SYNC for Deltek and Microsoft Dynamics 365

Commercient SYNC for Deltek and Microsoft Dynamics 365

Commercient SYNC, the #1 data integration platform that integrates your data between Deltek and Microsoft Dynamics 365. The Commercient SYNC Agent is rapidly deployable and gives you access to your Deltek customer and order information in Microsoft Dynamics 365. We work with the following: Costpoint, Maconomy, Ajera, Deltek for Professional Services, Vision, and Workbook.

About SYNC:

Commercient SYNC is created by ERP and CRM data integration experts. By having that, SYNC creates a simple data integration pathway between your Deltek and Microsoft Dynamics 365. Once the data integration takes place, your Deltek data is automatically loaded into your Microsoft Dynamics 365 without programming, coding, mapping or servers required. SYNCing data is a cloud-based experience that ensures your data is protected. SYNC has the following benefits:

- Data integrated from Deltek to Microsoft Dynamics 365 becomes native data inside Microsoft Dynamics 365 CRM. Being native data inside the CRM means bringing data from your Deltek over to Microsoft Dynamics 365 in which you can perform any function from that data and manipulate it to the way you need it, for example, connecting to third-party apps and creating dashboards
- Inside Microsoft Dynamics 365, the system provides the function of a user-friendly search engine to look up data that is SYNCed from Deltek because the data is native, it is searchable. For instance, looking for a serial number that relates to a Sales Order record or Invoice Record
- Commercient can significantly reduce the likelihood of exceeding the Microsoft Dynamics 365 API Deltek limits, as Deltek has a limit of 100 requests per minute per company. In the event that a daily limit is reached (which can occur during the initial SYNC of a large Deltek system) Commercient will continue to SYNC where it left off on the following day
- The Commercient SYNC app developed for Deltek and Microsoft Dynamics 365 detects changes in either database whether it is Deltek or Microsoft Dynamics 365 and SYNC only those changes in the data within either system

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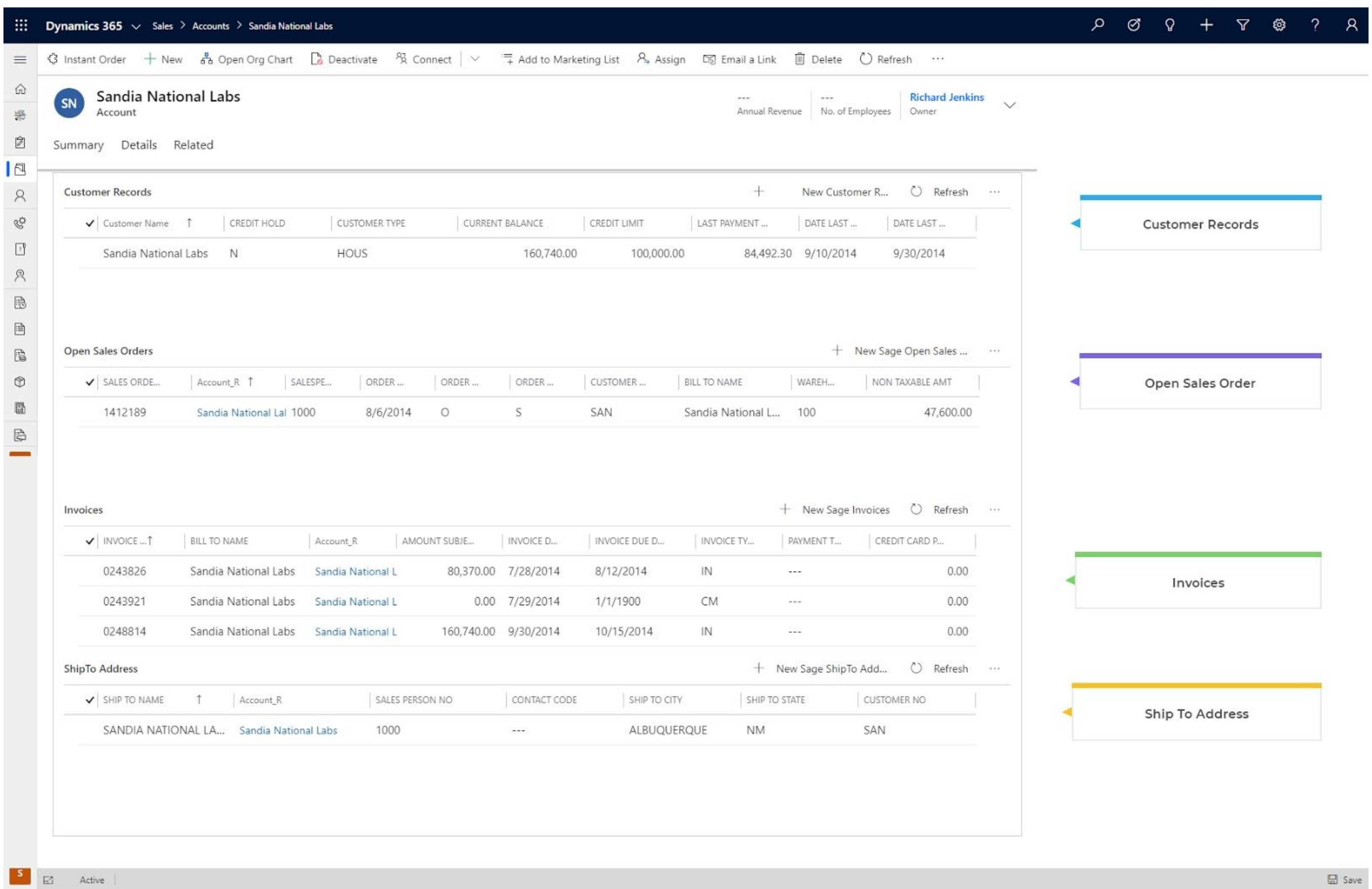
What if I have an existing Microsoft Dynamics 365 database?

