecting to Dynamics 365 Business Central using an OAuth Token SmartConnect (eonesolutions.com)</p> <p>If not checked, the connection will be setup using username/password. The username can be found in Business Central under “Users”, and the password will be the Web Service Access Key for that user.</p> <p>Note: OAuth will be the only option in the future.</p>
Tenant Id	The ID of the BC Tenant being used.
	This can be located within the Service URL.
Client Id	The Client (Application) Id from the application that was registered in the Azure Portal.
Client Secret	The Client Secret from the application.
	If the secret value was not saved when registering the application, then a new secret and value will need to be created.
Verify	This will start the OAuth process and you will be directed to a Microsoft login if not already logged in. If you were still logged in, you will be asked to grant permissions. Click accept to grant the permissions. If your user does not have the proper permissions, you will need to have an admin user grant the permissions.
Get Access Token	Click to finish the validation process.
Default Company	Company that will be used by default.
Refresh Metadata	Click to refresh the metadata of the BC Tenant.
eOne Redirect URL	The URL that will need to be added to the application in azure.

Dynamics 365 Business Central OData Setup

Save Cancel

Settings

Description: New Business Central ODataV4 Connection

Service Url: <https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a680-633943acee8b/Production/ODataV4/>

Use Oauth: ☒

Tenant Id: 93f1edcf-e187-4d27-a680-633943acee8b

Client Id: 0ebbf7f2-eb48-4dde-b874-fb247d337ab3

Client Secret: [Redacted]

Default Company: CRONUS US

eOne Redirect Url: <https://loginsmartconnect.azurewebsites.net/oauth/genericrestredirect>

Buttons: Verify, Get Access Token, Refresh Metadata

Dynamics 365 Business Central SOAP

Description	Name given to the new Connection.
Service URL	Enter your Service URL – this will be the base URL for Soap services up to the /WS/ portion of the URL (ie. <a href="https://api.businesscentral.dynamics.com/v2.0/<tenant-guid-here>/Production/WS/">https://api.businesscentral.dynamics.com/v2.0/<tenant-guid-here>/Production/WS/). Your tenant GUID will be unique for each BC tenant/instance.
User Name	User that has access to the BC company.
Password	Password for the User being used.
	The password is the Web Service Access Key for the user.
Default Company	Company that will be used by default.

Dynamics 365 Business Central Soap Setup

Save Cancel

Settings

Description: New Business Central SOAP Connection

Service Url: <https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a680-633943acee8b/Production/WS/>

User Name: chris.hanson

Password: [Redacted]

Default Company: CRONUS US

Dynamics 365 Customer Engagement

Description	Name given to the new Connection.
CRM Server	Enter the server address excluding the organization name. This will vary depending on which region CRM/CE is located in – ie. crm.dynamics.com, crm4.dynamics.com, crm11.dynamics.com, etc.
Use OAuth 2.0	OAuth option will be checked automatically, and it cannot be unchecked. Below is a link on how to setup the CE OAuth process. Connecting to Dynamics 365 Customer Engagement SmartConnect (eonesolutions.com)
Use Regional Discovery	Check the option if using the main “crm” region, or the “crm9” region. Those regions have a local discovery service that simplifies the connection process. If using any other region, keep the option unchecked.
Client Id	The Client (Application) Id from the application that was registered in the Azure Portal.
Client Secret	The Client Secret from the application. If the secret value was not saved when registering the application, then a new secret and value will need to be created.
Verify	This will start the OAuth process and you will be directed to a Microsoft login if not already logged in. If you were still logged in, you will be asked to grant permissions. Click accept to grant the permissions. If your user does not have the proper permissions, you will need to have an admin user grant the permissions.
Get Access Token	Click to finish the validation process.
Organization	Organization that will be used by default. Note: If you are using the “crm” or “crm9” region with the “Use Regional Discovery” checked, then the setup is complete, and you can save and close the window. If using a different region, the steps below will need to be followed to complete the OAuth process.
Verify Organization	This will start another OAuth process for the organization selected (Microsoft requires authentication at both the discovery and tenant level now) and you will be directed to a Microsoft login if not already logged in. Permissions should already be granted from the steps above so once the page refreshes you can continue within the app.
Get Organization Token	Click to complete the authentication process.
Allow Advanced Messages	Check to allow advanced messages.
Allow meta data updates	Check to allow meta data updates.
eOne Redirect Url	The URL that will need to be added to the application in azure.

The screenshot shows the 'Dynamics 365 Customer Engagement Setup' window. At the top, there are 'Save' and 'Cancel' buttons. The 'Settings' section contains the following fields and controls:

- Description:** New Dynamics 365 CE Connection
- CRM Server:** crm.dynamics.com
- Use OAuth 2.0:** ☒
- Use Regional Discovery:** ☐ (This checkbox is unchecked in this screenshot)
- Client Id:** a8cbc1a9-7df7-4d3e-a0c6-24a529d1324c
- Client Secret:** A field filled with 20 dots, with 'Verify' and 'Get Access Token' buttons below it.
- Organization:** eOne Integrated Business Solutions (dropdown menu), with 'Verify Organization' and 'Get Organization Token' buttons below it, and a 'Refresh' button to the right.
- Allow advanced messages:** ☒
- Allow meta data updates:** ☒
- eOne Redirect Url:** https://loginsmartconnect.azurewebsites.net/oauth/genericredirect

Note: The below screenshot has “Use Regional Discovery” checked since it’s the “crm” or “crm9” region. This removes the last 2 verification steps and simplifies the connection setup.

This screenshot is identical to the one above, but with the 'Use Regional Discovery' checkbox checked. The 'Verify' and 'Get Access Token' buttons under the 'Client Secret' field, and the 'Verify Organization' and 'Get Organization Token' buttons under the 'Organization' dropdown, are no longer visible, indicating they are bypassed when 'Use Regional Discovery' is enabled.

FTP Server

Description	Name given to the new Connection.
Host Name or IP Address	Enter the Host Name or IP Address on the FTP Server.
ServerType	Either FTP, FTPS, or SFTP
Port	Enter the Port.
Use Default	If checked, the default Port will be used.
	If not checked, select the Port being used.
Keep Alive	If checked, it shouldn't let the connection close.
Data Connection Type	Options include AutoPassive, PASV, PASVEX, EPSV, AutoActive, PORT, and EPRT.
Encryption Mode	This field will only be enabled for a Server Type of FTPS.
	Options include Auto, None, Implicit, and Explicit.
User Name	Username of the login user.
Password	Password of the login user.
Key File	This field will only be enabled for a Server Type of SFTP.
	Select the key file, must be formatted as openssh or ssh.com.

FTP Server Setup

Save Cancel

Settings

Description: New FTP Connection

Host name or IP Address: ftp.myfiles.com

ServerType: FTP (no encryption)

Port: 21 ☒ Use Default ☐ Keep Alive

Data Connection Type: AutoPassive

Encryption Mode:

User Name: chris.hanson

Password:

Key File:

Test

Description	Name given to the new Connection.
CRM Server	<p>Enter the default CRM server and port. Do not enter the http/https prefix.</p> <ol style="list-style-type: none"> 1. For Active Directory installations the server name is required. If the CRM server is not running on port 80 the port number should also be entered. 2. For Internet Facing Deployments, the server name should be prefaced with the discovery service alias (usually dev)
Authentication Type	Either Internet Facing Deployment or Active Directory.
Use Ssl to connect	Select "Use Ssl to connect" if https is required to connect to the CRM server. Internet Facing Deployments will automatically assume that SSL is to be used.
Use the following credentials	If a single user is to be used to connect SmartConnect and CRM check the "Use the following credentials" checkbox. (Note: Facing Deployment installations require definition of a single user to connect to CRM)
Domain	Enter the AD domain of the user to be used to connect to CRM.
Username	Enter the username to be used to connect to CRM. (Note: if nonstandard ports have been used for an IFD installation, the full username may be required to connect to CRM e.g. administrator@dev.eonesolutions.com)
Password	Enter the password to be used to connect to CRM.
Organization	<p>Select the Refresh button to retrieve the list of CRM organizations.</p> <p>Select the default organization.</p>
Service Url	The Service Url will populate automatically and is read only.
Metadata Url	The Metadata Url will populate automatically and is read only.
Allow advanced messages	If users are allowed to use the advanced messaging for CRM within SmartConnect, select the Allow advanced messages checkbox.
Allow meta data updates	If users are allowed to update meta data information within CRM, select the Allow meta data updates checkbox.

Microsoft Dynamics CRM Setup

Save

Cancel

Settings

Description

New CRM Connection

CRM Server

crm.eonesolutions.com

Authentication Type

Internet Facing Deployment

☒ Use Ssl to connect

☒ Use the following credentials

Domain

eone

Username

chris.hanson

Password

Organization

eOne Solutions

Refresh

Service Url

https://crm.eonesolutions.com/eOneSolutions/XRMServices/2011/Orga...

Metadata Url

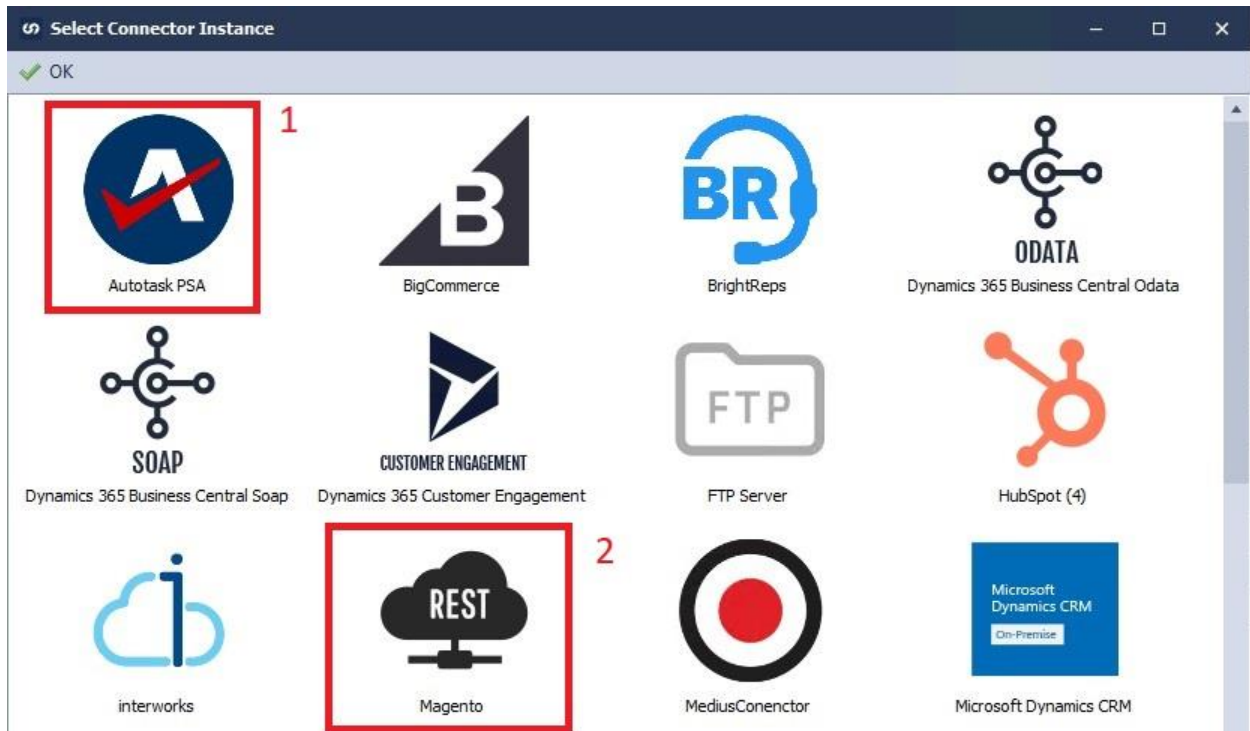
https://crm.eonesolutions.com/eOneSolutions/XRMServices/2011/Orga...

☐ Allow advanced messages

☐ Allow meta data updates

Generic REST Instance

Configure a REST Service instance utilizing one of the REST Service Definitions configured on the 'Maintenance' tab. If an image was defined on the REST Service Definition, the image will display in the list as shown on Option 1. If an image was not defined on the REST Service Definition, it will display with a generic image as shown on Option 2.



Generic REST Instance – Instructions

If Install instructions were defined in the REST Service Definition, they will display here.

Rest Service	Read-only name of the REST Service Definition being used.
Name	A friendly name for this Connector Instance.

The screenshot shows a window titled "Generic REST Instance Setup" with a close button (X) in the top right corner. Below the title bar is a toolbar with "Save" and "Cancel" buttons. The main area is divided into two tabs: "Settings" and "Instructions".

Settings Tab:

- Rest Service:** A dropdown menu showing "HubSpot (4)".
- Name:** A text input field containing "HubSpot Production".

Instructions Tab:

Welcome to the HubSpot REST Connector for SmartConnect.

The connector was built using v2 and v3 web services.

The official documentation for the v2 API can be found [here](#).

The official documentation for v3 API can be found [here](#).

Authentication

This connector will use OAuth 2.0 authentication as outlined [here](#).

1. Create a [developer account](#).
2. Create an [app in your developer account](#).
 1. Give the app a name and description
 2. Change to the "Auth" tab and enter the redirect URL for your region.
 1. To find your redirect URL, log into SmartConnect.com > System > API Settings
 2. Copy the OData Redirect Uri, it will look like: `app.smartconnect.com/Rest/OAuthInstanceRedirect`
 3. Paste this value into your HubSpot app as "Redirect URL"

Generic REST Instance – Authentication – Basic

This section is only shown if Authentication Method on the Rest Service Definition is set to 'Basic'. This method will Base64-encode the credentials and include them in an Authorization header with all requests.

User Name	System defined username.
Password	System defined password.

The screenshot shows a window titled "Generic REST Instance Setup" with a close button (X) in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main area is labeled "Settings" and contains a "Rest Service" field with the value "WooCommerce_1.0.0.0" and a "Name" field with the value "WooCommerce". Below these are three tabs: "Instructions", "Authentication", and "Variables". The "Authentication" tab is selected and shows a section titled "Basic Authentication". This section contains a "User Name" field with the value "ck_959cf354e5f73c7585cde4e526759a1f3cd505b3" and a "Password" field filled with asterisks.

Generic REST Instance – Authentication – OAuth2

This section is only shown if Authentication Method on the Rest Service Definition is set to 'OAuth2'

Client Id	System defined client id variable that can be mapped in the OAuth request.
Client Secret	System defined client secret variable that can be mapped in the OAuth request.
Scope	System defined scope variable that can be mapped in the OAuth request.
Authorize	Attempt to retrieve an access token.
Refresh Access Token	Attempt to refresh the access token.

The screenshot shows a window titled "Generic REST Instance Setup" with a close button (X) in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main area is divided into tabs: "Instructions", "Authentication", and "Variables". The "Authentication" tab is selected, showing the "OAuth2 Authentication" section. This section contains three input fields: "Client Id" with the value "b02c8d8c-1433-4c2b-97eb-6b859ef83990", "Client Secret" with a masked value "*****", and "Scope" with the value "contacts oauth integration-sync tickets e-commerce accounting". At the bottom right of the "Authentication" section are two buttons: "Authorize" and "Refresh Access Token".

Settings	
Rest Service	HubSpot (4)
Name	HubSpot Production
OAuth2 Authentication	
Client Id	b02c8d8c-1433-4c2b-97eb-6b859ef83990
Client Secret	*****
Scope	contacts oauth integration-sync tickets e-commerce accounting
<div>Authorize Refresh Access Token</div>	

Generic REST Instance – Authentication – Exchange Token

This section is only shown if Authentication Method on the Rest Service Definition is set to 'Exchange Token'

User Name	System defined username variable that can be mapped in exchange request.
Password	System defined password variable that can be mapped in exchange request.
Connect	Attempt to retrieve initial access token.

The screenshot shows a window titled "Generic REST Instance Setup" with a close button (X) in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main area is labeled "Settings" and contains two tabs: "Instructions" and "Authentication". The "Authentication" tab is selected and shows a section titled "Token Authentication". Within this section, there are two input fields: "User Name" with the value "ethan.sorenson" and "Password" with the value "*****". A "Connect" button is located at the bottom right of the "Token Authentication" section.

Rest Service	MediusConenctor
Name	Medius Sandbox
Token Authentication	
User Name	ethan.sorenson
Password	*****
<button>Connect</button>	

Generic REST Instance – Headers

This section is only shown if connector level headers are defined in the Rest Service Definition.

Name	The name of the header as outlined in the REST API documentation.
Description	A friendly description for the header.
Value	The value to be used by the header.

The screenshot shows the 'Generic REST Instance Setup' dialog box with the 'Headers' tab selected. The 'Rest Service' field is set to 'Procore' and the 'Name' field is also 'Procore'. The 'Headers' tab is active, showing a table with one header entry: 'Procore-Company-Id' with a value of '31153'.

Settings								
Rest Service: Procore								
Name: Procore								
Instructions	Authentication	Headers						
		<table border="1"><thead><tr><th>Name</th><th>Description</th><th>Value</th></tr></thead><tbody><tr><td>→ Procore-Company-Id</td><td>Procore-Company-Id</td><td>31153</td></tr></tbody></table>	Name	Description	Value	→ Procore-Company-Id	Procore-Company-Id	31153
Name	Description	Value						
→ Procore-Company-Id	Procore-Company-Id	31153						

Generic REST Instance – Parameters

This section is only shown if connector level parameters are defined in the Rest Service Definition.

Name	The name of the header as outlined in the REST API documentation.
Description	A friendly description for the header.
Value	The value to be used by the header.

The screenshot shows the 'Generic REST Instance Setup' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below them is the 'Settings' section. Under 'Settings', there are two text input fields: 'Rest Service' with the value 'Procore' and 'Name' with the value 'Procore'. Below these fields are five tabs: 'Instructions', 'Authentication', 'Headers', 'Parameters', and 'Variables'. The 'Parameters' tab is currently selected. Inside the 'Parameters' tab, there is a table with three columns: 'Name', 'Description', and 'Value'. The table contains one row with the following data:

Name	Description	Value
→ company_id	company_id	31153

Generic REST Instance – Variables

This section is only shown if variables are defined in the Rest Service Definition.

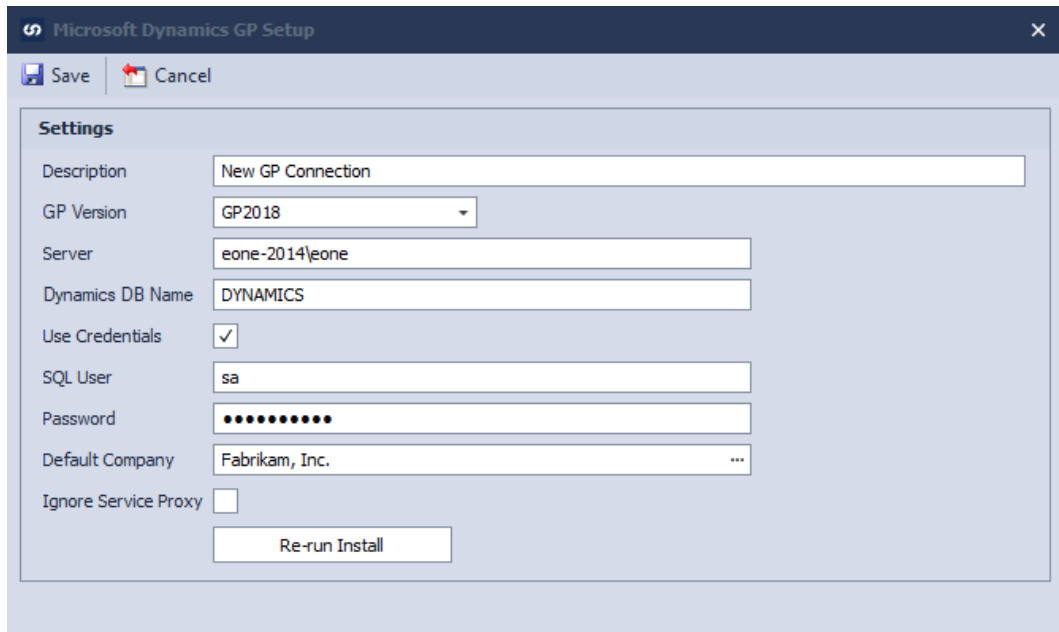
Name	The unique name for the variable.
Description	A friendly description for the variable.
Value	The default value for the variable.

The screenshot shows the 'Generic REST Instance Setup' dialog box. The 'Variables' tab is selected, displaying a table of defined variables. The table has three columns: Placeholder, Description, and Value. The variables listed are project_id (value 68693), contract_id (value 25119), and standard_cost_code_list_id (value 38517). The 'standard_cost_code_list_id' row is highlighted with a mouse cursor.

Placeholder	Description	Value
project_id	project_id	68693
contract_id	contract_id	25119
→ standard_cost_code_list_id	standard_cost_code_list_id	38517

Microsoft Dynamics GP

Description	Name given to the new Connection.
GP Version	Options include GP 2010, 2013, 2015, 2016 and 2018.
Server	SQL Server where the Dynamics Database is located.
Dynamics DB Name	Name of the Dynamics Database.
Use Credentials	If checked, entered the SQL user and password to connect to the MSSQL Server. If not checked, windows authentication will be used to connect to the GP Databases.
SQL User	SQL User used to connect to MSSQL Server.
Password	Password for the SQL User.
Default Company	Company that will be used by default.
Ignore Service Proxy	Check if the eConnect windows service should not be used to upgrade Dynamics GP. If the eConnect windows service is not used the windows credentials of the currently logged in windows user will be used to connect to Dynamics GP.
Re-run Install	Recreates the SmartConnect eOne Stored Procedures.



The screenshot shows the 'Microsoft Dynamics GP Setup' window. At the top, there are 'Save' and 'Cancel' buttons. Below them is the 'Settings' section, which contains the following fields and options:

- Description:** A text box containing 'New GP Connection'.
- GP Version:** A dropdown menu set to 'GP2018'.
- Server:** A text box containing 'eone-2014\jeone'.
- Dynamics DB Name:** A text box containing 'DYNAMICS'.
- Use Credentials:** A checked checkbox.
- SQL User:** A text box containing 'sa'.
- Password:** A text box filled with dots.
- Default Company:** A text box containing 'Fabrikam, Inc.' with a three-dot menu icon to its right.
- Ignore Service Proxy:** An unchecked checkbox.

At the bottom of the settings section is a 'Re-run Install' button.

Microsoft Dynamics NAV ODataV4

Description	Name given to the new Connection.
Service Url	Enter your Service URL in the following format: http://<server qualified name>/<Instance Name>/ODataV4.
User Name	Username of the User with access.
Password	Password for the User being used.
Default Company	Company that will be used by default.
Refresh Metadata	Click to refresh the metadata of the NAV Tenant.

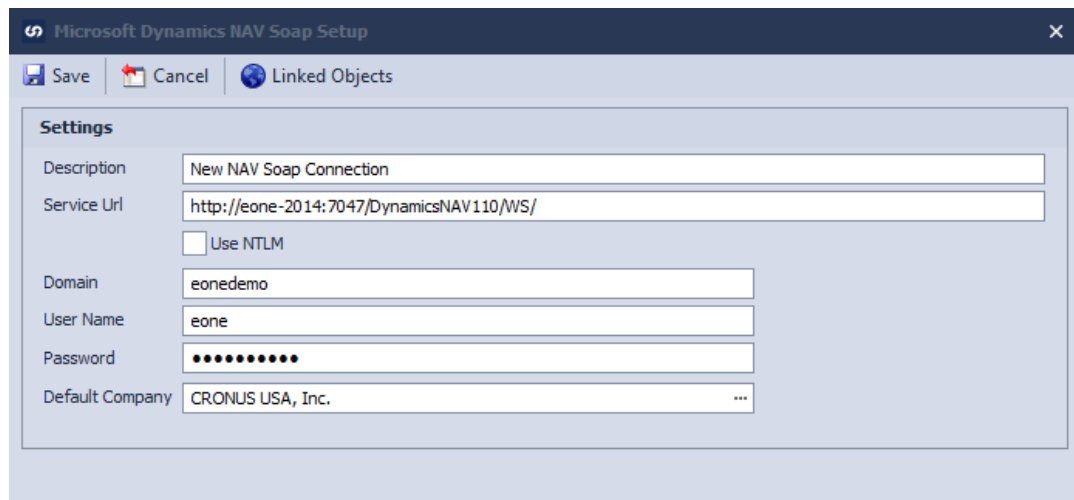
The screenshot shows the 'Microsoft Dynamics NAV Odata Setup' window. It has a title bar with a close button. Below the title bar is a ribbon with 'Save', 'Cancel', and 'Linked Objects' buttons. The main area is titled 'Settings' and contains the following fields:

- Description:** A text box containing 'New NAV OData Connection'.
- Service Url:** A text box containing 'http://eone-2014:7048/DynamicsNAV110/ODataV4'.
- User Name:** A text box containing 'EONEDEMO\EONE'.
- Password:** A text box with masked characters (dots).
- Default Company:** A dropdown menu showing 'CRONUS Canada, Inc.' with a three-dot menu icon to its right.

Below these fields is a 'Refresh Metadata' button.

Microsoft Dynamics NAV SOAP

Description	Name given to the new Connection.
Service URL	Enter your Service URL in the following format: http://<server qualified name>/<Instance Name>/WS.
Use NTLM	Needs to be enabled if the NAV instance is setup to use NTLM Auth.
Domain	Domain of the User with access.
User Name	Username of the User with access.
Password	Password for the User being used.
Default Company	Company that will be used by default.



Microsoft SQL Server

Description	Name given to the new Connection
Server	SQL Server being connected to.
Authentication	Either SQL Server Authentication or Windows Authentication. Note: If using Windows Authentication, the Login and Password fields will not be used.
Login	User used to login using SQL Server Authentication.
Password	Password of the login user.
Database	Default Database used.

The screenshot shows the 'Microsoft Sql Server Setup' window. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'Settings' section with the following fields:

- Description:** New SQL Connection
- Server:** HANSEL-LAPTOP\SQLEXPRESS
- Authentication:** Use SQL Server Authentication (dropdown menu)
- Login:** sa
- Password:** [masked with dots]
- Database:** tempdb

Below the password field, there is a green checkmark icon and the text 'Successfully connected'.

ODBC

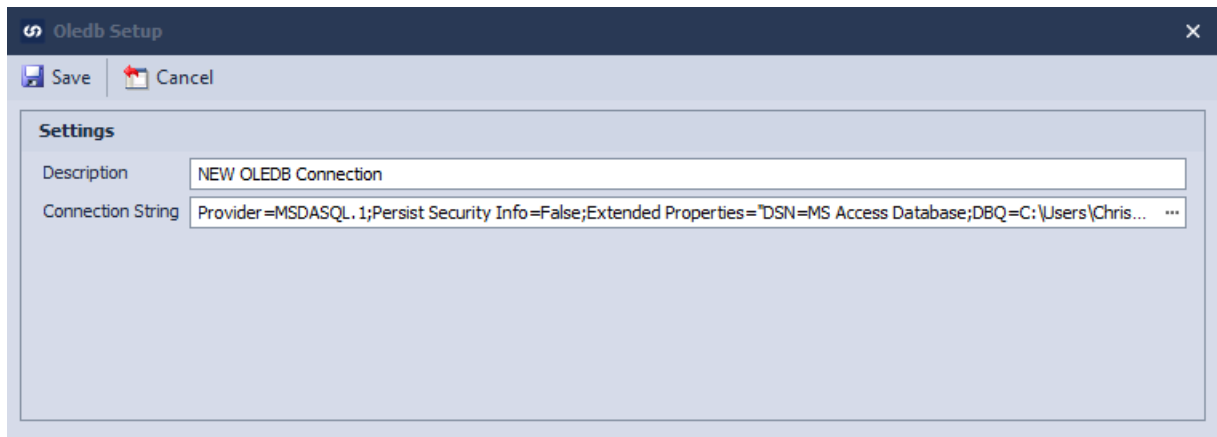
Description	Name given to the new Connection.
Connection String	Select the lookup option to define the connection string and then fill in the details required by that connection string. If a connection defined by a DSN on the computer is required select the 'Select a DSN' option.

The screenshot shows the 'Odbc Setup' window. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'Settings' section with the following fields:

- Description:** New ODBC Connection
- Connection String:** DBQ=C:\Users\ChrisHanson\OneDrive - eOne Integrated Business Solutions\Documents\Database1.accdb;Defa... (with an ellipsis button)

OleDb

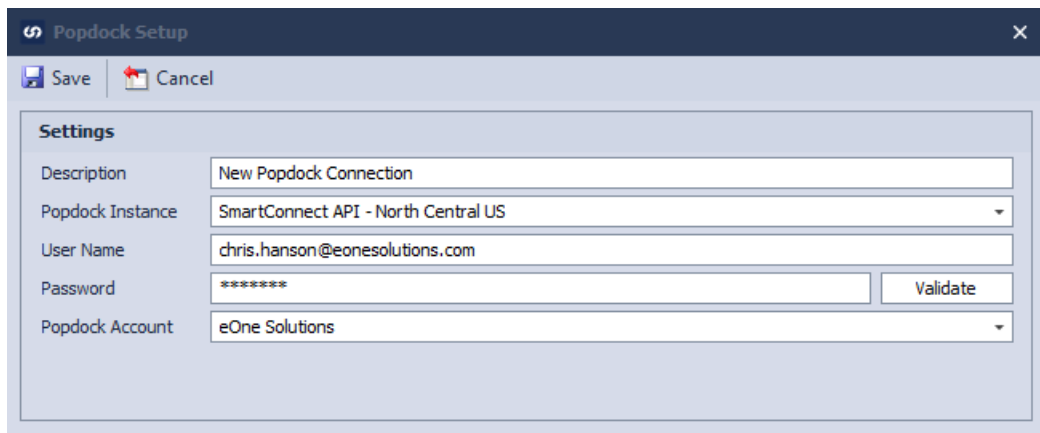
Description	Name given to the new Connection.
Connection String	Select the lookup option to define the connection string and then fill in the details required by that connection string.



The screenshot shows the 'OleDb Setup' dialog box. It has a title bar with a close button. Below the title bar are 'Save' and 'Cancel' buttons. The main area is titled 'Settings' and contains two text input fields. The first field is labeled 'Description' and contains the text 'NEW OleDb Connection'. The second field is labeled 'Connection String' and contains the text 'Provider=MSDASQL.1;Persist Security Info=False;Extended Properties='\"DSN=MS Access Database;DBQ=C:\Users\Chris...\"'. There is a small '...' button to the right of the second field.

Popdock

Description	Name given to the new Connection.
Popdock Instance	Select the Popdock Instance needed.
User Name	Enter the Username of the user with access.
Password	Enter the User's password.
Popdock Account	Select the Popdock Account you want to connect to.



The screenshot shows the 'Popdock Setup' dialog box. It has a title bar with a close button. Below the title bar are 'Save' and 'Cancel' buttons. The main area is titled 'Settings' and contains five input fields. The first field is labeled 'Description' and contains the text 'New Popdock Connection'. The second field is labeled 'Popdock Instance' and is a dropdown menu with the text 'SmartConnect API - North Central US'. The third field is labeled 'User Name' and contains the text 'chris.hanson@eonesolutions.com'. The fourth field is labeled 'Password' and contains the text '*****'. To the right of the password field is a 'Validate' button. The fifth field is labeled 'Popdock Account' and is a dropdown menu with the text 'eOne Solutions'.

Salesforce

Description	Name given to the new Connection.
Create Tests	Checking “Create Tests” will create the necessary apex tests in order to promote your sandbox objects to production.
Sandbox/Production	<p>Click the Sandbox Tab to setup a Connection to a Salesforce Sandbox Organization.</p> <p>Click the Production Tab to setup a Connection to a Salesforce Production Organization.</p> <p>Note: Both Sandbox and Production can be setup on one Connection.</p>
Default Security	Setup the Default Security to connect to the Salesforce Organization.
Administration Security	<p>If an administrative user is to be used to connect to Salesforce to perform administrative functions setup the Administration Security.</p> <p>Note: The Administration Security details will automatically be set to the Default Security details after saving the connection if the details are left empty.</p>
Username	Enter the Salesforce username.
Password	Enter the Salesforce password for the user.
Security Token	<p>Enter the Security Token for the user.</p> <p>Note: To reset the Security Token</p> <ol style="list-style-type: none">1. Log into Salesforce and click on “View Profile”.2. Click on “Settings”.3. Click “Reset My Security Token” under the “My Personal Information” tab.
Test	<p>Click the “Test” button on the Default Security setup section once all the details have been entered.</p> <p>Note: Make sure a Salesforce Service URL is entered before clicking “Test”.</p>
Salesforce Service URL	<p>The Salesforce Service URL will need to be manually entered for the Sandbox Tab. The URL will be in the following format <a href="https://<Location>.salesforce.com/services/Soap/u/48.0">https://<Location>.salesforce.com/services/Soap/u/48.0 To find the “Location”</p> <ol style="list-style-type: none">1. Log into the Production salesforce and go to Setup.2. Go to Platform Tools > Environments > Sandboxes.3. Look at the Sandbox you want to use and grab the Location value. <p>The Salesforce Service URL will be defaulted on the Production Tab.</p>
Organization	The name of the Organization being connected to.

	Note: This field will auto-populate after receiving a successful “Test” and it is read only.
Organization Type	The type of Organization being connected to.
	Note: This field will auto-populate after receiving a successful “Test” and it is read only.
Security Profiles	When setting up new objects in Salesforce (e.g., change and realtime entities) we need to give access to those objects before users can write to them or query them. If a security profile is selected on this window, then that profile will be given access to the new object. If they are not selected that profile will not have access.
Duplicate Aliases	In Salesforce you can set up two objects that have the same display name. SmartConnect would then show two objects with the same display name. In the Duplicate Aliases window, you can link a new display name that will show inside SmartConnect with the object technical name.
Reset All Tests	This will reset the tests that got created back to their default setting.

Salesforce Setup

Save Cancel

Settings

Description: New Salesforce Connection

Create Tests: ☐

Sandbox Production

Default Security

Username: chris.hanson@eonesolutions.com

Password: *****

Security Token: *****

Test

Administration Security

Username: chris.hanson@eonesolutions.com

Password: *****

Security Token: *****

Test

Salesforce Service

Salesforce Service Url: https://login.salesforce.com/services/Soap/u/48.0

Organization: eOne Solutions

Organization Type: Developer Edition

Security Profiles Duplicates Aliases Reset All Tests

Salesforce Outbound/Inbound Change Sets

Creating an outbound change set in your Salesforce Sandbox.

- Navigate to Setup>>Deploy>>Outbound Change Sets
- Create a new change set by entering a Name and Description and then Save.
- Click Add in the Change Set Components
 - Select Apex Class for the Component Type
 - Add eOne_Master_Tests, MasterRealTimeData(if using real time), and eOne_SC_RTDS1(if using real time).
- Click Add in the Change Set Components
 - Select Apex Trigger
 - Select all the eOne change and/or real time triggers you need to add to production. There can be 3 for each entity (Insert, Update, & Delete).
- Click Add in the Change Set Components
 - Select Custom Object

- Select eOneRTDS_Master1__c(if using real time) and any change tracking tables created by change tracking sources. There will be a custom tracking table for each entity you need to track changes on.
- Click View/Add Dependencies in the Change Set Components
 - Select all objects and add to change set.
- Click Add Profiles in the Profile Settings For Included Components section
 - Add a profile that will have the appropriate permissions to create the objects in production.
- Click Upload to send these objects to your Production instance.

Deploying an Inbound Change Set from your Sandbox to Production.

- Navigate to Setup>>Deploy>>Inbound Change Sets
- Click Deploy in the Change Sets Awaiting Deployment section for the change set that was just uploaded from the sandbox.
- Select Run Specified Tests and enter eOne_Master_Tests.
- Click Deploy
- This will run the tests and deploy the objects from the sandbox. You can view the progress by going to the Deployment Status page.

After successful deployment, you can now direct your integration processes to use the Production instance instead of the sandbox.

- For change source integrations- Open the integration, in the Data Source section change the Organization to Production and save the integration.
- For real time integrations- Open the integration, in the Data Source section change the Organization to Production and then click Register. Re-register the source.

Connections – Navigation – Open

Opens the selected connection for editing.

Connections – Navigation – Delete

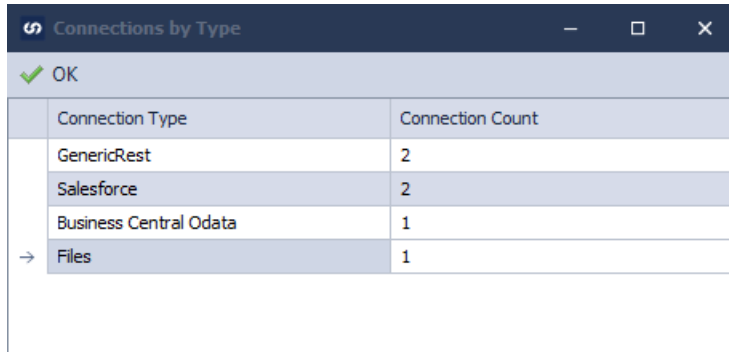
Deletes the selected connection. Connections cannot be deleted if they are in use by a data source or integration process.

Connections – Navigation – Refresh

Refreshes the list of connections to show any changes made by other users since the window was opened.

All Connections

This window will show a summary of all the connections used by the current instance of SmartConnect.



The screenshot shows a window titled "Connections by Type" with a dark blue header bar containing a refresh icon and window controls. Below the header is a light blue bar with a green checkmark and the text "OK". The main content is a table with two columns: "Connection Type" and "Connection Count". The table lists four connection types: GenericRest (2), Salesforce (2), Business Central Odata (1), and Files (1). The "Files" row is highlighted with a blue background and a right-pointing arrow in the left margin.

Connection Type	Connection Count
GenericRest	2
Salesforce	2
Business Central Odata	1
Files	1

Data Sources

Data Sources – Navigation – Create

The data source type must be selected prior to continuing with the data source setup. The 4 options are File/Folder, Bulk, Change, Real-Time.

File/Folder – Excel File

Name	Name given to the data source.
File Version	The Version of Excel being used.
	Options include Excel 2003, 2007, 2010, 2013, 2016, and 2019.
Connection	Either a local or FTP Connection.
	An FTP Connector will need to be created before that option will be available.
Excel Workbook	The Excel file being used.
Sheet	The sheet in the Excel file that will be used.
Select File at Runtime	Option to select the Excel file at Runtime.
	If checked, the Excel file will be selected during the actual run process of the integration.
	If not checked, the integration will use the Excel file set on the actual data source.
Preview Rows	How many rows the Preview button will display.

Data Source Setup: Microsoft Excel

Save Delete

Data Source Setup

Name: New Excel File

File Version: Excel2019

Connection: LOCAL OR NETWORK FOLDER

Excel Workbook: C:\Users\ChrisHanson\OneDrive - eOne Integrated Business Solutions\Document... ..

Sheet: Sheet1\$

Select File at Runtime: ☒

Preview Rows: 10

Validate Preview

File/Folder – Excel Folder Data Source

Name	Name given to the data source.
Connection	<p>Either a local or FTP Connection.</p> <p>An FTP Connector will need to be created before that option will be available.</p>
File Type	<p>The Version of Excel being used.</p> <p>Options include Excel 2003, 2007, 2010, 2013, 2016, and 2019.</p>
Template File	<p>The template file that all other source files must match exactly.</p> <p>If a source file does not match the template file, it will not run the file.</p>
Excel Sheet	The sheet in the Template file that will be used.
Source Folder	<p>The folder where source files will be placed to be ran by the integration.</p> <p>They must match the template file.</p>
Success Folder	The folder where the files are moved to if they integrate successfully.
Failure Folder	The folder where the files are moved to if they fail to integrate.
If Source File Is Empty	<p>Option to select if the source file is empty.</p> <p>Leave file – Keeps the file in the Source Folder.</p> <p>Move to Failure – Moves the file to the Failure Folder.</p> <p>Move to Success – Moves the file to the Success Folder</p>
Allow moved files to overwrite destination files	<p>If checked, moved files will overwrite any existing files.</p> <p>If not checked, moved files will not overwrite existing files.</p>
Append date/time to moved files	<p>If checked, date/time will be appended to moved files.</p> <p>If not checked, file name will remain the same.</p>
Create Real Time Trigger	<p>If checked, a trigger will be created to run the integration anytime a file is put into the Source Folder.</p> <p>If not checked, no Realtime trigger will be created.</p>

The image shows a 'Data Source Setup: Excel Folder' window. It has a title bar with a close button. Below the title bar are 'Save' and 'Delete' buttons. The main area is titled 'Data Source Setup' and contains several fields: 'Name' (New Excel Folder Data Source), 'Connection' (LOCAL OR NETWORK FOLDER), 'File Type' (Excel2019), 'Template File' (C:\Users\jeone\Documents\Excel Worksheets\Template\TestExcelW...), 'Excel Sheet' (Sheet1\$), 'Source Folder' (C:\Users\jeone\Documents\Excel Worksheets\Source), 'Success Folder' (C:\Users\jeone\Documents\Excel Worksheets\Success\), 'Failure Folder' (C:\Users\jeone\Documents\Excel Worksheets\Failure), and 'If Source File Is Empty' (Leave File). There are also three checkboxes: 'Allow moved files to overwrite destination files' (checked), 'Append date/time to moved files' (checked), and 'Create Real Time Trigger' (unchecked). At the bottom are 'Validate' and 'Preview' buttons.

File/Folder – JSON File

Name	Name given to the data source.
Connection	Either a local or FTP Connection.
	An FTP Connector will need to be created before that option will be available.
Source Json File	The JSON file being used.
Select File at Runtime	Option to select the JSON file at Runtime.
	If checked, the JSON file will be selected during the actual run process of the integration.
	If not checked, the integration will use the JSON file set on the actual data source.
Encoding	Select the encoding format of the source file.
Select Fields	Select the fields that you want to make available from the source.

