TA Sync Guide

03/21/2013 Blackbaud CRM 3.0 TA Sync US

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TASync-2013

Team Approach Sync

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From *Administration*, you view the Team Approach Sync tasks to help you manage the synchronization of data between Team Approach and Blackbaud Enterprise CRM. Once you have the synchronization process set up to run automatically, you can use the Sync Status report to view the results. You can also use **Sync Conflicts** to try to resolve any conflicts in the Sync Status report.

Set Up Sync with Team Approach

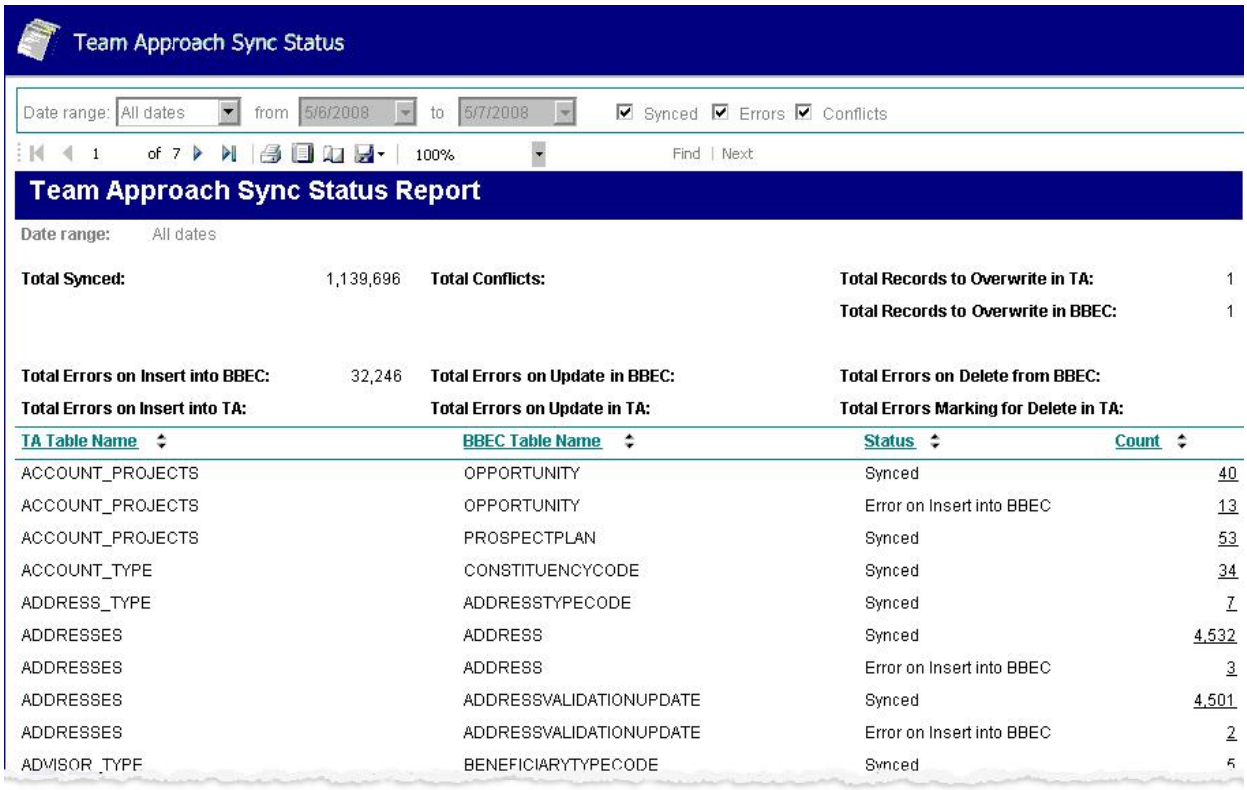
In order to use the Team Approach Sync tasks to help you manage the synchronization of data between Team Approach and this program, you must first schedule the sync through the SQL Server Agent. The sync can be set up to run automatically on a schedule or manually on demand.

Once the sync process runs, view the Sync Status report to see the status of all rows processed by the sync. The report shows any conflicts or errors which occurred during the sync. If conflicts occurred between data in Team Approach and data in this program, use **Sync Conflicts** to resolve them.

Team Approach Sync Status Report

The Sync Status report displays information about all the data processed during the sync. There are six error categories: errors on insert into Blackbaud Enterprise CRM and on insert into Team Approach, errors on update in Blackbaud Enterprise CRM and on update in Team Approach, and errors on delete from Blackbaud Enterprise CRM or on marking for delete in Team Approach.

