



SYNC for Microsoft Dynamics ERP and Microsoft Dynamics CRM

App Name: Commercient SYNC for Microsoft Dynamics ERP and Microsoft Dynamics CRM

Commercient SYNC, the #1 data integration platform for sales, makes it possible for your sales team to see Microsoft Dynamics ERP data directly in Salesforce. With SYNC, Microsoft Dynamics ERP and Microsoft Dynamics CRM are integrated, and you'll be able to access important Microsoft Dynamics ERP data directly in the Salesforce.

Commercient SYNC is compatible with Microsoft Dynamics Business Central (formerly NAV), Microsoft Dynamics 365 for Finance and Operations (formerly AX), Microsoft Dynamics GP and Microsoft Dynamics SL. The Commercient SYNC Agent is rapidly deployable and gives you easy access to your Microsoft Dynamics ERP information in Salesforce. This includes customer information, sales history, invoicing, serial numbers invoiced, inventory, multiple ship-to-addresses, and much more. New accounts, orders, opportunities, etc. created in Microsoft Dynamics CRM are SYNC'd to Microsoft Dynamics ERP.

About the SYNC:

- Unlike traditional data integration tools such as an ETL, there is no coding, mapping, or server. We handle everything, so you can focus on growing your business.
- Changes are reflected in Microsoft Dynamics CRM in real time as the records in Microsoft Dynamics ERP change.
- Commercient SYNC for Microsoft Dynamics ERP is built by ERP & CRM integration experts.
- Commercient software provides Microsoft Dynamics ERP users with a “CRM in the cloud” experience.
- Any field synced from Microsoft Dynamics ERP can be displayed on the Microsoft Dynamics CRM screen. All the data Commercient syncs to Sugar becomes part of Salesforce’s native database. As such, you can perform any Microsoft Dynamics CRM function on the data—from graphing to dashboards to using third-party apps that can make use of the data.

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- Commerciant has provided the means to make the data searchable in Salesforce. For instance, if you search for a serial number you can find the Invoice Records and Sales Order records that pertain to it.
- The SYNC tool only uploads or updates data when it has changed.
- Implementing Commerciant SYNC creates a simple data integration pathway between Microsoft Dynamics ERP and Salesforce. Our SYNC solution also enables you to prevent the duplication of data, handle custom objects in Salesforce, and take advantage of the premier support.
- Commerciant has an eye for detail and has programmed its services to make efficient use of tracking changes and submitting records to the Microsoft Dynamics CRM API in a single call. The result is that Commerciant significantly reduces the likelihood of exceeding the Microsoft Dynamics CRM API Microsoft Dynamics ERP limits. In the event that a daily limit is reached, which can occur during the initial SYNC of a large Microsoft Dynamics ERP system, Commerciant will continue to SYNC where it left off on the following day.

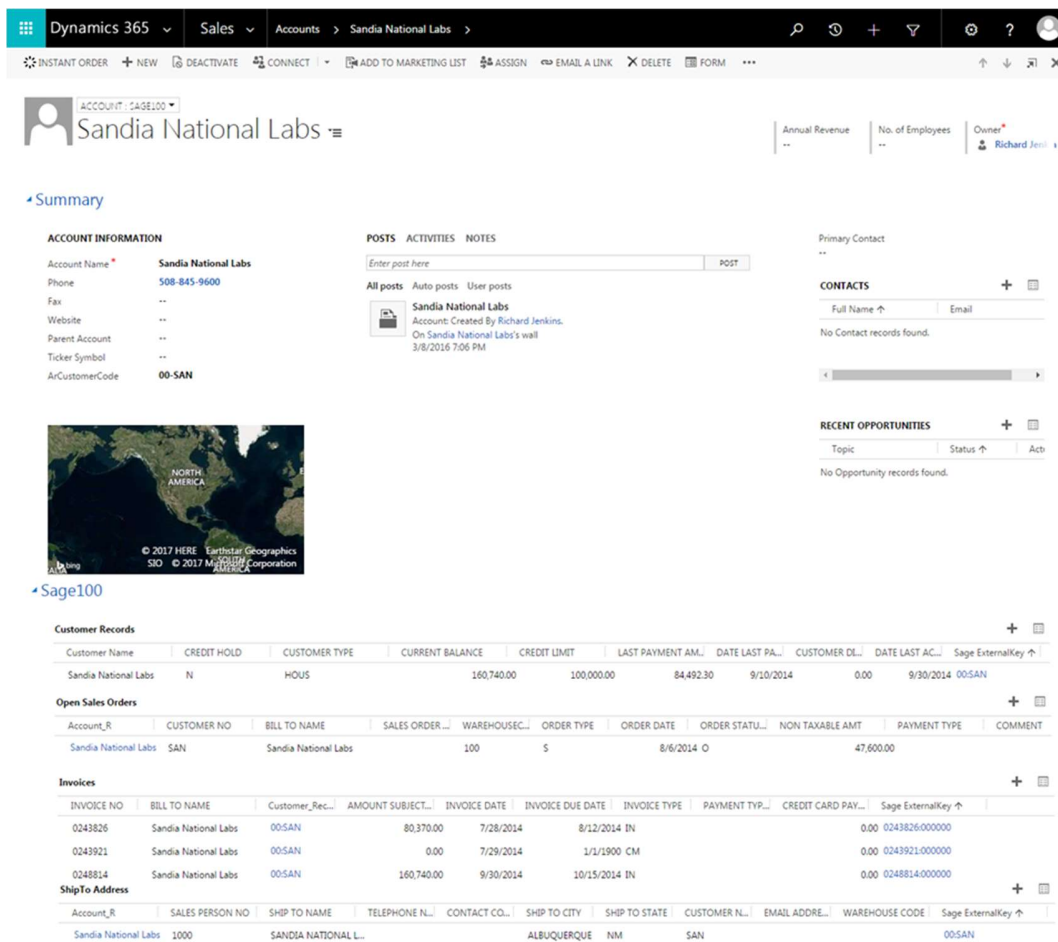
What is Synchronized?