Data Source Setup: Json

Save Delete

Data Source Setup

Name: New json file

Connection: LOCAL OR NETWORK FOLDER

Source Json File: C:\Users\joneadmin\Desktop\jsonexport.json

Select File at Runtime: ☐

Encoding: UTF-8

Customer

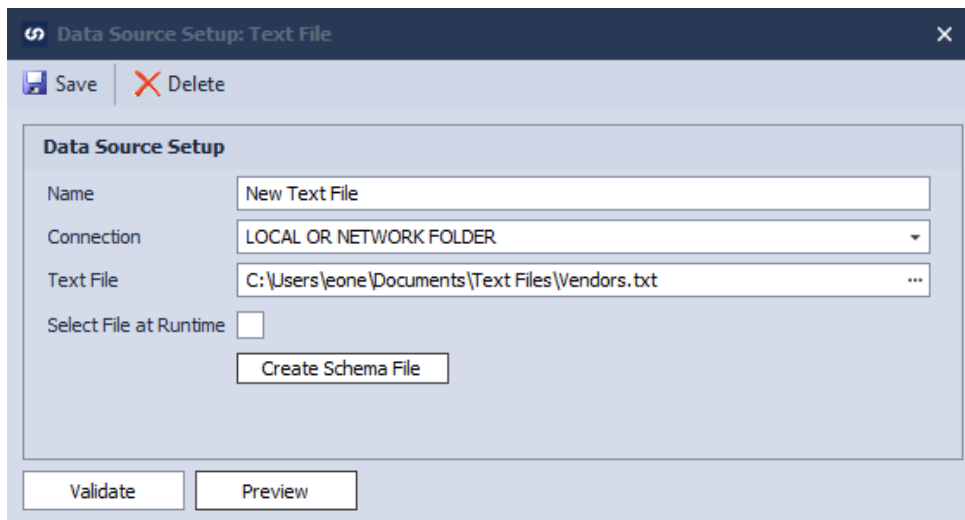
- firstname
- lastname
- emailaddress1

Select Fields

Validate Preview

File/Folder – Text File

Name	Name given to the data source.
Connection	Either a local or FTP Connection.
	An FTP Connector will need to be created before that option will be available.
Text File	The Text File being used.
Select File at Runtime	Option to select the Excel file at Runtime.
	If checked, the Excel file will be selected during the actual run process of the integration.
	If not checked, the integration will use the Excel file set on the actual data source.



Data Source Setup: Text File

Save Delete

Data Source Setup

Name: New Text File

Connection: LOCAL OR NETWORK FOLDER

Text File: C:\Users\jone\Documents\Text Files\Vendors.txt

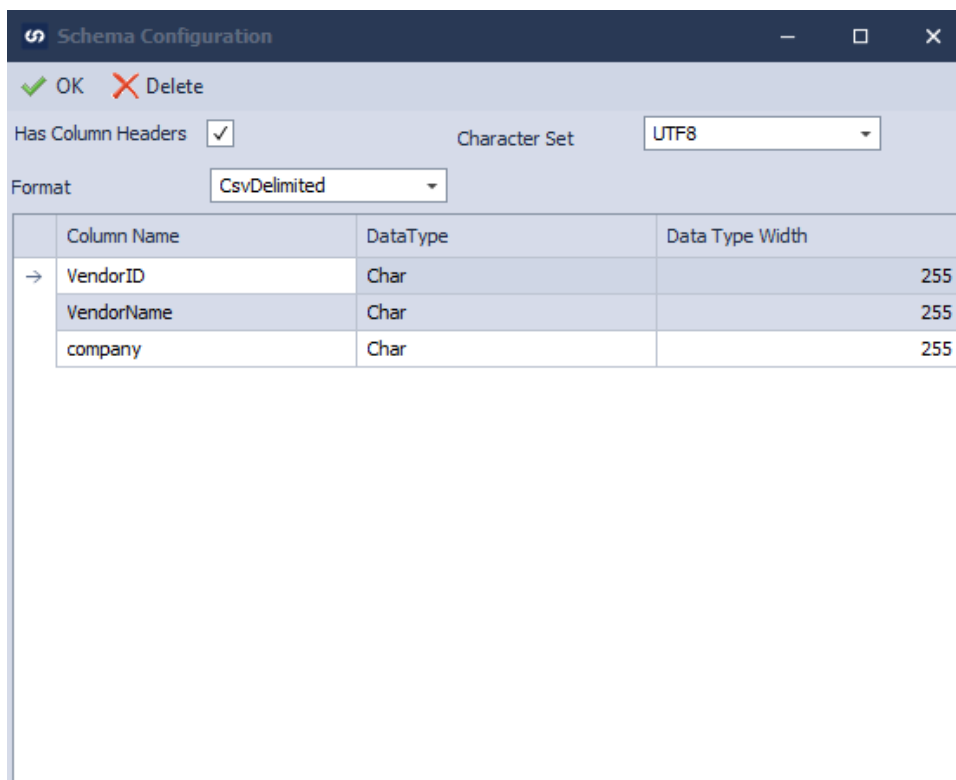
Select File at Runtime ☐

Create Schema File

Validate Preview

Create Schema File Button

Has Column Headers	If checked, the source column headers will be used.
	If not checked, columns will be named F1, F2, F3, etc.
Character Set	Either OEM, ANSI, or UTF8.
Format	Either Csv, Tab, Pipe, or Custom Delimited.



Schema Configuration

OK Delete

Has Column Headers ☒ Character Set: UTF8

Format: CsvDelimited

	Column Name	Data Type	Data Type Width
→	VendorID	Char	255
	VendorName	Char	255
	company	Char	255

File/Folder – Text Folder Data Source

Name	Name given to the data source.
Connection	Either a local or FTP Connection. An FTP Connector will need to be created before that option will be available.
Template File	The template file that all other source files must match exactly. If a source file does not match the template file, it will not run the file.
Source Folder	The folder where source files will be placed to be ran by the integration. They must match the template file.
Success Folder	The folder where the files are moved to if they integrate successfully.
Failure Folder	The folder where the files are moved to if they fail to integrate.
If Source File Is Empty	Option to select if the source file is empty. Leave file – Keeps the file in the Source Folder. Move to Failure – Moves the file to the Failure Folder. Move to Success – Moves the file to the Success Folder
Allow moved files to overwrite destination files	If checked, moved files will overwrite any existing files. If not checked, moved files will not overwrite existing files.
Append date/time to moved files	If checked, date/time will be appended to moved files. If not checked, file name will remain the same.
Create Real Time Trigger	If checked, a trigger will be created to run the integration anytime a file is put into the Source Folder. If not checked, no Realtime trigger will be created.

Data Source Setup

Name:

Connection:

Template File:

Source Folder:

Success Folder:

Failure Folder:

If Source File Is Empty:

☒ Allow moved files to overwrite destination files

☐ Append date/time to moved files

☐ Create Real Time Trigger

Create Schema File Button

Has Column Headers	If checked, the source column headers will be used.
	If not checked, columns will be named F1, F2, F3, etc.
Character Set	Either OEM, ANSI, or UTF8.
Format	Either Csv, Tab, Pipe, or Custom Delimited.


Has Column Headers ☒ Character Set


Format


	Column Name	DataType	Data Type Width
→	VendorID	Char	255
	VendorName	Char	255
	company	Char	255

File/Folder – XML Folder Data Source

Name	Name given to the data source.
Connection	Either a local or FTP Connection. An FTP Connector will need to be created before that option will be available.
Type	Either XML or XMLQuery. Selecting XMLQuery will enabled the XML Transform to be used.
Template File	The template file that all other source files must match exactly. If a source file does not match the template file, it will not run the file.
XML Transform	Select the XSL file being used to transform the XML.
Source Folder	The folder where source files will be placed to be ran by the integration. They must match the template file.
Success Folder	The folder where the files are moved to if they integrate successfully.
Failure Folder	The folder where the files are moved to if they fail to integrate.
If Source File Is Empty	Option to select if the source file is empty. Leave file – Keeps the file in the Source Folder. Move to Failure – Moves the file to the Failure Folder. Move to Success – Moves the file to the Success Folder
Allow moved files to overwrite destination files	If checked, moved files will overwrite any existing files. If not checked, moved files will not overwrite existing files.
Append date/time to moved files	If checked, date/time will be appended to moved files. If not checked, file name will remain the same.
Create Real Time Trigger	Not an option for XML Folder Sources.

 Data Source Setup: Xml Folder

 Save

 Delete

Data Source Setup

Name

New XML Folder Data Source

Connection

LOCAL OR NETWORK FOLDER

Type

Xml

Template File

C:\Users\jone\Documents\XML Files\template\XMLtest.xml

Xml Transform

Source Folder

C:\Users\jone\Documents\XML Files\Source

Success Folder

C:\Users\jone\Documents\XML Files\Success

Failure Folder

C:\Users\jone\Documents\XML Files\Failure

If Source File Is Empty

Leave File

☒ Allow moved files to overwrite destination files

☒ Append date/time to moved files

☐ Create Real Time Trigger

Validate

Preview

File/Folder – XML Query

Name	Name given to the data source.
Connection	Either a local or FTP Connection. An FTP Connector will need to be created before that option will be available.
Source XML File	The XML File being used.
XSL File	XSL File used to transform the XML.
Select File at Runtime	Option to select the Excel file at Runtime. If checked, the Excel file will be selected during the actual run process of the integration. If not checked, the integration will use the Excel file set on the actual data source.
Include Attributes as Columns	Select “Include attributes as columns” if data written as an attribute in the xml is needed within the returned data.

Data Source Setup: XML Query

Save

Delete

Linked Integrations

Data Source Setup

Name

New XML Query

Connection

LOCAL OR NETWORK FOLDER

Source Xml File

C:\Users\jeone\Documents\XML Files\XML test.xml

Xsl File

Select File at Runtime

☐

Include attributes as columns

☐

< Customers>

< Customer>

< Name>

< address1>

< city>

< state>

Validate

Preview

Bulk – Dynamics 365 Business Central ODataV4 Query

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the Company being used.
Refresh Metadata	Click to refresh BC metadata.
Services - Name	Name of the Service selected for the data source.

Click the (+) symbol to add a service to the source.

Click the (-) symbol to remove a service.

Data Source Setup: Dynamics 365 Business Central Odata Query

Save Delete Linked Integrations

Data Source Setup

Name: BC Odata Source

Instance: BC Odata

Company: CRONUS USA, Inc. Refresh Metadata

Services + -

Name
→ CustomerCard

Validate Preview Modify

OData Filter

Click the icon below to open the OData Filter window.

This is where data can be filtered down to the exact records needed.

Data Source Setup: Dynamics 365 Business Central Odata Query

Save Delete Linked Integrations

Data Source Setup

Name: BC Odata Source

Instance: BC Odata

Company: CRONUS USA, Inc. Refresh Metadata

Services

Name
→ CustomerCard ***

Validate Preview Modify

The Source columns are located on the left and can be dragged and dropped into the filter area.

Operators can be selected at the top of the filter area.

The new filter can be previewed using the Preview button at the top.

OK Cancel Clear Preview

Filter: No eq Test001

Columns	Filter	Operators and Functions
Address Edm.String		Equal =
Address_2 Edm.String		Not Equal ne
AdjCostProfit Edm.Decimal		Less Than lt
AdjProfitPct Edm.Decimal		Less Than Equal le
Allow_Late_Disc Edm.Boolean		Greater Than gt
AmountOnC... Edm.Decimal		Greater Than E... ge
AmountOnOut... Edm.Decimal		
AmountOnPos... Edm.Decimal		
AmountOnPoc... Edm.Decimal		
Application_M... Edm.String		
Balance_Due Edm.Decimal		
Balance_Due... Edm.Decimal		
Balance_LCY Edm.Decimal		
Bank_Commu... Edm.String		
Base_Calenda... Edm.String		
Bil_In_Cutto... Edm.String		
Block_Paymen... Edm.Boolean		
Blocked Edm.Boolean		
CalcCreditLim... Edm.Decimal		
Cash_Flow_P... Edm.String		
Cash_Flow_P... Edm.String		
CFOU_Purpose Edm.String		
CFOU_Selatio... Edm.String		
Check_Date... Edm.String		
Check_Date... Edm.String		
City Edm.String		
Combine_Ship... Edm.Boolean		
ContactName Edm.String		
Copy_Sel_In... Edm.String		
Country_Regi... Edm.String		
Country Edm.String		
Credit_Limit_L... Edm.Decimal		
CUPP_In Edm.String		
Currency_Code Edm.String		
Currency_Filter Edm.String		
Customized_C... Edm.String		
Customized_C... Edm.String		
Customized_C... Edm.String		
DayofMonth Edm.Decimal		

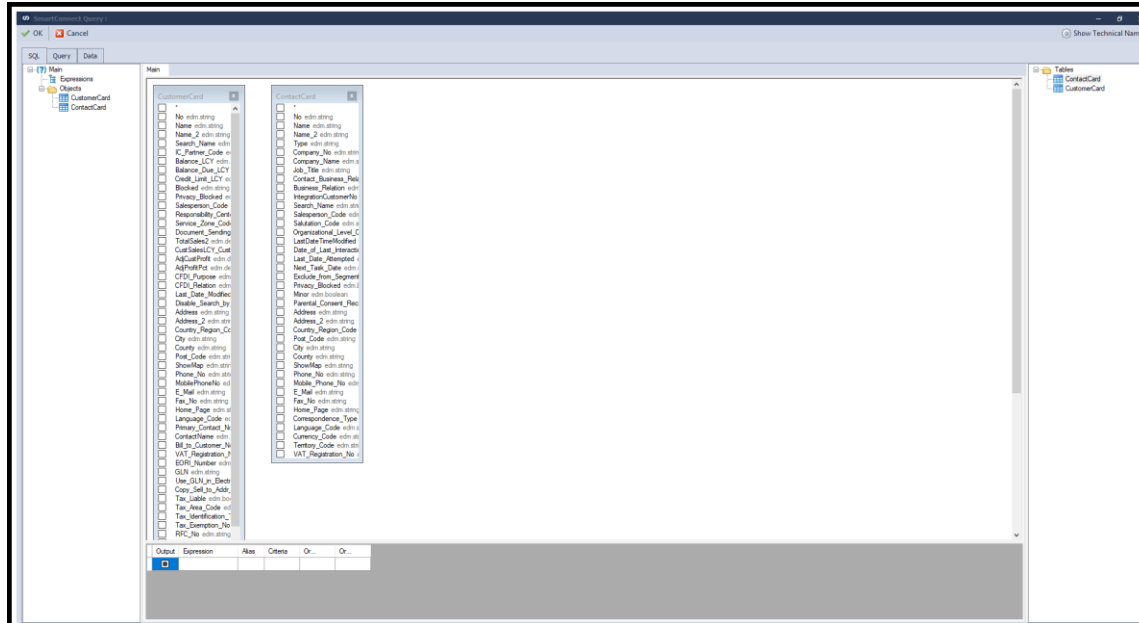
[https://api.businesscentral.dynamics.com/v2.0/93f3edcf-e387-4027-a600-633943ace8b5/Sandbox_Test/ODatas/Company\(CRONUS USA, Inc.\)/CustomerCard?\\$filter=No eq Test001](https://api.businesscentral.dynamics.com/v2.0/93f3edcf-e387-4027-a600-633943ace8b5/Sandbox_Test/ODatas/Company(CRONUS USA, Inc.)/CustomerCard?$filter=No eq Test001)

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.

NOTE: Two services will need to be selected to be able to use the “Modify” button.



See also Query Builder.

Bulk – Dynamics 365 Business Central SOAP Query

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the Company being used.
Service Name	Name of the Service selected for the data source.
	Click the (...) icon to open the Service Lookup.
Service URL	The URL from BC for the selected service.
	Note: The Service Url is read only.
Filter Fields	<ol style="list-style-type: none">1. Click the (+) to add a filter field.2. Select the field in the service that you want the filter to apply to.3. Enter the criteria that field must contain.4. Click the (-) to remove a filter field.

Data Source Setup: Dynamics 365 Business Central Soap Query

Save Delete Linked Integrations

Data Source Setup

Name: BC Soap Source

Instance: BC Soap

Company: CRONUS USA, Inc. ...

Service Name: CustomerCard ...

Service Url: https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a680-633943...

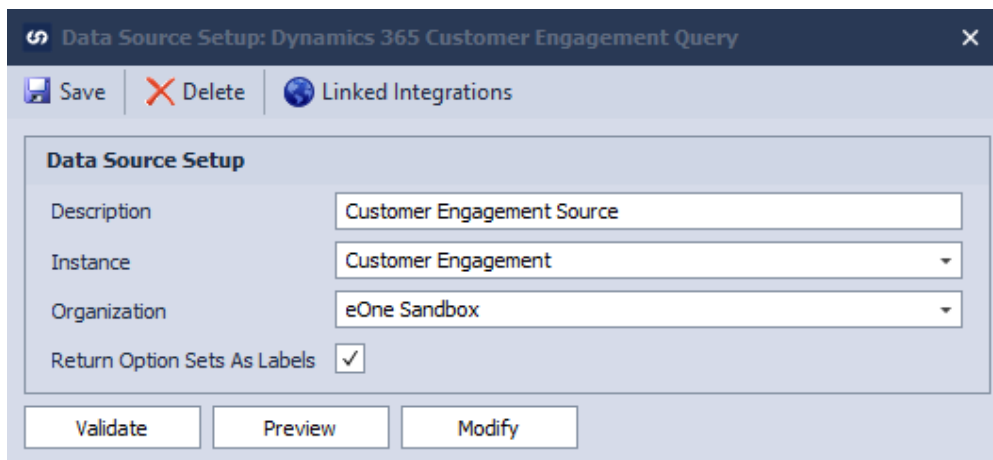
Filter Fields + -

Field	Criteria
→ No	TestFilter

Validate Preview

Bulk – Dynamics 365 Customer Engagement Query Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the Organization being used.
Return Option Sets as Labels	If checked, option set values in the query will be returned as description strings instead of an integer value. If not checked, values returned as normal.



Data Source Setup: Dynamics 365 Customer Engagement Query

Save Delete Linked Integrations

Data Source Setup

Description: Customer Engagement Source

Instance: Customer Engagement

Organization: eOne Sandbox

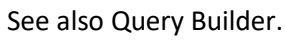
Return Option Sets As Labels: ☒

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

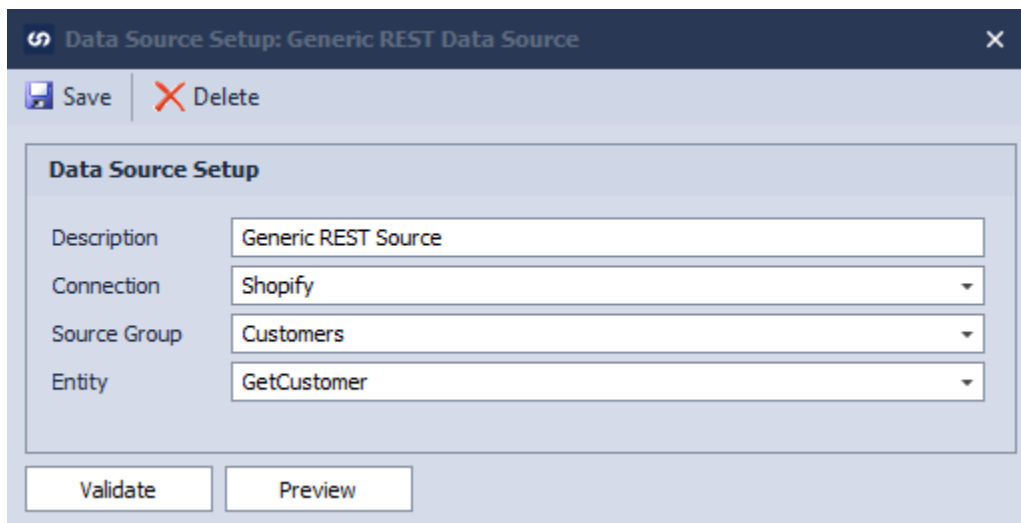
Here we can combine tables and query the data to display however needed.



See also [Query Builder](#).

Bulk – Generic REST Data Source

Description	Name given to the data source.
Connection	Select the Generic REST Connector Instance created on the Connections tab.
Source Group	Select the source group needed for the source.
Entity	Select the entity for the source.
The entities are created when setting up the Rest Service Definition on the Maintenance Tab.	



Data Source Setup: Generic REST Data Source

Save Delete

Data Source Setup

Description: Generic REST Source

Connection: Shopify



Source Group: Customers



Entity: GetCustomer

Validate Preview

Bulk – Legacy REST Bulk Data Source

Name	Name given to the data source.
REST Provider	Select the Legacy REST provider setup under File > Additional Setup > Service Providers.
Method Group	Select the Method Group for the source
Method	Select the Method for the source.
Parameters	Enter any parameter values that will be used.

 Data Source Setup: REST Service Query 

 Save  Delete

Data Source Setup

Name

Legacy REST Source

REST Provider

Shopify

...

Method Group

Customers

...

Method

Get All Customers

...

Parameters

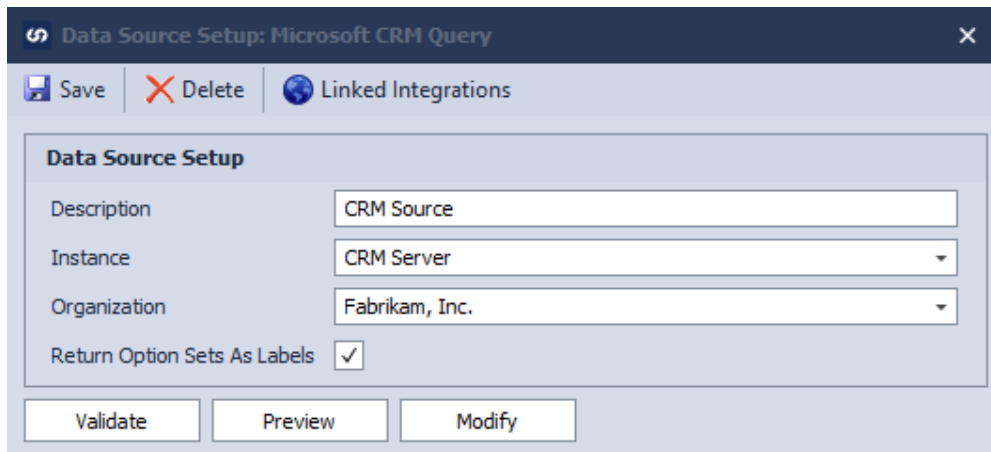
	Parameter Name	Parameter Value
→	Store Prefix	Test Store

Validate

Preview

Bulk – Microsoft Dynamics CRM Query Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the Organization being used.
Return Option Sets as Labels	If checked, option set values in the query will be returned as description strings instead of an integer value. If not checked, values returned as normal.



Data Source Setup: Microsoft CRM Query

Save Delete Linked Integrations

Data Source Setup

Description CRM Source

Instance CRM Server

Organization Fabrikam, Inc.

Return Option Sets As Labels ☒

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.

Bulk – Microsoft Dynamics GP Extender Query

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Database	Select the GP Database being used.
Extender Type	Either Window or Form
Extender ID	Select the Extender ID.

Data Source Setup: Dynamics GP Extender Query

Save Delete Linked Integrations

Data Source Setup

Description: GP Extender Source

Instance: Microsoft GP

Database: Fabrikam, Inc.

Extender Type: Form

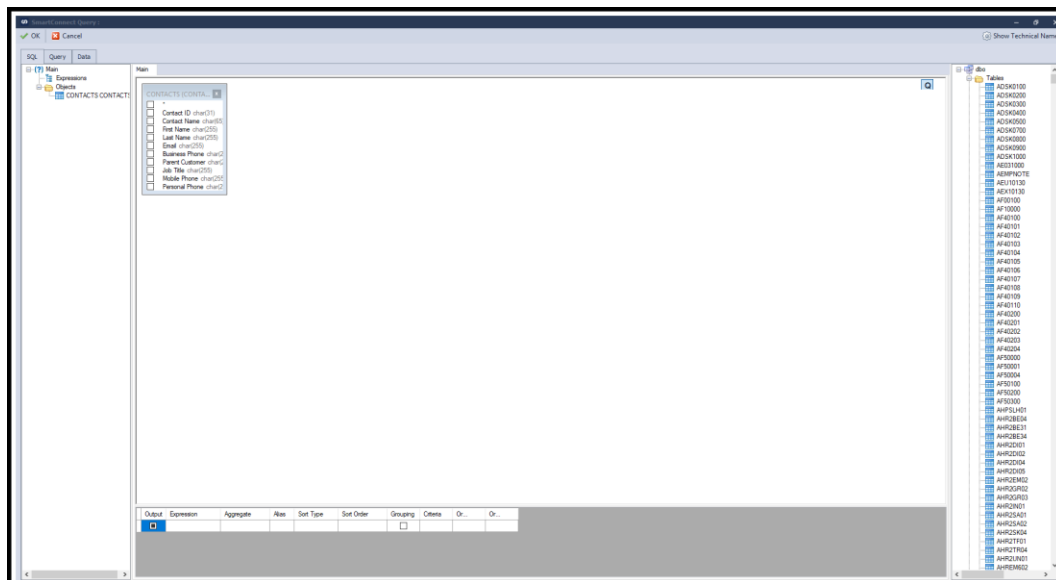
Extender ID: Contacts

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.

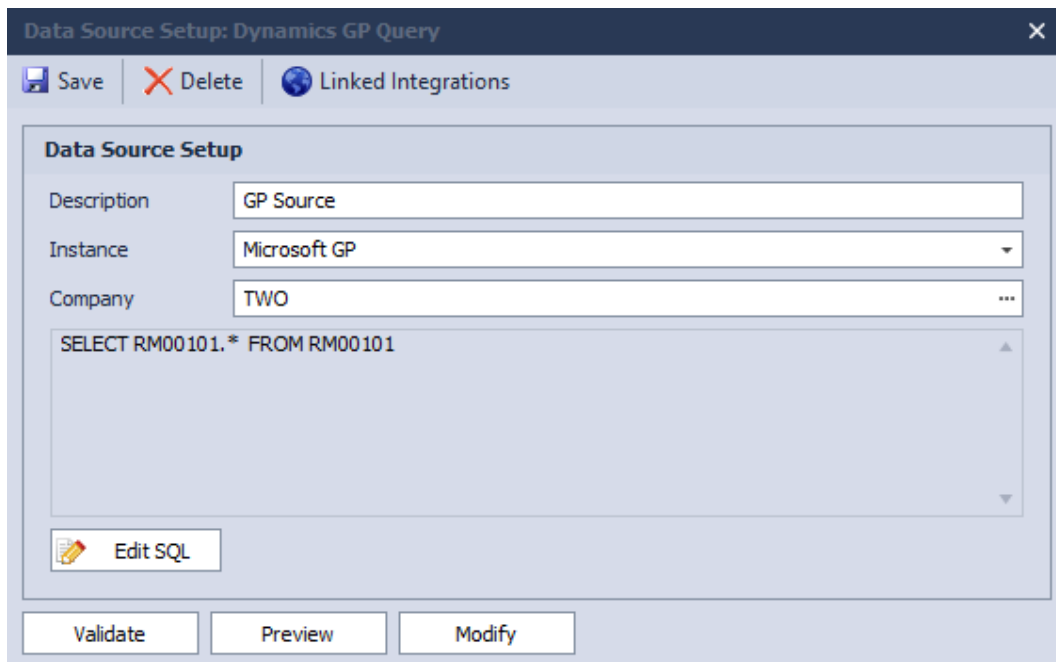


See also Query Builder.

Bulk – Microsoft Dynamics GP Query

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the Company being used.
Edit SQL	Click Edit SQL to manually enter or edit a query for the data source.

Note: The query will automatically get created when using the Query Builder. Click “Modify” to open the Query Builder.



Data Source Setup: Dynamics GP Query

Save Delete Linked Integrations

Data Source Setup

Description: GP Source

Instance: Microsoft GP

Company: TWO

SELECT RM00101.* FROM RM00101

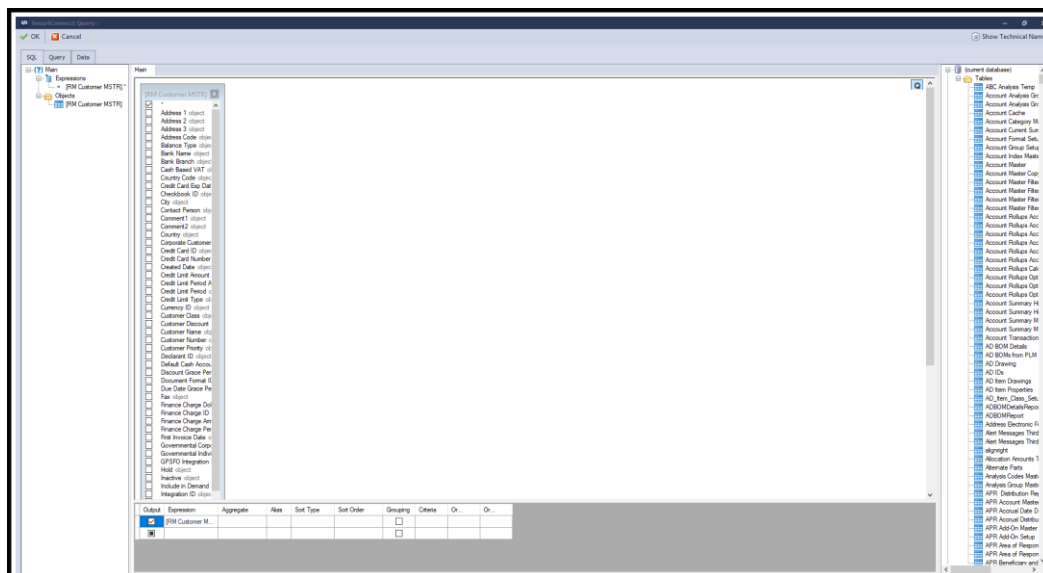
Edit SQL

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.



See also [Query Builder](#).

Bulk – Microsoft Dynamics NAV ODataV4 Query

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the Company being used.
Refresh Metadata	Click to refresh the metadata.
Services - Name	Name of the Service selected for the data source.
	Click the (+) symbol to add a service to the source.
	Click the (-) symbol to remove a service.

Data Source Setup: Microsoft Dynamics NAV Odata Query

Save Delete Linked Integrations

Data Source Setup

Name: NAV OData Source

Instance: NAV OData

Company: CRONUS USA, Inc. Refresh Metadata

Services + -

	Name
→	Customer_Card

Validate Preview Modify

OData Filter

Click the icon below to open the OData Filter window.

This is where data can be filtered down to the exact records needed.

Data Source Setup: Microsoft Dynamics NAV Odata Query

Save Delete Linked Integrations

Data Source Setup

Name: NAV OData Source

Instance: NAV OData

Company: CRONUS USA, Inc. Refresh Metadata

Services + -

Name
→ Customer_Card ***

Validate Preview Modify

The Source columns are located on the left and can be dragged and dropped into the filter area.

Operators can be selected at the top of the filter area.

The new filter can be previewed using the Preview button at the top.

OK Cancel Clear Preview

Columns: Address Edm.String, Address_2 Edm.String, AdjCostProfit Edm.Decimal, AdjProfit Edm.Decimal, Allow_Live_Disc Edm.Boolean, AmountOnCr... Edm.Decimal, AmountOnOut... Edm.Decimal, AmountOnOut... Edm.Decimal, AmountOnInPr... Edm.Decimal, Application_M... Edm.String, Balance_Due Edm.Decimal, Balance_Due Edm.Decimal, Balance_CT Edm.Decimal, Bank_Commu... Edm.String, Bank_Calcula... Edm.String, Bill_To_Custo... Edm.String, Block_Paymen... Edm.Boolean, Blocked Edm.String, CalcCreditLim... Edm.Decimal, Cash_Flow_P... Edm.String, CPOI_Purpose Edm.String, CPOI_Station Edm.String, Check_Debr... Edm.String, Check_Debr... Edm.String, City Edm.String, Combine_Shp... Edm.Boolean, ContactName Edm.String, Copy_Sel_To... Edm.String, Country_Reg... Edm.String, Country Edm.String, Credit_Limit_L... Edm.Decimal, CUIP_No Edm.String, Currency_Code Edm.String, Currency_Pref... Edm.String, CustOnCheck... Edm.Decimal, Customer_Ple... Edm.String, Customer_Ple... Edm.String, Customer_Ple... Edm.String, CustomerMgt... Edm.Decimal, Customerized_C... Edm.String, CustSales_CT... Edm.Decimal, Date_Filter Edm.String, DayOfTheWeek... Edm.Decimal

Filter: Pre eq Test002

Operators and Functions: Operators, Global Variables, Equal, Not Equal, Not Equal, Less Than, Less Than Equal, Greater Than, Greater Than Equal

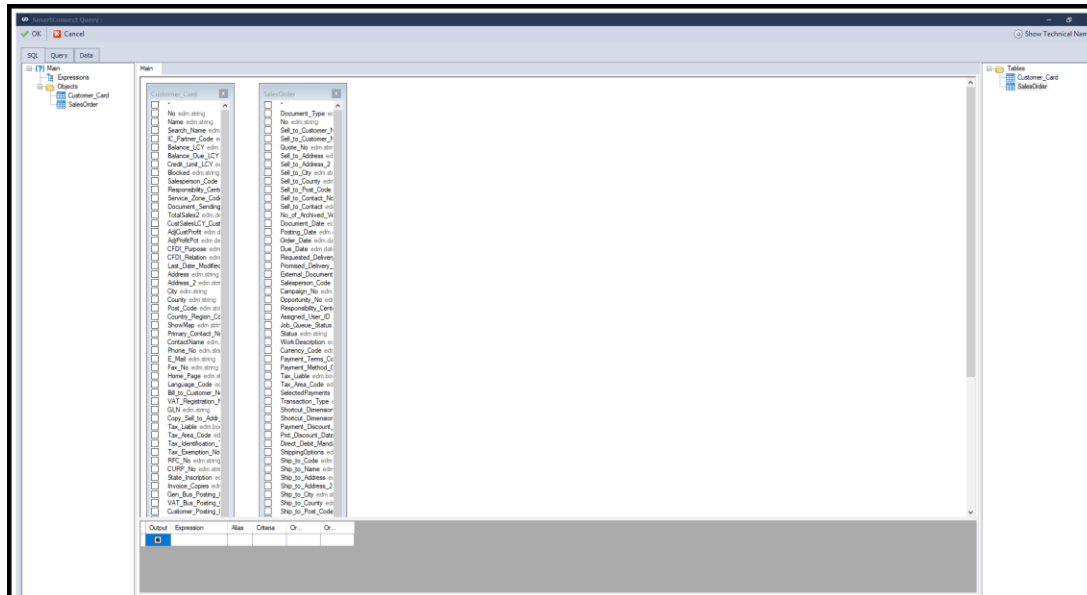
https://api.businesscentral.dynamics.com/v2.0/33f3ad1e-187-4027-a680-43943aceeb9/Sandbox_Test/Company/CRONUS USA, Inc./CustomerCard?filter=to eq Test002

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.

NOTE: Two services will need to be selected to be able to use the “Modify” button.



See also Query Builder.

Bulk – Microsoft Dynamics NAV SOAP Query

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the Company being used.
Service Name	Name of the Service selected for the data source. Click the (...) icon to open the Service Lookup.
Service URL	The URL from BC for the selected service.
Filter Fields	<ol style="list-style-type: none">1. Click the (+) to add a filter field.2. Select the field in the service that you want the filter to apply to.3. Enter the criteria that field must contain.4. Click the (-) to remove a filter field.

Data Source Setup: Microsoft Dynamics NAV Soap Query

Save Delete Linked Integrations

Data Source Setup

Name: NAV Soap Source

Instance: NAV Soap

Company: CRONUS USA, Inc. ...

Service Name: Customer_Card ...

Service Url: http://eone-2014:7047/DynamicsNAV110/WS/Page/Customer_Card

Filter Fields + -

Field	Criteria
-------	----------

Validate Preview

Bulk – MSSQL Query Data Source

Name	Name given to the data source.
Connection	Select the Connector Instance created on the Connections tab.
Server	SQL Server setup on the Connection.
Authentication	This field will populate itself after selecting the Connection and is read only. Authentication method setup on the Connection.
Login	This field will populate itself after selecting the Connection and is read only. The login user setup on the Connection.
Database	This field will populate itself after selecting the Connection and is read only. The Default Database setup on the Connection.
Query	This field will populate itself after selecting the Connection. This field can be changed to a different database other than the default. The query used to retrieve data from the database.
Preview Rows	The query can be manually entered or created by the Query Builder. The number of rows the Preview button will display.

Data Source Setup: MSSQL Query

Save Delete Linked Integrations

Data Source Setup

Name: MSSQL Query Source

Connection: MSSQL Server

Server: eone-2014\jeone

Authentication: Use SQL Server Authentication

Login: sa

Database: TWO

Query: `SELECT [RM00101].*
FROM [RM00101]`

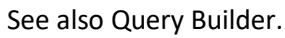
Preview Rows: 10

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.



Bulk – Multi Data Source

Name	Name given to the data source.
Linked Data Sources	Add two or more existing data sources that can be joined using the + button.
Data Table Name Field	Required field – user defined name for each data source added to the multi data source.
Validate	Validates the multi data source is setup correctly.
Preview	Previews data from joined sources.
Modify	Opens the Query Builder to allow joining the sources and select fields. See Query Builder section for details on using the Query Builder.
Edit SQL	Manually edit SQL query if needed.

Data Source Setup: Multi Data Source

Save Delete

Data Source Setup

Name: New Multi Source

Linked Data Sources + -

Drag a column header here to group by that column

Data Source Name	Data Source Type	Data Table Name
New json file	Json File	SampleCustomers
→ shopifycustomers	Text File	ShopifyCustomers

```
SELECT SampleCustomers.*, ShopifyCustomers.*
FROM SampleCustomers INNER JOIN
ShopifyCustomers ON SampleCustomers.emailaddress1 = ShopifyCustomers.email
```

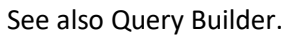
Edit SQL

Validate Preview Modify

Modify Button

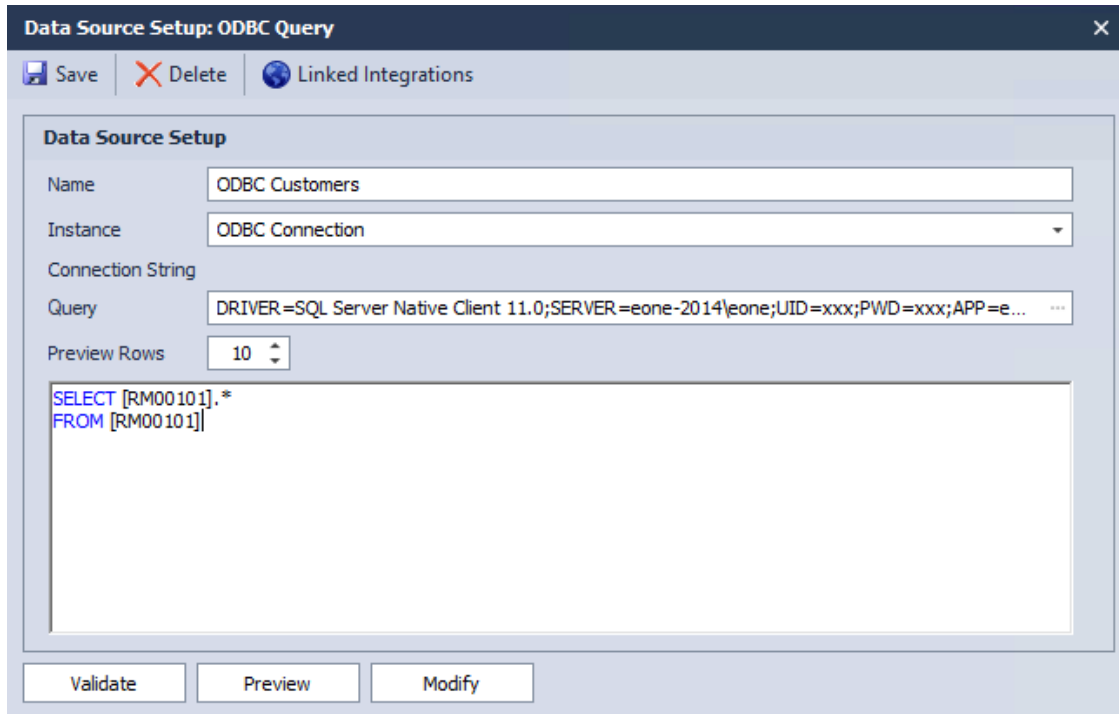
Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.



Bulk – ODBC Query Data Source

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Connection String	The Connection String Query from the ODBC Connection.
	This field will automatically populate from the Connection.
Preview Rows	How many rows the Preview button will display.



Data Source Setup: ODBC Query

Save Delete Linked Integrations

Data Source Setup

Name: ODBC Customers

Instance: ODBC Connection

Connection String: DRIVER=SQL Server Native Client 11.0;SERVER=eone-2014\jone;UID=xxx;PWD=xxx;APP=e...

Preview Rows: 10

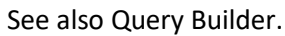
SELECT [RM00101].*
FROM [RM00101]

Validate Preview Modify

Modify Button

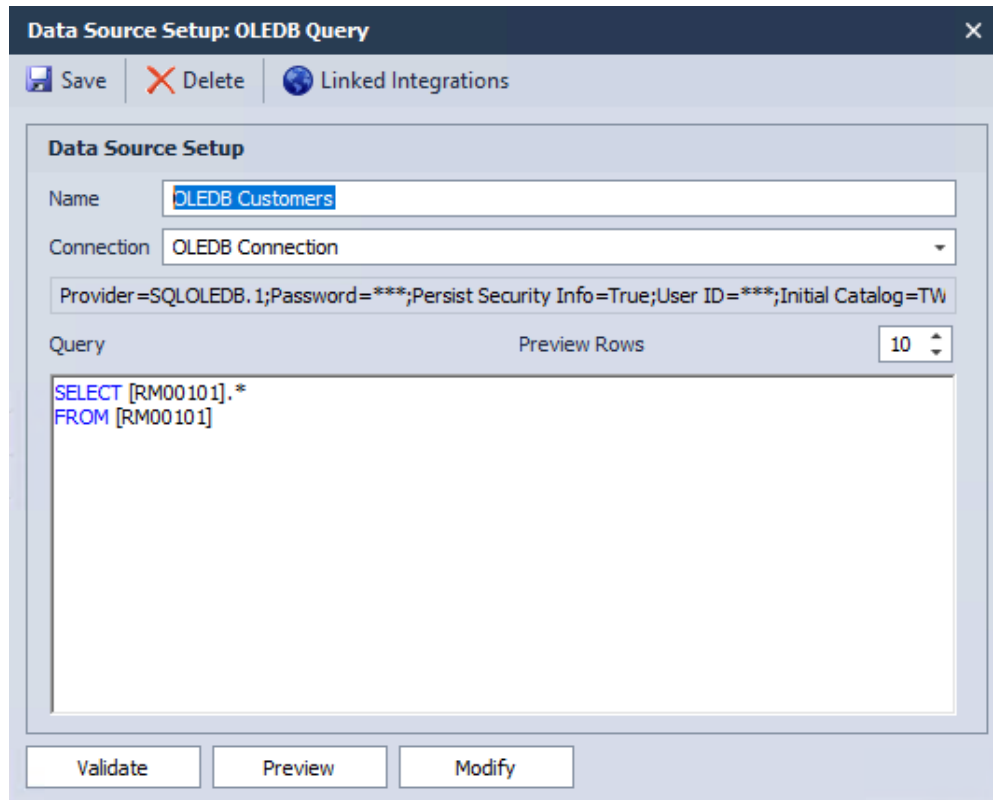
Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.



