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.

- Commercient 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 Commercient 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.
- Commercient has an eye for detail and has programmed its services to make efficient use of tracking changes and submitting records to the Microsoft Dynamics CRMAPI in a single call. The result is that Commercient significantly reduces the likelihood of exceeding the Microsoft Dynamics CRMAP 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, Commercient will continue to SYNC where it left off on the following day.

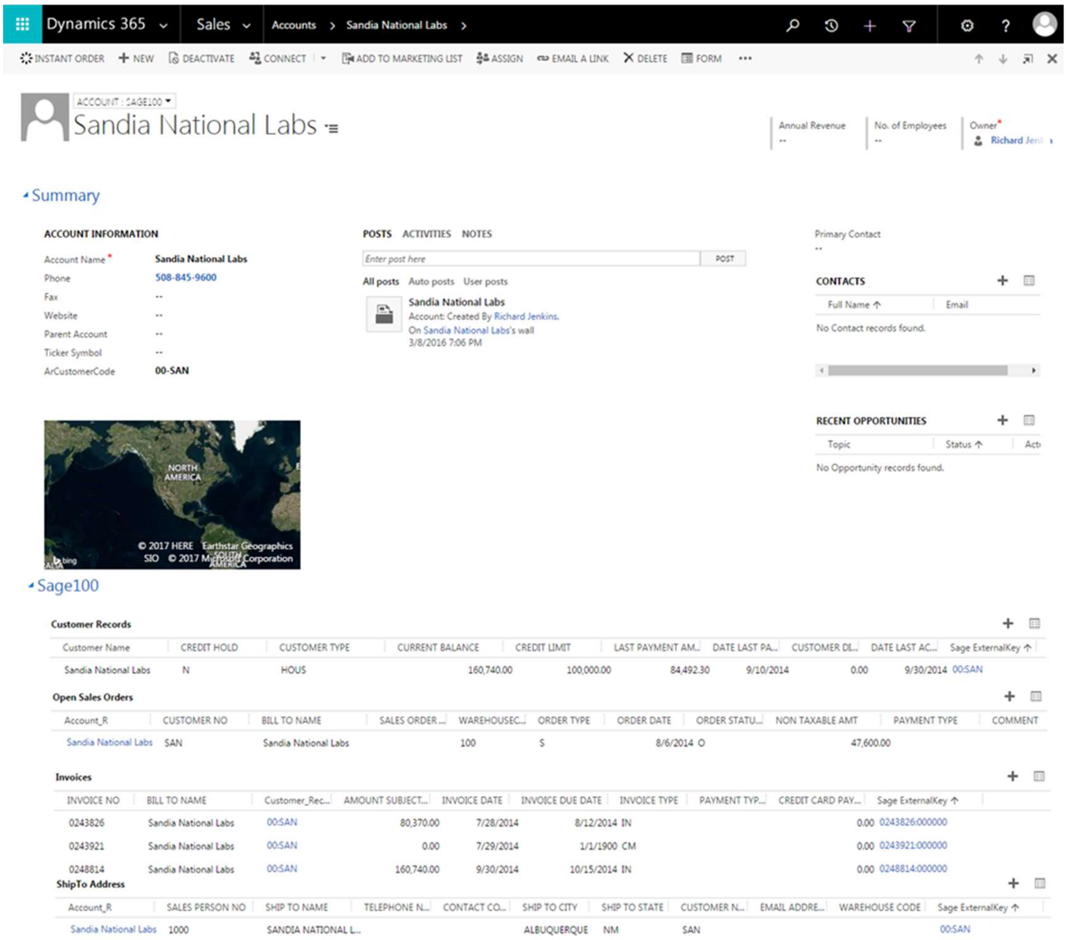
What is Synchronized?