What Commerciant initially SYNCs:

1. Financial accounting data
2. Customer data
3. Sales order data
4. Invoice data
5. Products
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects

7. Plus any other data customers request

The **Microsoft Dynamics ERP AR Customer record** is the first item to be synced. As you can see below. Customers in Microsoft Dynamics ERP are synchronized into Microsoft Dynamics CRM Account records. The Customer's Ship To and Bill To addresses in Microsoft Dynamics ERP are mapped to Salesforce's address fields using a mapping schema. The Microsoft Dynamics ERP Customer fields can be displayed on the Microsoft Dynamics CRM screen however, you may decide to show Credit Limit, Outstanding Invoice Value, and the On-Hold status onto the screen while hiding other fields. By clicking on the Microsoft Dynamics ERP Customer Record, you can see all the fields that are synchronized.



The screenshot displays the Microsoft Dynamics CRM interface for the account 'Sandia National Labs'. The interface includes a navigation bar at the top with 'Dynamics 365', 'Sales', and 'Accounts > Sandia National Labs'. Below the navigation bar, there are various action buttons like 'INSTANT ORDER', 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', and 'FORM'. The main content area shows the account name 'Sandia National Labs' and a profile picture. To the right, there are fields for 'Annual Revenue', 'No. of Employees', and 'Owner' (Richard Jenkins). Below this, there is a 'Summary' section with tabs for 'ACCOUNT INFORMATION', 'POSTS', 'ACTIVITIES', and 'NOTES'. The 'ACCOUNT INFORMATION' tab is active, showing fields like 'Account Name', 'Phone', 'Fax', 'Website', 'Parent Account', 'Ticker Symbol', and 'ArCustomerCode'. There is also a map of North America. To the right of the account information, there are sections for 'Primary Contact', 'CONTACTS', and 'RECENT OPPORTUNITIES'. Below the summary section, there are three tables: 'Customer Records', 'Open Sales Orders', and 'Invoices'. The 'Customer Records' table has columns for Customer Name, CREDIT HOLD, CUSTOMER TYPE, CURRENT BALANCE, CREDIT LIMIT, LAST PAYMENT AM., DATE LAST PA., CUSTOMER DL., DATE LAST AC., and Sage ExternalKey. The 'Open Sales Orders' table has columns for Account_R, CUSTOMER NO, BILL TO NAME, SALES ORDER, WAREHOUSE, ORDER TYPE, ORDER DATE, ORDER STATU., NON TAXABLE AMT, PAYMENT TYPE, and COMMENT. The 'Invoices' table has columns for INVOICE NO, BILL TO NAME, Customer_Rec, AMOUNT SUBJECT, INVOICE DATE, INVOICE DUE DATE, INVOICE TYPE, PAYMENT TYP., CREDIT CARD PAY., and Sage ExternalKey. Below the invoices table, there is a 'ShipTo Address' section with columns for Account_R, SALES PERSON NO, SHIP TO NAME, TELEPHONE N., CONTACT CO., SHIP TO CITY, SHIP TO STATE, CUSTOMER N., EMAIL ADDR., WAREHOUSE CODE, and Sage ExternalKey.