Bulk – OLEDB Query Data Source

Name	Name given to the data source.
Connection	Select the Connector Instance created on the Connections tab.
Preview Rows	How many rows the Preview button will display.
Query	Query for the data source created with the Query Builder.



Data Source Setup: OLEDB Query

Save Delete Linked Integrations

Data Source Setup

Name: OLEDB Customers

Connection: OLEDB Connection

Provider=SQLOLEDB.1;Password=***;Persist Security Info=True;User ID=***;Initial Catalog=TW

Query: SELECT [RM00101].*
FROM [RM00101]

Preview Rows: 10

Validate Preview Modify

Modify Button

Click the “Modify” button to open the Query Builder.

Here we can combine tables and query the data to display however needed.



See also [Query Builder](#).

Bulk – Popdock Query

Name	Name given to the data source.
Connection	Select the Connector Instance created on the Connections tab.
Validate	Click Validate to load the Popdock Connectors
Popdock Connector	Choose a connector from the Popdock account.
Company	If the Popdock connector supports companies, select a company.
Group	If the Popdock connector supports Groups, select a group.
List	Select a list for the Popdock connector.
Favorite	Choose a favorite for the Popdock list.

Data Source Setup: Popdock

Save Delete

Data Source Setup

Name: New Popdock Bulk Source

Connection: New Popdock Connection Validate

Popdock Connector: eOne Account Management (Production)

Company:

Group: Accounts

List: Active subscriptions

Favorite: Default View

Validate Preview

Bulk – Salesforce Query

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the Organization being used.
Base Entity	The Entity that the source will be using.
Query	Enter the SOQL query for the Data Source.

Data Source Setup: Salesforce Query

Save Delete

Data Source Setup

Name: New Salesforce Bulk Source

Instance: New Salesforce Connection

Organization: ☒ Sandbox ☐ Production

Base Entity: Account

Select Id, Name FROM Account

Validate Preview

Bulk – SmartList Data Source

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
SmartList Name	Select the SmartList that will be used for the source.
SmartList Favorite Name	The SmartList Favorite Name will be automatically populated.

Data Source Setup: SmartList Data Source

Save Delete Linked Integrations

Data Source Setup

Name: Smartlist Source

Instance: Microsoft GP

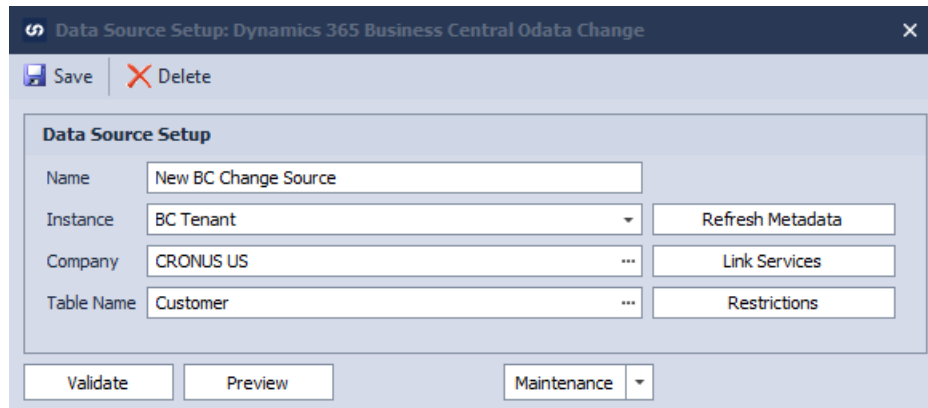
SmartList Name: Customers - *

SmartList Favorite Name: *

Validate Preview

Change – Dynamics 365 Business Central ODataV4 Change Data Source

Name	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the BC Company that will be used for the source.
Table	Select the table that will be used to track changed data.



Data Source Setup: Dynamics 365 Business Central Odata Change

Save Delete

Data Source Setup

Name: New BC Change Source

Instance: BC Tenant Refresh Metadata

Company: CRONUS US Link Services

Table Name: Customer Restrictions

Validate Preview Maintenance

Data Source Setup: Dynamics 365 Business Central ODataV4 Change – Link Services

Link service allows you to link 2 additional services to the main table. The top service will be linked to the main table with the chosen fields in the Where section. The bottom service can be linked to the main table or to the top service with the chosen fields in the bottom where section.

Change Data Source Linked Services

Save
Delete
Refresh Metadata

Service
Customer

Where
+
-

	Service Field	Source Field	Overwrite Source Val...
→	No	No_	

Service
CustomerShipToAddress

Link To
Customer

Where
+
-

	Service Field	Source Field	Overwrite Source Val...
→	Customer_No	No	

Data Source Setup: Dynamics 365 Business Central ODataV4 Change – Restrictions

Allows changes to be tracked only when the defined criteria have been met.

Change Data Source Restrictions

Save
Delete

Where
+
-

	Field	Value
→	Contact	ne "

Change – Dynamics 365 Customer Engagement Change Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the organization that will be used for the source.
Entity	Select the entity that will be used to track changes.
Return option set values as labels	Returns a sting value instead of a numeric value when enabled.

Data Source Setup: Dynamics 365 Customer Engagement Change

Save Delete

Data Source Setup

Description: NEW Dynamics 365 CE Change Source

Instance: New Dynamics 365 CE Connection

Organization: eOne Integrated Business Solutions eone

Entity: account Account

Table Name: eones_ch_account

Options

☒ Return option set values as labels

Restrict Columns ...

Validate Preview Modify Maintenance

Data Source Setup: Dynamics 365 Customer Engagement Change – Restrict Columns

Updates to a record will only be tracked when data changes for the specific fields checked here.

Change Data Source Fields

Save Cancel

Organization: eone

Entity: account

- ☒ Account Name
- ☒ Account Number
- ☒ Account Rating
- ☒ Accounting Reference
- ☒ Address 1
- ☒ Address 1: Address Type
- ☒ Address 1: City
- ☒ Address 1: Country/Region
- ☒ Address 1: County
- ☒ Address 1: Fax
- ☒ Address 1: Freight Terms
- ☒ Address 1: ID
- ☒ Address 1: Latitude

Select All Clear All

Change – Microsoft CRM Change Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the organization that will be used for the source.
Entity	Select the entity that will be used to track changes.
Return option set values as labels	Returns a sting value instead of a numeric value when enabled.

Data Source Setup: Microsoft CRM Change

Save Delete

Data Source Setup

Description: New CRM Change Source

Instance: New CRM Connection

Organization: Test Test

Entity: account Account

Table Name: eones_ch_account

Options

☒ Return option set values as labels

Restrict Columns ...

Validate Preview Modify Maintenance

Data Source Setup: Microsoft CRM Change – Restrict Columns

Updates to a record will only be tracked when data changes for the specific fields checked here.

Change Data Source Fields

Save Cancel

Organization: Test

Entity: account

☒ Account

☒ Account

☒ Account Code

☒ Account Name

☒ Account Number

☒ Account Rating

☒ Account Score

☒ Account Specialty

☒ Account Type

☒ Acumatica ISV

☒ Acumatica VAR

☒ Address 1

☒ Address 1: Address Type

Select All Clear All

Change – Microsoft Dynamics GP Change

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Product	Select the GP product that will be used for the source.
Series	Select the GP series that will be used for the source.
Table	Select the GP table that will be used for the source.
Database	Select the GP company used for the source.

Data Source Setup: Dynamics GP Change

Save Delete

Data Source Setup

Description: GP Customers

Instance: localGP

Product: Microsoft Dynamics GP

Series: Sales

Table: RM Customer MSTR RM00101

Database: Fabrikam, Inc. Restrict Columns ...

Validate Preview Modify Maintenance

Data Source Setup: Microsoft Dynamics GP Change – Restrict Columns

Updates to a record will only be tracked when data changes for the specific fields checked here.

Change Data Source Fields

Save Cancel

Product: Microsoft Dynamics GP

Series: Sales

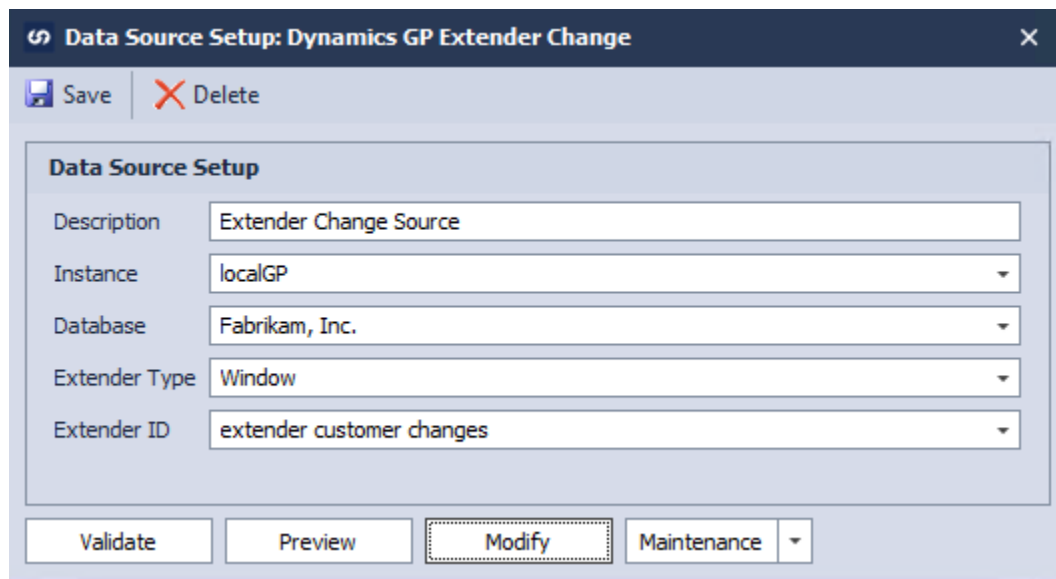
Table: RM Customer MSTR

- ☒ CUSTNMER
- ☒ CUSTNAME
- ☒ CUSTCLAS
- ☒ CPRCSTNM
- ☒ CNTCPRSIN
- ☒ STMTNAME
- ☒ SHRTNAME
- ☒ ADRSCODE
- ☒ UPSZONE
- ☒ SHIPMTHD
- ☒ TAXSCHID
- ☒ ADDRESS1
- ☒ ADDRESS2

Select All ☒

Change – Microsoft Dynamics GP Extender Change

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Database	Select the GP company database that will be used for the source.
Extender Type	Choose if the source is for an Extender Window or Form.
Extender ID	Select the Window or Form ID.



Data Source Setup: Dynamics GP Extender Change

Save Delete

Data Source Setup

Description: Extender Change Source

Instance: localGP

Database: Fabrikam, Inc.

Extender Type: Window

Extender ID: extender customer changes

Validate Preview **Modify** Maintenance

Change – Microsoft Dynamics NAV OData Change Data Source

With an on-premise instance of Microsoft Dynamics NAV we recommend using a SQL Change data source at this time. Please refer to the MSSQL Change Data source section.

Change – MSSQL Table Change Data Source

Name	Name given to the data source.
Connection	Select the Connector Instance created on the Connections tab.
Server	Read only field showing server.
Database	Select database that contains the table needed for the source.
Table	Select the Table that will be used to track changes.

Data Source Setup: MSSQL Table Change

Save Delete

Data Source Setup

Name: New SQL Change Source

Connection: New SQL Connection

Server: hansel-laptop\sqlexpress

Database: SmartConnect21_395

Table: [dbo].[ConnectorInstance]

Preview Rows: 10

Validate Preview Modify Maintenance

Change – Salesforce Change Data Source

Name	Name given to the data source.
Salesforce Instance	Select the Connector Instance created on the Connections tab.
Organization	Choose which organization changes are to be tracked in. Initially Sandbox will be used until the objects are promoted from a Sandbox instance to you production instance. See Salesforce Outbound/Inbound Change Sets to promote from Sandbox to Production.
Entity	Choose the Salesforce entity to track changes.
Check SOQL	View the SOQL query and edit if needed.

Data Source Setup: Salesforce Change

Save Delete

Data Source Setup

Name: New Salesforce Change Source

SalesForce Instance: New Salesforce Connection

Organization: ☒ Sandbox ☐ Production

SalesForce Entity: Account

Restrict Columns ... Check SOQL

Validate Preview Maintenance

Real Time – Dynamics 365 Customer Engagement Real-Time Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the organization that will be used for the source.
Entity	Select the entity that will be used to track changes.
Return option set values as labels	Returns a sting value instead of a numeric value when enabled.

Data Source Setup: Dynamics 365 Customer Engagement Real Time

Save Delete

Data Source Setup

Description: New Dynamics 365 CE Real-Time Source

Instance: New Dynamics 365 CE Connection

Organization: eOne Integrated Business Solutions

Entity: Account

Return Option Set Labels: ☒ Restrict Columns ...

Validate Preview Modify

Data Source Setup: Dynamics 365 Customer Engagement Realtime – Restrict Columns

Updates to a record will only be triggered when data changes for the specific fields checked here.

Realtime Data Source Fields

Save Cancel

Organization: D1054NAM0909979

Entity: account

☒ (Deprecated) Process Stage

☒ (Deprecated) Traversed Path

☒ Account

☒ Account Name

☒ Account Number

☒ Account Rating

☒ Address 1

☒ Address 1: Address Type

☒ Address 1: City

☒ Address 1: Country/Region

☒ Address 1: County

☒ Address 1: Fax

☒ Address 1: Freight Terms

☒ Address 1: ID

Select All Clear All

Real Time – Microsoft CRM Real-Time Data Source

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Organization	Select the organization that will be used for the source.
Entity	Select the entity that will be used for real time source.
Return option set values as labels	Returns a sting value instead of a numeric value when enabled.

Data Source Setup: Microsoft CRM Real Time

Save Delete

Data Source Setup

Description: New CRM Real-Time Source

Instance: New CRM Connection

Organization: Test

Entity: Account

Return Option Set Labels: ☒

Restrict Columns ...

Validate Preview Modify

Data Source Setup: Microsoft CRM Realtime – Restrict Columns

Updates to a record will only be triggered when data changes for the specific fields checked here.

Realtime Data Source Fields

Save Cancel

Organization: Fabrikam, Inc.

Entity: account

- ☒ Account
- ☒ Account Name
- ☒ Account Number
- ☒ Account Rating
- ☒ Address 1
- ☒ Address 1: Address Type
- ☒ Address 1: City
- ☒ Address 1: Country/Region
- ☒ Address 1: County
- ☒ Address 1: Fax
- ☒ Address 1: Freight Terms
- ☒ Address 1: ID
- ☒ Address 1: Latitude
- ☒ Address 1: Longitude

Select All Clear All

Real Time – Microsoft Dynamics GP Extender Real-Time

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Company	Select the GP company database that will be used for the source.
Extender Type	Choose if the source is for an Extender Window or Form.
Extender ID	Select the Window or Form ID.

Data Source Setup: Dynamics GP Extender Real Time

Save Delete

Data Source Setup

Description: NEW GP Extender Realtime

Instance: localGP

Company: Fabrikam, Inc.

Extender Type: Window

Extender Id: realtimewindow

Validate Preview

Real Time – Microsoft Dynamics GP Real-Time

Description	Name given to the data source.
Instance	Select the Connector Instance created on the Connections tab.
Product	Select the GP product that will be used for the source.
Series	Select the GP series that will be used for the source.
Table	Select the GP table that will be used for the source.
Companies	Select the GP companies used for the source.

Data Source Setup: Dynamics GP Real Time

Save Delete

Data Source Setup

Description: NEW GP Realtime

Instance: localGP

Product: Microsoft Dynamics GP

Series: Sales

Table: RM Customer MSTR

Companies

Validate Preview Modify

Real Time – MSSQL Table Real-Time Data Source

Name	Name given to the data source.
Connection	Select the Connector Instance created on the Connections tab.
Server	Red only field showing server.
Database	Select database that contains the table needed for the source.
Table	Select the Table.

Data Source Setup: MSSQL Real Time

Save Delete

Data Source Setup

Name: New SQL Real-Time Source

Connection: New SQL Connection

Server: hansel-laptop\\sqlexpress

Database: SmartConnect21_395

Table: [dbo].[ConnectorInstance] ...

Restrict Columns...

Validate Preview Modify

Real Time – Salesforce Real-Time Data Source

Name	Name given to the data source.
Salesforce Instance	Select the Connector Instance created on the Connections tab.
Organization	Choose which organization real time events are to be tracked in. Initially Sandbox will be used until the objects are promoted from a Sandbox instance to you production instance. See Salesforce Outbound/Inbound Change Sets to promote from Sandbox to Production.
Entity	Choose the Salesforce entity to track changes.
Check SOQL	View the SOQL query and edit if needed.

Data Source Setup: Salesforce Real-Time

Save Delete

Data Source Setup

Name: New Salesforce Real-Time Source

Instance: New Salesforce Connection

Organization: ☒ Sandbox ☐ Production

SalesForce Entity: Account

Restrict Columns ... Check SOQL

Validate Preview

Query Builder

The Query Builder information has been divided into the following topics:

- The Query Builder Window
- Adding Query Objects
- Selecting Fields
- Adding Criteria
- Joins and Links
- Grouping and Sorting
- Properties
- Sub Queries
- Unions
- Derived Tables

Query Builder Window

SQL Tab

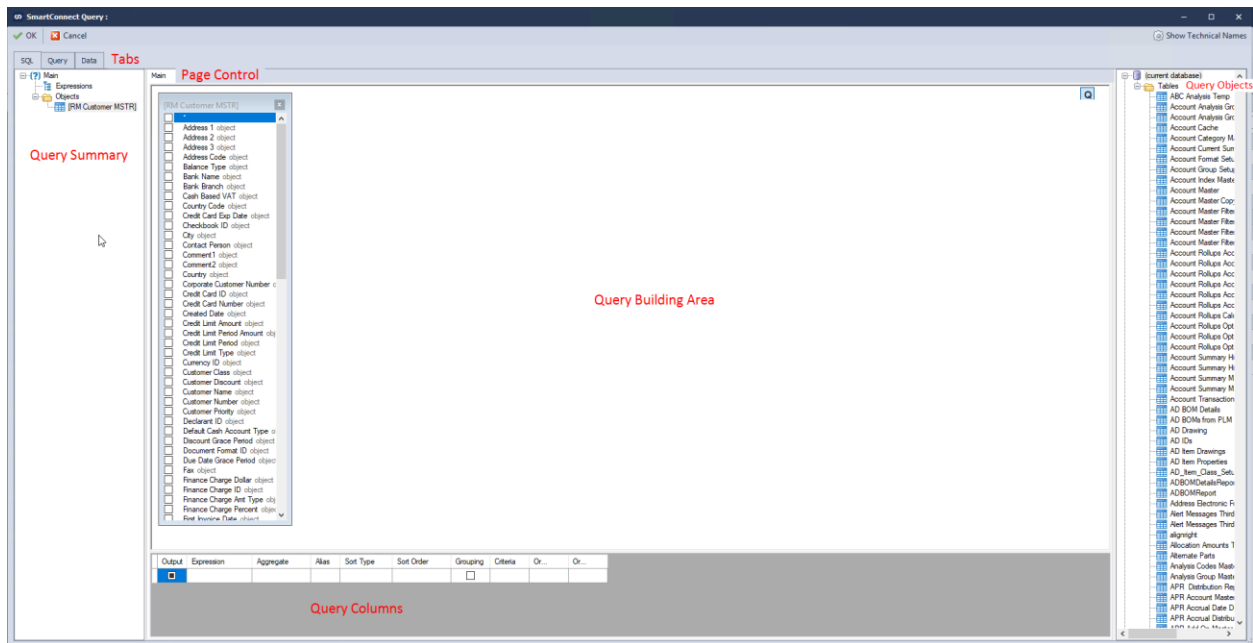
- Query Summary - the area on the left of the Query Builder window where columns, restrictions, groupings will be displayed in a summary format.
- Query Building Area- the main area where the visual representation of the query is shown. This area allows definition of source database objects and derived tables, define links between them, and configure properties of tables and links.
- Query Columns - located below the query building area. It is used to perform all the necessary operations with query output columns and expressions. Here field aliases, sorting and grouping, and selection criteria may be defined.
- Query Objects - on the right side of the Query Builder window. This area displays all the data source objects for the current connection. From here objects may be dragged onto the main query building area or doubled clicked to have them move to the query building area.
- Page Control - allows switching between the main query and any sub-queries that may have been defined.
- Union Handler - allows adding of new sub-queries.

Query Tab

- As the query is built through Query Builder, the SQL code may be viewed on the query tab. This code is view only and may not be changed through this tab.

Data Tab

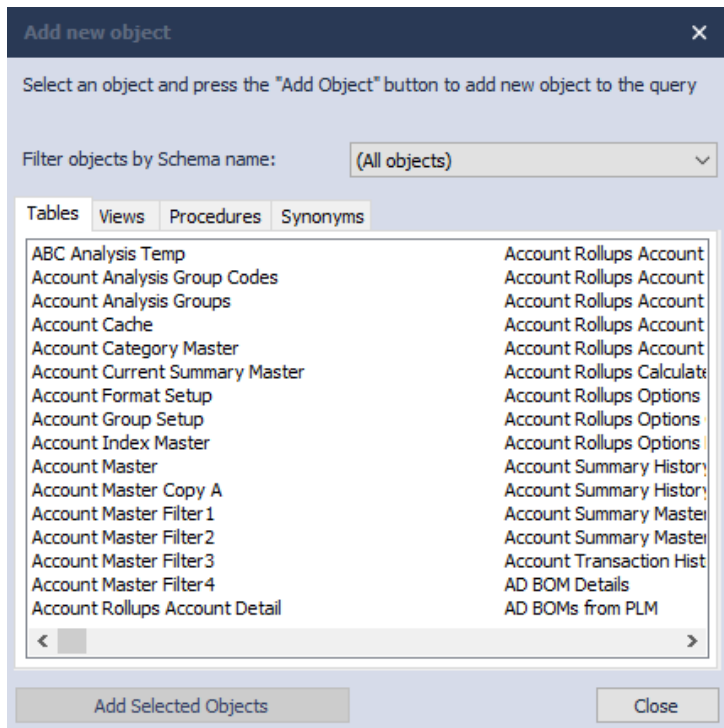
- Data returned from the query may be viewed on the data tab.



Query Builder Adding Objects

An object may be added to the Query Building Area by dragging and dropping the required object from the Query Objects area or double clicking the object from the Query Objects area. Alternatively, right-click the query building area and select Add Object from the drop-down menu. This will then open the Add new object window.

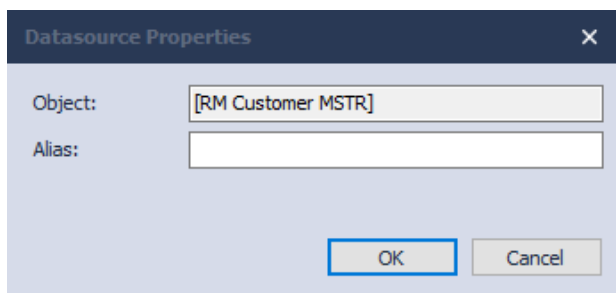
The add new object window allows the selection of multiple objects at once. The objects are grouped into Tables, Views and Procedures according to the object type. One or more objects may be selected by holding the Control key down, selecting the required object(s), then selecting Add Selected Objects. After all required objects have been added select close to close the window.



For connections that have schemas, or allow selections from different databases, objects may be filtered by database or schema name by selecting the necessary schema or database from the combo box at the top of the window.

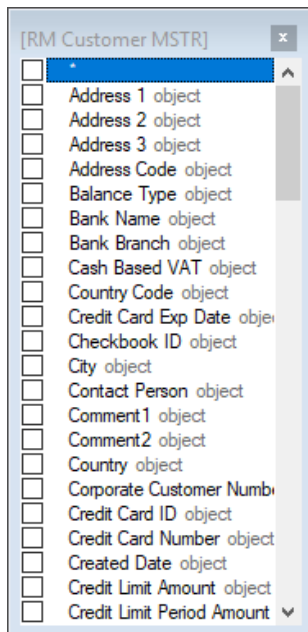
To remove an object from the query, select the object then hit the Delete key, or click close in the object header.

Objects added to the Query Building Area may be aliased by double-clicking the object header.



Query Builder Selecting Fields

To add a field to the list of query output fields, check the checkbox next to the field name in the Query Building area. To include all fields, select the asterisk item at the top of the object.



Fields may also be selected by selecting the field name from the drop-down list of the Expression column in the Query Columns area.

To remove a field from the list of query output fields, uncheck the checkbox next to the field name in the Query Building area. Alternatively, it may be removed by de-selecting the checkbox in the Output column of the Query Columns area.

Fields can also be moved around in the Query Columns section. Can Move up, Move down, Remove, or insert an empty item.

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Criteria for	Criteria	Or...	Or...
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Number]			Descending	1	<input checked="" type="checkbox"/>	For groups			
<input type="checkbox"/>	[RM Customer MSTR].[Customer Name]					<input type="checkbox"/>	For values			
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Address 1]			Ascending	2	<input checked="" type="checkbox"/>	For values			
<input type="checkbox"/>	[RM Customer MSTR].[Address 2]									
<input type="checkbox"/>	[RM Customer MSTR].City									
<input checked="" type="checkbox"/>										

Move up
Move down
Remove item
Insert empty item
Alt-Up
Alt-Down
Alt-Delete
Alt-Insert

Query Builder Adding Criteria

To define criteria for the expression listed in the Query Columns area the Criteria column should be used.

In the criteria column enter the criterion (omitting the expression) i.e.

To enter a criteria of WHERE (field >= 10) AND (field <= 20)

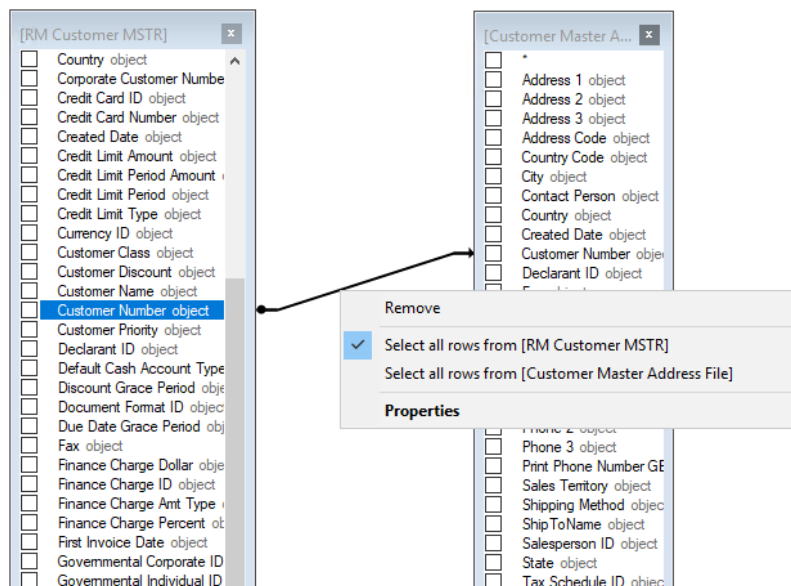
>= 10 AND <= 20 should be entered.

Multiple criteria for a single expression may be used using the 'Or' operator.

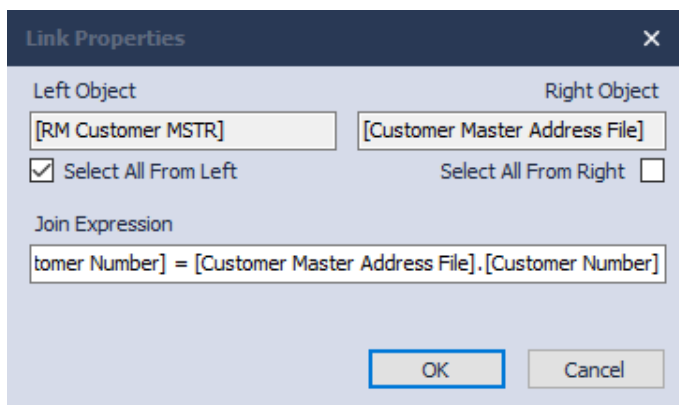
Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Criteria	Or...	Or...
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Number]		CUSTNUM	Ascending	1	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Name]					<input type="checkbox"/>	= 'Test Name'	= 'Test Name 2'	
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Address 2]					<input type="checkbox"/>			
<input checked="" type="checkbox"/>	[RM Customer MSTR].City					<input type="checkbox"/>			
<input checked="" type="checkbox"/>	[RM Customer MSTR].Country					<input type="checkbox"/>			
<input type="checkbox"/>						<input type="checkbox"/>			

Query Builder Joins and Links

To create a link between two objects in the Query Building Area select the field to be linked with the other object, then drag it to the corresponding field on the second object. After the drag is finished a line connecting the two objects will appear.



The default join type is INNER JOIN. i.e. only matching records of both tables will be included in the result set. To define other types of joins right click the link and select the properties item in the drop-down menu, or simply double-click the link line. The dialog allows further definition of link properties.



To remove a link between objects, right-click the link line and select the Remove item from the drop-down menu.

Query Builder Grouping and Sorting

To enable sorting of output query fields the Sort Type and Sort Order columns of the Query Columns area should be used.

- The sort type column allows selection of the way columns will be sorted (ascending, descending)
- The sort order column allows the order in which fields will be sorted to be defined.
- To disable sorting by a specific field, clear the sort type column for that field.

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Criteria	Or...	Or...
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Number]			Descending	1	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Name]					<input type="checkbox"/>			

To define grouping by some of the fields, and / or to define aggregate functions on the grouped rows the Group By checkbox column in the Query Columns area should be used.

- When defining groupings and using criteria the query must define if the given criteria is for the group or for elements contained within the group.
- By selecting an aggregate function (count, sum etc) an aggregate expression will be created for the value indicated in the Expression column.

Output	Expression	Aggregate	Alias	Sort Type	Sort Order	Grouping	Criteria for	Criteria	Or...	Or...
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Customer Number]			Descending	1	<input checked="" type="checkbox"/>	For groups			
<input type="checkbox"/>	[RM Customer MSTR].[Customer Name]					<input type="checkbox"/>	For values			
<input checked="" type="checkbox"/>	[RM Customer MSTR].[Address 1]			Ascending	2	<input checked="" type="checkbox"/>	For values			
<input type="checkbox"/>	[RM Customer MSTR].[Address 2]					<input type="checkbox"/>	For values			
<input type="checkbox"/>	[RM Customer MSTR].[City]					<input type="checkbox"/>	For values			
<input type="checkbox"/>						<input type="checkbox"/>	For values			

Query Builder Properties

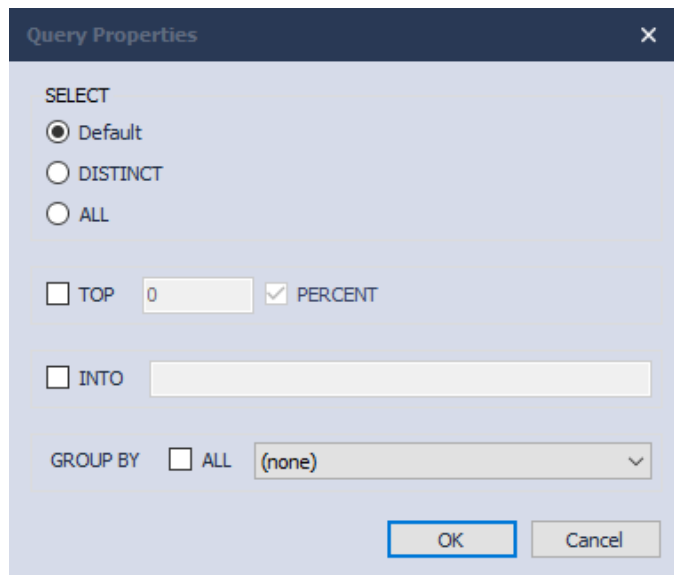
To open the Query Properties window either double click the Query Building area or right click the Query Building area and select Properties.

The Select statement can be either Default, DISTINCT, or ALL. (Note: The Default and All options will return the same result.) DISTINCT will return only distinct (different) values from the column.

To select only a certain number of records, click the “Top” checkbox and then enter a number of records to return. Also, you can return a percentage of records by clicking the “Percent” checkbox.

Check the “Into” checkbox if you want to send the data into another table.

Check the “ALL” checkbox if you want the group by statement to display all groups including those excluded in the WHERE clause. Also, there are options to group by “With Rollup” or “With Cube”. With Rollup is used to calculate sub-totals and grand totals. With Cube is used to generate all combinations of columns specified in the group by clause.



Query Properties

SELECT

☒ Default

☐ DISTINCT

☐ ALL

☐ TOP ☒ PERCENT

☐ INTO

GROUP BY ☐ ALL

OK Cancel

Query Builder Sub Queries

Sub-queries may be added as part of an expression or criterion using the columns pane.

To add a new sub-query, click on the Expression, Aggregate or Criteria columns of the Query Columns pane, then select the Insert Sub-Query item from the drop-down menu.

Expression	Aggregate
[RM Customer MSTR].[Customer Number]	Sum
[RM Customer MSTR].[Address 1]	
[RM Customer MSTR].[Address 2]	
[RM Customer MSTR].[Address 3]	

The corresponding tab will be created after adding the sub-query. This tab allows the sub-query to be edited visually in the same way as the main query.

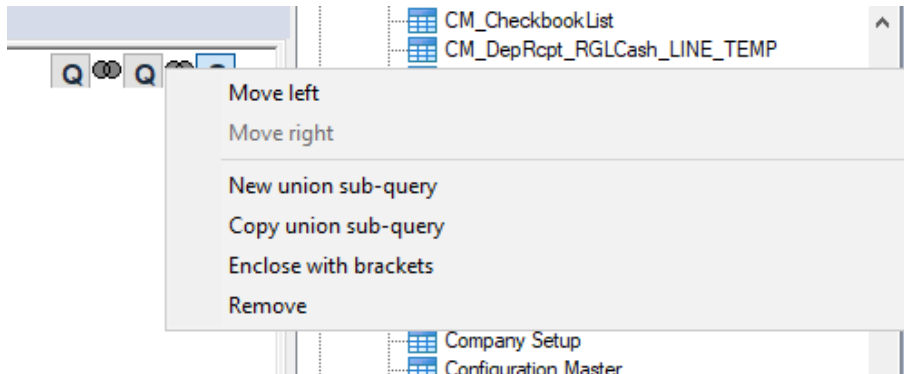


Query Builder Unions

Union sub-queries can be worked with by using the small panel in the top right corner of the Query Building area. Initially there is only one union sub-query labeled with the Q letter. All required operations are performed by means of context (right click) drop down menus.

- To add a new union subquery, select the New Union Sub Query menu item.
- To enclose the sub query in brackets, select the Enclose in Brackets menu item. Right click on the brackets to either move them or remove them.
- To move the sub-query or bracket to the top of the query select the Move Backward menu item.

- To move the sub-query or bracket to the bottom of the query select the Move Forward menu item.
- To remove the sub-query or bracket select the Remove menu item.
- To change the union operator, select the necessary operator from the list of supported operators in the drop-down menu.



Query Builder Derived Tables

Derived tables (a sub-query in the from clause of the query) may be created using the Query Building area. To add a derived table right click on the Query Building area and select the Add Derived Table option from the drop-down menu.

A new object representing the newly created derived table will be added to the query building area of the main query. In addition, the corresponding tab will be created after adding the derived table. This tab allows edit of the sub-query in the same way as the main query is edited. Another way to switch to the sub-query is to select the maximize button at the header of the object representing the derived table.

[RM Customer MSTR] x

- ☐ *
- ☒ Address 1 object
- ☒ Address 2 object
- ☒ Address 3 object
- ☐ Address Code object
- ☐ Balance Type object
- ☐ Bank Name object
- ☐ Bank Branch object
- ☐ Cash Based VAT object
- ☐ Country Code object
- ☐ Credit Card Exp Date object
- ☐ Checkbook ID object
- ☐ City object
- ☐ Contact Person object
- ☐ Comment1 object
- ☐ Comment2 object
- ☐ Country object
- ☐ Corporate Customer Number
- ☐ Credit Card ID object
- ☐ Credit Card Number object
- ☐ Created Date object
- ☐ Credit Limit Amount object
- ☐ Credit Limit Period Amount
- ☐ Credit Limit Period object
- ☐ Credit Limit Type object
- ☐ Currency ID object
- ☐ Customer Class object

[Customer Master A...] x

- ☐ *
- ☐ Address 1 object
- ☐ Address 2 object

Add object
Add derived table
Union >

Properties

- ☐ Customer Number object
- ☐ Declarant ID object
- ☐ Fax object
- ☐ GPSFO Integration ID object
- ☐ Integration ID object
- ☐ Integration Source object
- ☐ Location Code object
- ☐ Modified Date object
- ☐ Phone 1 object
- ☐ Phone 2 object
- ☐ Phone 3 object
- ☐ Print Phone Number GE
- ☐ Sales Territory object
- ☐ Shipping Method object
- ☐ ShipToName object
- ☐ Salesperson ID object

Data Sources – Navigation – Open

Opens the selected data source for editing.

Data Sources – Navigation – Delete

Deletes the selected data source. Data sources cannot be deleted if they are in use by an integration process.

Data Sources – Navigation – Refresh

Refreshes the list of data sources to show any changes made by other users since the window was opened.

Integrations

Integrations – Navigation – Create

The Integration Process window is the only location in SmartConnect where a new integration can be created or modified. There are several components and sub-windows broken out across the Integration Process window.

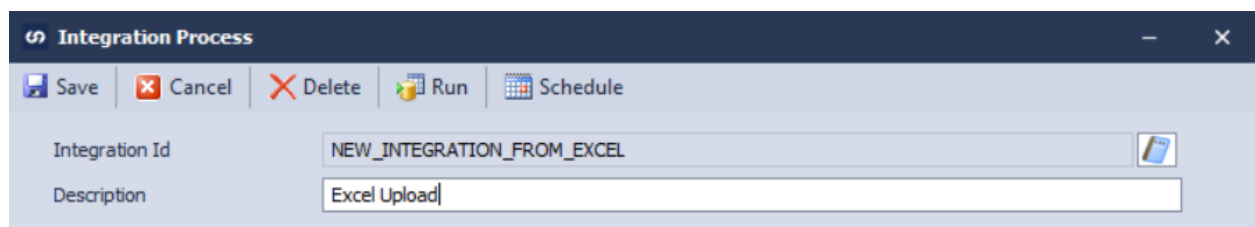
When an integration is opened in the Integration Process window it sets the integration to edit-mode and until the integration is saved or closed out of it cannot be edited by another user or executed by the scheduling service.

The main action buttons across the top of the Integration Process window are defined below:

Save	Saves the current integration process that is open.
Cancel	Cancels any changes made to the integration process and closes it.
Delete	Deletes the current integration process.
Run	Saves and then executes the current integration process.

There are also two identifying fields for any integration and a note process:

Integration ID	The ID for the integration. This cannot be changed after being set.
Description	The description used to help identify the integration process.
<Note Icon>	Allows users to add timestamped notes to the integration to track modifications or improvements.



Integration Process – Source

The Source panel in the Integration Process window allows a previously configured data source to be utilized by the integration.

Data Source Type	The main data source type of File/Folder, Bulk, Change, or Real-Time. Selection affects what shows in the Data Source field below.
Data Source	The data sources that have been previously configured will show here based on the type selected.
Data Source Keys	The data source keys will determine how the source data is split into separate records for processing. Each unique key or combination of keys will be treated as a separate record.
Preview	Returns a handful of records from the selected data source.

The screenshot displays the 'Integration Process' window with the 'Source' panel active. The window has a title bar with standard OS controls and a toolbar with 'Save', 'Cancel', 'Delete', 'Run', and 'Schedule' buttons. The 'Integration Id' field contains 'NEW_INTEGRATION_FROM_EXCEL' and the 'Description' field contains 'Excel Upload'. Below these are tabs for 'Source & Destination', 'Options', 'Tasks', and 'Variables'. The 'Data Source' section is expanded, showing 'Data Source Type' set to 'File / Folder', 'Data Source' set to 'New Excel File', and 'Data Source Keys' set to 'CustomerID'. A 'Preview' button is located below the keys. The 'Destination' section is currently collapsed.

Integration Id	NEW_INTEGRATION_FROM_EXCEL
Description	Excel Upload
Source & Destination Options Tasks Variables	
Data Source	
Data Source Type	File / Folder
Data Source	New Excel File
Data Source Keys	CustomerID
Preview	
Destination	

Integration Process – Destination

Integration Process – Destination – Dynamics 365 Business Central ODataV4

Instance	Select the BC OData Connector Instance.
Services	Select the BC Services needed for the integration.
Include linked entities	If checked, the linked entities of the Services selected will show as available integration lines. If not checked, the linked entities will not show.
Remove blank properties	Check to remove blank values before it sends to BC.
Ignore Update Conflicts	Check to Ignore any updates conflicts that could happened when 2 users update the same record at the same time.
Send to file	If checked, select the file path where the data can be sent to. Note: The data will not be integrated into Business Central if this option is checked. If not checked, the integration will run to Business Central like normal.

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Integration Id' is 'NEW_INTEGRATION' and the 'Description' is 'Data Integration'. Under 'Destination', the 'Destination Type' is 'Dynamics 365 Business Central Odata'. In the 'Settings' section, 'Instance' is 'New Business Central ODataV4 Connection' and 'Services' is 'CustomerCard,SalesInvoice'. Checkboxes for 'Include linked entities' (checked), 'Remove blank properties' (unchecked), and 'Ignore Update Conflicts' (unchecked) are present. There is an unchecked 'Send to file' checkbox with an empty text field. A 'Companies' button is at the bottom left of the settings. Below is the 'Available Lines' table:

	Description	Grouped	Mapped
→	CustomerCard	<input type="checkbox"/>	<input type="checkbox"/>
	SalesInvoice	<input type="checkbox"/>	<input type="checkbox"/>
	SalesInvoiceSalesLines	<input type="checkbox"/>	<input type="checkbox"/>

'Map' and 'Delete Mapping' buttons are at the bottom right of the table.