The Sync Status report contains a summary section with row counts for each type of error, in addition to the total number of rows synced and the total number of conflicts. A conflict appears on the Sync Status report when a row has been updated in both programs since the last sync. Conflicts appear in one of three categories: conflicts that are detected but unresolved, conflicts to be resolved by overwriting the data in Team Approach, and conflicts to be resolved by overwriting the data in Blackbaud Enterprise CRM. For more information about resolving conflicts, see “Team Approach Sync Conflicts” on page 3.


Team Approach Sync Status

Date range: All dates from 5/6/2008 to 5/7/2008 Synced Errors Conflicts

1 of 7 100% Find | Next

Team Approach Sync Status Report

Date range: All dates

Total Synced:	1,139,696	**Total Conflicts:**		**Total Records to Overwrite in TA:**	1
				Total Records to Overwrite in BBEC:	1
Total Errors on Insert into BBEC:	32,246	**Total Errors on Update in BBEC:**		**Total Errors on Delete from BBEC:**	
Total Errors on Insert into TA:		**Total Errors on Update in TA:**		**Total Errors Marking for Delete in TA:**	

TA Table Name	BBEC Table Name	Status	Count
ACCOUNT_PROJECTS	OPPORTUNITY	Synced	40
ACCOUNT_PROJECTS	OPPORTUNITY	Error on Insert into BBEC	13
ACCOUNT_PROJECTS	PROSPECTPLAN	Synced	53
ACCOUNT_TYPE	CONSTITUENCYCODE	Synced	34
ADDRESS_TYPE	ADDRESSTYPECODE	Synced	7
ADDRESSES	ADDRESS	Synced	4,532
ADDRESSES	ADDRESS	Error on Insert into BBEC	3
ADDRESSES	ADDRESSVALIDATIONUPDATE	Synced	4,501
ADDRESSES	ADDRESSVALIDATIONUPDATE	Error on Insert into BBEC	2
ADVISOR_TYPE	BENEFICIARYTYPECODE	Synced	5

The detailed information in this report shows at least one row for each table in Team Approach synced with a table in Blackbaud Enterprise CRM. For data synced with no errors or conflicts, there is one row with a status of “Synced”. If there are conflicts or errors for the synced tables, additional rows for each conflict or error category appear.

For example, if the table ADDRESSES in Team Approach is synced with the table ADDRESS in Blackbaud Enterprise CRM and everything syncs correctly with no errors, there is one row in the report with a status of “Synced” and a total count of the rows synced. If there is an error during the synchronization, a row will appear in the report with a status of “Error...” and a total count of the rows which encountered that error. If there are multiple errors or conflicts encountered, each error or conflict category is listed with the total count of the rows for each category.

To view more detail about each row, you can click the row count. Detailed information about errors is grouped by the actual error message. Error messages are generally those returned by the database and contain references to database objects. You can click on the row count for each error category to view more precise information, including **TA Primary Key** and **BBEC ID**, as well as **Date Last Changed**, **Date Added by Sync**, and **Date Last Processed by Sync**. Contact Blackbaud Customer Support for more information and troubleshooting assistance with these errors.

For more information about conflicts shown in the Sync Status report, see “Team Approach Sync Conflicts” on page 3.

Team Approach Sync Conflicts

A conflict appears on the Sync Status report when a row has been updated in both programs since the last sync. Use **Sync Conflicts** to view information about and resolve the conflicts. The Sync Conflicts page displays conflicts in three categories: unresolved conflicts, conflicts to resolve by overwriting the data in Team Approach, and conflicts to be resolved by overwriting the data in Blackbaud Enterprise CRM.

You can go through the unresolved conflicts row by row to decide how to handle each one. When a row is selected, you can click **Overwrite TA Row** or **Overwrite BBEC Row** on the action bar to indicate how to resolve the conflict.

For example, if a synced interest is updated in Team Approach as well as in Blackbaud Enterprise CRM, the sync process will recognize that address as a conflict. If the Team Approach address is the one you want to keep, click **Overwrite BBEC Row**. That unresolved conflict now appears in the Resolved Conflicts: Overwrite BBEC section, instead of the Unresolved Conflicts section.

Note: Some tables in Team Approach and Blackbaud Enterprise CRM sync bidirectionally; you can choose which data to keep and which to overwrite in the case of a conflict. However, some tables sync in the Team Approach to Blackbaud Enterprise CRM direction only. In that case, you can choose only **Overwrite BBEC Row** to resolve the conflict

Until the sync process runs, you can click **Undo Conflict Resolution** to move rows back into the Unresolved Conflicts section.

The next time the sync process runs, the rows in the Resolved Conflicts sections will be processed and removed from the Sync Conflicts page. If the sync process is running and has already processed a row in a Resolved Conflicts section, you will not be able to undo the conflict resolution.