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Once the Customer Record is in Salesforce, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Microsoft Dynamics CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects in Microsoft Dynamics CRM to simplify the Microsoft Dynamics CRM screens. As seen below. With this approach, a user can easily see Sales orders and Detail Lines with their Invoices, as well as viewing the status of Sales Orders as they change in Microsoft Dynamics ERP. Cleansing of Cancelled Microsoft Dynamics ERP Sales Order data from Microsoft Dynamics CRM is performed automatically.

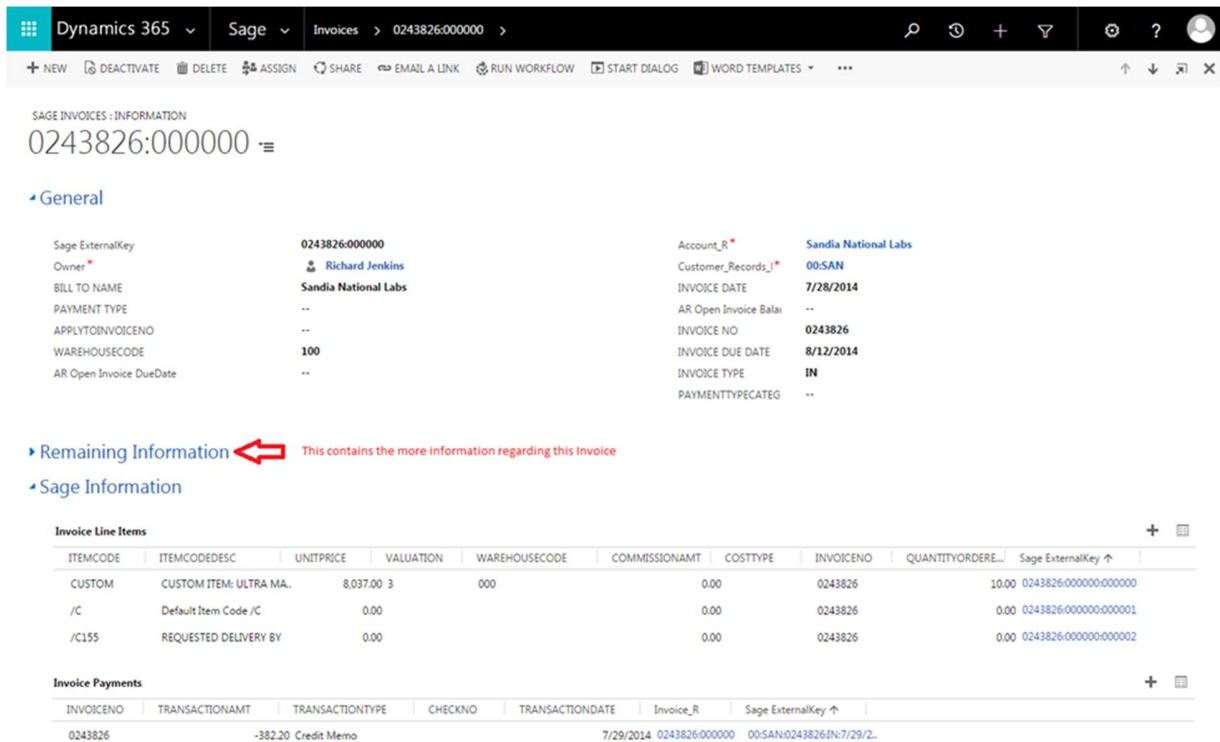
Account_R	CUSTOMER NO	BILL TO NAME	SALES ORDER N...	WAREHOUSECO...	ORDER TYPE	ORDER DATE	ORDER STATUS	NON TAXABLE AMT	PAYMENT TYPE	COI
SIA SECURITY TECHN...	SSY	SIA SECURITY TECHNOLOGY	028	S	S	8/13/2014	O	145,645.65	CHECK	
New Pig Corporation	NPC	New Pig Corporation	100	S	S	9/12/2014	O	74,934.08		
Sandia National Labs	SAN	Sandia National Labs	100	S	S	8/6/2014	O	47,600.00		
GOLDCREST INTL SIN...	GDSS	GOLDCREST INTL SINGAP...	000	S	S	9/30/2014	O	20,868.37	CHECK	
New Pig Corporation	NPC	New Pig Corporation	100	S	S	9/12/2014	O	19,570.00		
GREENWOOD SOLUT...	GRNS	GREENWOOD SOLUTIONS ...	028	S	S	9/29/2014	O	17,275.25	CHECK	
ASESORIAS Y TECNOL...	ASES	ASESORIAS Y TECNOLOGIA...	028	S	S	9/16/2014	O	15,968.17	CHECK	
LONE STAR SAFETY &...	LSSS	LONE STAR SAFETY & SUP...	100	S	S	10/10/2014	N	13,308.00	CHECK	
MAYFLOWER UK	MAYF	MAYFLOWER UK	000	S	S	9/2/2014	O	12,456.20	CHECK	
SAFE RACK LLC	SRL	SAFE RACK LLC	000	S	S	9/5/2014	O	11,420.00	CHECK	
Quatrex Environmental	QUA	Quatrex Environmental	000	S	S	10/6/2014	O	10,830.00		
MEDSAFE	MEDS	MEDSAFE	100	S	S	10/10/2014	N	10,280.00	CHECK	
CYNDAN CHEMICALS	CYND	CYNDAN CHEMICALS	028	S	S	9/25/2014	O	10,157.95	CHECK	
SAFEWARE, INC.	SPWR	SAFEWARE, INC.	100	S	S	9/26/2014	O	9,053.05	CHECK	
OIL MOP, LLC	OMI	OIL MOP, LLC	000	S	S	10/10/2014	O	8,415.00	CHECK	
CYNDAN CHEMICALS	CYND	CYNDAN CHEMICALS	028	S	S	8/27/2014	O	7,268.55	CHECK	
SPILL 911	SPIL	SPILL 911	001	S	S	9/19/2014	O	6,892.64	CHECK	C
INTERSTATE PRODUCT...	INTRO	INTERSTATE PRODUCT...	000	S	S	10/10/2014	O	6,874.00	CHECK	