Integration Process – Destination – Dynamics 365 Business Central SOAP

Instance	Select the BC Soap Connector Instance.
Service Name	Select the BC Service needed for the integration.
Service Url	The Service URL used to connect to the BC Service.
To File	<p>If checked, select the file path where the data can be sent to. Note: The data will not be integrated into Business Central if this option is checked.</p>
File Path	<p>If not checked, the integration will run to Business Central like normal. Select the file path, if the “To File” option is checked.</p>

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Dynamics 365 Business Central Soap

Settings

Instance: New Business Central SOAP Connection

Service Name: CustomerCard

Service Url: https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a66

To File: ☐

File Path:

Companies

[Available Lines](#)

	Description	Grouped	Mapped
→	Customer Card	<input type="checkbox"/>	<input type="checkbox"/>
	Aged Acc Receivable Chart	<input type="checkbox"/>	<input type="checkbox"/>
	Delete Customer Card	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Integration Process – Destination – Dynamics 365 Customer Engagement

CRM Instance	Select the CE Connector Instance.
Entities to Process	Select the Entities needed for the Integration.
Entity Technical Names	Displays the Entity Technical Names.
	This field is read only.
Include advanced messages	If checked, the advanced messages of the Services selected will show as available integration lines.
	If not checked, the linked entities will not show.
Reference Data	Click the lookup to open the Reference Lookup window.

Ignore Duplicate Detection Rules	If duplicate detection rules on the CRM server should be ignored when creating or updating records, select the Ignore Duplicate Detection Rules checkbox.
To File	If checked, select the file path where the data can be sent to. Note: The data will not be integrated into Customer Engagement if this option is checked.

If not checked, the integration will run to Customer Engagement like normal.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Dynamics 365 Customer Engagement

Settings

CRM Instance: New Dynamics 365 CE Connection

Entities to Process: Account,Contact

Entity Technical Names: account,contact

☐ Include advanced messages

Reference Data:

☐ Ignore Duplicate Detection Rules

☐ To File

Organizations

[Available Entities](#)

Description	Grouped	Mapped
→ Account (account)	<input type="checkbox"/>	<input type="checkbox"/>
Contact (contact)	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Destination – Dynamics 365 Customer Engagement – Reference Lookup

Note: all changes to reference information made via SmartConnect must be published before they are visible within CRM.

Messages available for selection in the reference data drop down are as follows:

- Publish duplicate rule
 1. Requires the id of the duplicate rule to be published
- Publish specified solution components
- Reassign all objects owned by a user or team to another user or team
 1. Entity reference of the new user or team
 2. Entity reference of the old user or team

- Reassign all objects from a user to another user or team
 1. Entity reference of the new user or team
 2. Id of the old user
- Replace access rights for a user or team
 1. Entity reference for the revoke user or team
 2. Entity reference of the target record
- Associate Record
- Delete Option Value
 1. Attribute logical name (field name)
 2. Entity logical name
 3. Option set name
 4. Value to be deleted
- Insert Option Value
 1. Attribute logical name (field name)
 2. Entity logical name
 3. Label (description label)
 4. Value
- Insert Status Value
 1. Attribute logical name (field name)
 2. Entity logical name
 3. State code
 4. Value
- Update Option Value
 1. Attribute logical name (field name)
 2. Entity logical name
 3. Label
 4. Value
- Update State Value
 1. Attribute logical name (field name)
 2. Entity logical name
 3. Label
 4. Value

Reference Lookup

Enter text to search...

Find

	Select	RequestName	DisplayName
→	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Publi...	Publish duplicate rule
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Publi...	Publish specified solution components
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Reas...	Reassign all objects owned by a user or team to another user ...
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Reas...	Reassign all objects from a user to another user or team
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Revo...	Replace access rights for a user or team
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Asso...	Associate Record
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Delet...	Delete Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Inser...	Insert Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Inser...	Insert Status Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Upda...	Update Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Upda...	Update State Value

Cancel

OK

Integration Process – Destination – Export to File

Connection	Either a local or FTP Connection. An FTP Connector will need to be created before that option will be available.
File Type	Either Excel or Text file.
Encoding	Options include ASCII, Unicode, UTF-7, UTF-8, UTF-16, and UTF-32. This option is only available for Text files.
Column Separator	Options include Csv, Tab, Pipe, and Custom Delimited.
Delimiter	This option is only available for Text files. If “Custom Delimited” is selected for the Column Separator, then define what Delimiter to use here.
File Path Name	Select the file path and enter a file name for the created file.
FTP File Name	The name of the FTP file selected.
Edit Columns	Option only available if an FTP Connection is selected. Click to open the Edit Columns window.
Include Headings	If checked, the file being created will also have the source file headings. If not checked, no headings will be in file.
Overwrite File	If checked, the file being created will overwrite any file with the same name. If not checked, the file will not be able to overwrite a file with the same name.
Append Date/Time	If checked, the date and time will be appended to the end of the file name. If not checked, the file name will remain the same.
Separate file per key field	If checked, a separate file will be created for each key field in the source. If not checked, one file will be created like normal.
Append key field to filename	If checked, the key field will be appended to the end of the file name. If not checked, the file name will remain the same. Note: this option is only available if “Separate file per key field” is checked.

Enclose in quotes (""")

If checked, all values in the destination file will be enclosed in quotes.

If not checked, the values in the file will remain the same.

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Destination Type' is set to 'Export to File'. Under the 'Settings' section, the 'Connection' is 'LOCAL OR NETWORK FOLDER', 'File Type' is 'Text File', 'Encoding' is 'UTF-8', 'Column Separator' is 'Csv Delimited', and 'File Path Name' is 'C:\eOne Files\output_file.csv'. There is an 'Edit Columns' button. The 'Include Headings' and 'Overwrite File' checkboxes are checked, while 'Append Date/Time', 'Separate file per key field', 'Append key field to filename', and 'Enclose in quotes (""")' are unchecked. At the bottom, there is an 'Available Entities' table with one entry 'Export to file' and 'Map'/'Delete Mapping' buttons.

Integration Id: NEW_INTEGRATION
Description: Data Integration

Source & Destination | Options | Tasks | Variables

Data Source

Destination

Destination Type: Export to File

Settings

Connection: LOCAL OR NETWORK FOLDER
File Type: Text File | Encoding: UTF-8
Column Separator: Csv Delimited | Delimiter:
File Path Name: C:\eOne Files\output_file.csv
FTP File Name:
Edit Columns

☒ Include Headings ☒ Overwrite File ☐ Append Date/Time
☐ Separate file per key field ☐ Append key field to filename ☐ Enclose in quotes (""")

[Available Entities](#)

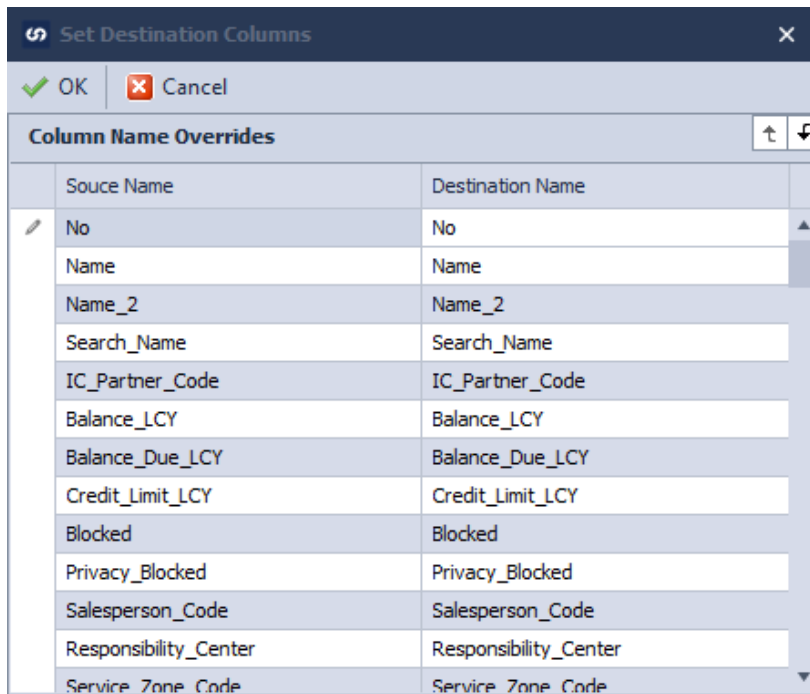
Description	Grouped	Mapped
→ Export to file	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Destination – Export to File – Edit Columns

The “Edit Columns” button will allow you to change the Names on the Destination Fields.

For example, we could change the “No” field under Destination Name to “Number”.



The dialog box titled "Set Destination Columns" contains a table with two columns: "Source Name" and "Destination Name". The table lists various fields, including "No", "Name", "Name_2", "Search_Name", "IC_Partner_Code", "Balance_LCY", "Balance_Due_LCY", "Credit_Limit_LCY", "Blocked", "Privacy_Blocked", "Salesperson_Code", "Responsibility_Center", and "Service_Zone_Code". The "No" field in the "Destination Name" column is highlighted, indicating it is the field being edited.

Source Name	Destination Name
No	No
Name	Name
Name_2	Name_2
Search_Name	Search_Name
IC_Partner_Code	IC_Partner_Code
Balance_LCY	Balance_LCY
Balance_Due_LCY	Balance_Due_LCY
Credit_Limit_LCY	Credit_Limit_LCY
Blocked	Blocked
Privacy_Blocked	Privacy_Blocked
Salesperson_Code	Salesperson_Code
Responsibility_Center	Responsibility_Center
Service_Zone_Code	Service_Zone_Code

Integration Process – Destination – Dynamics CRM

CRM Instance	Select the CRM Connector Instance.
Entities to Process	Select the Entities needed for the Integration.
Entity Technical Names	Displays the Entity Technical Names. This field is read only.
Include advanced messages	If checked, the advanced messages of the Services selected will show as available integration lines. If not checked, the linked entities will not show.
Reference Data	Click the lookup to open the Reference Lookup window.
Ignore Duplicate Detection Rules	If duplicate detection rules on the CRM server should be ignored when creating or updating records, select the Ignore Duplicate Detection Rules checkbox.
To File	If checked, select the file path where the data can be sent to. Note: The data will not be integrated into CRM if this option is checked. If not checked, the integration will run to CRM like normal.

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Data Source' is 'Data Integration'. The 'Destination Type' is 'Microsoft Dynamics CRM'. The 'Settings' section includes:

- CRM Instance:** New CRM Connection
- Entities to Process:** Account, Order, Order Product
- Entity Technical Names:** account, salesorder, salesorderdetail
- Include advanced messages:** ☐
- Reference Data:**
- Ignore Duplicate Detection Rules:** ☐
- To File:** ☐

The 'Organizations' section is empty. The 'Available Entities' table is shown below:

Description	Grouped	Mapped
→ Account (account)	<input type="checkbox"/>	<input type="checkbox"/>
Order (salesorder)	<input type="checkbox"/>	<input type="checkbox"/>
Order Product (salesorderdetail)	<input type="checkbox"/>	<input type="checkbox"/>

Buttons at the bottom: Map, Delete Mapping.

Destination – Dynamics CRM – Reference Lookup

Note: all changes to reference information made via SmartConnect must be published before they are visible within CRM.

Messages available for selection in the reference data drop down are as follows:

- Publish duplicate rule
 - 2. Requires the id of the duplicate rule to be published
- Publish specified solution components
- Reassign all objects owned by a user or team to another user or team
 - 3. Entity reference of the new user or team
 - 4. Entity reference of the old user or team
- Reassign all objects from a user to another user or team
 - 3. Entity reference of the new user or team
 - 4. Id of the old user
- Replace access rights for a user or team
 - 3. Entity reference for the revoke user or team
 - 4. Entity reference of the target record
- Associate Record
- Delete Option Value
 - 5. Attribute logical name (field name)
 - 6. Entity logical name
 - 7. Option set name
 - 8. Value to be deleted
- Insert Option Value
 - 5. Attribute logical name (field name)
 - 6. Entity logical name
 - 7. Label (description label)
 - 8. Value
- Insert Status Value
 - 5. Attribute logical name (field name)
 - 6. Entity logical name
 - 7. State code
 - 8. Value
- Update Option Value
 - 5. Attribute logical name (field name)
 - 6. Entity logical name
 - 7. Label
 - 8. Value
- Update State Value
 - 5. Attribute logical name (field name)
 - 6. Entity logical name
 - 7. Label
 - 8. Value

Reference Lookup

Enter text to search...

Find

	Select	RequestName	DisplayName
→	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Publi...	Publish duplicate rule
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Publi...	Publish specified solution components
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Reas...	Reassign all objects owned by a user or team to another user ...
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Reas...	Reassign all objects from a user to another user or team
	<input type="checkbox"/>	Microsoft.Crm.Sdk.Messages.Revo...	Replace access rights for a user or team
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Asso...	Associate Record
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Delet...	Delete Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Inser...	Insert Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Inser...	Insert Status Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Upda...	Update Option Value
	<input type="checkbox"/>	Microsoft.Xrm.Sdk.Messages.Upda...	Update State Value

Cancel

OK

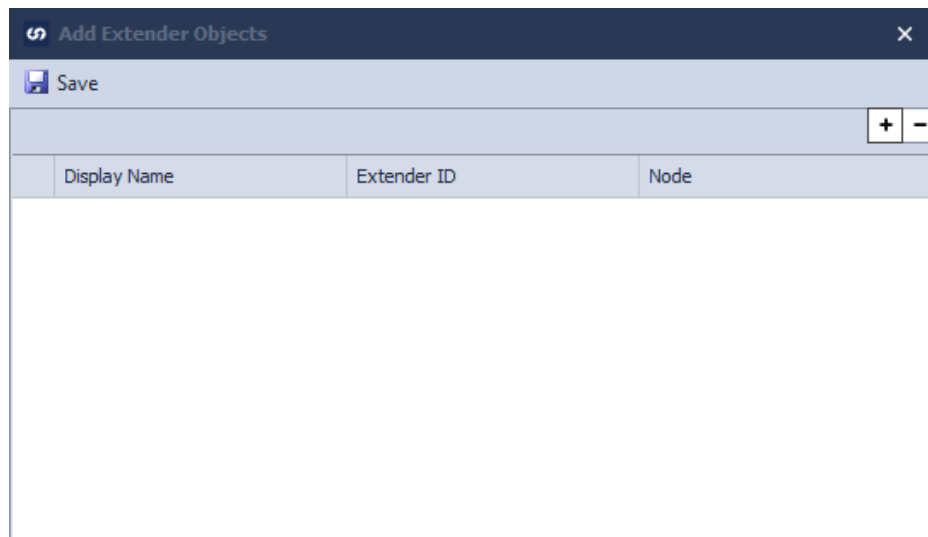
Integration Process – Destination – Dynamics GP

Instance	Select the GP Connector Instance.
Group	Select the Group.
Node Type	Select the Node Type being integrated to.
Destination Type	Either Normal or File. Select “Normal” to have your data integrate into GP. Select “File” to have your data sent to a file instead of into GP. This is especially useful when either setting up a new integration or troubleshooting as the exact information that would be sent to GP can be viewed without sending the data to Dynamics GP.
Path	Enter the path for the send to file option. This option will only be available if “File” is the Destination Type.
Add Extender Object	Click to Add an Extender Object.

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Data Source' is 'NEW_INTEGRATION' and the 'Description' is 'Data Integration'. Under 'Destination', the 'Destination Type' is set to 'Microsoft Dynamics GP'. In the 'Settings' section, 'Instance' is 'Microsoft GP', 'Group' is 'Receivables', 'Node Type' is 'Customers', and 'Destination Type' is 'File'. The 'Path' field is empty, and there is an 'Add Extender Object' button below it. A 'Companies' button is also present. At the bottom, there is a table of 'Available Nodes' with columns for 'Description', 'Grouped', and 'Mapped'. The table lists five nodes: 'Create/update customer', 'Add customer address', 'Create parent customer', 'Create child customer', and 'Create Internet Address'. Each node has checkboxes for 'Grouped' and 'Mapped'. 'Map' and 'Delete Mapping' buttons are at the bottom right.

Description	Grouped	Mapped
→ Create/update customer	<input type="checkbox"/>	<input type="checkbox"/>
Add customer address	<input type="checkbox"/>	<input type="checkbox"/>
Create parent customer	<input type="checkbox"/>	<input type="checkbox"/>
Create child customer	<input type="checkbox"/>	<input type="checkbox"/>
Create Internet Address	<input type="checkbox"/>	<input type="checkbox"/>

Destination – Dynamics GP – Add Extender Object



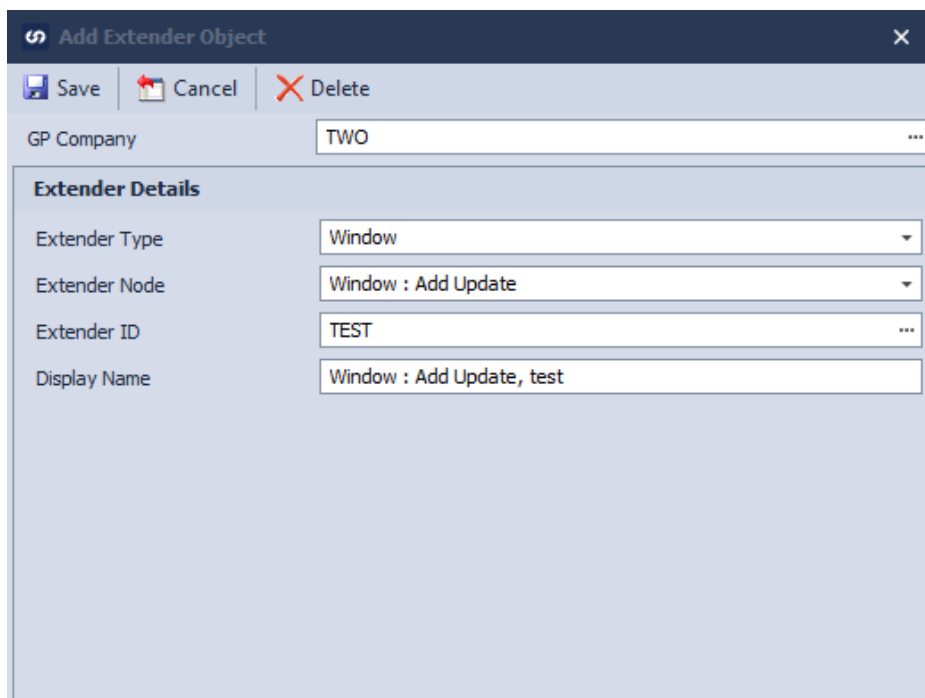
Select the (+) button to add an Extender object to the Extender object list.

GP Company	Select the Dynamics GP company that contains the Extender object.
Extender Type	Select the Extender type, available options are Form and Window.
Extender Node	<div>Select the Extender node to be used valid options for each Extender type are listed below:<ul style="list-style-type: none">Forms<ol style="list-style-type: none">Form : Add Update - allows creation and update of Extender forms.Form : Delete - allows deletion of Extender forms.Form Detail Line : Add Update - allows creation and update of detail lines on Extender forms. The Extender ID lookup will be filtered to show only forms that contain detail lines.Form Detail Line : Delete - allows deletion of detail lines on Extender forms. The Extender ID lookup will be filtered to show only forms that contain detail lines.Form Extra Window : Add Update - allows creation and update of Extender form extra windows. The Extender ID lookup will be filtered to show only forms that contain extra windows of type field entry.Form Extra Window Note : Add Update - allows creation and update of Extender form extra window notes. The Extender ID lookup will be filtered to show only forms that contain windows of type note or note list.Form Extra Window Note : Delete - allows deletion of Extender form extra window notes. The Extender ID lookup will be filtered to show only forms that contain windows of type note or note list.</div>

- Windows

1. Window : Add Update - allows creation and update of Extender windows. The Extender ID field will be filtered to show only windows of type field entry.
2. Window : Delete - allows deletion of Extender windows. The Extender ID field will be filtered to show only windows of type field entry.
3. Window Detail Line : Add Update - allows creation and update of Extender window detail lines. The Extender ID field will be filtered to show only windows of type field entry that contain detail lines.
4. Window Detail Line : Delete - allows deletion of Extender window detail lines. The Extender ID field will be filtered to show only windows of type field entry that contain detail lines.
5. Window Note : Add Update - allows creation of Extender window notes. The Extender ID field will be filtered to show only windows of type note or note list.
6. Window Note : Delete - allows deletion of Extender window notes. The Extender ID field will be filtered to show only windows of type note or note list.

Extender ID	Use the lookup to select the Extender object to be used.
Display Name	If required change the defaulted display name.



The image shows a software dialog box titled "Add Extender Object". At the top, there are three buttons: "Save" (with a floppy disk icon), "Cancel" (with a red X icon), and "Delete" (with a red X icon). Below the buttons, there is a field for "GP Company" with the value "TWO" and a dropdown arrow. Underneath is a section titled "Extender Details" which contains four fields: "Extender Type" (a dropdown menu showing "Window"), "Extender Node" (a dropdown menu showing "Window : Add Update"), "Extender ID" (a text field with "TEST" and a dropdown arrow), and "Display Name" (a text field with "Window : Add Update, test").

Integration Process – Destination –Generic REST Destination

Rest Service	Rest Service Connector Definition containing the endpoint
Connection	The Connector instance containing the endpoint
Groups	Optional: Custom defined group containing the endpoint
Actions to Process	Select one or more endpoints to process
To File	If selected, the request body will be saved to a file and NOT sent to the REST Service

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Destination Type' is set to 'Generic REST Destination'. The 'Settings' section includes fields for 'Rest Service' (ConnectWise), 'Connection' (New ConnectWise Instance), 'Groups' (Inventory), and 'Actions to Process' (Create Product). There is an unchecked checkbox for 'To File'. Below the settings is a table of 'Available Entities' with one entry: 'Create Product'. At the bottom right are 'Map' and 'Delete Mapping' buttons.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Generic REST Destination

Settings

Rest Service: ConnectWise

Connection: New ConnectWise Instance

Groups: Inventory

Actions to Process: Create Product

☐ To File

Available Entities

Description	Grouped	Mapped
→ Create Product	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Instance	Select the NAV OData Connector Instance.
Services	Select the NAV Services needed for the integration.
Include linked entities	If checked, the linked entities of the Services selected will show as available integration lines. If not checked, the linked entities will not show.
Remove blank properties	Check to remove blank values before it sends to NAV.
Ignore Update Conflicts	Check to Ignore any updates conflicts that could happened when 2 users update the same record at the same time.
Send to file	If checked, select the file path where the data can be sent to. Note: The data will not be integrated into NAV if this option is checked. If not checked, the integration will run to NAV like normal.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Microsoft Dynamics NAV Odata

Settings

Instance: NAV OData

Services: Customer_Card,salesDocumentLines,salesDocuments

☐ Include linked entities ☐ Remove blank properties

☐ Ignore Update Conflicts

☐ Send to file

Companies

[Available Lines](#)

Description	Grouped	Mapped
→ Customer_Card	<input type="checkbox"/>	<input type="checkbox"/>
salesDocumentLines	<input type="checkbox"/>	<input type="checkbox"/>
salesDocuments	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Integration Process – Destination – Dynamics NAV SOAP

Instance	Select the NAV Soap Connector Instance.
Service Name	Select the NAV Service needed for the integration.
Service Url	The Service URL used to connect to the NAV Service.
To File	If checked, select the file path where the data can be sent to. Note: The data will not be integrated into NAV if this option is checked.
File Path	If not checked, the integration will run to NAV like normal. Select the file path, if the “To File” option is checked.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Microsoft Dynamics NAV Soap

Settings

Instance: NAV Soap

Service Name: Customer_Card

Service Url: http://eone-2014:7047/DynamicsNAV110/WS/Page/Customer_Card

To File: ☐

File Path:

Companies

Available Lines

Description	Grouped	Mapped
→ Customer Card	<input type="checkbox"/>	<input type="checkbox"/>
Aged Acc Receivable Chart	<input type="checkbox"/>	<input type="checkbox"/>
Sales Priceand Line Discounts	<input type="checkbox"/>	<input type="checkbox"/>
Delete Customer Card	<input type="checkbox"/>	<input type="checkbox"/>
Delete Aged Acc Receivable Chart	<input type="checkbox"/>	<input type="checkbox"/>
Delete Price And Line Disc	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Integration Process – Destination – SQL Table

Connection	Select the MSSQL Connector Instance.
Server	The SQL Server being connected to. This field will populate automatically and is read only.
Database	Select the Database for the destination.
Table	Select the Tables needed for the integration.
Use Transaction	Take an example where you have a header and line node, and the header was successful, and the line failed.

	If use transaction is checked, the header and line nodes will not be integrated. If not checked, the header will go through successfully, and the lines will fail.
Redirect to Files	If checked, the data will be sent to the file instead of into the database table. If not checked, the integration will run to the SQL table like normal.
Files Directory	Select the file path and name. This option will only be available if “Redirect to Files” is checked.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Microsoft SQL Table

Settings

Connection: New SQL Connection

Server: hansel-laptop\squlexpress

Database: SmartConnect21_395

Table: [dbo].[Connector],[dbo].[ConnectorInstance]

Use Transaction: ☐

Redirect to Files: ☐

Files Directory:

Databases

Available Tables

Description	Grouped	Mapped
→ (dbo) ConnectorInstance	<input type="checkbox"/>	<input type="checkbox"/>
(dbo) Connector	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Integration Process – Destination – SQL Stored Procedure

Connection	Select the MSSQL Connector Instance.
Server	The SQL Server being connected to. This field will populate automatically and is read only.
Database	Select the Database for the destination.
Procedure	Select the Procedures needed for the integration.
Use Transaction	Take an example where you have a header and line node, and the header was successful, and the line failed.

	If use transaction is checked, the header and line nodes will not be integrated. If not checked, the header will go through successfully, and the lines will fail.
eConnect Procedure	If this is an eConnect stored procedure with validation messages stored in the eConnect tables check the eConnect Procedure checkbox.
Redirect to Files	If checked, the data will be sent to the file instead of into the database table. If not checked, the integration will run to the SQL table like normal.
Files Directory	Select the file path and name. This option will only be available if “Redirect to Files” is checked.

The screenshot shows the 'Integration Process' dialog box with the following configuration:

- Integration Id:** NEW_INTEGRATION
- Description:** Data Integration
- Source & Destination:**
 - Data Source:** (empty)
 - Destination:**
 - Destination Type:** Microsoft SQL Stored Procedure
 - Settings:**
 - Connection:** MSSQL Server
 - Server:** eone-2014\jeone
 - Database:** TWO
 - Procedure:** [dbo].[E1_AP_INTERCOMPANY_HEADER],[dbo].[E1_AP_INT...
 - Use Transaction:** ☐
 - eConnect Procedure:** ☐
 - Redirect to Files:** ☒ Files Directory: (empty)
- Available Stored Procedures:**

Description	Grouped	Mapped
→ (dbo) E1_AP_INTERCOMPANY_HEADER	<input type="checkbox"/>	<input type="checkbox"/>
(dbo) E1_AP_INTERCOMPANY_HEADERPost	<input type="checkbox"/>	<input type="checkbox"/>

Integration Process – Destination – Salesforce

Instance	Select the Salesforce Connector Instance.
Organization	Select the Organization, either Sandbox or Production.
	If the Salesforce Connection only has a Sandbox Organization setup, then only Sandbox will show as an option and vice versa.
Salesforce Entity	Select the Salesforce Entity being integrated to.

Integration Process

Save Cancel Delete Run Schedule

Integration Id: NEW_INTEGRATION

Description: Data Integration

Source & Destination Options Tasks Variables

Data Source

Destination

Destination Type: Salesforce

Settings

Instance: New Salesforce Connection

Organization: ☒ Sandbox ☐ Production

SalesForce Entity: Account

Organizations

[Available Entities](#)

Description	Grouped	Mapped
→ Create Account	<input type="checkbox"/>	<input type="checkbox"/>
Update Account	<input type="checkbox"/>	<input type="checkbox"/>
Delete Account	<input type="checkbox"/>	<input type="checkbox"/>

Map Delete Mapping

Integration Process – Destination – JSON File

Edit Format	Define the structure of the destination JSON file.
Clear Format	Clear the current defined structure.
Connection	Choose if the file is being saved local or on an FTP server.
File Path Name	Set the path where the destination file will be saved. File name required here if saving locally. If FTP, this will just be the directory.
FTP File Name	The name of the file when saving to FTP.

Encoding	Select the desired encoding for the JSON file.
Overwrite File	Select to overwrite existing file with the same name.
Append Date/Time	Add the current date/time to the JSON file name.
Separate File Per Key Field	Create a new JSON file for every key field.
Append Key Field To Filename	Add the data from the key field to the file name.

The screenshot shows the 'Integration Process' window with the 'Destination' tab selected. The 'Destination Type' is set to 'Json File'. Under the 'Settings' section, the 'Connection' is 'LOCAL OR NETWORK FOLDER', the 'File Path Name' is 'C:\Users\ChrisHanson\OneDrive - eOne Integrated Business Solutions\Desktop\output_json.json', and the 'Encoding' is 'UTF-8'. The 'Overwrite File' checkbox is checked, while 'Append Date/Time', 'Separate File Per Key Field', and 'Append Key Field To Filename' are unchecked. Below the settings is a table of 'Available Entities' with columns for Description, Grouped, and Mapped. The entities listed are 'Json - shipments', 'Json - shipments | shipTo', 'Json - shipments | weight', 'Json - shipments | insuranceOptions', and 'Json - shipments | shipmentItems'. At the bottom right are 'Map' and 'Delete Mapping' buttons.

Description	Grouped	Mapped
→ Json - shipments	<input type="checkbox"/>	<input type="checkbox"/>
Json - shipments shipTo	<input type="checkbox"/>	<input type="checkbox"/>
Json - shipments weight	<input type="checkbox"/>	<input type="checkbox"/>
Json - shipments insuranceOptions	<input type="checkbox"/>	<input type="checkbox"/>
Json - shipments shipmentItems	<input type="checkbox"/>	<input type="checkbox"/>

Destination – JSON File – JSON File Format

The JSON File Format window is where we define what our JSON Destination file will look like. You can either select a JSON template file or create the format from scratch.

To create the format from scratch, use the below buttons.



Note: Highlight over each button to show what that button will do.

Json Template File	Import the desired JSON structure from an existing JSON file.
Name	Enter or edit field name for selected field.
Data Type	Set the data type for the selected field.
Child Nodes Are	Set child nodes to be an array or property.
Required	Select to make a field required during the mapping process.
Data Source Columns	View fields from the source. Drag fields into tree view to build structure.

Json File Format

OK Cancel Clear

Json Template File C:\Users\ChrisHanson\OneDrive - eOne Integrated Business Solutions\Desktop\shipstation_shipmen...

shipments

- shipmentId
- orderId
- orderKey
- userId
- orderNumber
- createDate
- shipDate
- shipmentCost
- insuranceCost
- trackingNumber
- isReturnLabel
- batchNumber
- carrierCode
- serviceCode
- packageCode
- confirmation
- warehouseId
- voided

Properties

Name shipments

Data Type

Child Nodes Are An Array

Required ☐

Data source columns

- CustomerID
- CustomerName
- AddressName
- AddressStreet1
- AddressStreet2
- City
- State
- PostalCode
- Phone

Edit Format	Click to open the “Edit Format” window.
	This is where we setup the format of our xml destination file.
Clear Format	Clears the format that was created in the “Edit Format” window.
Connection	Either a local or FTP Connection.
	An FTP Connector will need to be created before that option will be available.
File Path Name	Select the file path and enter a file name.
FTP File Name	The name of the FTP file selected.
	Option only available if an FTP Connection is selected.
Overwrite File	If checked, the file being created will overwrite any file with the same name.
	If not checked, the file will not be able to overwrite a file with the same name.
Append Date/Time	If checked, the date and time will be appended to the end of the file name.
	If not checked, the file name will remain the same.
Separate file per key field	If checked, a separate file will be created for each key field in the source.
	If not checked, one file will be created like normal.
Append key field to filename	If checked, the key field will be appended to the end of the file name.
	If not checked, the file name will remain the same.
	Note: this option is only available if “Separate file per key field” is checked.

Integration Process

Save

Cancel

Delete

Run

Schedule

Integration Id

NEW_INTEGRATION

Description

Data Integration

Source & Destination

Options

Tasks

Variables

Data Source

Destination

Destination Type

Xml File

Settings

Edit Format

Clear Format

Connection

LOCAL OR NETWORK FOLDER

File Path Name

C:\eOne Files\xml_output.xml

FTP File Name

Overwrite File

☒

Append Date/Time

☐

Separate File Per Key Field

☐

Append Key Field To Filename

☐

Available Entities

Description	Grouped	Mapped
Xml - VendorProvider	<input type="checkbox"/>	<input type="checkbox"/>
Xml - VendorProvider Header	<input type="checkbox"/>	<input type="checkbox"/>
Xml - VendorProvider Header ExtractRequest	<input type="checkbox"/>	<input type="checkbox"/>
Xml - VendorProvider Header ExtractRequest User	<input type="checkbox"/>	<input type="checkbox"/>
→ Xml - VendorProvider Header ExtractRequest User ContactMethods	<input type="checkbox"/>	<input type="checkbox"/>
Xml - VendorProvider MasterBillOfLading	<input type="checkbox"/>	<input type="checkbox"/>
Xml - VendorProvider MasterBillOfLading ReferenceNumbers	<input type="checkbox"/>	<input type="checkbox"/>

Map

Delete Mapping

Destination – XML File – XML File Format

The Xml File Format window is where we define what our Xml Destination file will look like. You can either select an Xml template file or create the format from scratch.

To create the format from scratch, use the below buttons.



Note: Highlight over each button to show what that button will do.

Xml Template File	Select an XML file that will be used for the format. Once a file is selected, all the nodes will display in the window. Note: Additional nodes can be added using the (+) symbol.
Xml Declaration	The Xml declaration will automatically be set to, <?xml version="1.0" encoding="utf-8"?> Note: the declaration can be edited.
Name	Name given to the node.
Text Type	Either an Element or an Attribute.
Content	Either Text or CDATA.
Required	If checked, that will be a required node. If not checked, the node will not be required.
Group Children	

XML File Format

OK
Cancel
Clear

XML Template File
C:\Users\leone\Documents\XML Files\XML.test.xml

XML Declaration
<?xml version="1.0" encoding="utf-8"?>

Customers
Customer
Name
address1
city
state

Properties

Name
Customers

Text Type
Element

Content
Text

Required
☐

Group Children
☐

Data Source Columns

CUSTNMNR	FAX	MXWOFTYP	RMVAACC
CUSTNAME	PRBTADCD	MXWROFAM	RMFCGACC
CUSTCLAS	PRSTADCD	COMMENT1	RMWRACC
CPRCSTNM	STADDRCD	COMMENT2	RMSORACC
CNTCPRSN	SLPRSNID	USERDEF1	FRSTINDT
STMTNAME	CHEKBKID	USERDEF2	INACTIVE
SHRTNAME	PYMTRMID	TAXEXMT1	HOLD
ADRS CODE	CRLMTTY	TAXEXMT2	CRCARDID
UPSZONE	CRLMTAMT	TXRGNNUM	CRCRDNUM
SHIPMTHD	CRLMTPER	BALNCTYP	CCRDXPDT
TAXSCHID	CRLMTPAM	STMTCYCL	KPDSTHST
ADDRESS1	CURNCYID	BANKNAME	KPCALHST
ADDRESS2	RATETPID	BNKBRNCH	KPERHIST
ADDRESS3	CUSTDISC	SALSTERR	KPTRXHST
COUNTRY	PRCLEVEL	DEFACTY	NOTEINDX
CITY	MINPYTYP	RMCSHACC	CREATDDT
STATE	MINPYDLR	RMARACC	MODIFDT
ZIP	MINPYPCT	RMSLSACC	Revalue_Cu
PHONE1	FNCHATYP	RMIVACC	Post_Result
PHONE2	FNCHPCNT	RMCOSACC	FINCHID
PHONE3	FINCHDLR	RMTAKACC	GOVCRPID

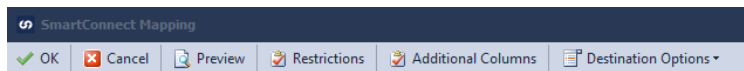
Integration Process – Destination – SmartConnect Mapping

The SmartConnect mapping window gives field-level control to designing integrations. This window will vary slightly depending on the destination chosen, but much of the setup will remain the same.

The basic layout allows for any source fields and any additional columns that are created to be listed in the left grid, while any available destination fields are listed in the right grid. Fields can be mapped by dragging them from the left grid to the right grid, or by clicking in the Column Name and selecting the value from the drop-down list.

The main toolbar buttons are defined as follows:

OK	Saves any work performed in the mapping window and closes it.
Cancel	Discards any work performed in the mapping window and closes it.
Preview	Attempts to preview the data source based on the grouping set within the mapping window. This may not be allowed if additional columns must be grouped on.
Restrictions	Opens the restriction window, defined later in this document.
Additional Columns	Open the Additional Columns window, defined later in this document.
Destination Options	Allows fields to be auto matched on name for most destinations. File-based destinations have additional options based on type selected.



The checkboxes available on the mapping window are as follows:

Update Existing	If unchecked, the mapping will attempt to only insert records. If checked, both inserts and updates will be performed – upserts for destinations that allow it.
Update Blank Data	Available based on destination. If unchecked, passing a blank value through on a field will not remove an existing value in the destination system. If checked, existing values can be replaced with blank values on updated records.
For Delete	Available based on destination. When checked, any records that match the source fields which have been grouped on will be deleted from the destination system. Use caution marking this option.
Group Data	May be required for some destinations. Checking the group data option allows the data to be grouped beyond how the data source keys break the data apart into separate records.
Show Required Only	Checking this option will show only destination fields which are flagged as required by the destination system.

SmartConnect Mapping

OK Cancel Preview Restrictions Additional Columns Destination Options

Map ID: NEW_INTEGRATION_FROM_EXCEL ☒ Update existing ☐ For Delete

Map Description: Excel Upload

Mapping: Customer ☒ Group data ☐ Show Required Only

There are columns within the grids that can be interacted with on the mapping window as well:

Source Columns - Function	Visible only when the Group Data option is checked. Allows a function to be applied to the data based on the grouping.
Source Columns – Group On	Any field selected in the Group On column will cause the mapping to group the data on that combination of fields checked, along with the data source keys.
Destination Columns – Column Type	Column type can be switched to display a different value. This is useful for when using the drop-down option for Column Name. It will automatically change when using drag and drop to map the source fields.
Destination Columns – Column Name	Will display whatever source field/additional column has been mapped to each destination field. To un-map a field, click on the needed value and then press the delete key.

SmartConnect Mapping

OK Cancel Preview Restrictions Additional Columns Destination Options

Map ID: NEW_INTEGRATION_FROM_EXCEL ☒ Update existing ☐ For Delete

Map Description: Excel Upload

Mapping: Customer ☒ Group data ☐ Show Required Only

Source Columns

Enter text to search... Find

	Name	Type	Function	Group On
→	CustomerID	Source Column	First	<input checked="" type="checkbox"/>
✓	CustomerName	Source Column	First	<input type="checkbox"/>
	AddressName	Source Column	First	<input type="checkbox"/>
	AddressStreet1	Source Column	First	<input type="checkbox"/>
	AddressStreet2	Source Column	First	<input type="checkbox"/>
	City	Source Column	First	<input type="checkbox"/>
	State	Source Column	First	<input type="checkbox"/>
	PostalCode	Source Column	First	<input type="checkbox"/>
	Phone	Source Column	First	<input type="checkbox"/>

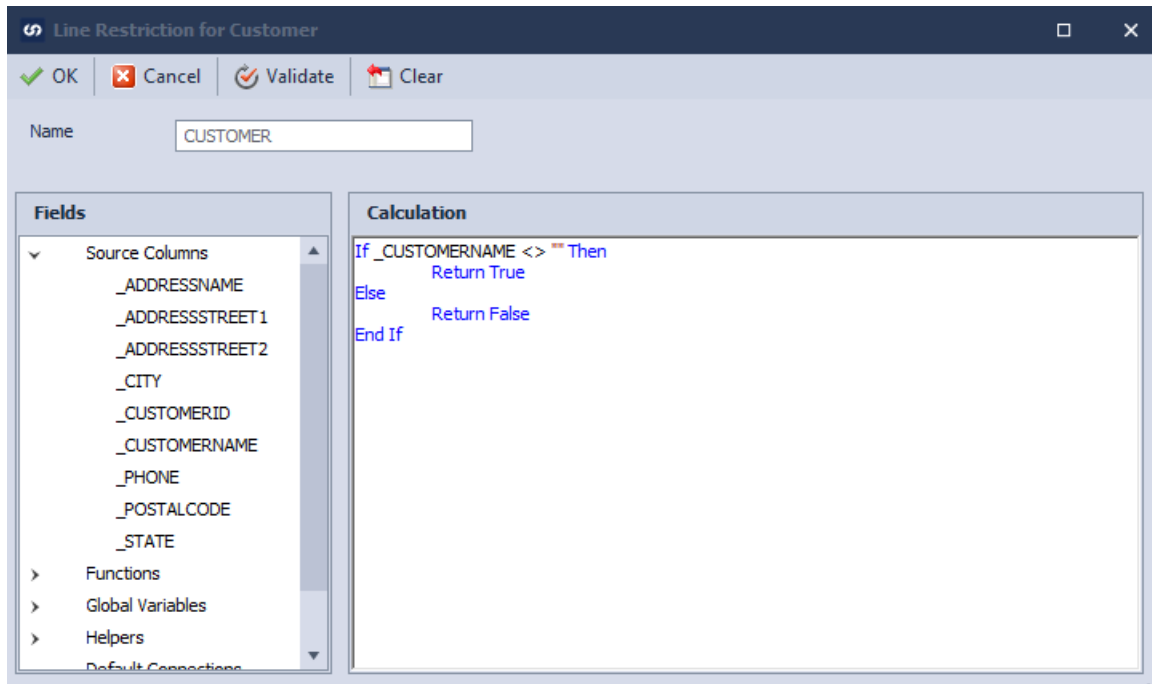
Destination Columns

Enter text to search... Find

	Name	Technical Name	Data Type	Column Type	Column Name
→	No	No	Edm.String	Source Column	CustomerID
	Name	Name	Edm.String	Source Column	CustomerName
	Name_2	Name_2	Edm.String	Source Column	
	Search_Name	Search_Name	Edm.String	Source Column	
	IC_Partner_Code	IC_Partner_Code	Edm.String	Source Column	
	Balance_LCY	Balance_LCY	Edm.Decimal	Source Column	
	Balance_Due_L...	Balance_Due_L...	Edm.Decimal	Source Column	
	Credit_Limit_LCY	Credit_Limit_LCY	Edm.Decimal	Source Column	
	Blocked	Blocked	Edm.String	Source Column	
	Privacy_Blocked	Privacy_Blocked	Edm.Boolean	Source Column	
	Salesperson_C...	Salesperson_C...	Edm.String	Source Column	
	Responsibility_...	Responsibility_...	Edm.String	Source Column	
	Service_Zone_...	Service_Zone_...	Edm.String	Source Column	
	Document_Sen...	Document_Sen...	Edm.String	Source Column	
	TotalSales2	TotalSales2	Edm.Decimal	Source Column	
	CustSalesLCY_...	CustSalesLCY_...	Edm.Decimal	Source Column	
	AdjCustProfit	AdjCustProfit	Edm.Decimal	Source Column	
	AdjProfitPct	AdjProfitPct	Edm.Decimal	Source Column	
	CFDI_Purpose	CFDI_Purpose	Edm.String	Source Column	
	CFDI_Relation	CFDI_Relation	Edm.String	Source Column	
	Last_Date_Mo...	Last_Date_Mo...	Edm.Date	Source Column	
	Disable_Search...	Disable_Search...	Edm.Boolean	Source Column	
	Address	Address	Edm.String	Source Column	

SmartConnect Mapping – Restrictions

The Line Restriction window allows scripting that can prevent a line of data from being sent through to the destination node. This restriction code will execute on each line of data or each line of grouped data, and if the code returns the value of “true” it will allow the data to be sent to the destination. If it returns “false” then that line of data will not be sent to the destination. The default value of a restriction is to “Return True” which would let every line of data process.