What Commercient initially SYNCs:

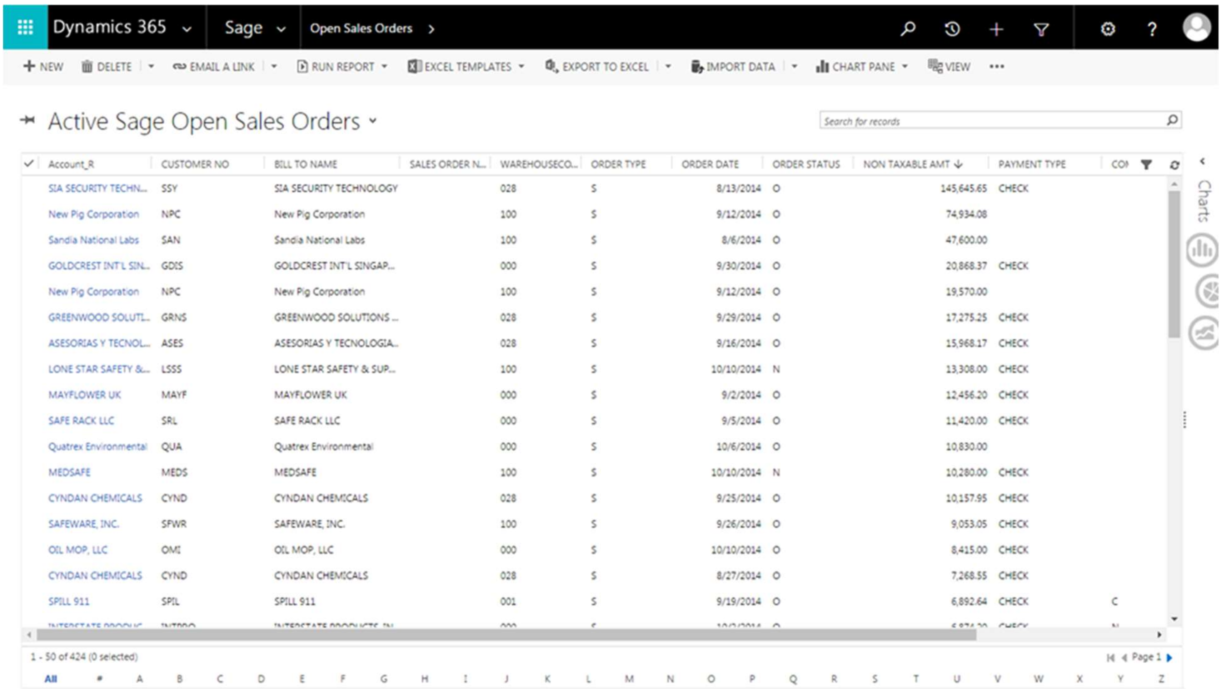
1. Financial accounting data
2. Customer data
3. Sales order data
4. Invoice data
5. Products
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects

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.