Commercient has crafted the relationships with the data objects in Microsoft Dynamics CRM so that you have the power to decide which objects you would like to display onscreen. You are still always able to click to other parent- or child-related objects. For example, an Admin user can remove the Sales Orders from the Account screen but leave their Detail Lines. This allows salespeople to see what was sold and shipped from the main Account screen without clicking anywhere; but they can still click the Sales Order link on the detail line to open the full Sales Order Screen.

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The **AR Invoice** records are synced and related to the **Invoiced Sales Order Data**, and the Invoice Payments. As seen below.



The screenshot shows the Dynamics 365 Sage interface for an invoice. The breadcrumb trail is 'Dynamics 365 > Sage > Invoices > 0243826:000000'. The main content area is titled 'SAGE INVOICES : INFORMATION' and shows the invoice number '0243826:000000'. Below this, there are two sections: 'General' and 'Remaining Information'. The 'General' section contains fields for Sage ExternalKey (0243826:000000), Owner (Richard Jenkins), BILL TO NAME (Sandia National Labs), PAYMENT TYPE, APPLYTOINVOICENO, WAREHOUSECODE (100), and AR Open Invoice DueDate. The 'Remaining Information' section is highlighted with a red arrow and contains fields for Account_R (Sandia National Labs), Customer_Records (00:SAN), INVOICE DATE (7/28/2014), AR Open Invoice Bal, INVOICE NO (0243826), INVOICE DUE DATE (8/12/2014), INVOICE TYPE (IN), and PAYMENTTYPECAT. Below these sections are 'Sage Information' and 'Invoice Line Items' tables. The 'Invoice Line Items' table has columns for ITEM CODE, ITEM CODE DESC, UNIT PRICE, VALUATION, WAREHOUSE CODE, COMMISSION AMT, COST TYPE, INVOICE NO, QUANTITY ORDERED, and Sage ExternalKey. It lists three items: a custom item 'CUSTOM ITEM: ULTRA MA.' with a unit price of 8,037.00 and a valuation of 3, and two other items with a unit price of 0.00. The 'Invoice Payments' table has columns for INVOICE NO, TRANSACTION AMT, TRANSACTION TYPE, CHECK NO, TRANSACTION DATE, Invoice_R, and Sage ExternalKey. It shows one payment with an amount of -382.20 and a transaction type of 'Credit Memo'.

The AR Invoice data is useful for spotting unpaid invoices and being able to drill down into the data. The other records which are synchronized include the **AR Customer Ship to Tax Exemptions, Item Master, and Item Warehouse**. Commercient creates **Microsoft Dynamics CRM Products** from the **Item Master** and associates the entire **Item** and **Warehouse** records to the Product. This gives you the ability to have accurate product data and Inventory availability. In addition, you can **SYNC any Database, table, or view**.

What if I have an existing Microsoft Dynamics CRM database?

Clients with existing records in both Microsoft Dynamics ERP and Microsoft Dynamics CRM must consult with the Commercient Professional Services team to perform a clean-up and match-up of records before the Commercient SYNC is

enabled.