SmartConnect Mapping – Additional Columns

The Additional Columns window allows users to create new columns to transform, lookup, or process data before the values are sent to the destination. There are several standard additional column types that can be used on any integration, along with specific additional column types based on the destination selected.

Additional Columns

OK

Columns

Delete

	Name	Type
→	REMOVE_PHONE_FORMATTING	Calculation
	CUSTOM_NUMBER	Custom Rolling Column
	LOOKUP_STATUS	MSSQL Lookup

Additional Columns – MSSQL Lookup

The MSSQL Lookup uses a configured SQL Connection to lookup a value from within that server.

Available on: All Connectors

Lookup Name	The name to identify the SQL lookup, cannot be changed once set.
Connection	Drop-down to select an existing SQL Connection. The SQL connection must be created prior to setting up the SQL Lookup.
Server Name	Read-only value of the SQL server name pulled from the configured SQL Connection.
Database	The list of available databases from the SQL Connection, clicking the Refresh button will load in the currently accessible databases.
Table	The list of available tables from the selected database. If multiple tables must be joined together to get the necessary fields into one query, the Modify button can be used to open a query builder window.
Return Value	The field that should be returned from the table if there is a match on the criteria.
If No Data	The action to take if data is not found based on the criteria setup.
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.
Lookup Criteria	One or more criteria fields can be setup to filter and compare to the lookup table. Source fields or other additional columns can be used to compare against the table fields.

The screenshot shows the 'Microsoft SQL Lookup Column' configuration window. It includes fields for 'Lookup Name' (LOOKUP_STATUS), 'Connection' (New SQL Connection), 'Server Name' (hansel-laptop\sqlexpress), 'Database' (test_registration), 'Table' (Setup), 'Return Value' (RegistrationDate), and 'If No Data' (Return failure for current integration line). There are 'Refresh' and 'Modify' buttons next to the Database and Table fields respectively. A 'Default Value' field is also present. At the bottom, there is a 'Lookup Criteria' section with a table containing one row: Source (CustomerID), Operator (Equal To), and Target (SetupId).

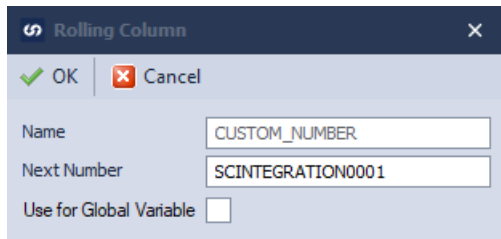
Lookup Criteria			
	Source	Operator	Target
→	CustomerID	Equal To	SetupId

Additional Columns – Custom Rolling Column

The Rolling Column window allows for the creation of a custom next number generator within an integration. The number configured on this window will increment per record and will be stored from one integration run to the next. This number is not shared across integrations, if that functionality is required then the global rolling column should be used.

Available on: All Connectors

Name	The name to identify the Rolling Column, cannot be changed once set.
Next Number	<p>The incrementing value to be initially used by the custom rolling column. This will also display the current value of the next number.</p> <p>It is important to leave room for the number to “roll over” as it increments. The total length of the value will never change so 0’s have to be left within the number to allow it to increment. For example, the value IMPORT0099 will generate the next number of IMPORT0100 the next time a record is processed.</p>
Use for Global Variable	If this option is marked, the global variable GlobalRollingColumn will be assigned the value that is used for the record.



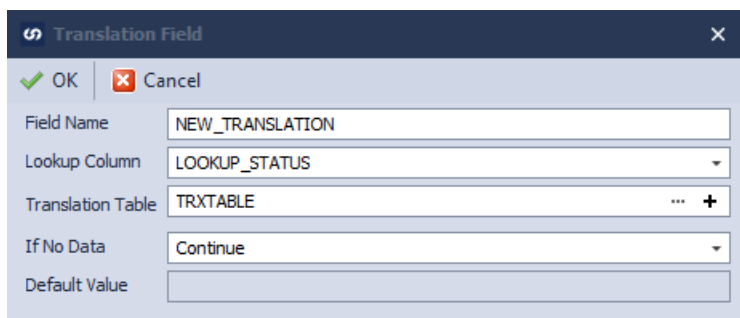
The screenshot shows a dialog box titled "Rolling Column" with a close button (X) in the top right corner. Below the title bar, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon. The main area of the dialog contains three fields: "Name" with the text "CUSTOM_NUMBER", "Next Number" with the text "SCINTEGRATION0001", and "Use for Global Variable" with an unchecked checkbox.

Additional Columns – Translation

The Translation column uses a predefined translation table to convert a source column to a new value. Additional translation tables can be created in this window by clicking (+), or by navigating to File > Maintenance > Translation Tables

Available on: All Connectors

Field Name	The name to identify the Translation field, cannot be changed once set.
Lookup Column	The Source Column that will be translated
Translation Table	The predefined translation table that defines the value translations
If No Data	The action to take if data is not found based on the criteria setup
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.



The screenshot shows a 'Translation Field' configuration window. It has a title bar with a gear icon and a close button. Below the title bar are 'OK' and 'Cancel' buttons. The form contains five fields: 'Field Name' with the value 'NEW_TRANSLATION', 'Lookup Column' with a dropdown menu showing 'LOOKUP_STATUS', 'Translation Table' with the value 'TRXTABLE' and a '+ ' button to the right, 'If No Data' with a dropdown menu showing 'Continue', and 'Default Value' with an empty text box.

Translation Field	
OK Cancel	
Field Name	NEW_TRANSLATION
Lookup Column	LOOKUP_STATUS
Translation Table	TRXTABLE ... +
If No Data	Continue
Default Value	

Additional Columns – Calculated

A calculated column runs a VB.NET or C# script based on an input of values and outputs the value for mapping to a destination field.

Available on: All Connectors

Validate	Validate the script syntax
Clear	Reset the script back to return ""
Name	The name to identify the calculated field, cannot be changed once set.
Fields	Available helpers to use in the script
Script Code	Free text field to write the script

Create new calculation

OK Cancel Validate Clear

Name: NEW_CALC

Fields

- Source Columns
 - _ADDRESSNAME
 - _ADDRESSSTREET1
 - _ADDRESSSTREET2
 - _CITY
 - _CUSTOMERID
 - _CUSTOMERNAME
 - _PHONE
 - _POSTALCODE
 - _STATE
- Functions
- Global Variables
- Helpers
- Default Connections
- Additional Columns

Calculation

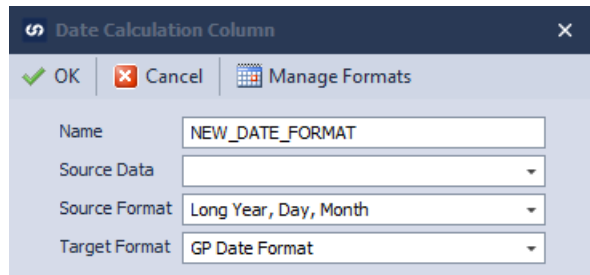
```
return _ADDRESSSTREET1 & " " & _ADDRESSSTREET2
```

Additional Columns – Date Column

A Date Column takes a source field in a specified format and outputs the date in a different specified format.

Available on: All Connectors

Name	The name to identify the Date Calculation field, cannot be changed once set.
Source Data	Source column containing the date to format
Source Format	The format of the 'Source Data' date column
Target Format	The desired date format for the field to output



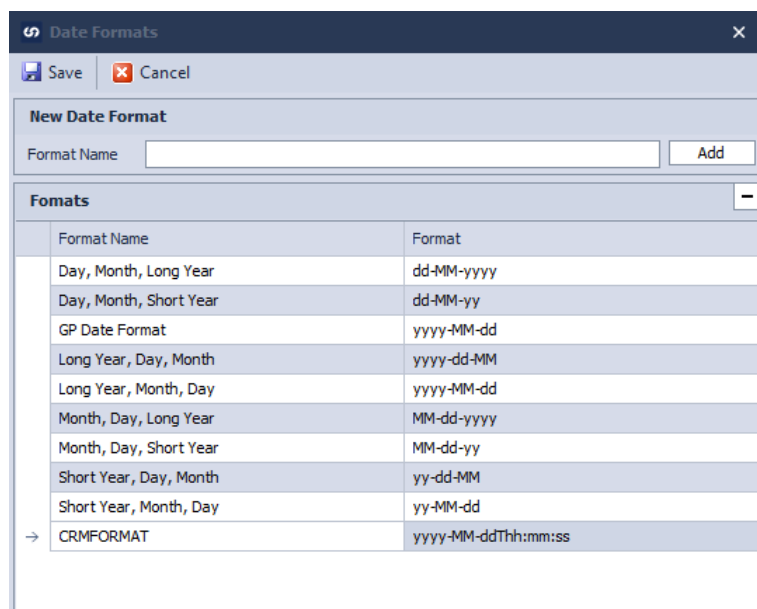
Date Calculation Column – Manage Formats

A list of date formats in SmartConnect using standard .NET formatting.

For more information see the official [Microsoft documentation](#).

Available on: All Connectors

Format Name	A friendly name to identify the format
Format	The technical .NET formatting string



Format Name	Format
Day, Month, Long Year	dd-MM-yyyy
Day, Month, Short Year	dd-MM-yy
GP Date Format	yyyy-MM-dd
Long Year, Day, Month	yyyy-dd-MM
Long Year, Month, Day	yyyy-MM-dd
Month, Day, Long Year	MM-dd-yyyy
Month, Day, Short Year	MM-dd-yy
Short Year, Day, Month	yy-dd-MM
Short Year, Month, Day	yy-MM-dd
→ CRMFORMAT	yyyy-MM-ddThh:mm:ss

Additional Columns – Odata Field Lookup

The Odata field Lookup uses published Business Central web service to retrieve a value based on a defined criterion.

Available on: Business Central Odata, NAV Odata

Name	The name to identify the Odata Field lookup, cannot be changed once set.
Service Name	The Business Central web service to use for the lookup
Return Value	Select the field from the lookup response that will be mapped to the destination
If No Data	The action to take if data is not found based on the criteria setup
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.
Filter Fields	One or more criteria fields can be setup to filter and compare to the lookup service. Source fields or other additional columns can be used to compare against the table fields.

The screenshot shows the 'NAV Odata Field Lookup' configuration window. It has a title bar with a gear icon and standard window controls. Below the title bar are 'OK' and 'Cancel' buttons. The main area contains several input fields: 'Name' (text box with 'ODATA_LOOKUP_CODE'), 'Service Name' (text box with 'CustomerShipToAddress'), 'Return Value' (dropdown menu with 'Code' selected), 'If No Data' (dropdown menu with 'Continue' selected), and 'Default Value' (empty text box). Below these is a 'Filter Fields' section with a '+' and '-' button. It contains a table with three columns: 'Field', 'Field Type', and 'Criteria'. The table has one row with 'Customer_No' in the 'Field' column, 'Source Column' in the 'Field Type' column, and 'CustomerID' in the 'Criteria' column. A right-pointing arrow is to the left of the first row.

Field	Field Type	Criteria
→ Customer_No	Source Column	CustomerID

Additional Columns – Page Field Lookup

The Page field Lookup uses published Business Central soap page to retrieve a value based on a defined criterion.

Available on: Business Central Soap, NAV Soap

Name	The name to identify the Page Field lookup, cannot be changed once set.
Service Name	The Business Central web service page to use for the lookup
Service Url	Read-only field showing the field the web service Url used by the lookup
Return Value	Select the field from the lookup response that will be mapped to the destination
Filter Fields	One or more criteria fields can be setup to filter and compare to the lookup service. Source fields or other additional columns can be used to compare against the table fields.

Page Field Lookup

OK Cancel

Name: NEW_FIELD_LOOKUP

Service Name: CustomerShipToAddress

Service Url: https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a680-633943acee8b/P

Return Value: Code

Filter Fields

Field	Field Type	Criteria
Customer_No	Source Column	CustomerID

Additional Columns – Page Key Lookup

The Page key Lookup uses published Business Central soap page to retrieve a unique key for a record. These keys can be used for advanced actions such as deleting.

Available on: Business Central Soap, NAV Soap

Name	The name to identify the Page Key lookup field, cannot be changed once set.
Service Name	The Business Central web service page to use for the lookup
Service Url	Read-only field showing the field the web service Url used by the lookup
Filter Fields	One or more criteria fields can be setup to filter and compare to the lookup service. Source fields or other additional columns can be used to compare against the table fields.

Page Key Lookup

OK Cancel

Name: NEW_KEY_LOOKUP

Service Name: CustomerShipToAddress

Service Url: https://api.businesscentral.dynamics.com/v2.0/93f1edcf-e187-4d27-a680-633943acee8b/Pr

Filter Fields

Field	Field Type	Criteria
Customer_No	Source Column	CustomerID

Additional Columns – Activity Party

An Activity Party in Dynamics CRM represents a person or group associated with an activity. This column type may be used to facilitate linking entities within Dynamics CRM to the required groups / people.

Available on: CE, CRM

Name	The name to identify the Activity Party field, cannot be changed once set.
Party Members	Select the type of entity to be linked (The entity name may be selected or contained within a source column). Select the source column that contains the entity reference to be linked. Add extra member party rows if required.

Activity Party Column

OK Cancel

Name: NEW_ACTIVITY_PARTY

Party Members + -

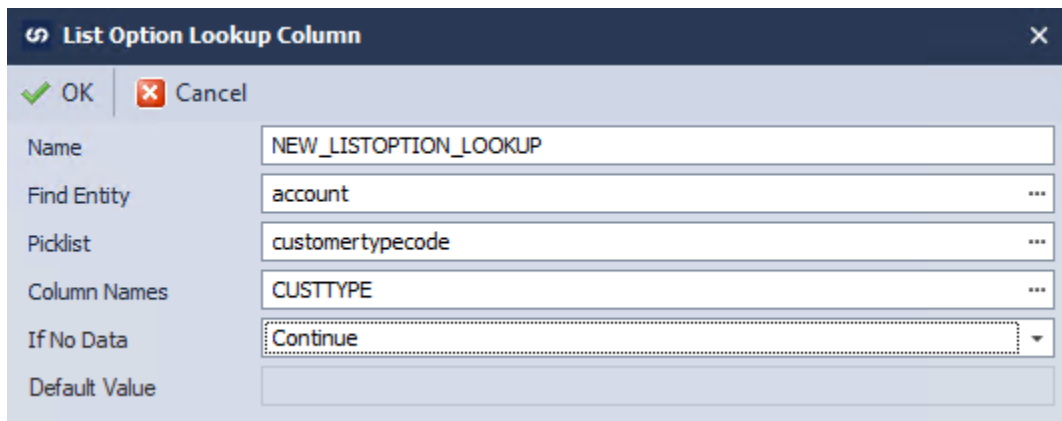
Entity Type	Column Data
→ Contact	Email

Additional Columns – List Option Lookup

A List Option Lookup column may be used to link data within a SmartConnect data source with the applicable option list value within Dynamics CRM.

Available on: CE, CRM

Name	The name to identify the List Option Lookup, cannot be changed once set.
Find Entity	Entity that contains the list option.
Picklist	Select the required list of options.
Column Names	Select the source column that contains the data to be looked up within Dynamics CRM.
If No Data	The action to take if data is not found based on the criteria setup
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.



The screenshot shows a configuration window titled "List Option Lookup Column" with a close button (X) in the top right corner. At the top, there are "OK" and "Cancel" buttons. Below these are six configuration fields:

- Name:** A text box containing "NEW_LISTOPTION_LOOKUP".
- Find Entity:** A text box containing "account" with a three-dot menu icon on the right.
- Picklist:** A text box containing "customertypecode" with a three-dot menu icon on the right.
- Column Names:** A text box containing "CUSTTYPE" with a three-dot menu icon on the right.
- If No Data:** A dropdown menu with "Continue" selected.
- Default Value:** An empty text box.

Additional Columns – Mapped Column Set

A mapped column set allows related fields from the source entity to be integrated to the target entity.

Available on: CE, CRM

Name	The name to identify the Mapped Column Set field, cannot be changed once set.
Source Entity	Select the source entity that is to be processed.
Target Entity	Select the target entity for processing.
Mapped Fields	The fields mapped between the two entities should now appear in the mapped fields window.

The screenshot shows the 'Dynamics CRM Mapped Column Set' dialog box. It has a title bar with a back icon, the text 'Dynamics CRM Mapped Column Set', and a close icon. Below the title bar are 'OK' and 'Cancel' buttons. The dialog contains four sections: 'Name' with a text box containing 'NEW_MAPPED_COLUMN_SET'; 'Source Entity' with a dropdown menu showing 'salesorder'; 'Target Entity' with a dropdown menu showing 'invoice'; and 'Mapped Fields' with a list box containing eight field mappings: 'billto_city » billto_city', 'billto_country » billto_country', 'billto_fax » billto_fax', 'billto_line1 » billto_line1', 'billto_line2 » billto_line2', 'billto_line3 » billto_line3', 'billto_name » billto_name', and 'billto_postalcode » billto_postalcode'. The list box has a scrollbar on the right.

Dynamics CRM Mapped Column Set	
OK Cancel	
Name	NEW_MAPPED_COLUMN_SET
Source Entity	salesorder
Target Entity	invoice
Mapped Fields	billto_city » billto_city billto_country » billto_country billto_fax » billto_fax billto_line1 » billto_line1 billto_line2 » billto_line2 billto_line3 » billto_line3 billto_name » billto_name billto_postalcode » billto_postalcode

Additional Columns – Column Set

A column set will take data from the source entity, and process it, creating a record of the target type. The column set column defines the list of columns that should be passed to the target record from the source record.

Available on: CE, CRM

Name	The name to identify the Column Set field, cannot be changed once set.
Entity	Select the entity type that should be linked to the column set column.
Field List	Select the fields that should be passed to the target object.

Column Set

OK Cancel

Name: NEW_COLUMN_SET

Entity: opportunity

- ☐ (Deprecated) Opportunity Grade (msdyn_opportunitygra)
- ☐ (Deprecated) Opportunity Score (msdyn_opportunityscor)
- ☐ (Deprecated) Opportunity Score Trend (msdyn_opportun
- ☐ (Deprecated) Score History (msdyn_scorehistory)
- ☐ (Deprecated) Score Reasons (msdyn_scorereasons)
- ☐ Account (accountid)
- ☐ Account (parentaccountid)

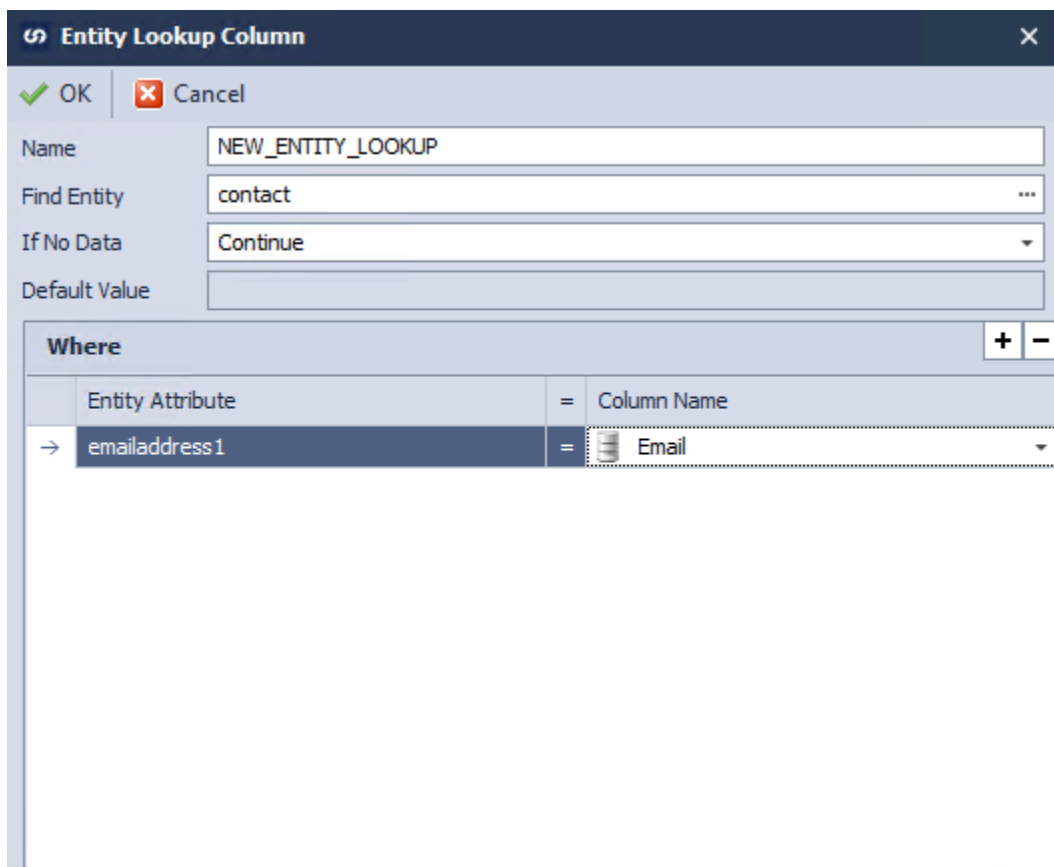
Select All Clear All

Additional Columns – Entity Lookup

A List Option Lookup column may be used to link data within a SmartConnect data source with the applicable option list value within Dynamics CRM.

Available on: CE, CRM, Salesforce

Name	The name to identify the Entity Lookup, cannot be changed once set.
Find Entity	Entity that contains the records.
If No Data	The action to take if data is not found based on the criteria setup
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.
Where Fields	One or more criteria fields can be setup to filter and compare to the lookup entity. Source fields or other additional columns can be used to compare against the entity fields.



The image shows a configuration window titled "Entity Lookup Column". At the top, there are "OK" and "Cancel" buttons. Below them are four input fields: "Name" with the value "NEW_ENTITY_LOOKUP", "Find Entity" with the value "contact", "If No Data" with a dropdown menu showing "Continue", and "Default Value" which is empty. Below these fields is a section titled "Where" with a "+" and "-" button. Inside the "Where" section is a table with two columns: "Entity Attribute" and "Column Name". The first row in the table shows "emailaddress1" in the "Entity Attribute" column and "Email" in the "Column Name" column, with an equals sign between them. The "Email" value is shown in a dropdown menu.

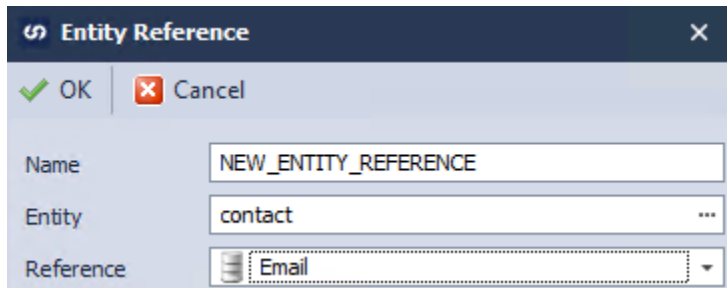
Entity Lookup Column	
OK Cancel	
Name	NEW_ENTITY_LOOKUP
Find Entity	contact
If No Data	Continue
Default Value	
Where + -	
Entity Attribute	= Column Name
→ emailaddress1	= Email

Additional Columns – Entity Reference

When linking records in CRM, if the id (GUID) of the record to be linked to is known, an entity reference column may be used to create the link between the current record and the target record. This removes the need to use an entity lookup to find the record to link to in CRM.

Available on: CE, CRM

Name	The name to identify the Entity Reference, cannot be changed once set.
Entity	Select the entity that the reference is for.
Reference	Select the column that holds the GUID for the entity reference.



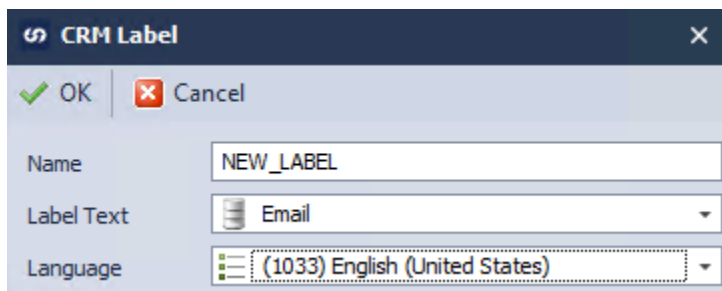
The image shows a dialog box titled "Entity Reference" with a close button (X) in the top right corner. Below the title bar, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon. The dialog contains three input fields: "Name" with the text "NEW_ENTITY_REFERENCE", "Entity" with the text "contact" and a three-dot menu icon to its right, and "Reference" with a dropdown menu showing "Email" and a downward arrow icon.

Additional Columns – Label

When updating meta type data within CRM a label column must be used for description fields. This allows descriptions / name fields to be displayed in multiple languages depending on system requirements.

Available on: CE, CRM

Name	The name to identify the CRM Label, cannot be changed once set.
Label Text	Select the data source field that holds the label text.
Language	Select the field that holds the label language or select the language from the list of languages from within CRM.



The screenshot shows a dialog box titled "CRM Label" with a close button (X) in the top right corner. Below the title bar, there are "OK" and "Cancel" buttons. The dialog contains three fields: "Name" with the text "NEW_LABEL", "Label Text" with a dropdown menu showing "Email", and "Language" with a dropdown menu showing "(1033) English (United States)".

Additional Columns – Multi Lookup

Sometimes when loading data into CRM information that should be included in the created record(s) exists in CRM but does not exist in the data source, a CRM lookup column may be used to query CRM with user definable criteria and return multiple columns which may then be used when mapping to the CRM destination. e.g. When creating address information for a contact, address may be read from the linked account and written to the contact record.

Available on: CE, CRM

Name	The name to identify the Multi lookup field, cannot be changed once set.
Server	Read only field showing what server/region the lookup is using.
Organization	Select the CRM organization that this lookup should always run against or select Runtime Organization to perform the lookup against the destination organization.
Entity	Select the entity to perform the lookup against.
Where	Select the entity fields and source fields to match.
Return Fields	Mark which fields will be returned from the lookup.

The screenshot shows the 'CRM Lookup Column' configuration window. It has a title bar with a refresh icon and a close button. Below the title bar are 'OK' and 'Cancel' buttons. The main configuration area includes fields for 'Name' (NEW_MULTI_LOOKUP), 'Server' (crm.dynamics.com), 'Organization' (Runtime Organization), and 'Entity' (contact). There is a checkbox for 'Return Error if No Data Found' which is checked. Below this is a 'Where' section with a table for defining lookup criteria. The table has two columns: 'Entity Attribute' and 'Column Name'. A single row is defined with 'emailaddress1' in the first column and 'Email' in the second column. At the bottom is a 'Return Fields' section with a list of fields and checkboxes. The fields are: '(Deprecated) Process Stage', '(Deprecated) Traversed Path', 'Account', 'Address 1', 'Address 1: Address Type', and 'Address 1: City'. The checkboxes for 'Address 1', 'Address 1: Address Type', and 'Address 1: City' are checked.

Where	
Entity Attribute	Column Name
emailaddress1	Email

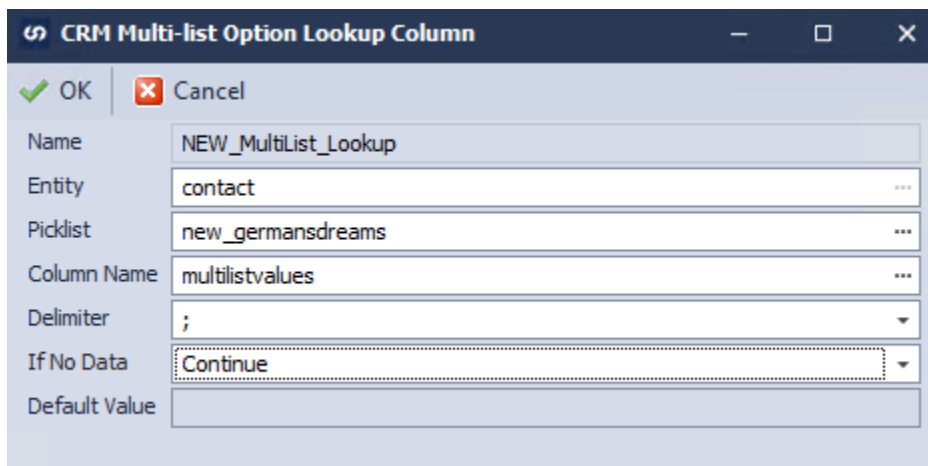
Return Fields	
<input type="checkbox"/>	(Deprecated) Process Stage
<input type="checkbox"/>	(Deprecated) Traversed Path
<input type="checkbox"/>	Account
<input checked="" type="checkbox"/>	Address 1
<input checked="" type="checkbox"/>	Address 1: Address Type
<input checked="" type="checkbox"/>	Address 1: City

Additional Columns – MultiList Option Lookup

A MultiList Option Lookup allows you to set multiple values in a CRM picklist from a source field that contains the available values within the CRM list.

Available on: CE, CRM

Name	The name to identify the Multi lookup field, cannot be changed once set.
Entity	Entity that contains the multi list option field.
Picklist	Select the picklist.
Column Name	Select the source fields that contain the list values separated by the delimiter specified below.
Delimiter	Select delimiter used in the source field. Can be a colon, semi colon, or a comma.
If No Data	The action to take if data is not found based on the criteria setup.
Default Value	Only applicable if 'Return default value' is selected for the field above. Allows the user to define the default value to be returned.



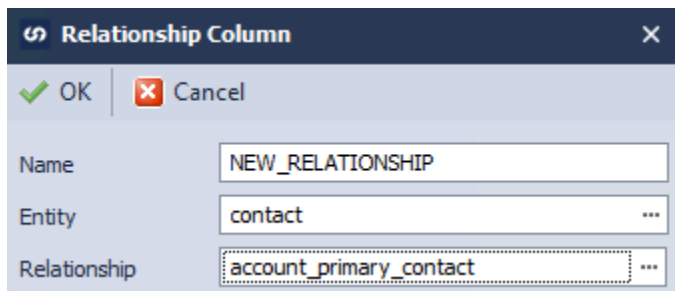
The screenshot shows a configuration window titled "CRM Multi-list Option Lookup Column". At the top, there are "OK" and "Cancel" buttons. Below, several fields are configured: "Name" is "NEW_MultiList_Lookup"; "Entity" is "contact"; "Picklist" is "new_germansdreams"; "Column Name" is "multilistvalues"; "Delimiter" is ";"; "If No Data" is "Continue"; and "Default Value" is an empty field.

✓ OK	✗ Cancel
Name	NEW_MultiList_Lookup
Entity	contact
Picklist	new_germansdreams
Column Name	multilistvalues
Delimiter	;
If No Data	Continue
Default Value	

Additional Columns – Relationship

A relationship column in CRM is used to define which relationship should be used with linking records together. e.g. When making a contact the primary contact for an account the account_primary_contact relationship should be used.

Name	The name to identify the Relationship field, cannot be changed once set.
Entity	Select the entity that represents the source side of the relationship.
Relationship	Select the required relationship from the list read from the previously selected entity.



Relationship Column

OK Cancel

Name: NEW_RELATIONSHIP

Entity: contact

Relationship: account_primary_contact

Additional Columns – REST Lookup

The REST Lookup uses a preconfigured Lookup template to retrieve a value from a REST Service. New lookups must first be created on the REST Service Definition.

Available on: Generic REST Destination

Name	The name to identify the REST lookup, cannot be changed once set
Instance	Read-only field showing the Connector Instance being used
Lookup	Drop-down to select an existing REST Lookup from the REST Service Definition
Late Bound Lookup	If selected, the lookup will be performed after all other processing is completed. If using other additional columns for 'Mappable Items', use this check box
Return Fields	Select fields from the lookup response that will be mapped to the destination
If No Data	Used to define action if No data is returned from the lookup (check below table for definitions of all options)
Default Value	If no data is found what value should be used. Only available when 'If No Data' is set to 'Return default value'
Mappable Items – Type	Is the mappable item a Variable, Parameter, or Header
Mappable Items – Name	What is the unique name for the mappable item
Mappable Items - Column	Which source column is mapped to the mappable item

Rest Lookup Column

OK

Cancel

Name

lkup_owner__ID

Instance

HubSpot

Lookup

lookup owner

Late Bound Lookup

☒

Return Fields

id

If No Data

Return default value

Default Value

1296735

Mappable Items

	Type	Name	Column
→	Parameter	email	emailaddress
	Variable	id	owneremail

Additional Columns – REST Lookup - If No Data Options

Define what happens if no records are found with the lookup criteria

Continue	Continue processing with a blank value for the lookup output
Restrict line out if data exists	Override's the value set in the restriction of the mapping window if data exists.
	Requires the lookup field to be mapped otherwise lookup is not run.
Restrict line out if no data exists	Override's the value set in the restriction of the mapping window if data does not exist.
	Requires the lookup field to be mapped otherwise lookup is not run.
Return default value	Continue processing with the value in 'Default Value' for the lookup output
Return failure for current integration line	Throw an error on the current integration line stating the lookup failed to find a record
Stop processing integrations	Stop processing all documents
	Unavailable if 'Late Bound Lookup' is selected

Integration Process – Options

The options tab of the integration allows users to configure settings for the integration.

Tasks – Process Stages

Allow any user to run this integration	Allows any user to run the integration without grant them access individually; enables running the integration through the SmartConnect web service
Owner	Set the owner of the integration
Integration Group	Assign the integration to an Integration Group as defined in Integrations > Integration Group
Concatenation Delimiter	Select the delimiter used if the aggregation for a destination field is set to 'Concat'
Return map success	If the data source returns no rows the process will end successfully
Return map failure	If the data source returns no rows the process will end with a failure
If there are blank lines in the data source	Define how blank lines should be processed, available options: Do Nothing, Exclude Blank Lines and Exclude Blank Keys
Use Log	Enables the additional logging options below, but does not do any logging without a specific log type also enabled
Log Errors	Specify if unsuccessfully processed documents should be written to the 'Map Log'
Log Error Source Data	Specify if source data and error messages for failed documents should be stored in 'Process Errors' for reprocessing
Log Successes	Specify if successfully processed documents should be written to the 'Map Log'
Log Xml	Specify if XML that would be written to the destination is also written to the directory in File > Maintenance > Setup
Process Errors	Specify if process errors should be output to a file in the directory defined in File > Maintenance > Setup
Script Language	Specify the scripting language for the integration

Integration Process

Save

Cancel

Delete

Run

Schedule

Integration Id

NEW_INTEGRATION_FROM_EXCEL

Description

Excel Upload

Source & Destination

Options

Tasks

Variables

☐ Allow any user to run this integration

Owner

user1@eonesolutions.com

...

Integration Group

General

...

Concatenation Delimiter

|

If there is no data returned from this maps data source

☐ Return map success

☐ Return map failure

If there are blank lines in the data source:

Do Nothing

☐ Use Log

☐ Log Errors

☐ Log Successes

☐ Log Error Source Data

☐ Log Xml

Process Errors

☒ None

☐ Save As Csv File

☐ Save As Xml File

Script Language

☐ C# .Net

☒ VB .Net

Integration Process – Tasks

Tasks are operations that occur at different stages in the integration process.

Tasks – Process Stages

Tasks that run before the Integration	These tasks will be executed before the data is read from the data source
Integration Data Checks	These tasks are executed after data is read from the data source, before processing documents
Tasks that run before the document	These tasks are executed before each document as defined by the 'Data Source Keys'
Tasks that run if the document fails	These tasks are executed after a document, as defined by the 'Data Source Keys', fails to import to the destination
Tasks that run if the document succeeds	These tasks are executed after a document, as defined by the 'Data Source Keys', successfully imports to the destination
Tasks that run if the Integration fails	These tasks will execute if any documents or tasks fail
Tasks that run if the Integration succeeds	These tasks will execute if all documents and tasks succeed

Integration Process

Save

Cancel

Delete

Run

Schedule

Integration Id

NEW_INTEGRATION_FROM_EXCEL

Description

Excel Upload

Source & Destination

Options

Tasks

Variables

Integration Pre Tasks

Tasks that run before the Integration

Integration Data Checks

Document Tasks

Tasks that run before the document

Tasks that run if the document fails

Tasks that run if the document succeeds

Run Script: UPDATE_ADDITIONAL_SYSTEM

Integration Post Tasks

Tasks that run if the Integration fails

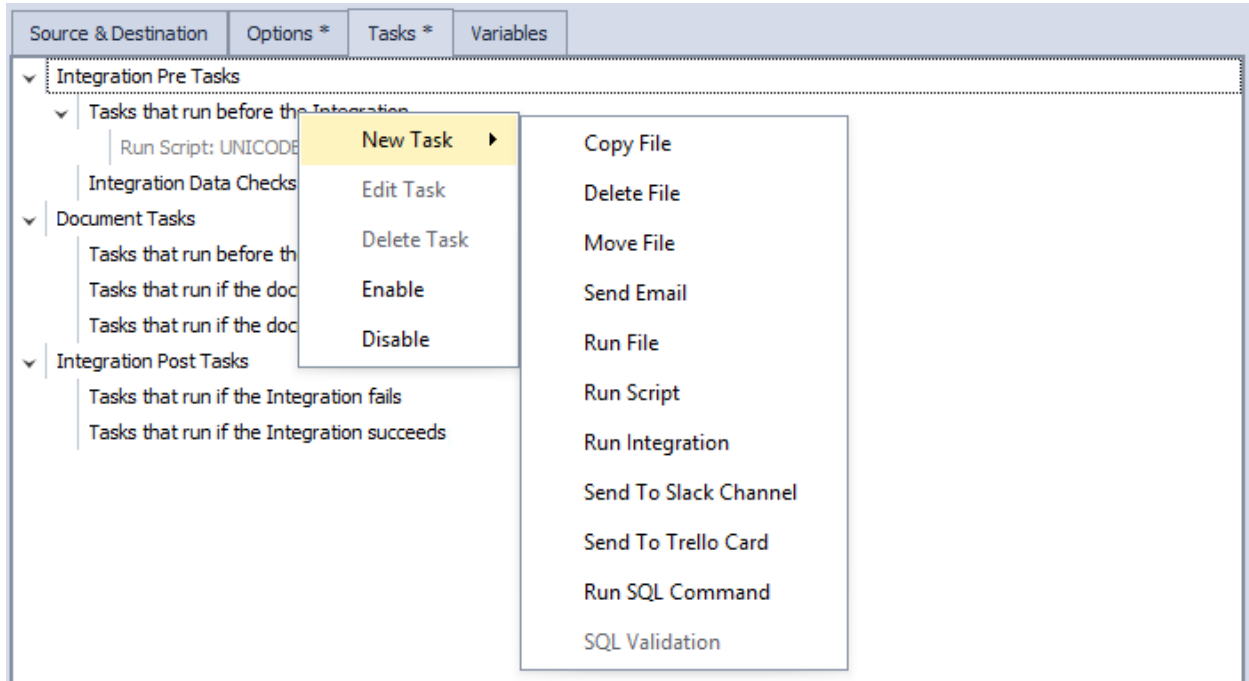
Send Email: SEND_FAILURE_EMAIL

Tasks that run if the Integration succeeds

Input Output Task: ARCHIVE_FILES

Tasks – New Task

New tasks can be created by right clicking on the process stage where the task will be added. Then select the task type desired.



Tasks – Type - Copy File

Copy file tasks will copy a file from a local file directory to another location.

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Overwrite file	If selected, existing files with the same name will be overwritten.
Append date/time	If selected, the current date and time will be appended to the new file name.
Copy file	The location of the file to be copied.
To	The location where the new copy of the file will be created.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

FormTaskBase

Save

Cancel

Delete

Test

Task Details

Task Name

COPY_FILE

Enable

☒

On Failure

Quit

On Success

Go to next step

☐ overwrite file

☐ append date/time

Copy file

C:\eOne\sku.xlsx

To

C:\eOne\Source\sku.xlsx

Tasks that run before the map

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	Sequence	Task Name	Task Type
→	1	UNICODE	Script

Tasks – Type - Delete File

Delete file tasks will delete a file from a local file directory.

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Delete file	The location of the file to be deleted.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Delete File

Save

Cancel

Delete

Test

Task Details

Task Name

DELETE_FILE

Enable

☒

On Failure

Quit

On Success

Go to next step

☐ overwrite file

☐ append date/time

Delete file

C:\eOne\sku.xlsx

Tasks that run before the map

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Sequence	Task Name	Task Type
→ 1	UNICODE	Script

Tasks – Type - Move File

Move file tasks will move a file from a local file directory to another location.

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Overwrite file	If selected, existing files with the same name will be overwritten.
Append date/time	If selected, the current date and time will be appended to the file name.
Move file	The location of the file to be moved.
Copy file	The target location for the file.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Move File

Save Cancel Delete Test

Task Details

Task Name

MOVE_FILE

Enable

☒

On Failure

Quit

On Success

Go to next step

☐ overwrite file

☐ append date/time

Move file

C:\eOne\sku.xlsx

To

C:\eOne\Source\sku.xlsx

Tasks that run before the map

→

Sequence

1

Task Name

UNICODE

Task Type

Script

Tasks – Type - Send Email

Send Email tasks will send an email to specified user(s). All text fields on an email task can be set using global variables if desired.