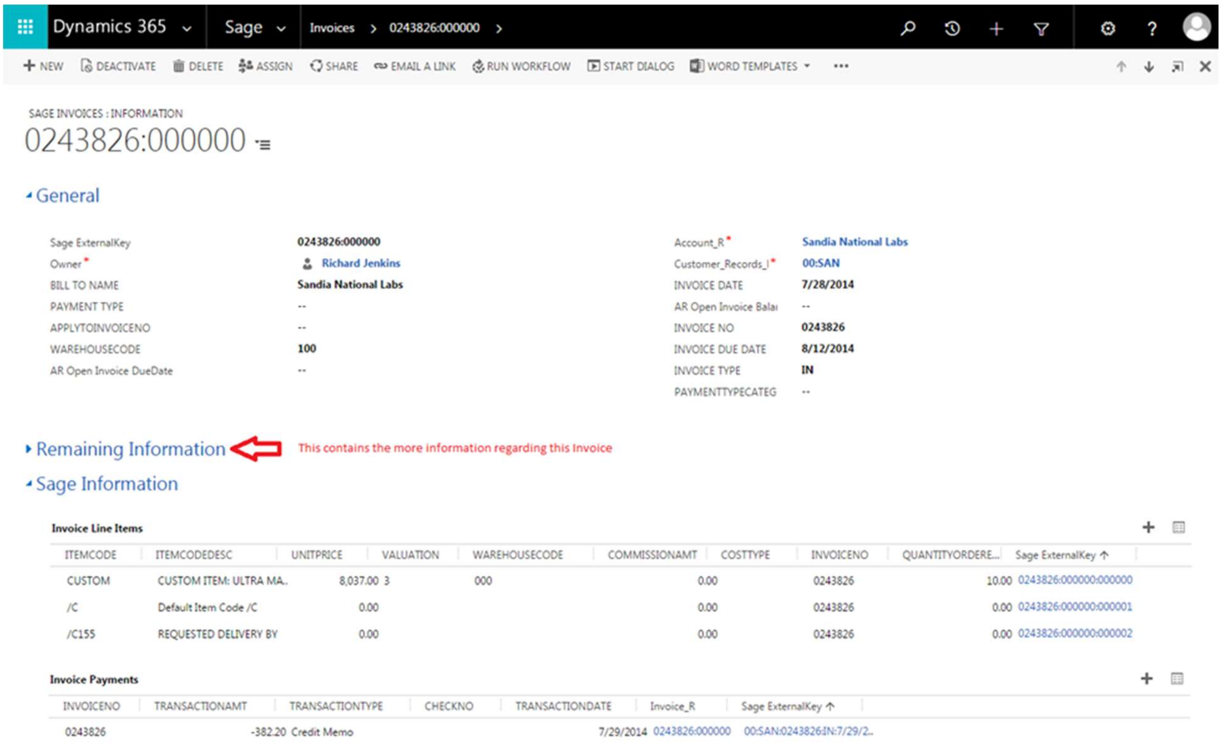


Once the Customer Record is in Salesforce, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Microsoft Dynamics CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects 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 CRMis performed automatically.



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.

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



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. Commercient 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 sub-queries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)

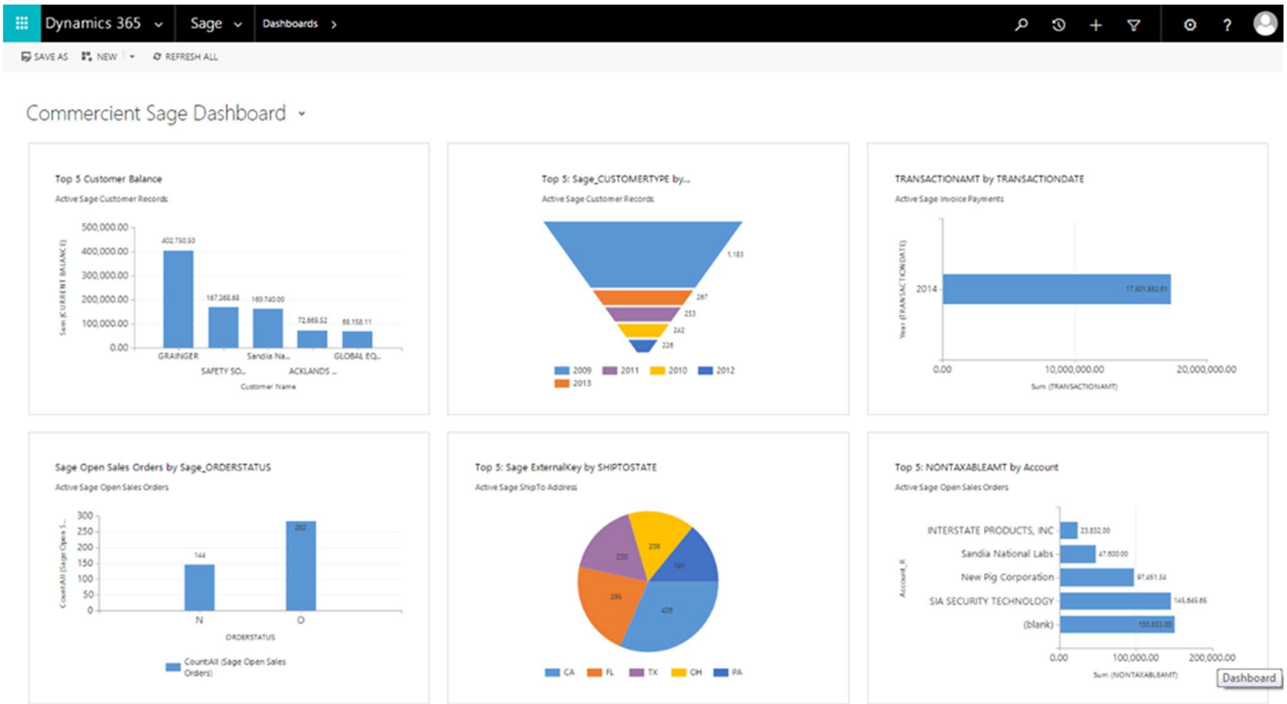
What else does Commercient do with Salesforce?

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

Commercient™ ERP Integration for CRM

SYNC for Microsoft Dynamics ERP and Microsoft Dynamics CRM



System Requirements:

Microsoft Dynamics CRM Group, Professional, Enterprise editions or higher. Microsoft Dynamics CRMAPI 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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