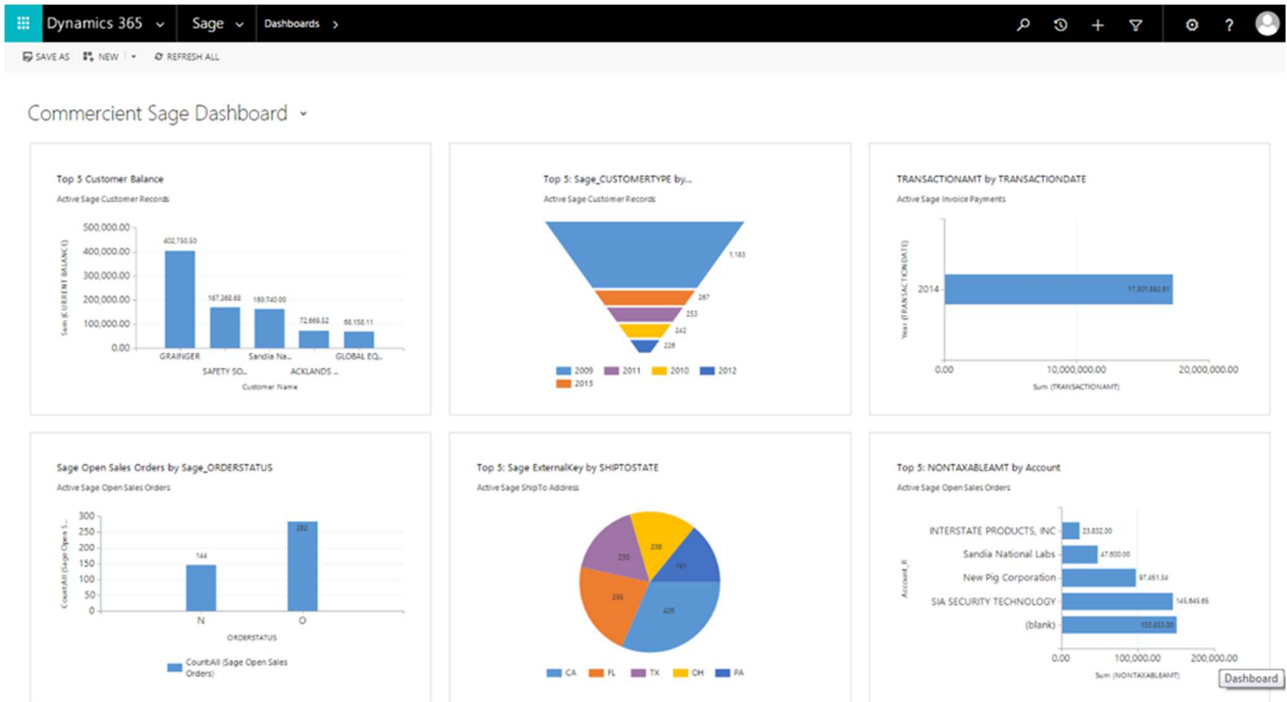
Can I limit or control the data that I SYNC?

Yes. Commerciant has created an open methodology of allowing you to control the filtering of data in the SQL WHERE statement while maintaining the integrity of relationship mapping and efficient syncing methodologies. Within the WHERE you can perform subqueries, filters, and cross-table and cross-database subqueries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)

What else does Commerciant do with Salesforce?

Data synchronization is the first step towards a total solution. Ask about these additional modules for Microsoft Dynamics ERP:

- Quote Processing
- Web-based Product Configurator
- Opportunity and Quote -> Sales Order Conversion
- Products and Price Book SYNC
- Product Record Types
- Cases with Serial Numbers Invoiced and Service Orders
- Opportunity Commissions Calculations based on Microsoft Dynamics ERP Invoices
- Automatic Microsoft Dynamics ERP Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to Microsoft Dynamics ERP AR Customer



System Requirements:

Microsoft Dynamics CRM Group, Professional, Enterprise editions or higher. Microsoft Dynamics CRM API is included at no charge. Own the Microsoft Dynamics ERP software.

Company Information:

Commercient is a cloud-based company that connects Microsoft Dynamics CRM directly to your Microsoft Dynamics ERP system. Our open SYNC Agent works with ERPs such as Sage, SYSPRO, Traverse, and other Microsoft Dynamics ERP accounting systems. Commercient improves the efficiency of getting CRM, B2B, and B2C eCommerce orders directly into your accounting system in real time, with all of the associated business rules.

For more information, please use the Contact Us link on www.commercient.com.



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