*There is a prerequisite to setup SMTP server settings in File > Maintenance > Setup

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
To	Email address(s) to receive the email.
CC	Email address(s) to be CC'd on the email.
BCC	Email address(s) to be BCC'd on the email.
Subject	The Subject of the email.
Include Validation Errors	If selected, any SQL validation task errors that occurred during processing will be attached to the email.
Include Process Errors	If selected, any process errors that occurred during processing will be attached to the email.
Insert Variable	Will guide the user to variables that will be inserted to the current location of the cursor.
Message	The body of the email.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Send Email

Save

Cancel

Delete

Test

Task Details

Task Name

FAILURE_EMAIL

To

support@eonesolutions.com; eonesupport@eonesol

CC

GlobalCCAddress

BCC

From

Subject

Integration GlobalMapID has failed

Message

Please investigate this failed integration ASAP!

Run Date: GlobalRunDate

Run Number: GlobalRunNumber

Process Count: GlobalProcessCount

Success Count: GlobalSuccessCount

Process Errors:

GlobalRunErrors

Enable

☒

On Failure

Quit

On Success

Go to next step

Include Validation Errors

☒

Include Process Errors

☒

Insert Variable

Tasks that run if the map fails

Sequence

Task Name

Task Type

Tasks – Type - Run File

Run file tasks will run the specified file.

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
File	File on local directory to run.
Exit Code	Expected exit code on run to signal the process completed successfully.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Run File

Save

Cancel

Delete

Test

Task Details

Task Name

RUN_FILE

Enable

☒

On Failure

Quit

On Success

Go to next step

File

C:\Test_map.bat

Exit Code

0

Tasks that run before a document

Sequence	Task Name	Task Type
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Tasks – Type - Run Script

Run a VB.NET or C# script. Script tasks must return either true or false. True will cause the On Success options to be used, and False will use the On Failure options.

Validate	Validate the script syntax.
Clear	Reset the script back to 'return true'.
Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Fields	Available helpers to use in the script.
Script Code	Free text field to write the script.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Run Script

Save

Cancel

Delete

Test

Validate

Clear

Name

RUN_SCRIPT

On Success

Go to next step

On Fail

Quit

Enable

☒

Fields

Source Columns

_SKU

Functions

Global Variables

Helpers

Default Connections

Script Code

GBL_BC_ORDER_ID = _SKU;
return true;

Tasks that run before a document

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Sequence	Task Name	Task Type
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Tasks – Type - Run Integration

Run a specified integration.

Task Name	Unique name for the integration task.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Integration Id	Unique Id of the integration to be run.
Use data from parent integration	If selected, the full data set from the parent integration will be used on integration run.
Use variables from parent integration	If selected, the current value of all map variables will be used on integration run.
Show run integration in new tab	If selected, the integration run will open in another tab when manually running the parent integration.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Run Integration

Save

Cancel

Delete

Test

Task Details

Task Name

RUN_DOCUMENT_LINES

Enable

☒

On Failure

Quit

On Success

Go to next step

Integration Id

CASH_RECEIPT_JOURNAL

...

☐ Use data from parent integration

☐ Use variables from parent integration

☐ Show run integration in new tab

Tasks that run if a document succeeds

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Sequence	Task Name	Task Type
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Tasks – Type - Run SQL Command

Run a Microsoft SQL command.

*There is a prerequisite to setup at least one Microsoft SQL connection first.

Task Name	Unique name for the integration task.
Connection	The MSSQL connection to be used by the task.
Server	Read-only field displaying server used by the connection.
Database	Select the database on the server to be used by the command.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Update global variable with SQL command result	If selected, the output of the SQL command will be saved to a global variable.
Variable Name	The global variable to save the output result.
Insert Variable	Will guide the user to variables that will be inserted to the current location of the cursor.
SQL Command	Free text field to write the SQL command to be executed.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Run SQL Command

Save Cancel Delete Test

Task Details

Task Name: WRITEBACK_SUCCESS ☒ Enable

Connection: Local DB On Failure: Quit

Server: eone-2017\eone On Success: Go to next step

Database: TEST ☒ Update global variable with SQL command result

Variable Name: GBL_SHOPIFY_DATE

SQL Command: UPDATE Customers set Processed = 1 WHERE Id = '._id'

Tasks that run if a document succeeds

Sequence	Task Name	Task Type
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Tasks – Type - Send To Slack Channel

Send a message to a Slack channel. This process will require an OAuth app is configured in Slack for SmartConnect to use for communication.

Task Name	Unique name for the integration task.
Client Id	OAuth Client Id.
Client Secret	OAuth Client Secret.
Authorize	Authorize will redirect the user to a browser to log into Slack.
Refresh Access Token	Retrieve a new access token for Slack.
Channels	The channel for the message to be sent to.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Include Validation Errors	If selected, any SQL validation task errors that occurred during processing will be attached to the email.
Include Process Errors	If selected, any process errors that occurred during processing will be attached to the email.
Insert Variable	Will guide the user to variables that will be inserted to the current location of the cursor.
Message	Free text field to write the message.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Send To Slack Channel

Save Cancel Delete Test

Task Details

Task Name: notify_slack Enable: ☒

Client Id: 2458089221734.2458101181526 On Failure: Quit

Client Secret: ***** On Success: Go to next step

Authorize Refresh Access Token Include Validation Errors: ☐

Channels: smartconnect Include Process Error: ☒

Message: The integration was a success! Integration: GlobalMapID

Insert Variable

Tasks that run if a document succeeds

Sequence	Task Name	Task Type
→ 1	WRITEBACK_SUCCESS	

Tasks – Type - Send To Trello Card

Send a message to a Trello card. This process will require a logon token to access the Trello API.

Task Name	Unique name for the integration task.
Logon Key	Unique Logon key for the Trello environment.
Logon Token	Generated Login Token from Trello.
Board	The board containing the Card.
List	The list containing the Card.
Card	The Card to be notified.
Enabled	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Include Validation Errors	If selected, any SQL validation task errors that occurred during processing will be attached to the email.
Include Process Errors	If selected, any process errors that occurred during processing will be attached to the email.
Insert Variable	Will guide the user to variables that will be inserted to the current location of the cursor.
Message	Free text field to write the message.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: Send To Trello Card

Save

Cancel

Delete

Test

Task Details

Task Name

trello_notify

Enable

☒

Logon Key

73ac136215d9d871ad81d743cac8fdea

On Failure

Quit

Logon Token

On Success

Go to next step

Board

Projects

Include Validation Errors

☐

List

Ethan

Include Process Error

☒

Card

ConnectWise - BC Templates

Message

Insert Variable

You fix now please!
Integration Id: GlobalMapID

Tasks that run if a document succeeds

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Sequence	Task Name	Task Type
→	1 WRITEBACK_SUCCESS	
	2 notify_slack	

Tasks – Type – SQL Validation

Determine if source data is valid against a SQL table. This task type can only be used on the 'Integration Data Checks' process stage.

*There is a prerequisite to setup at least one Microsoft SQL connection first.

Task Name	Unique name for the integration task.
Connection	The MSSQL connection to be used by the task.
Server	Read-only field displaying server used by the connection.
Database	Select the database on the server to be used by the command.
Table	Select the table to be evaluated.
Valid if	Select if validation is successful by data existing or not existing.
Modify	Modify opens a query editor window for creating advanced queries.
Enable	If selected, the task will be processed at runtime.
On Failure	Action performed if task fails. Options: Quit, Go to next step and Cancel Processing.
On Success	Action performed if task succeeds. Options: Quit, Go to next step and Cancel Processing.
Criteria	Specified criteria that must be met for validation.
Sequence	Arrow keys can be used to modify process order of tasks on the same process stage.

Task: SQL Validation

Save

Cancel

Delete

Test

Task Details

Task Name

VALIDATE_ITEM

Enable

☒

Connection

Local DB

On Failure

Quit

Server

eone-2017\eone

On Success

Go to next step

Database

TEST

Table

WebOrdersProducts

Valid if

Data Exists

Modify

Criteria

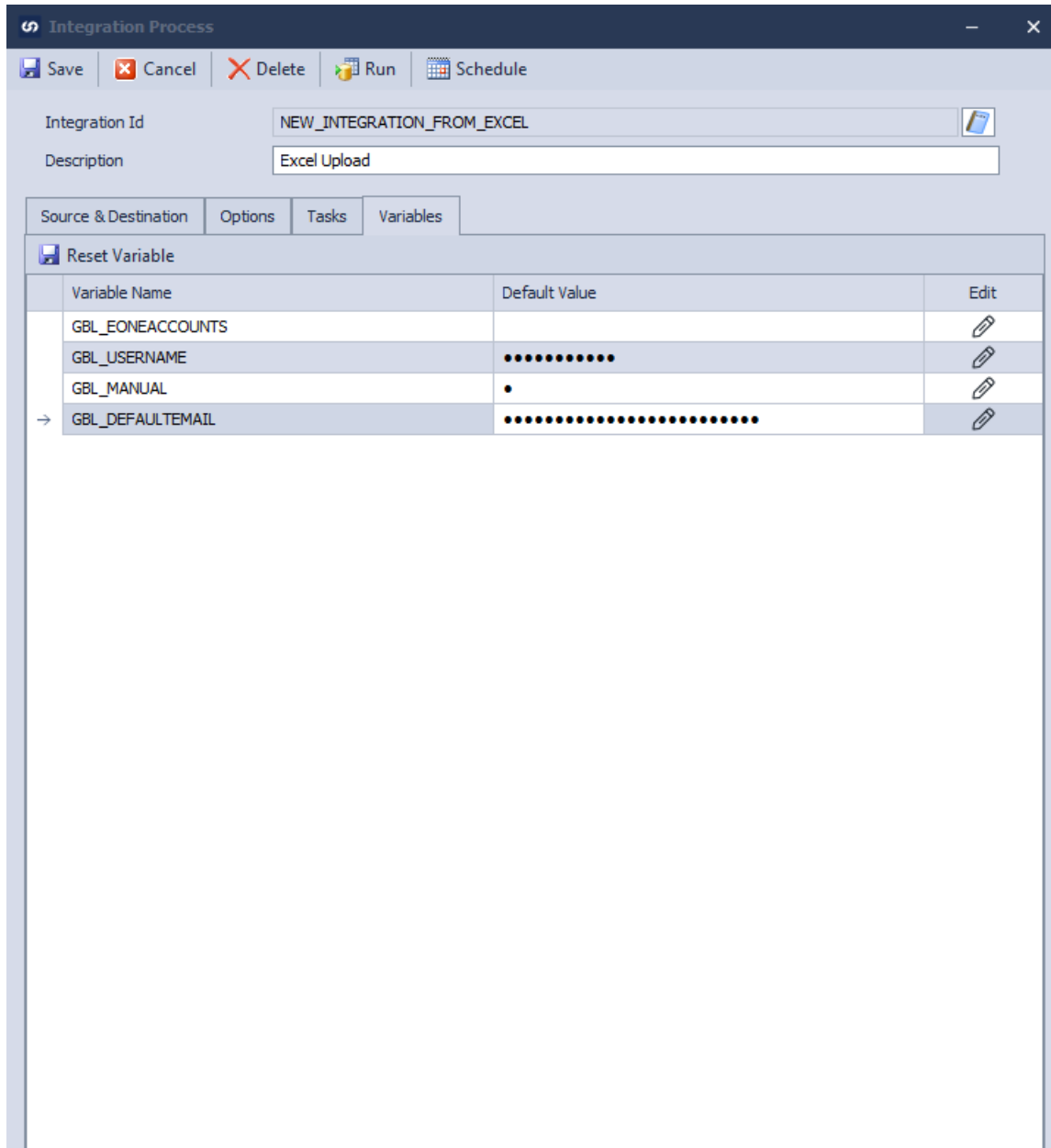
Grouping	Source Field	Operator	Target Field
→ And	sku	Not Equal To	OrderNumber

Data validation that runs before the map





Sequence	Task Name	Task Type
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Integration Process – Variables

When a global variable is added to any script window on an integration it will automatically be added to this tab. From this screen you can modify the default values or click edit to adjust more settings.



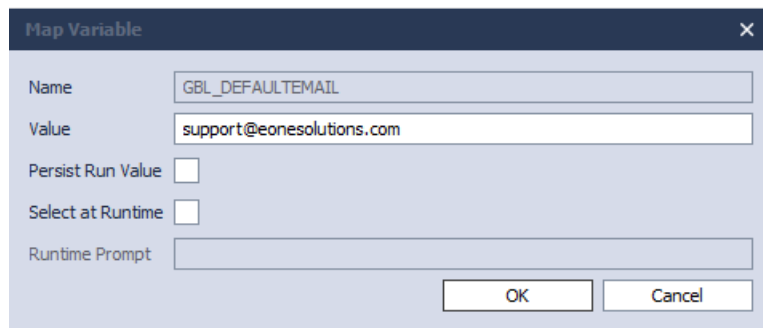
The screenshot shows the 'Integration Process' window with the 'Variables' tab selected. The window has a title bar with a minus and close button. Below the title bar is a toolbar with 'Save', 'Cancel', 'Delete', 'Run', and 'Schedule' buttons. The 'Integration Id' field contains 'NEW_INTEGRATION_FROM_EXCEL' and the 'Description' field contains 'Excel Upload'. Below these fields are four tabs: 'Source & Destination', 'Options', 'Tasks', and 'Variables'. The 'Variables' tab is active, showing a 'Reset Variable' button and a table of global variables.

Variable Name	Default Value	Edit
GBL_EONEACCOUNTS		
GBL_USERNAME	
GBL_MANUAL	•	
→ GBL_DEFAULTEMAIL	

Variables – Map Variable

Map variables can be used in the integration scripts and sources.

Name	The unique name of the global variable.
Value	The value this integration will use for the variable.
Persist Run Value	When checked, the current value in memory at the end of the map run will overwrite the 'Value' field and be used on the next run.
Select at Runtime	When checked, at runtime the user will be asked to provide a value for the variable.
Runtime Prompt	When 'Select at Runtime' is checked, a prompt description can be provided when the user is asked to provide a value at runtime.



Map Variable

Name: GBL_DEFAULTEMAIL

Value: support@eonesolutions.com

Persist Run Value: ☐

Select at Runtime: ☐

Runtime Prompt:

OK Cancel

Integration Process – Schedule

SmartConnect maps can be scheduled to run automatically. Schedules require the SmartConnect Windows service to be installed on at least one server.

Schedule Task	The type of schedule to set. Options are: Daily, Weekly, Monthly and Once.
Start Time	The time on the local server to run the integration.
Every	Repeat the schedule every 'x' number of periods.
Repeat every	When checked, the integration can repeat every 'x' number of minutes.
For the duration of	Set the duration of the 'Repeat every' option.
End Time	Set the end time of the 'Repeat every' option.

Schedule

Save Delete

Schedule Task: Daily Start Time: 8:00:00 AM

☒ Active

Daily

Every: 1 day(s)

Repeat

☒ Repeat every: 60 minutes

☐ For the duration of: 720 minutes

☐ End Time: 8:00:00 PM

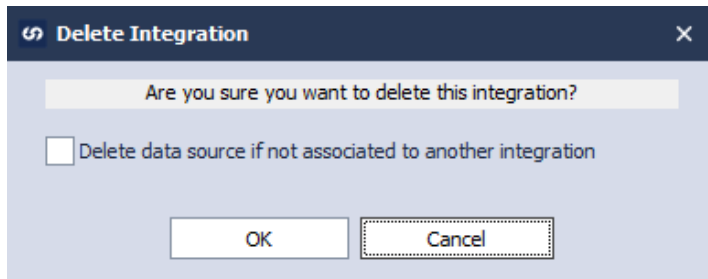
Integrations – Navigation – Open

Allows users to open and edit integrations.

Integrations – Navigation – Delete

Allows users to delete an existing integration.

Delete data source	Check this box to also delete the associated data source when deleting this integration.
---------------------------	--



Integrations – Navigation – Refresh

Refresh the integration list to show any updates caused by integrations that were ran, modified, or deleted since the window was loaded.

Integrations – Integration – Integrations

Navigate to the integration list. This option only functions if user is currently on the 'Schedules' view.

Integrations – Integration – Run Integration

Runs the highlighted integration. This option is unavailable for real-time data sources. The following options are only available if at least one of the following criteria are met.

- Source is a file, and the 'Select File at Runtime' box is checked.
- The integration has a map variable with the 'Select at Runtime' box checked.

Connection	The unique name of the global variable
Select File	The value this integration will use for the variable
File Version	When checked, the current value in memory at the end of the map run will overwrite the 'Value' field and be used on the next run.
Select Sheet	When checked, at runtime the user will be asked to provide a value for the variable
Set Variables – Name	The unique name of the global variable
Set Variables – Prompt	A prompt description about the variable
Set Variables – Default Value	An editable field to set the default value for the global variable

Select an Excel File to Process

Select Source File

Connection

LOCAL OR NETWORK FOLDER

Select File

C:\eOne\sku.xlsx

File Version

Excel2016

Select Sheet

Set Variables

	Name	Prompt	Default Value
→	GBL_SHOPIFY_DA...	Set Filter	2020-05-12T07:17:39

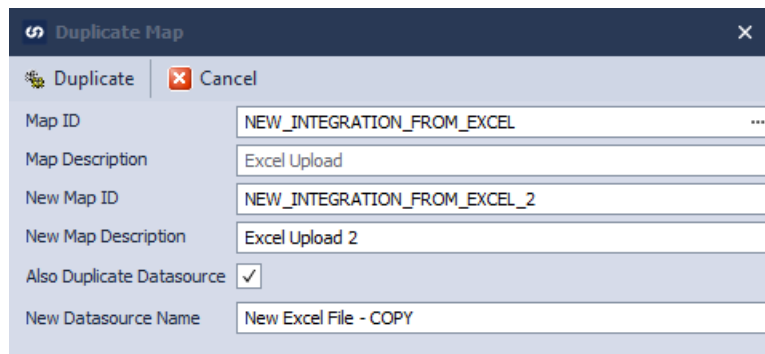
OK

Cancel Run



Integrations – Integration – Duplicate Integration

Allows users to duplicate/clone an existing integration.

Map ID	The unique Id of the existing integration
Map Description	The description of the existing integration
New Map ID	The unique Id of the new integration
New Map Description	The description of the new integration
Also Duplicate Datasource	If checked the existing data source will be duplicated; if unchecked the new integration will use the existing data source
New Datasource Name	If 'Also Duplicate Datasource' is checked, the user must provide a unique name for the new data source



Duplicate Map

 Duplicate  Cancel

Map ID: NEW_INTEGRATION_FROM_EXCEL

Map Description: Excel Upload

New Map ID: NEW_INTEGRATION_FROM_EXCEL_2

New Map Description: Excel Upload 2

Also Duplicate Datasource: ☒

New Datasource Name: New Excel File - COPY

Integrations – Integration Maintenance – Schedules

Shows a list of all configured schedules. 3 actions can be performed on this screen.

SmartConnect

File Connections Data Sources Integrations Maintenance Security

Create Open Delete Refresh Integrations Run Integration Duplicate Integration Schedules Process Errors Activity Integration Group Import Export

Navigation Integration Integration Maintenance Import / Export

Schedules

Drag a column header here to group by that column

	Process Id	Next Run Date	Active	Last Run Success	Last Success Date	Last Fail Date
→	+ NEW_INTEGRATION_FROM_EXCEL	12/09/2021 12:00:00 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	+ BULK_UPLOAD_MAP_1	12/10/2021 08:00:00 AM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	+ NEW_INTEGRATION_FROM_EXCEL_2	12/10/2021 09:00:00 AM	<input type="checkbox"/>	<input type="checkbox"/>		

Site Name : Two, Inc. User : chhanson.1@gmail.com Version : Perpetual

Schedules - Refresh

This will reload all the schedules and show updated run time and history.

Schedules - Expand schedule history

By clicking on the (+) next to the Process Id, a user can view the integration schedule history.

SmartConnect

File Connections Data Sources Integrations Maintenance Security

Create Open Delete Refresh Integrations Run Integration Duplicate Integration Schedules Process Errors Activity Integration Group Import Export

Navigation Integration Integration Maintenance Import / Export

Schedules

Drag a column header here to group by that column

Process Id	Next Run Date	Active	Last Run Success	Last Success Date	Last Fail Date
→ CONTACT_DUMP	08-24-2021 08:10:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 08:05:00 AM	

Started	Ended	Records	Run Number	Success	Rescheduled	Next Run	Run Errors	System Error
08-24-2021 08:05:16 AM	08-24-2021 08:05:20 AM	633	187	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 08:10:00 AM		
08-24-2021 08:00:16 AM	08-24-2021 08:00:20 AM	633	186	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 08:05:00 AM		
08-24-2021 07:55:16 AM	08-24-2021 07:55:19 AM	633	185	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 08:00:00 AM		
08-24-2021 07:50:16 AM	08-24-2021 07:50:19 AM	633	184	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:55:00 AM		
08-24-2021 07:45:16 AM	08-24-2021 07:45:19 AM	633	183	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:50:00 AM		
08-24-2021 07:40:16 AM	08-24-2021 07:40:19 AM	633	182	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:45:00 AM		
08-24-2021 07:35:16 AM	08-24-2021 07:35:19 AM	633	181	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:40:00 AM		
08-24-2021 07:30:16 AM	08-24-2021 07:30:19 AM	633	180	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:35:00 AM		
08-24-2021 07:25:16 AM	08-24-2021 07:25:21 AM	633	179	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:30:00 AM		
08-24-2021 07:20:16 AM	08-24-2021 07:20:18 AM	633	178	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:25:00 AM		
08-24-2021 07:15:16 AM	08-24-2021 07:15:18 AM	633	177	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	08-24-2021 07:20:00 AM		

Schedules - Edit an existing schedule

An existing schedule can be modified by double clicking on the Process Id from the list. New schedules can only be created by opening the integration and selecting 'Schedule'

Schedule Task	The type of schedule to set. Options are: Daily, Weekly, Monthly and Once
Start Time	The time on the local server to run the integration
Every	Repeat the schedule every 'x' number of periods
Repeat every	When checked, the integration can repeat every 'x' number of minutes
For the duration of	Set the duration of the 'Repeat every' option
End Time	Set the end time of the 'Repeat every' option

Schedule

Save Delete

Schedule Task: Daily Start Time: 8:00:00 AM

☒ Active

Daily

Every: 1 day(s)

Repeat

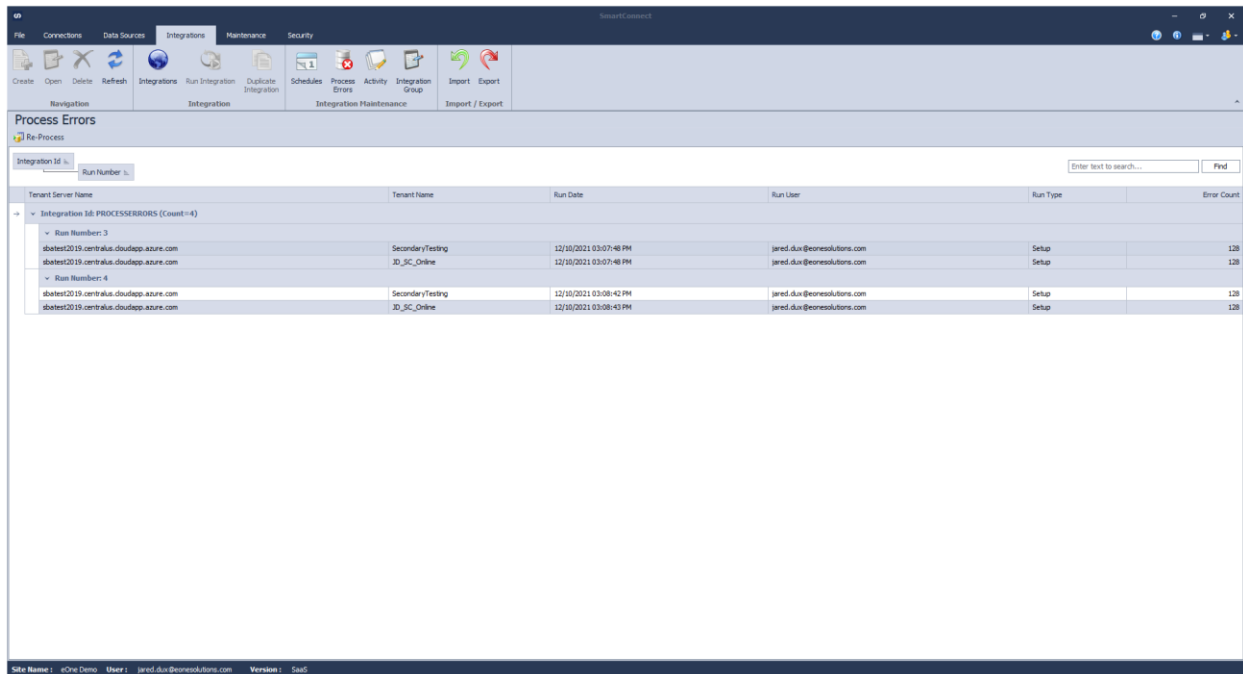
☒ Repeat every: 60 minutes

☐ For the duration of: 720 minutes

☐ End Time: 8:00:00 PM

Integrations – Integration Maintenance – Process Errors

The Process Errors button displays integration errors ordered by run number by default.



The screenshot shows the 'Process Errors' window in the SmartConnect application. The window has a menu bar with 'File', 'Connections', 'Data Sources', 'Integrations', 'Maintenance', and 'Security'. Below the menu bar is a toolbar with icons for 'Create', 'Open', 'Delete', 'Refresh', 'Integrations', 'Run Integration', 'Duplicate Integration', 'Schedules', 'Process Errors', 'Activity', 'Integration Group', 'Import', and 'Export'. The 'Process Errors' button is highlighted in the toolbar.

The main area of the window is titled 'Process Errors' and contains a 'Re-Process' button. Below this is a search bar with 'Integration Id' and 'Run Number' dropdowns, and a 'Find' button. The search bar contains the text 'Enter text to search...'.

The table below shows the results of the search, displaying integration errors ordered by run number. The table has columns for 'Tenant Server Name', 'Tenant Name', 'Run Date', 'Run User', 'Run Type', and 'Error Count'.

Tenant Server Name	Tenant Name	Run Date	Run User	Run Type	Error Count
Integration Job: PROCSSEERRORS (Count=4)					
Run Number: 3					
sbates12019.centralus.cloudapp.azure.com	SecondaryTesting	12/10/2021 03:07:48 PM	jared.dux@eonesolutions.com	Setup	128
sbates12019.centralus.cloudapp.azure.com	ID_SC_Online	12/10/2021 03:07:48 PM	jared.dux@eonesolutions.com	Setup	128
Run Number: 4					
sbates12019.centralus.cloudapp.azure.com	SecondaryTesting	12/10/2021 03:08:42 PM	jared.dux@eonesolutions.com	Setup	128
sbates12019.centralus.cloudapp.azure.com	ID_SC_Online	12/10/2021 03:08:43 PM	jared.dux@eonesolutions.com	Setup	128

The status bar at the bottom of the window shows 'Site Name: eOne Demo', 'User: jared.dux@eonesolutions.com', and 'Version: 1.0.0'.

Process Errors – SmartConnect Process Errors

Double clicking a run number opens the specific errors for the run.

SmartConnect Process Errors

Save Clear Delete Run All

Integration PROCESSERRORS Run Number 3

Description ProcessErrors Disable Pre-Tasks for Re-Run ☐

sbatest2019.cent... sbatest2019.centralus.cloudapp.azure.com-JD_SC_Online

	CUSTNM...	CUSTNA...	CUSTCLAS	CPRCST...	CNTCPR...	STMTNA...	SHRTNA...	ADRSCO...	UPSZONE	SHIPMTHD	TAXSCHID	ADDR...
✖	AARONF...	Dew was...	USA-ILM...		Bob Fitz ...	Aaron Fi...	Aaron Fi...	PRIMAR...		LOCAL D...	USASTCI...	On ▲
✖	ADAMPA...	Adam Pa...	USA-INM...		Roberta ...	Adam Pa...	Adam Pa...	PRIMAR...		GROUND...	USASTCI...	Su
✖	ADVANC...	Advance...	USA-ILM...		Manoj M...	Advance...	Advance...	PRIMAR...		LOCAL D...	USASTCI...	45
✖	ADVANC...	Advance...	CAN-ON...		Grant La...	Advance...	Advance...	PRIMAR...		GROUND...	CANALL...	87
✖	ALTONM...	Alton Ma...	USA-INM...		Jennifer ...	Alton Ma...	Alton Ma...	PRIMAR...		GROUND...	USASTCI...	P.0
✖	AMERIC...	America...	USA-ILM...		Andrew ...	America...	America...	PRIMAR...		GROUND...	USASTCI...	78
✖	AMERIC...	America...	USA-IAK...		Sue Alm...	America...	America...	PRIMAR...		GROUND...	USASTCI...	34
✖	ASSOCI...	Associat...	USA-IAK...		Dmitry R...	Associat...	Associat...	PRIMAR...		GROUND...	USASTCI...	32
✖	ASTORS...	Astor Sui...	USA-INM...		Business...	Astor Sui...	Astor Sui...	PRIMAR...		GROUND...	USASTCI...	98
✖	ATMORE...	Atmore ...	USA-ILM...		Jane Do...	Atmore ...	Atmore ...	PRIMAR...		GROUND...	USASTCI...	56
✖	BAKERS...	Baker's E...	USA-INM...		Arthur H...	Baker's E...	Baker's E...	PRIMAR...		GROUND...	USASTCI...	78
✖	BERRYM...	Berry Me...	USA-MN...		Develop...	Berry Me...	Berry Me...	PRIMAR...		GROUND...	USASTCI...	Su
✖	BLUEYO...	Blue Yon...	USA-IAK...		Lt. Jame...	Blue Yon...	Blue Yon...	PRIMAR...		GROUND...	USALLEX...	P.0
✖	BOYLES...	Boyle's C...	AUSTRA...		Sarah Pa...	Boyle's C...	Boyle's C...	PRIMAR...		INTERN...	AUSNSW...	12
✖	BREAKT...	Breakthr...	CAN-PQ...		Nancy D...	Breakthr...	Breakthr...	PRIMAR...		GROUND...	CANALL...	34
✖	CASTLEI...	Castle In...	CAN-ON...		Helen Ch...	Castle In...	Castle In...	PRIMAR...		GROUND...	CANALL...	23

Save to File... Run Selected Tenant Delete All Delete Rows

SmartConnect Process Errors – Run Errors

Re-run the integration with the specific records that failed on the initial run.

Run All	Runs the error records to all tenants.
Disable Pre-Tasks for Re-Run	Re-runs the records without re-running any integration pre tasks.
Save to File	Saves the error to a local file on the machine.
Run Selected Tenant	Run the errors again using a selected tab.
Delete All	Removes all the error records for the current run number.
Delete Rows	Removes specific rows form the current run number.

SmartConnect Process Errors

Save Clear Delete Run All

Integration: PROCESSERRORS Run Number: 3

Description: ProcessErrors

Disable Pre-Tasks for Re-Run ☐

sbatest2019.cent... sbatest2019.centralus.cloudapp.azure.com-JD_SC_Online

	CUSTNMBR	CUSTNAME	CUSTCLAS	CPRCSTNM	CNTCPRS	STMTNAME	SHRTNAME	ADRS	UPS	SHIP
✖	AARONFIT...	Dew was h...	USA-ILMO-...		Bob Fitz ...	Aaron Fitz ...	Aaron Fitz ...	PRIMARY ...		LOCAL D
✖	ADAMPAR...	Adam Park ...	USA-INMI-...		Roberta M...	Adam Park ...	Adam Park ...	PRIMARY ...		GROUND
✖	ADVANCED...	Advanced	USA-ILMO-		Manni Mon	Advanced	Advanced	PRIMARY ...		LOCAL D
✖	ADVANCED...	Advanced								GROUND
✖	ALTONMA...	Alton Manu								GROUND
✖	AMERICAN...	American S								GROUND
✖	AMERICAN...	American E								GROUND
✖	ASSOCIAT...	Associated								GROUND
✖	ASTORSUI...	Astor Suite...	USA-INMI-...		Business O...	Astor Suite...	Astor Suite...	PRIMARY ...		GROUND
✖	ATMORER...	Atmore Re...	USA-ILMO-...		Jane Dona...	Atmore Re...	Atmore Re...	PRIMARY ...		GROUND
✖	BAKERSEM...	Baker's Em...	USA-INMI-...		Arthur Hol...	Baker's Em...	Baker's Em...	PRIMARY ...		GROUND
✖	BERRYMED...	Berry Medi...	USA-MINWI...		Developme...	Berry Medi...	Berry Medi...	PRIMARY ...		GROUND
✖	BLUEYOND...	Blue Yonde...	USA-IAKSN...		Lt. James ...	Blue Yonde...	Blue Yonde...	PRIMARY ...		GROUND
✖	BOYLESKO...	Boyle's Co...	AUSTRALI...		Sarah Parn...	Boyle's Co...	Boyle's Co...	PRIMARY ...		INTERNA
✖	BREAKTHR...	Breakthrou...	CAN-PQMT...		Nancy Dut...	Breakthrou...	Breakthrou...	PRIMARY ...		GROUND
✖	CASTLEIN0...	Castle Inn ...	CAN-ONMB...		Helen Chol...	Castle Inn ...	Castle Inn ...	PRIMARY ...		GROUND

Save to File... Run Selected Tenant Delete All Delete Rows

SmartConnect

Are you sure you would like to run the Integration for the selected tenant now?

Yes No

Integrations – Integration Maintenance – Activity

SmartConnect Activity shows you any integrations that are currently locked and by which user or service.

SmartConnect Activity				
<div>OK Refresh</div>				
Activity				
	Integration	User	Lock Type	Date Time
→	PROCESSERRORS	JJ Dux	Integration Setup	12/10/2021 03:13:3...

Integrations – Integration Maintenance – Integration Group

Create groups to help organize integrations and allow filtering on the main integration window by group name.

Integration Groups

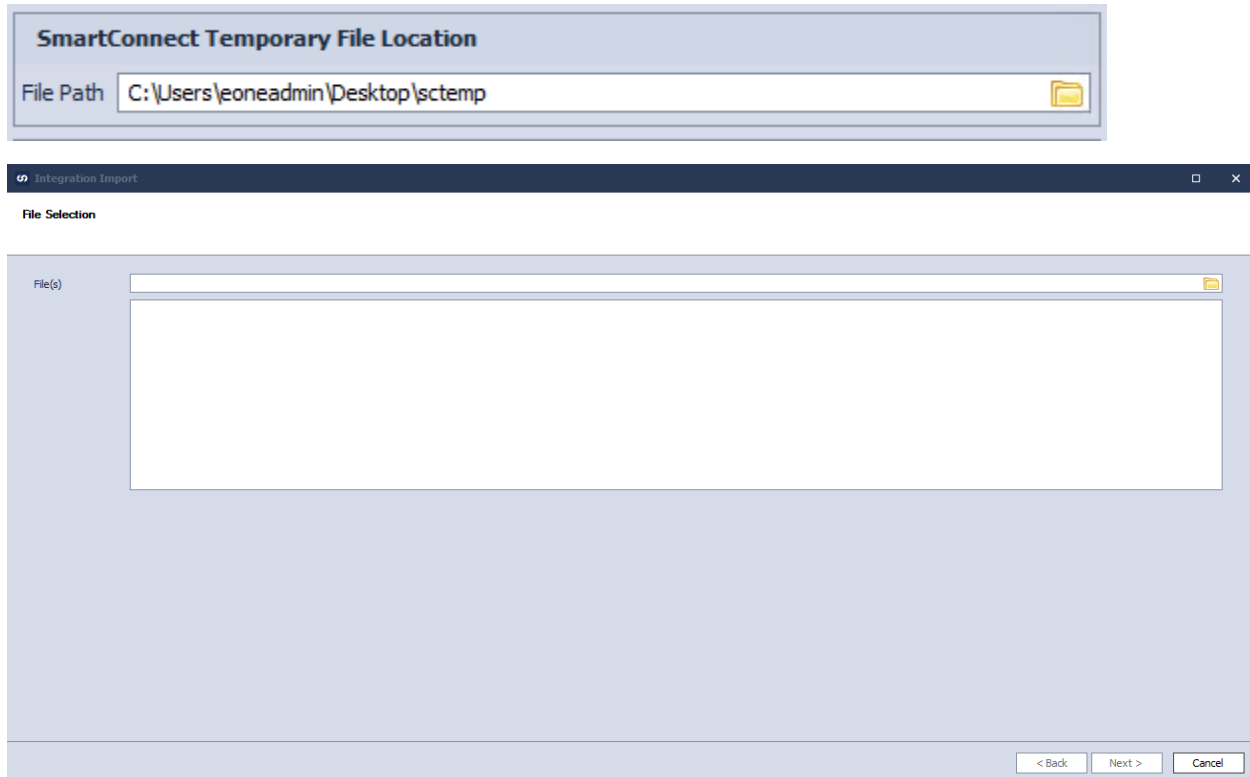
Create

Delete

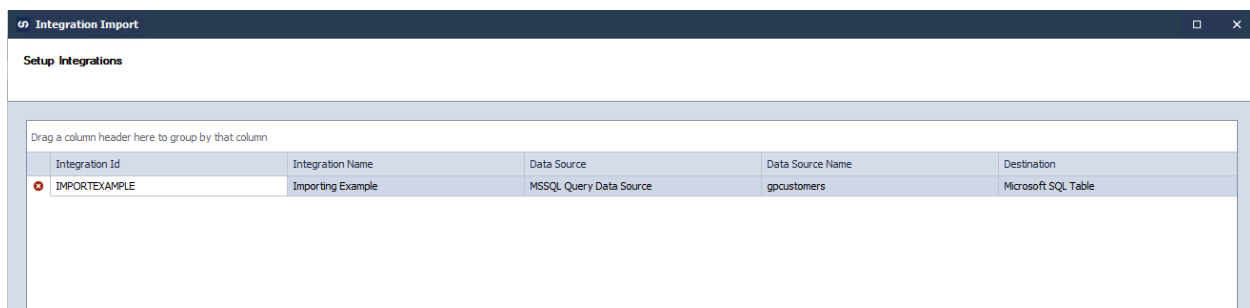
	Group Name
→	Business Central
	GP
	Shopify

Integrations – Import/Export – Import

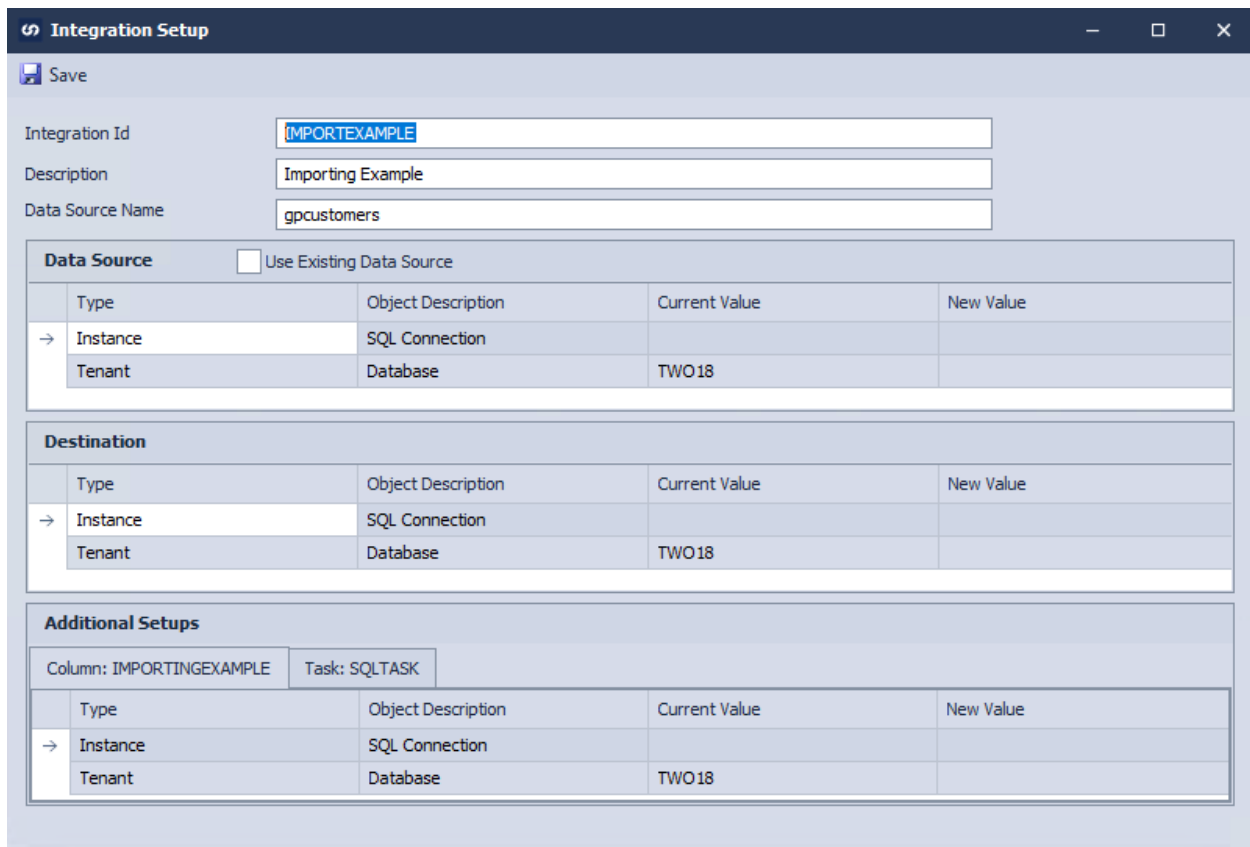
Import an integration from a zip file. A temporary file location must be set in File>>Maintenance>>Setup before any integrations can be imported.



Select the zip files for the integrations to be imported and click Next. The next window will be a summary of the integrations being imported. If you decide you do not need a specific integration unmark the import checkbox and then click Next.



This window will show which integrations are ready to be imported. You will not be able to click Next until all integrations are setup. A red X will appear for any integrations that need to be setup. Double click the integration row to enter the Integration Setup.



The screenshot shows the 'Integration Setup' window. At the top, there's a 'Save' button. Below it are three input fields: 'Integration Id' with the value 'IMPORTEXAMPLE', 'Description' with 'Importing Example', and 'Data Source Name' with 'gpcustomers'. The 'Data Source' section has a checkbox 'Use Existing Data Source' which is unchecked. It contains a table with columns: Type, Object Description, Current Value, and New Value. The table has two rows: 'Instance' (SQL Connection) and 'Tenant' (Database). The 'Current Value' for 'Tenant' is 'TWO18'. The 'Destination' section is identical to the 'Data Source' section. The 'Additional Setups' section shows 'Column: IMPORTINGEXAMPLE' and 'Task: SQLTASK', followed by a similar table with 'Instance' and 'Tenant' rows.

Integration Id	Set the Integration Id for the imported integration.
Description	Set the Integration Description for the imported integration.
Data Source Name	Set the Data Source Name if creating a new source.
Use Existing Data Source	Choose this checkbox if there is already a data source in SmartConnect you want to use.

Data Source – If you have checked Use Existing Data Source, select the existing data source by clicking the lookup button in the New Value column. If a new data source is being created, choose the connector and tenant in the New Value column.

Destination – Choose the connector and tenant in the New Value column.

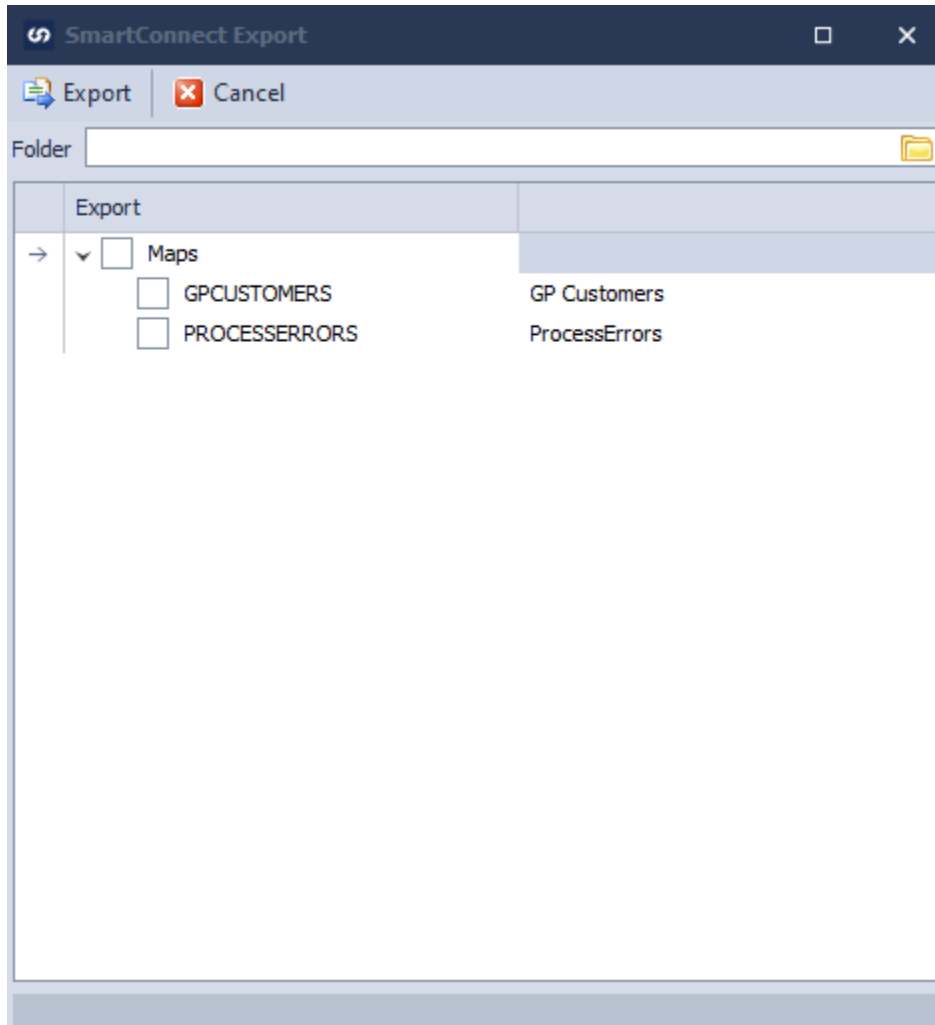
Additional Setups – This section shows all additional connections used within an integration. Each additional setup will have its own tab that will need to be setup like the Data Source and Destination sections.

Once setup, click Save on the Integration Setup window and repeat the process if importing multiple integrations. Once all integrations have been setup click Next to process the integrations.

Integrations – Import/Export – Export

Export integrations to a zip file with all dependencies.

Set an export location and choose which map(s) are to be exported and then click the export button.



Maintenance

View a list of all REST Service definitions currently in the database.

*Note: REST Service Definitions do not count against your paid connection limit until they are added as a connection on the 'Connections' tab.

Name	A name for the service provider
Connection Count	Number of Connections currently using the definition
Service Type	Is User or System defined

The screenshot shows the 'Maintenance' tab in the SmartConnect application. The top navigation bar includes 'File', 'Connections', 'Data Sources', 'Integrations', 'Maintenance' (selected), and 'Security'. Below the navigation bar is a toolbar with icons for 'Create', 'Open', 'Delete', 'Refresh', 'Services', 'Import', 'Export', and 'Clone'. The main area displays a table titled 'Generic Rest Services' with columns for 'Name', 'Connection Count', and 'Service Type'. The table lists various REST service providers, including Autotask PSA, BigCommerce, BrightReps, HubSpot (4), Interworks, MediusConenctor, miniter, Procore, Shopify, and WooCommerce_1.0.0.0.

	Name	Connection Count	Service Type
→	Autotask PSA	1	User
	BigCommerce	1	User
	BrightReps	1	User
	HubSpot (4)	1	User
	Interworks	0	User
	MediusConenctor	0	User
	miniter	1	User
	Procore	1	User
	Shopify	1	User
	WooCommerce_1.0.0.0	1	User

Maintenance – Navigation – Create

Creates a new REST Service Definition. this will be generic definitions SmartConnect will use to interact with a REST based API. After the REST Service definition is created it will need to be added to the Connections tab in SmartConnect before it can be used.

Generic REST Service – Settings

General setup information for the REST Service.

Service Provider Name	A name for the service provider
Service Image	Upload a PNG or JPG image to help identify the service
Base Url	The part of the URL that will stay the same for all requests
Request Method	The default request method (can be modified on each individual request as needed)
Response Type	What format the responses from the REST service use
Body Type	What format will the body generated by SmartConnect use
Authentication Method	What authentication type does the REST service use
Date Format	What format will date fields from the REST service use
Custom Date Format	Specify a custom date format used by the REST Service

Generic Rest Service - WooCommerce_1.0.0.0

Save


Cancel

SettingsInstall NotesParametersHeadersPagingGroupsData SourcesDestinationsLookupsVariables

Service

Service Provider NameWooCommerce_1.0.0.0

Service Image



Select Image

Settings

Base Url[[url]]/wp-json/wc/v3/

Request MethodGet

Response TypeJSON

Body TypeJSON

Authentication MethodBasic

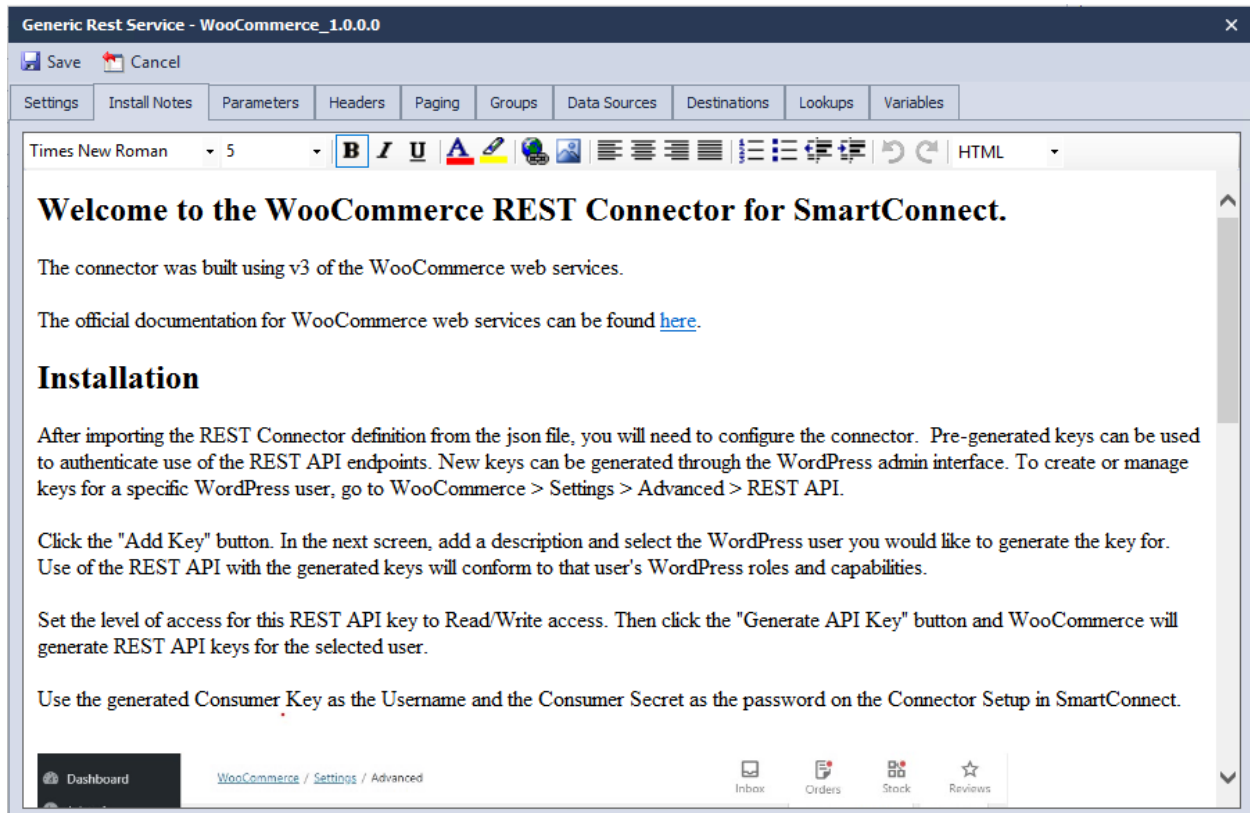
Date/Time Options

Date FormatIso8601

Custom Date Format

Generic REST Service – Install Notes

Configure an HTML document to help users configure this REST Connector.



Generic REST Service – OAuth Settings

This section is accessible and applies only when OAuth2 is selected as the Authentication Method on the Settings panel of the REST Service setup window.

Authorization Url	Url SmartConnect will use to retrieve an access code
Access Token Url	Url SmartConnect will use to retrieve an access token
Scope	OAuth Scopes required by SmartConnect
State	Always set this field to <serviceid>
Refresh Method	Set the method type used to refresh an expired token
Token Refresh Length	Set the life expectancy of a token
Token Refresh Units	Set the units used by the 'Token Refresh Units'
Refresh Token Url	Set the Refresh Token Url
Redirect Url	A read-only field showing the redirect Url to setup on the OAuth settings of the REST Service application

The OAuth Setup includes some standard variables that can be used to provide standard OAuth functionality. These variables should always be wrapped in <> example: <serviceid>

clientid	Client Id retrieved from the 3 rd part app
redirect	The SmartConnect app password to redirect the flow back to SmartConnect
scope	OAuth permissions SmartConnect Requires
state	A string value used to maintain the user's state when redirected back to SmartConnect after the auth flow
serviceid	Unique guid identifying your SmartConnect Connector

The screenshot shows the 'Generic Rest Service - HubSpot (4)' window with the 'OAuth Settings' tab selected. The fields are as follows:

Authorization Url	<input type="text" value="https://app.hubspot.com/oauth/authorize?client_id=<clientid>&redirect_uri=<redirect>&scope=<scope>&state=<state>"/>		
Access Token Url	<input type="text" value="https://api.hubapi.com/oauth/v1/token"/>		
Scope	<input type="text" value="contacts oauth integration-sync tickets e-commerce accounting"/>		
State	<input type="text" value="<serviceid>"/>		
Refresh Method	<input type="text" value="After Time Period Expires"/>		
Token Refresh Length	<input type="text" value="6"/>	Token Refresh Units	<input type="text" value="Hour"/>
Refresh Token Url	<input type="text" value="https://api.hubapi.com/oauth/v1/token"/>		
Redirect Url	<input type="text" value="https://login.smartconnect.com/OAuth/OAuthRedirect"/>		

Generic REST Service – Exchange Token

This section is accessible and applies only when Exchange Token is selected as the Authentication Method on the Settings panel of the REST Service setup window.

End Point	The Url endpoint to request a token
Request Method	The request method type
Body Type	The body data type Available options: JSON, XML, Text, Url Encoded Form
Body	Body to send to remote server
Token Response Path	Location of the access token in the body of the authentication response
Token Expires	Select frequency method to refresh token. Available options: Never, After Time Period, Before Request
Length	Length of time token expires
Units	Units of Token expiry length

The Exchange Token Setup includes two standard variables that users can set when configuring the connector. These variables should always be wrapped in `[[]]` example: `[[Username]]`

Username	Value the user provides for Username in the connector setup
Password	Value the user provides for Password in the connector setup

The screenshot shows the 'Generic Rest Service - MediusConenctor' window with the 'Exchange Token' tab selected. The 'Exchange Token Settings' section contains the following fields:

- End Point:** `https://cloud.mediusflow.com/eoneQA/api/connect/token`
- Request Method:** `Post`
- Body Type:** `Url Encoded Form`
- Body:** `grant_type=client_credentials&scope=Integration.Erp&client_id=[[Username]]&client_secret=[[Password]]`
- Token Response Path:** `access_token`
- Token Expires:** `After Time Period`
- Length:** `1`
- Units:** `Hour`

The token retrieved from this request will be saved to a variable named Token. This token can then be added to either a header or parameter as shown below.

The screenshot shows the 'Generic Rest Service - MediusConenctor' window with the 'Headers' tab selected. The 'Headers' section contains a table with the following data:

Name	Description	Value	Clear Empty
→ Authorization	Authorization Token	<code>Bearer [[Token]]</code>	<input type="checkbox"/>

Generic REST Service – Parameters

Parameters that will default on all API requests. If the parameter is not required for a particular endpoint, it can be disabled on that endpoint.

Name	The name of the parameter as outlined in the REST API documentation
Description	A friendly description for the parameter
Value	The value to be used by the parameter
Clear Empty	If selected, don't use the parameter if the Value is blank
Exclude in Paging	If selected, the parameter will not be used when requesting additional pages of data from sources

Generic Rest Service - Procore

Save Cancel

Settings Install Notes OAuth Settings Parameters Headers Paging Groups Data Sources Destinations Lookups Variables

Parameters + -

Name	Description	Value	Clear Empty	Exclude in Paging
→ company_id	The unique customer number	31153	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Generic REST Service – Headers

Headers that will default on all API requests. If the header is not required for a particular endpoint, it can be disabled on that endpoint.

Name	The name of the header as outlined in the REST API documentation
Description	A friendly description for the header
Value	The value to be used by the header
Clear Empty	If selected, don't use the header if the Value is blank

Generic Rest Service - Procore

Save Cancel

Settings Install Notes OAuth Settings Parameters Headers Paging Groups Data Sources Destinations Lookups Variables

Headers + -

	Name	Description	Value	Clear Empty
→	Procore-Company-Id	Procore-Company-Id	31153	<input checked="" type="checkbox"/>

Generic REST Service – Paging

When reading large data sets it may be necessary for SmartConnect to make multiple requests to the web service to retrieve the full data set. Most modern APIs support paging, and SmartConnect can manage the most common implementations of paging.

*Note it is not required to provide a value for all fields in paging setup.

Paging Method – Custom

A simple method of paging which only expects two parameters.

Has More Pages Path	Where in the response the Has more Pages identifier can be found
Page Size	Maximum number of records to return per page

Generic Rest Service - Procore

Save Cancel

Settings Install Notes OAuth Settings Parameters Headers **Paging** Groups Data Sources Destinations Lookups Variables

Paging

Paging Method: Custom

Has More Pages Path: Link From response header: From response header

Page Size: 10000

Paging Method – Item Count

Paging method to use when response includes a count of total records

Page Offset Parameter	Name of the request parameter specifying offset index
Page Parameter	Name of the request parameter specifying the current page
Item Count Path	Where in the response the total item count can be found
Page Size Parameter	Name of the request parameter specifying page size
Page Size	Maximum number of records to return per page

Generic Rest Service - interworks

Save Cancel

Settings Install Notes Parameters Headers **Paging** Groups Data Sources Destinations Lookups Variables

Paging

Paging Method: Item Count

Page Offset Parameter: From response body: From response body

Page Parameter: page As request url parameter: As request url parameter

Item Count Path: paging.totalCount From response body: From response body

Page Size Parameter: size As request url parameter: As request url parameter

Page Size: 100

Paging Method – Next Page Link

Paging where the REST Service response includes a link for the next page.

Next Page Link Path	Path to the next page link in the response
Has More Pages Path	Where in the response the Has more Pages identifier can be found
Page Size Parameter	Name of the request parameter specifying page size
Page Size	Maximum number of records to return per page

Generic Rest Service - Shopify

Save Cancel

Settings Install Notes Parameters Headers **Paging** Groups Data Sources Destinations Lookups Variables

Paging

Paging Method: Next Page Link

Next Page Link Path: Link

Has More Pages Path:

Page Size Parameter: limit

Page Size: 250

From response header

As request url parameter

Paging Method – Next Page Number

Paging where you don't know how many pages there will be.

Has More Pages Path	Where in the response the Has more Pages identifier can be found
Page Parameter	Name of the request parameter specifying the current page
Page Size Parameter	Name of the request parameter specifying page size
Page Size	Maximum number of records to return per page

Generic Rest Service - WooCommerce_1.0.0.0

Save Cancel

Settings Install Notes Parameters Headers **Paging** Groups Data Sources Destinations Lookups Variables

Paging

Paging Method: Next Page Number

Has More Pages Path: X-WP-TotalPages

Page Parameter: page

Page Size Parameter: per_page

Page Size: 100

From response header

As request url parameter

Paging Method – None

The connector will not page through large data sets.

Paging Method – Page Count

Paging where the REST service provides a page count.

Page Count Path	Where in the response the page count can be found
Has More Pages Path	Where in the response the Has more Pages identifier can be found
Page Parameter	Name of the request parameter specifying the current page
Page Size Parameter	Name of the request parameter specifying page size
Page Size	Maximum number of records to return per page

The screenshot shows the 'Generic Rest Service - BigCommerce' configuration window. The 'Paging' tab is selected. The configuration fields are as follows:

Paging Method	Page Count	
Page Count Path	meta.pagination.total_pages	From response body
Has More Pages Path		From response header
Page Parameter	page	As request url parameter
Page Size Parameter	limit	As request url parameter
Page Size	250	

Paging Method – Page Offset

Paging where the response includes an offset value

Page Offset Path	Where in the response the offset of the next page begins
Page Offset Parameter	Name of the request parameter specifying offset index
Has More Pages Path	Where in the response the Has more Pages identifier can be found
Page Size Parameter	Name of the request parameter specifying page size
Page Size	Maximum number of records to return per page

The screenshot shows the 'Generic Rest Service - HubSpot (4)' configuration window. The 'Paging' tab is selected. The configuration fields are as follows:

Paging Method	Page Offset	
Page Offset Path	paging.next.after	From response body
Page Offset Parameter	after	As request url parameter
Has More Pages Path	paging.next.after	From response body
Page Size Parameter	limit	As request url parameter
Page Size	100	

Generic REST Service – Groups

Optional groups that can be configured to organize data sources and destinations.

The screenshot shows a configuration window titled "Generic Rest Service - interworks". It features a tabbed interface with the following tabs: Settings, Install Notes, Parameters, Headers, Paging, Groups (selected), Data Sources, Destinations, Lookups, and Variables. The "Groups" tab is active, displaying a table with the following structure:

Groups		
	Group Name	
	Customers	
	Products	
→	Transactions	

At the top right of the Groups tab, there are two buttons: a plus sign (+) and a minus sign (-).

Generic REST Service – Data Sources

List of all Data Sources configured for the REST Service. New Sources can be created here and existing data sources can be modified or cloned.

Data Source Name	Friendly name to identify your data source
Group	Group to organize requests
Edit	Will open the edit data source window
Clone	Will duplicate/clone the existing data source

Generic Rest Service - interworks

Save

Cancel

Settings

Install Notes

Parameters

Headers

Paging

Groups


Data Sources

Destinations

Lookups

Variables

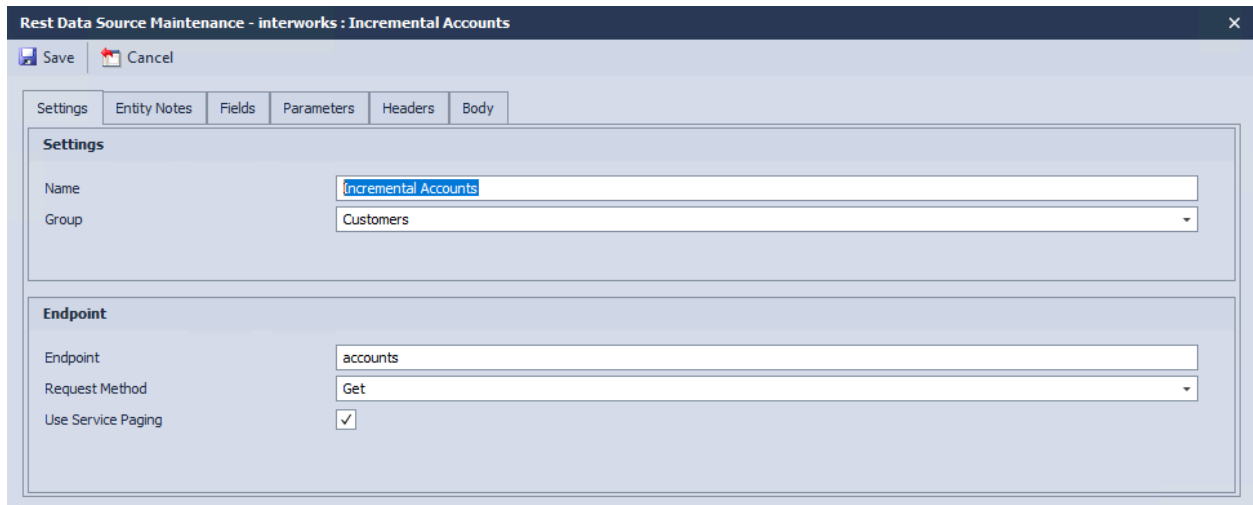
Service Data Sources

	Data Source Name	Group	Edit	Clone
→	Incremental Accounts	Customers		
	Incremental Invoices	Transactions		
	Incremental Products	Products		

REST Data Source Maintenance – Settings

Configure general settings for the data source.

Name	Friendly name to identify your data source
Group	Group to organize requests
Endpoint	The remainder of the Url after the Base Url
Request Method	The request method used
Use Service Paging	If checked, this data source will use paging (if configured)



Rest Data Source Maintenance - interworks : Incremental Accounts

Save Cancel

Settings Entity Notes Fields Parameters Headers Body

Settings

Name: Incremental Accounts

Group: Customers

Endpoint

Endpoint: accounts

Request Method: Get

Use Service Paging: ☒

REST Data Source Maintenance – Entity Notes

Optional: Configure an HTML document to help users use this data source.

REST Data Source Maintenance – Fields

The Fields tab allows users to configure how SmartConnect will parse the body of the response from the REST Service.

Load From File	Load a sample JSON file of the expected response from the REST Service
Name	Friendly name for the data source field
Path	The technical path to the field. Each parent child relationship is defined by a period
Type	The data type of the field. Data type must match the API otherwise the field will appear blank when previewing
Calculated Fields	Section to configure custom calculations based on source fields (more below)

Rest Data Source Maintenance - interworks : Incremental Accounts

Save

Cancel

Settings

Entity Notes

Fields

Parameters

Headers

Body

Fields

Load From File

+

-

Name	Path	Type
autoInvoiceNotification	data.autoInvoiceNotification	Boolean
billingAddress address	data.billingAddress.address	String
billingAddress address2	data.billingAddress.address2	String
billingAddress city	data.billingAddress.city	String
billingAddress country code	data.billingAddress.country.code	String

Calculated Fields

+

-

Name	Type	Edit
------	------	------

REST Data Source Maintenance – Fields - Calculated

Custom fields can be defined as part of the data source.

Field Name	A friendly name for the data source field
Field Type	The output data type of the calculation
Script	JavaScript script to calculate the output for the field
Insert Field	Insert a source field into the cursor location

Calculated Field Setup

Save

Cancel

Field Name

Full Address

Field Type

String

Script

Insert Field

<<billingAddress address>> + ' ' + <<billingAddress address2>>

REST Data Source Maintenance – Parameters

Configure parameters to filter the data source

Use Default Parameters	If checked, default parameters will be used on this data source
Key	The name of the parameter as outlined in the REST API documentation
Description	A friendly description for the parameter
Value	The value to be used by the parameter
Clear Empty	If selected, don't use the parameter if the Value is blank
Exclude in Paging	If selected, the parameter will not be used when requesting additional pages of data from sources

Rest Data Source Maintenance - Procore : Projects

Save

Cancel

Settings

Entity Notes

Fields

Parameters

Headers

Body

Default Parameters

☒ Use Default Parameters

Key	Description	Value	Clear Empty	Exclude in Paging
→ company_id	company_id	31153	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Parameters

+

-

Key	Description	Value	Clear Empty	Exclude in Paging
→ modified_at	Last Modified Date	2022-01-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>

REST Data Source Maintenance – Headers

Configure headers for the data source

Use Default Headers	If checked, default headers will be used on this data source
Key	The name of the header as outlined in the REST API documentation
Description	A friendly description for the header
Value	The value to be used by the header
Clear Empty	If selected, don't use the header if the Value is blank

Rest Data Source Maintenance - Procore : Projects

Save

Cancel

Settings

Entity Notes

Fields

Parameters

Headers

Body

Default Headers

☐ Use Default Headers

Key	Description	Value	Clear Empty
→ Procore-Company-Id	Procore-Company-Id	31153	<input checked="" type="checkbox"/>

Entity Headers

+

-

Key	Description	Value	Clear Empty
→ Application-key	Authentication Id	Bearer XXXX	<input type="checkbox"/>

REST Data Source Maintenance – Body

If the data source request requires a body this can be provided in this section.

Type	Data type of body
Insert Field	Insert a default connector variable
Body	Request body text
Body Includes Paging	If paging parameters will be sent in the body instead of the Url, check this box

Rest Data Source Maintenance - HubSpot (4) : Contact Search

Save

Cancel

Settings

Entity Notes

Fields

Parameters

Headers

Body

Type

JSON

Body

Insert Field

```
{
  "filterGroups": [
    {
      "filters": [
        {
          "propertyName": "lifecyclestage",
          "operator": "NEQ",
          "value": "marketingqualifiedlead"
        }
      ]
    }
  ],
  "properties": [
    "email",
    "firstname",
    "lastname",
    "phone"
  ],
  "limit": "[[page-size]]",
  "after": "[[page-start-record]]"
}
```



☒ Body Includes Paging

Generic REST Service – Destinations

List of all Destinations configured for the REST Service. New Destinations can be created here, and existing destinations can be modified or cloned.





Destination Name	Friendly name to identify your destination.
Group Name	Group to organize requests.
Edit	Will open the edit destination window.
Clone	Will duplicate/clone the existing destination.

Generic Rest Service - Procore ×

 Save  Cancel

Settings | Install Notes | OAuth Settings | Parameters | Headers | Paging | Groups | Data Sources | Destinations | Lookups | Variables

Service Destinations + -



	Destination Name	Group Name	Edit	Clone
→	Create Standard Cost Code List	Cost Codes		
	Sync Standard Cost Codes	Cost Codes		

REST Destination Maintenance – Settings

Configure general settings for the destination.

Name	Friendly name to identify your destination
Linked Entity	Select a predefined data source to import source fields from
Group	Group to organize requests
Endpoint	The remainder of the Url after the Base Url
Request Method	The request method used
Clear Unmapped Values	If a field is not mapped in the integration, it will not be sent to the REST Service even if defined in the Body tab
Use Value Pairs	Specify if the body will be using value pairs. Required for 'Clear Unmapped Values' to function
Value Pair key	Specify the key in the value pair to help SmartConnect parse the body objects

Rest Destination Maintenance - WooCommerce_1.0.0.0 : Update Order ×

 Save  Cancel

Settings | Action Notes | Fields | Child Entities | Parameters | Headers | Variables | Body

Settings

Name

Update Order

Linked Entity

Group

Orders

Endpoint

Endpoint

orders/[[id]]

Request Method

Put

Unmapped Fields

Clear Unmapped Values

☒

Use Value Pairs

☒

Value Pair Key

id

REST Destination Maintenance – Action Notes

Optional: Configure an HTML document to help users use this destination.

REST Destination Maintenance – Fields

Specify the fields that will be visible to users when mapping to this destination in the integration.

Load Fields	Select a method to import fields. Available Options: from Entity, from File, from Json
Name	A friendly name to identify the field
Type	Set the data type of the field as outlined in the REST API documentation
Required	Will require the user to map the field in the integration

Rest Destination Maintenance - Procore : Create Standard Cost Code List

Save

Cancel

Settings

Action Notes

Fields

Child Entities

Parameters

Headers

Variables

Body

Fields

Load Fields

+

-

Name	Type	Required
→ Name	String	<input type="checkbox"/>

REST Destination Maintenance – Child Entities

Child entities allow nested arrays to be generated by SmartConnect. Common use cases are order lines or addresses. A child entity can be nested in another child entity. If this is required, make sure the parent entity is always listed above the child.

Name	Technical name for the child entity
Description	Friendly description of child entity
Move Up	Move selected child entity up
Move Down	Move selected child entity down
Edit	Edit selected child entity

Rest Destination Maintenance - WooCommerce_1.0.0.0 : Create Order

Save

Cancel

Settings

Action Notes

Fields

Child Entities




Parameters

Headers

Variables

Body

Child Entities



Name	Description	Move Up	Move Down	Edit
→ line_items	Line Items	↑	↓	
tax_lines	Tax Lines	↑	↓	
shipping_lines	Shipping Lines	↑	↓	

REST Action Child Entity – Settings

Basic setup for the child entity

Child Entity Key	Technical name for the child entity
Description	Friendly description of child entity
Parent Entity	Parent entity that will immediately own the child entity

Rest Action Child Entity ×

 Save  Cancel

SettingsFieldsTemplate

Settings

Child Entity Key

line_items

Description

Line Items

Parent Entity



Base action - Create Order

REST Action Child Entity – Fields

Specify the fields that will be visible to users when mapping to this child destination in the integration.

Name	A friendly name to identify the field
Type	Set the data type of the field as outlined in the REST API documentation
Required	Will require the user to map the field in the integration

Rest Action Child Entity ×

 Save  Cancel

Settings Fields Template

Fields + -

Name	Type	Required	
product_id	Integer	<input type="checkbox"/>	▲
quantity	Integer	<input type="checkbox"/>	
name	String	<input type="checkbox"/>	
variation_id	Integer	<input type="checkbox"/>	
tax_class	String	<input type="checkbox"/>	
subtotal	String	<input type="checkbox"/>	
subtotal_tax	String	<input type="checkbox"/>	
total	String	<input type="checkbox"/>	▼

REST Action Child Entity – Template

Define the body layout based on the desired output. Fields will automatically be sent as the data type specified on the 'Fields' tab.

Body	A free text field to enter the body template
Validate	Validate body syntax is correct
Insert Child Entity	Insert a child entity to the cursor location
Insert Field	Insert a field to the cursor location

The screenshot shows a software interface titled "Rest Action Child Entity". It has a dark blue header bar with a close button (X). Below the header is a light blue bar with "Save" and "Cancel" buttons. The main area has three tabs: "Settings", "Fields", and "Template". The "Template" tab is selected. Inside the "Template" tab, there are three buttons: "Body", "Validate", and "Insert Child Entity". The "Body" button is active, and a text area below it contains a JSON template. The "Validate" button is highlighted. To the right of the "Validate" button are two dropdown menus labeled "Insert Child Entity" and "Insert Field".



```
{
  "name": <<name>>,
  "product_id": <<product_id>>,
  "variation_id": <<variation_id>>,
  "quantity": <<quantity>>,
  "tax_class": <<tax_class>>,
  "subtotal": <<subtotal>>,
  "subtotal_tax": <<subtotal_tax>>,
  "total": <<total>>,
  "total_tax": <<total_tax>>,
  "sku": <<sku>>,
  "price": <<price>>
}
```

REST Destination Maintenance – Parameters

Specify URL parameters to send to this endpoint.

Use Default Parameters	If selected, default parameters will be sent to this endpoint
Key	The name of the parameter as outlined in the REST API documentation
Description	A friendly description for the parameter
Value	The value to be used by the parameter
Clear Empty	If selected, don't use the parameter if the Value is blank

Rest Destination Maintenance - Procore : Create Standard Cost Code List ×

 Save  Cancel

Settings | Action Notes | Fields | Child Entities | **Parameters** | Headers | Variables | Body

Default Parameters

☒ Use Default Parameters

	Key	Description	Value	Clear Empty
→	company_id	company_id	31153	<input checked="" type="checkbox"/>

Parameters + -



	Key	Description	Value	Clear Empty
→	project_id	Project Id	67689	<input type="checkbox"/>

REST Destination Maintenance – Headers

Specify headers to send to this endpoint.

Use Default Headers	If selected, default headers will be sent to this endpoint
Key	The name of the header as outlined in the REST API documentation
Description	A friendly description for the header
Value	The value to be used by the header
Clear Empty	If selected, don't use the header if the Value is blank

Rest Destination Maintenance - Procore : Create Standard Cost Code List ×

 Save  Cancel

Settings | Action Notes | Fields | Child Entities | Parameters | **Headers** | Variables | Body

Default Headers

☒ Use Default Headers

	Key	Description	Value	Clear Empty
→	Procore-Compa...	Procore-Company-Id	31153	<input checked="" type="checkbox"/>

Headers + -



	Key	Description	Value	Clear Empty
→	project_id	Project Id	67689	<input type="checkbox"/>

REST Destination Maintenance – Variables

Select from a list of variables previously defined variables (see Variables tab on Generic Rest Service Setup). If a variable is 'Mappable' it can be used as part of the URL with double square brackets [[]] around it. In the below example the variable will be referenced in the URL as: /orders/[[id]]

Key	The unique identifier for the variable
Description	A friendly description for the variable
Value	The default value for the variable
Mappable	If selected, the field will display as a mappable field in the integration process

Rest Destination Maintenance - WooCommerce_1.0.0.0 : Update Order ×

 Save  Cancel

SettingsAction NotesFieldsChild EntitiesParametersHeadersVariablesBody

	Key	Description	Value	Mappable
	attribute_id	Attribute Id		<input type="checkbox"/>
	id	Woo Record Id		<input checked="" type="checkbox"/>
	order_id	Order Id		<input type="checkbox"/>
	product_id	Product Id		<input type="checkbox"/>
	slug	Woo Record Slug		<input type="checkbox"/>
	url	Base Url	https://shop.eone.com	<input type="checkbox"/>
→	zone_id	Shipping Zone Id		<input type="checkbox"/>

REST Destination Maintenance – Body

Define the body layout based on the desired output. Fields will automatically be sent as the data type specified on the 'Fields' tab.

Type	Select the data type of the body
Body	A free text field to enter the body template
Insert Field	Insert a field to the cursor location
Insert Child Entity	Insert a child entity to the cursor location
Validate	Validate body syntax is correct

Rest Destination Maintenance - WooCommerce_1.0.0.0 : Create Order

Save

Cancel

Settings

Action Notes

Fields

Child Entities

Parameters

Headers

Variables

Body

Type

JSON

Body

Insert Field

Insert Child Entity

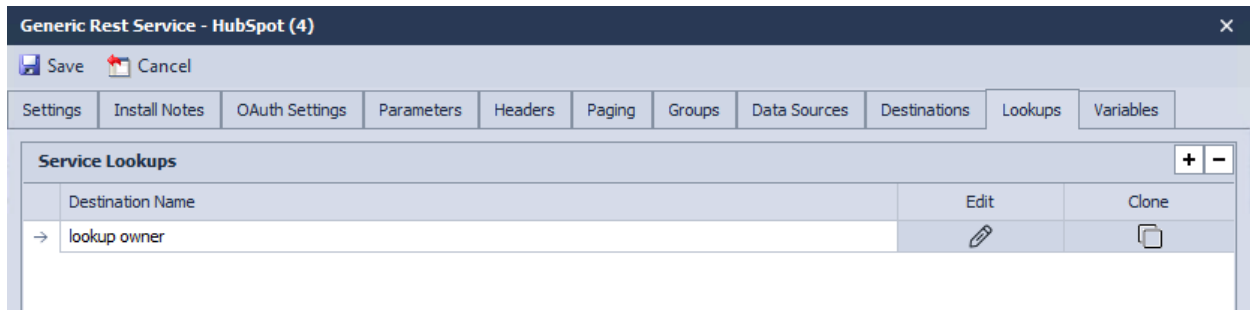
Validate

```
{
  "payment_method": <<payment_method>>,
  "payment_method_title": <<payment_method_title>>,
  "set_paid": <<set_paid>>,
  "payment_method": <<payment_method>>,
  "payment_method_title": <<payment_method_title>>,
  "transaction_id": <<transaction_id>>,
  "billing": {
    "first_name": <<billing first_name>>,
    "last_name": <<billing last_name>>,
    "address_1": <<billing address_1>>,
    "address_2": <<billing address_2>>,
    "city": <<billing city>>,
    "state": <<billing state>>,
    "postcode": <<billing postcode>>,
    "country": <<billing country>>,
    "email": <<billing email>>,
    "phone": <<billing phone>>
  },
  "line_items": [
    <<line_items>>
  ],
  "tax_lines": [
    <<tax_lines>>
  ],
  "shipping_lines": [
    <<shipping_lines>>
  ]
}
```


Generic REST Service – Lookups

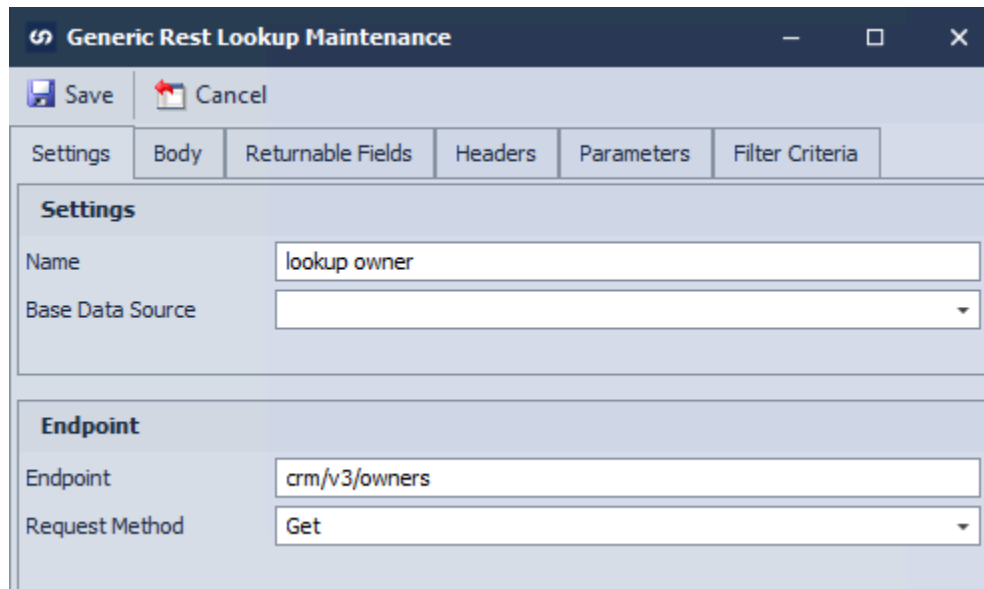
Define custom lookups allowing users to lookup records from the target REST Service based on source fields.

Destination Name	A friendly description for the lookup
Edit	Will open the edit lookup window
Clone	Will duplicate/clone the existing lookup



REST Lookup Maintenance – Settings

Name	A friendly description for the lookup
Base Data Source	If desired, import settings from an existing data source
Endpoint	The remainder of the Url after the Base Url
Request Method	The request method used



The image shows a software window titled "Generic Rest Lookup Maintenance". It has a dark blue header bar with a back arrow icon, the title, and standard window controls (minimize, maximize, close). Below the header is a toolbar with "Save" and "Cancel" buttons. A tabbed interface follows, with tabs for "Settings", "Body", "Returnable Fields", "Headers", "Parameters", and "Filter Criteria". The "Settings" tab is active, showing two sections: "Settings" and "Endpoint". The "Settings" section contains a text field for "Name" with the value "lookup owner" and a dropdown for "Base Data Source". The "Endpoint" section contains a text field for "Endpoint" with the value "crm/v3/owners" and a dropdown for "Request Method" with the value "Get".

REST Lookup Maintenance – Body

If the request requires a body, this can be defined here. If assigning a dynamic filter value to the body use a variable enclosed in double square brackets [[]] as shown below

Type	Select the data type of the body
Body	A free text field to enter the body template
Insert Field	Insert a field to the cursor location

The screenshot shows a window titled "Generic Rest Lookup Maintenance" with a dark blue header bar containing a minus, maximize, and close button. Below the header is a toolbar with "Save" and "Cancel" buttons. A tabbed interface shows "Settings", "Body", "Returnable Fields", "Headers", "Parameters", and "Filter Criteria". The "Body" tab is active, showing a "Type" dropdown set to "JSON" and an "Insert Field" dropdown. The main text area contains a JSON body template with a highlighted value:

```
{
  "filterGroups": [
    {
      "filters": [
        {
          "propertyName": "email",
          "operator": "EQ",
          "value": "[[email]]"
        }
      ]
    }
  ],
  "properties": [
    "id"
  ],
  "limit": 100,
  "after": 0
}
```

REST Lookup Maintenance – Returnable Fields

Name	A friendly name for the field
Path	The technical path to the field. Each parent child relationship is defined by a period
Type	The data type of the field as outlined in the REST API documentation

The screenshot shows a web application window titled "Generic Rest Lookup Maintenance". It has a dark blue header bar with a logo and window controls. Below the header is a light blue bar with "Save" and "Cancel" buttons. A tabbed interface shows "Settings", "Body", "Returnable Fields", "Headers", "Parameters", and "Filter Criteria". The "Returnable Fields" tab is active, displaying a table with columns "Name", "Path", and "Type". A single row is visible with "id" as the Name, "results.id" as the Path, and "Integer" as the Type. A right arrow icon is to the left of the "id" in the Name column. A "+" and "-" button are at the top right of the table area.

	Name	Path	Type
→	id	results.id	Integer

REST Lookup Maintenance – Headers

Specify headers to send to this lookup.

Use Default Headers	If selected, default headers will be sent to this endpoint
Key	The name of the header as outlined in the REST API documentation
Description	A friendly description for the header
Value	The value to be used by the header
Clear Empty	If selected, don't use the header if the Value is blank

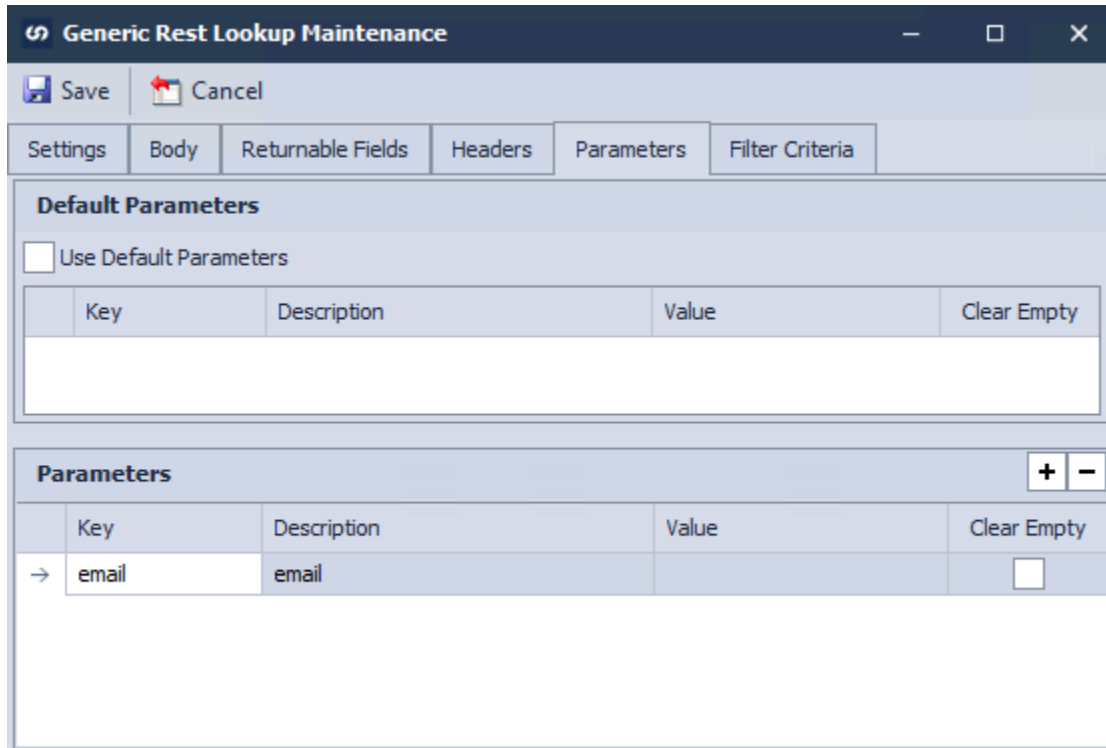


The screenshot shows a software window titled "Generic Rest Lookup Maintenance". It has a dark blue title bar with standard window controls. Below the title bar is a light blue bar with "Save" and "Cancel" buttons. A tabbed interface contains five tabs: "Settings", "Body", "Returnable Fields", "Headers" (which is selected), and "Filter Criteria". The "Default Headers" section has a checked checkbox for "Use Default Headers" and an empty table with columns: Key, Description, Value, and Clear Empty. The "Headers" section has a table with the same columns, containing one entry: Key "company", Description "Company Id", Value "1234", and an unchecked "Clear Empty" checkbox. Plus and minus icons are to the right of the Headers table.

REST Lookup Maintenance – Parameters

Specify URL parameters to send to this lookup.

Use Default Parameters	If selected, default parameters will be sent to this endpoint
Key	The name of the parameter as outlined in the REST API documentation
Description	A friendly description for the parameter
Value	The value to be used by the parameter
Clear Empty	If selected, don't use the parameter if the Value is blank

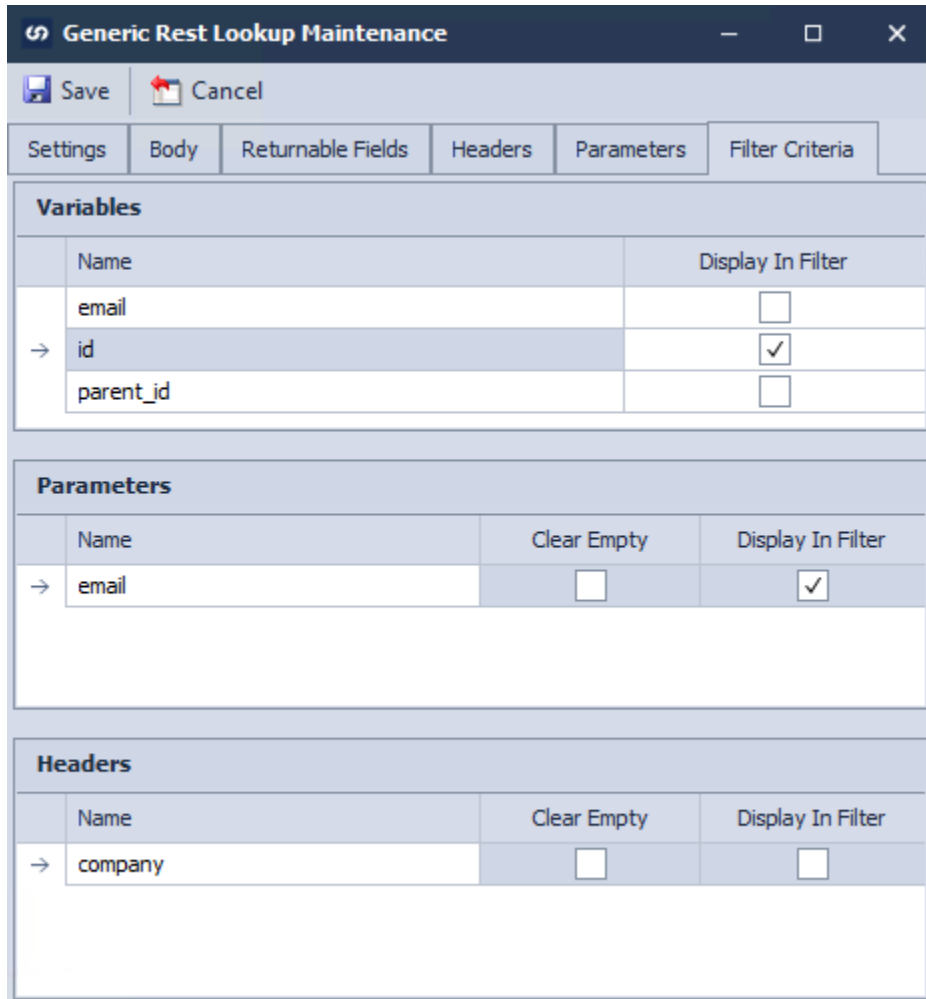


The screenshot shows a software window titled "Generic Rest Lookup Maintenance". It has a dark blue header bar with standard window controls (minimize, maximize, close). Below the header is a toolbar with "Save" and "Cancel" buttons. A tabbed interface contains six tabs: "Settings", "Body", "Returnable Fields", "Headers", "Parameters", and "Filter Criteria". The "Parameters" tab is active. It features a section titled "Default Parameters" with a checkbox labeled "Use Default Parameters". Below this is a table with four columns: "Key", "Description", "Value", and "Clear Empty". The "Parameters" section below has a "+" and "-" button on the right. It contains a table with the same four columns. The first row has a right-pointing arrow in the "Key" column, the value "email" in "Key", "email" in "Description", an empty "Value" field, and an unchecked "Clear Empty" checkbox. Below the table is a large empty text area.

REST Lookup Maintenance – Filter Criteria

Specify which variables, parameters, and headers will be provided to the user to use as the filter criteria when using the lookup in an integration.

Name	The name shown to the user in the integration setup
Display in Filter	If selected, the user will see this field as a filter criteria in integration setup
Clear Empty	Remove these Parameters and Headers if they are blank



The image shows a software window titled "Generic Rest Lookup Maintenance". It has a dark blue header bar with a back arrow icon, the title, and standard window controls (minimize, maximize, close). Below the header is a toolbar with "Save" and "Cancel" buttons. A tabbed interface is present with tabs for "Settings", "Body", "Returnable Fields", "Headers", "Parameters", and "Filter Criteria", with "Filter Criteria" being the active tab. The main content area is divided into three sections: "Variables", "Parameters", and "Headers". Each section contains a table with columns for "Name", "Clear Empty", and "Display In Filter". In the "Variables" section, "id" is selected for display in the filter. In the "Parameters" section, "email" is selected for display in the filter. In the "Headers" section, "company" is listed but not selected for display in the filter.

Variables		
	Name	Display In Filter
	email	<input type="checkbox"/>
→	id	<input checked="" type="checkbox"/>
	parent_id	<input type="checkbox"/>

Parameters			
	Name	Clear Empty	Display In Filter
→	email	<input type="checkbox"/>	<input checked="" type="checkbox"/>



Headers			
	Name	Clear Empty	Display In Filter
→	company	<input type="checkbox"/>	<input type="checkbox"/>

Generic REST Service – Variables

Define variables in the context of this REST Connector. These variables can be used throughout the connector for specifying URL segments or the body in a REST Lookup.

Placeholder	Unique identifier for the variable
Description	A friendly description of the variable
Type	A helpful way to identify variables as System (set at connector level) or Runtime (set at endpoint level). Does not impact functionality.
Value	The default value for the variable
Required	If selected, variable is required on all endpoints

Generic Rest Service - WooCommerce_1.0.0.0 ×

 Save  Cancel

SettingsInstall NotesParametersHeadersPagingGroupsData SourcesDestinationsLookupsVariables

Variables + -

	Placeholder	Description	Type	Value	Required
→	url	Base Url	System	https://shop.eone.com	<input checked="" type="checkbox"/>
	id	Woo Record Id	Runtime		<input type="checkbox"/>
	slug	Woo Record Slug	Runtime		<input type="checkbox"/>
	product_id	Product Id	Runtime		<input type="checkbox"/>
	order_id	Order Id	Runtime		<input type="checkbox"/>
	attribute_id	Attribute Id	Runtime		<input type="checkbox"/>
	zone_id	Shipping Zone Id	Runtime		<input type="checkbox"/>

Maintenance – Navigation – Open

Opens the currently selected REST Service Definition in edit mode.

Maintenance – Navigation – Delete

Deletes the currently selected REST Service Definition.

*Only possible if 'Connection Count' is 0.

Maintenance – Navigation – Refresh

Refreshes the list of REST Service Definitions.

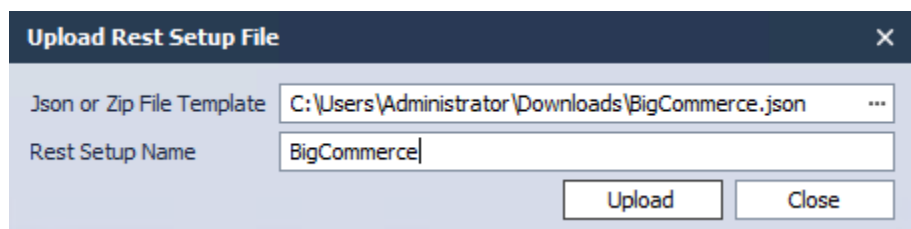
Maintenance – Generic REST – Services

A navigation button to return to the list of REST Service Definitions.

Maintenance – Generic REST – Import

Import a REST Service Definition from another SmartConnect environment. The import tool only works with REST Service Definitions previously created by SmartConnect using the 'Export' option.

Json or Zip File Template	JSON or Zip file containing the REST Service Definition
Rest Setup Name	Friendly name for the REST Service Definition



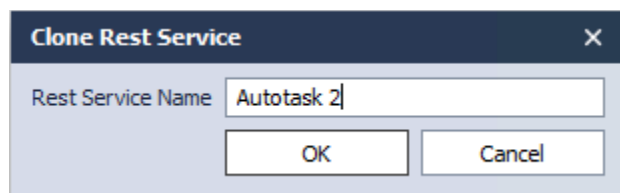
Maintenance – Generic REST – Export

Exports the currently selected REST Service Definition to a zip file. When exporting the output file can be renamed as desired.

Maintenance – Generic REST – Clone

Clone/Duplicate the currently select REST Service Definition.

Rest Service Name	Friendly name for the new REST Service Definition
--------------------------	---



Security

Security – Navigation – Create

User Setup – Details

Email	Email address of the user being added.
Password	The SmartConnect password set for the user.
Change Password at Login	If checked, the user will be asked to change their password when logging in for the first time. If not checked, the set password will remain.
Admin	If checked, the user will have Admin rights within SmartConnect. Allowing the user to do everything within the application. If not checked, the user will need to be granted individual permissions within SmartConnect.
Active	If checked, the user will be active. If not checked, the user will be inactive.
First Name	First Name given to the user.
Last Name	Last Name given to the user.
Create or Update Instances	Allows user to create or update connector instances.
Create or Update Data Sources	Allows user to create or update data sources.
Create or Update Integrations	Allows user to create or update integrations. The user will also need to be granted which specific integrations that they can create or update on the Integration Permissions tab. Also, the user will need to be granted which connector instances they have access to on the Connector Instance tab. If a user has access to an integration but doesn't have access to the connector used, then they will not be able to update that integration.
Run Integrations	Allows user to run integrations.
Schedule Integrations	Allows user to schedule Integrations.
Maintenance	Allows user to open and update SmartConnect Maintenance.
Import	Allows user to Import Integrations.
Export	Allows user to Export Integrations.
Legacy Web Service	Allows user to access the Legacy Web Service.
Legacy REST	Allows user to access the Legacy REST.

User Setup

Save

Cancel

Delete

Copy From

Details

Integration Permission

Connector Instance

Integration Groups

Email

test@test.com

Password

••••

☒ Change Password at Login

☒ Admin

☒ Active

First Name

test

Last Name

user

☒ Create or Update Instances

☒ Create or Update Data Sources

☒ Create or Update Integrations

☒ Run Integrations

☒ Schedule Integrations

☒ Maintenance

☒ Import

☒ Export

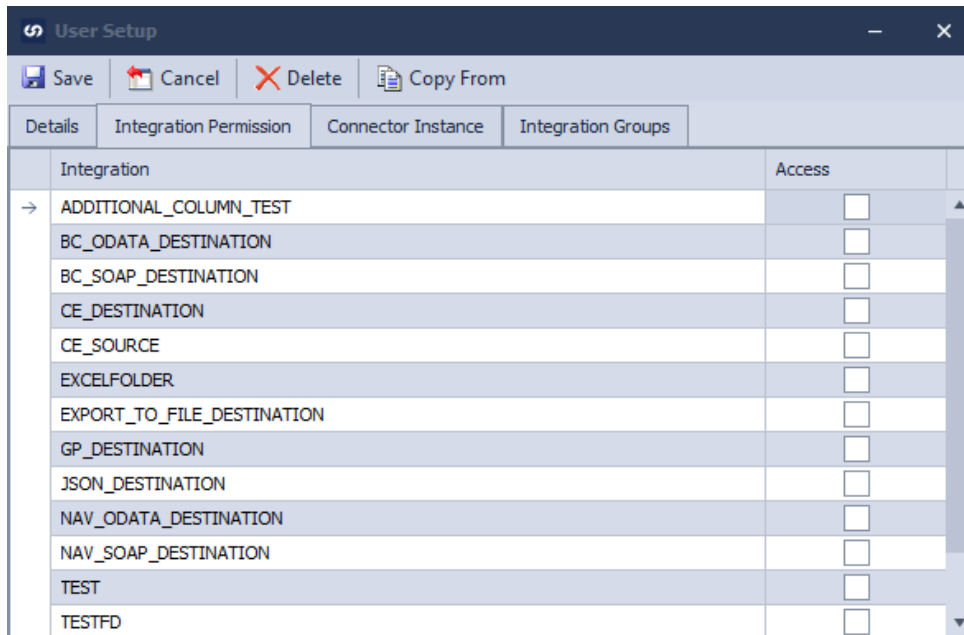
☒ Legacy Web Service

☒ Legacy REST

User Setup – Integration Permission

Select which integrations the user will have access to by clicking the checkbox. The user will need Create or Update Integrations permissions to be able to access the integrations. Depending on which data source and destination is used, the user will also need connector instance permissions to open the integration.

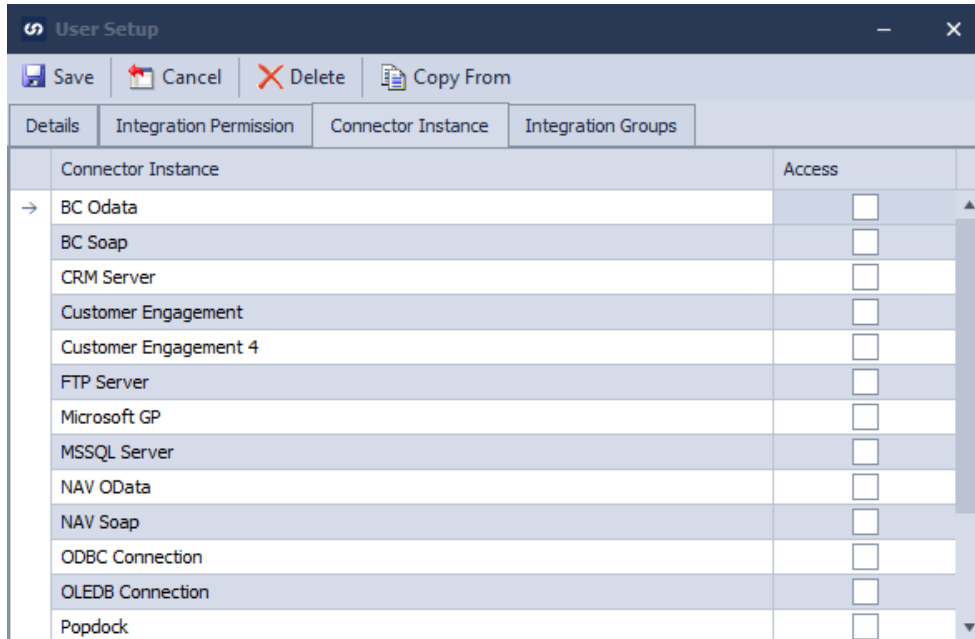
If the user is an Admin, then they will have access to every integration by default.



Integration	Access
→ ADDITIONAL_COLUMN_TEST	<input type="checkbox"/>
BC_ODATA_DESTINATION	<input type="checkbox"/>
BC_SOAP_DESTINATION	<input type="checkbox"/>
CE_DESTINATION	<input type="checkbox"/>
CE_SOURCE	<input type="checkbox"/>
EXCELFOLDER	<input type="checkbox"/>
EXPORT_TO_FILE_DESTINATION	<input type="checkbox"/>
GP_DESTINATION	<input type="checkbox"/>
JSON_DESTINATION	<input type="checkbox"/>
NAV_ODATA_DESTINATION	<input type="checkbox"/>
NAV_SOAP_DESTINATION	<input type="checkbox"/>
TEST	<input type="checkbox"/>
TESTFD	<input type="checkbox"/>

User Setup – Connector Instance

Select what Connector Instances the user will have access to. If an integration has a BC OData destination, then the user will need to have access to the BC OData Connector Instance to open the integration. They will also need to have access to the integration on the Integration Permission tab and access to Create and Update integrations on the Details tab.



The screenshot shows the 'User Setup' dialog box with the 'Connector Instance' tab selected. The dialog has a title bar with a logo and window controls. Below the title bar is a toolbar with 'Save', 'Cancel', 'Delete', and 'Copy From' buttons. The main area contains a table with two columns: 'Connector Instance' and 'Access'. The table lists various connector instances, each with a corresponding checkbox in the 'Access' column. A right arrow is visible next to the first row, 'BC Odata'.

Connector Instance	Access
→ BC Odata	<input type="checkbox"/>
BC Soap	<input type="checkbox"/>
CRM Server	<input type="checkbox"/>
Customer Engagement	<input type="checkbox"/>
Customer Engagement 4	<input type="checkbox"/>
FTP Server	<input type="checkbox"/>
Microsoft GP	<input type="checkbox"/>
MSSQL Server	<input type="checkbox"/>
NAV OData	<input type="checkbox"/>
NAV Soap	<input type="checkbox"/>
ODBC Connection	<input type="checkbox"/>
OLEDB Connection	<input type="checkbox"/>
Popdock	<input type="checkbox"/>

User Setup – Integration Groups

Give access to any available integration groups. Security will be automatically given according to the Integration Group Security settings.

User Setup

Save

Cancel

Copy From

Details

Integration Permission

Connector Instance

Integration Groups

Integration Group	Access
→ New Integration Group	<input checked="" type="checkbox"/>

Security – Navigation – Open

Opens the selected User for editing.

Security – Navigation – Delete

Deletes the selected User. A User cannot be deleted if that User is currently logged in.

Security – Navigation – Refresh

Refreshes the list of Users to show any changes made by other users since the window was opened.

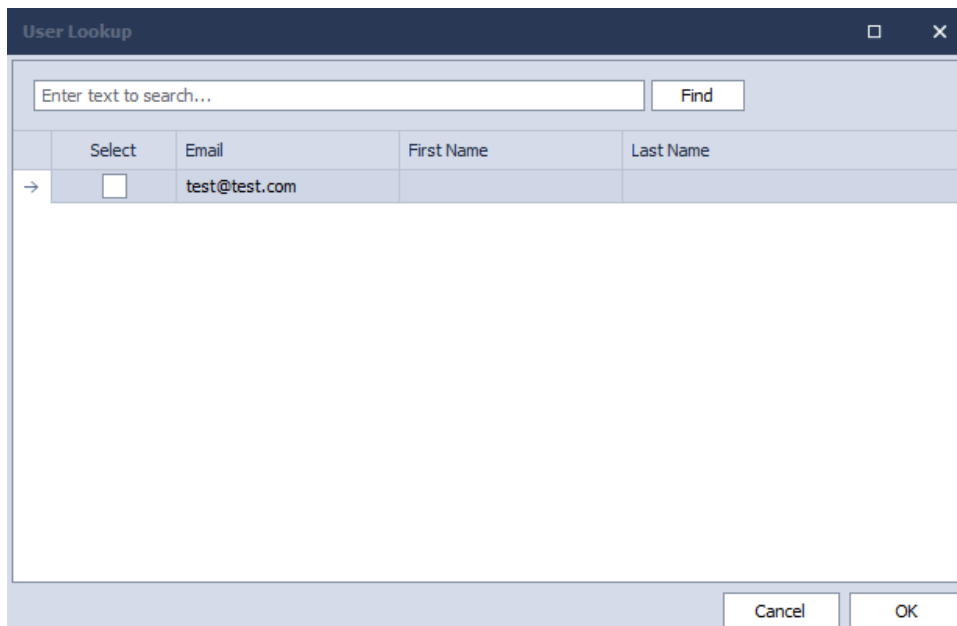
Security – Copy – To New User

Copies the setup of the selected User to a new User.

Security – Copy – To Existing Users

Copies the setup of the selected User to an existing User.

Select the existing User on the User Lookup window.

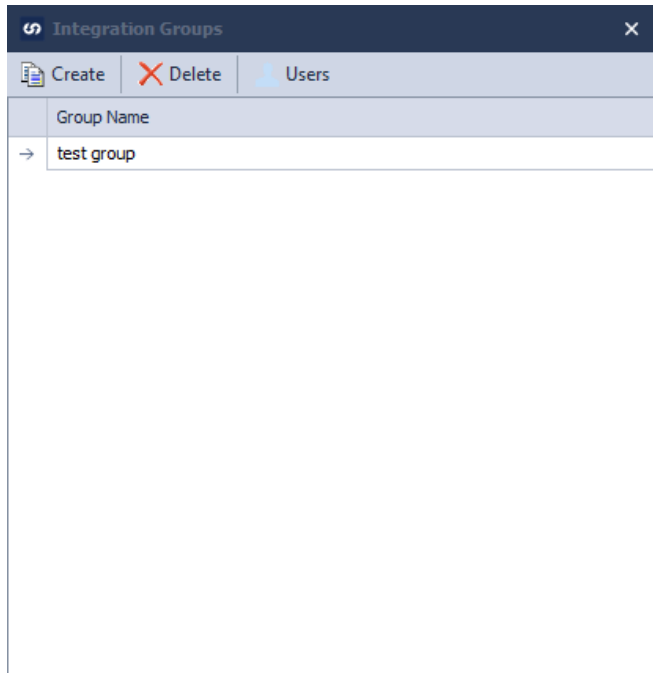


The screenshot shows a 'User Lookup' dialog box. It has a search bar at the top with the placeholder text 'Enter text to search...' and a 'Find' button. Below the search bar is a table with four columns: 'Select', 'Email', 'First Name', and 'Last Name'. The 'Select' column contains a checkbox and a right-pointing arrow. The 'Email' column contains the text 'test@test.com'. The 'First Name' and 'Last Name' columns are empty. At the bottom of the dialog box are 'Cancel' and 'OK' buttons.

Select	Email	First Name	Last Name
→ <input type="checkbox"/>	test@test.com		

Security – Integration Group Security

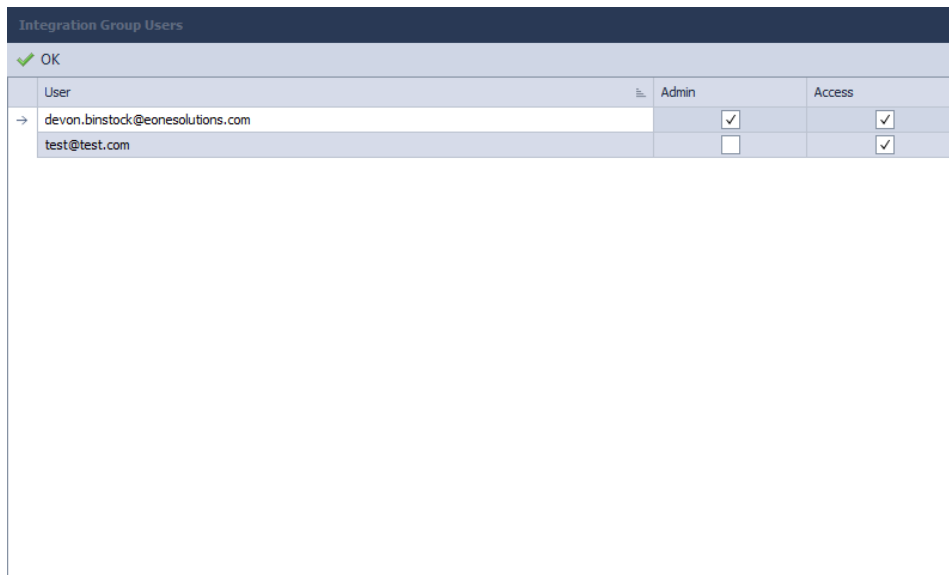
Integrations Groups can be created or deleted with this window.



The 'Integration Groups' window features a dark blue header with a close button. Below the header is a light blue bar with three tabs: 'Create' (with a document icon), 'Delete' (with a red 'X' icon), and 'Users' (with a person icon). The main area is a table with a single row containing the text 'test group' under the 'Group Name' header. A right-pointing arrow is visible to the left of the text.

Group Name
→ test group

The Users tab will display all the Users and if they have access to the selected Integration Group or not.



The 'Integration Group Users' window has a dark blue header. Below it is a light blue bar with a green checkmark and the text 'OK'. The main area is a table with three columns: 'User', 'Admin', and 'Access'. The 'User' column contains two entries: 'devon.binstock@eonesolutions.com' and 'test@test.com'. The 'Admin' column has checkboxes, with the first one checked. The 'Access' column has checkboxes, with both the first and second ones checked. A right-pointing arrow is visible to the left of the first user entry.

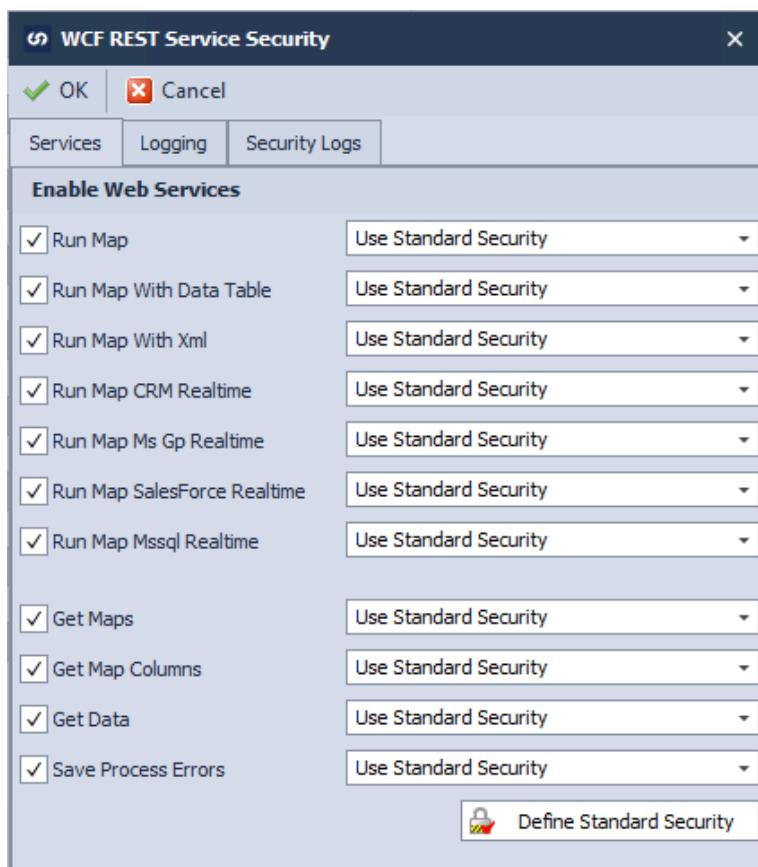
User	Admin	Access
→ devon.binstock@eonesolutions.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
test@test.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Security – Web Security

WCF REST Service Security – Services

Each request available via the SmartConnect web service may be turned on/off in the configuration screen. To enable or disable a request through SmartConnect, and to enable SmartConnect security for web service requests:

1. Select or de-select the checkbox beside the required request to enable or disable the request.
2. Once a request has been enabled the type of security required for the request may be selected.
 - a. No Security: no extra security will be applied to the SmartConnect web service. Security defined in IIS and the web.config file will still be applied.
 - b. Standard Security: make the security for this request the standard SmartConnect webs service security. When this option is selected the 'Define Standard Security' button at the bottom of the screen should be configured. This defines what is meant by standard security. Note: Security defined in IIS and the web.config file will be applied over and above standard security.
 - c. Specify Security: specify a special security configuration for this request. When selected this option will enable a configuration button that will allow the configuration of security specific to the request.
3. Select OK to save your changes. Note: changes made to web service configurations via SmartConnect require the web service to be restarted before they will take effect.



The image shows a screenshot of the 'WCF REST Service Security' dialog box. The dialog has a title bar with a close button (X). Below the title bar are two buttons: 'OK' (with a green checkmark icon) and 'Cancel' (with a red X icon). Below these are three tabs: 'Services' (selected), 'Logging', and 'Security Logs'. The main area is titled 'Enable Web Services' and contains a list of services with checkboxes and dropdown menus for security settings. All checkboxes are checked, and all dropdown menus are set to 'Use Standard Security'. At the bottom right, there is a button labeled 'Define Standard Security' with a small icon.

Service	Security Setting
<input checked="" type="checkbox"/> Run Map	Use Standard Security
<input checked="" type="checkbox"/> Run Map With Data Table	Use Standard Security
<input checked="" type="checkbox"/> Run Map With Xml	Use Standard Security
<input checked="" type="checkbox"/> Run Map CRM Realtime	Use Standard Security
<input checked="" type="checkbox"/> Run Map Ms Gp Realtime	Use Standard Security
<input checked="" type="checkbox"/> Run Map Salesforce Realtime	Use Standard Security
<input checked="" type="checkbox"/> Run Map Mssql Realtime	Use Standard Security
<input checked="" type="checkbox"/> Get Maps	Use Standard Security
<input checked="" type="checkbox"/> Get Map Columns	Use Standard Security
<input checked="" type="checkbox"/> Get Data	Use Standard Security
<input checked="" type="checkbox"/> Save Process Errors	Use Standard Security

Define Standard Security

WCF REST Service Security – Logging

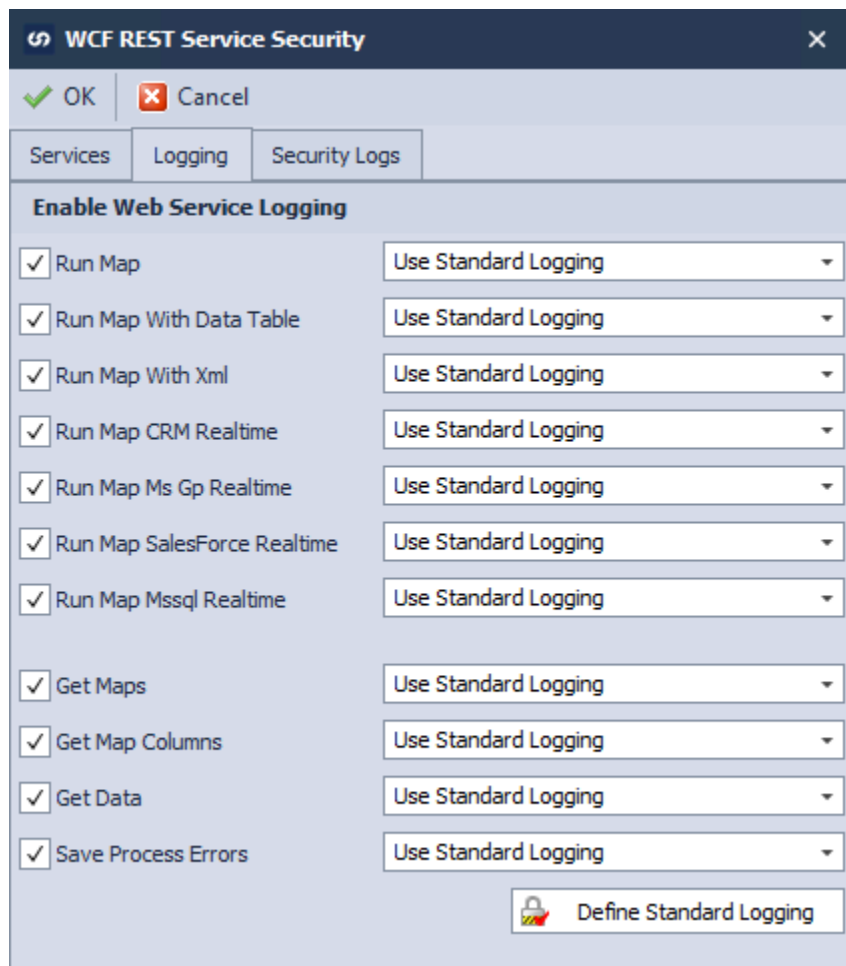
Requests made to the SmartConnect web service may be logged in the SmartConnect web service activity log.

Enable the SmartConnect web service activity log:

Logging may be set up standard across multiple requests or individually for specified requests.

To enable the activity log:

1. Select the checkbox beside the required request to enable logging for that request.
2. Select either 'Use Standard Logging' or 'Specify Logging' as required.
3. If standard logging is selected, select the Define Standard Logging button to set up logging. If Specify Logging is selected, select the configuration button to specify logging settings.
4. Enter the required settings on the logging setup screen.



The image shows a screenshot of the 'WCF REST Service Security' dialog box, specifically the 'Logging' tab. The dialog has a title bar with a close button (X) and a subtitle bar with 'OK' and 'Cancel' buttons. Below the subtitle bar are three tabs: 'Services', 'Logging', and 'Security Logs'. The 'Logging' tab is selected. The main area is titled 'Enable Web Service Logging'. It contains a list of services with checkboxes and dropdown menus for logging settings. All checkboxes are checked, and all dropdown menus are set to 'Use Standard Logging'. At the bottom right, there is a button labeled 'Define Standard Logging' with a padlock icon.

Service	Logging Setting
<input checked="" type="checkbox"/> Run Map	Use Standard Logging
<input checked="" type="checkbox"/> Run Map With Data Table	Use Standard Logging
<input checked="" type="checkbox"/> Run Map With Xml	Use Standard Logging
<input checked="" type="checkbox"/> Run Map CRM Realtime	Use Standard Logging
<input checked="" type="checkbox"/> Run Map Ms Gp Realtime	Use Standard Logging
<input checked="" type="checkbox"/> Run Map Salesforce Realtime	Use Standard Logging
<input checked="" type="checkbox"/> Run Map Mssql Realtime	Use Standard Logging
<input checked="" type="checkbox"/> Get Maps	Use Standard Logging
<input checked="" type="checkbox"/> Get Map Columns	Use Standard Logging
<input checked="" type="checkbox"/> Get Data	Use Standard Logging
<input checked="" type="checkbox"/> Save Process Errors	Use Standard Logging

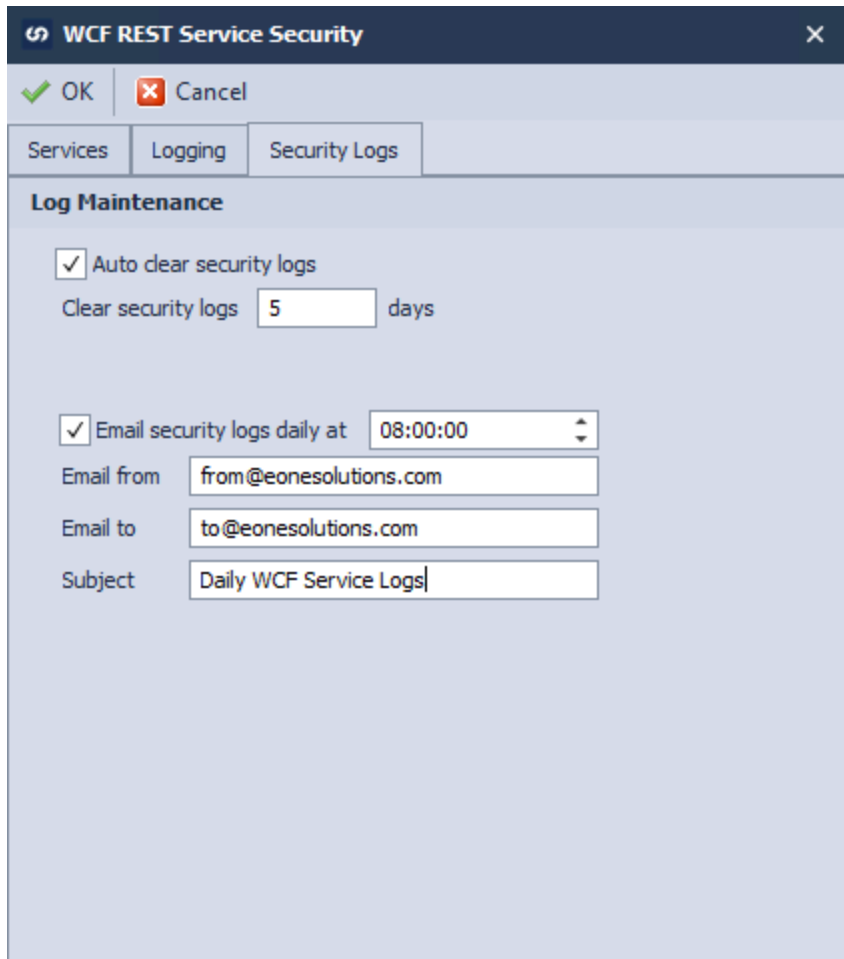
Define Standard Logging

WCF REST Service Security – Security Logs

If security logs should be automatically deleted after a specified time frame check the Auto clear security logs checkbox. Enter the number of days to keep security logs. Logs older than this will be removed.

You can also email the logs daily. Check the box to Email security logs daily. Set a time to send the email and the Email from, Email to, and Subject fields.

Note: the SmartConnect windows service must be running before automatic removal will occur.



The image shows a Windows-style configuration window titled "WCF REST Service Security". It has a dark blue header bar with a close button (X) on the right. Below the header is a light blue bar with "OK" (green checkmark) and "Cancel" (red X) buttons. The main area has three tabs: "Services", "Logging", and "Security Logs", with "Security Logs" being the active tab. Under the "Security Logs" tab, there is a section titled "Log Maintenance". It contains two checked checkboxes: "Auto clear security logs" and "Email security logs daily at". The "Auto clear security logs" checkbox is followed by a text input field containing the number "5" and the word "days". The "Email security logs daily at" checkbox is followed by a time selection dropdown menu showing "08:00:00". Below these are three text input fields: "Email from" with the value "from@eonesolutions.com", "Email to" with the value "to@eonesolutions.com", and "Subject" with the value "Daily WCF Service Logs".

WCF REST Service Security

OK Cancel

Services Logging Security Logs

Log Maintenance

☒ Auto clear security logs
Clear security logs 5 days

☒ Email security logs daily at 08:00:00

Email from from@eonesolutions.com

Email to to@eonesolutions.com

Subject Daily WCF Service Logs

About

Displays the active instance details.



The screenshot shows a software window titled "About" with a close button (X) in the top right corner. The window has a light blue background and displays the following information:

eOne SmartConnect	
SmartConnect Version:	21.1.0.447
Account Code:	[Redacted]
Account Name:	Two, Inc.
License Type:	Perpetual
Registration Date:	05/18/2021
Expiry Date:	07/19/3000
Connection Count:	50

At the bottom of the window, there is a copyright notice: © 2007 eOne Integrated Business Solutions. All rights reserved.

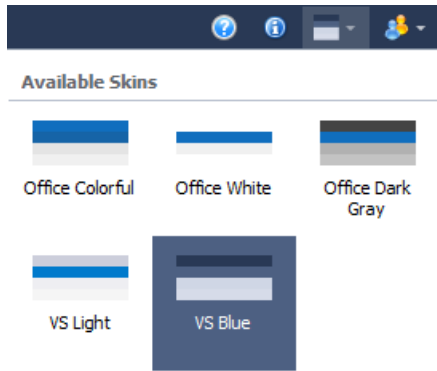
Information

Loads the <http://www.eonesolutions.com> website.

Display

Available Skins

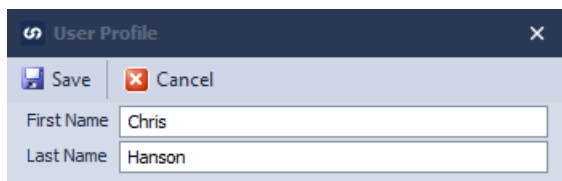
Change the way the SmartConnect UI looks.



Profile

User Details

Change the current user's name.



Reset Password

Change the current user's password.