When you have existing data in both systems(Deltek and Microsoft Dynamics 365) the following steps will take place, first, the data will need to be backed up, second, you will come to a point when integrating the data and you will have to do deduplication on 3 items that we have a native function inside our Commercient SYNC app that also leverages artificial intelligence(AI) for following items listed below:

- Accounts: Deduplication happens here when customer names are spelled incorrectly and deduplication for child-parent relationships, form part of the standard purchase of Commercient SYNC at no additional costs.
- Customers: They need deduplication as there are customers with no accounts that are contacts and there is an AI for this.
- Products/Items: Deduplication happens for this when there is a different item description over the same product.

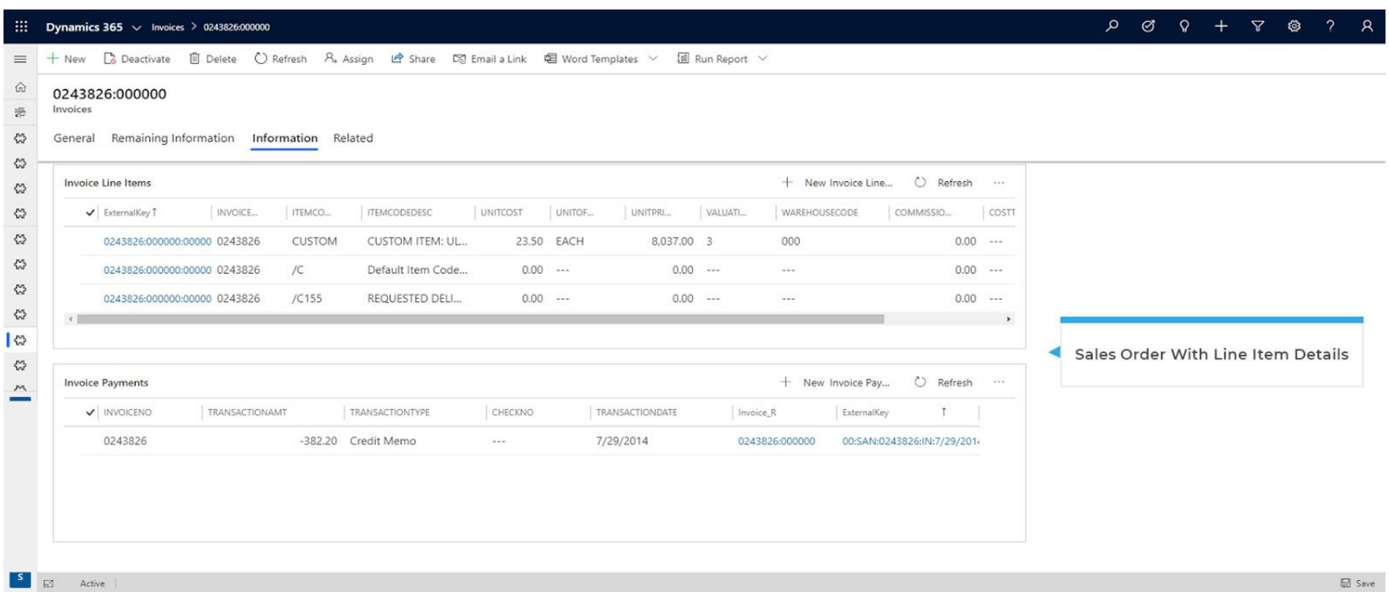
What does SYNC offer?

Customers in Deltek are integrated into Microsoft Dynamics 365. The first item to be SYNCed is your **AR Customer Record** and once this is completed, all the fields can be shown. Customers Ship To and Bill To address in Deltek is merged into Microsoft Dynamics 365, which can be displayed according to their needs. By clicking on the Deltek Customer Record, you can see all the fields that are synchronized.



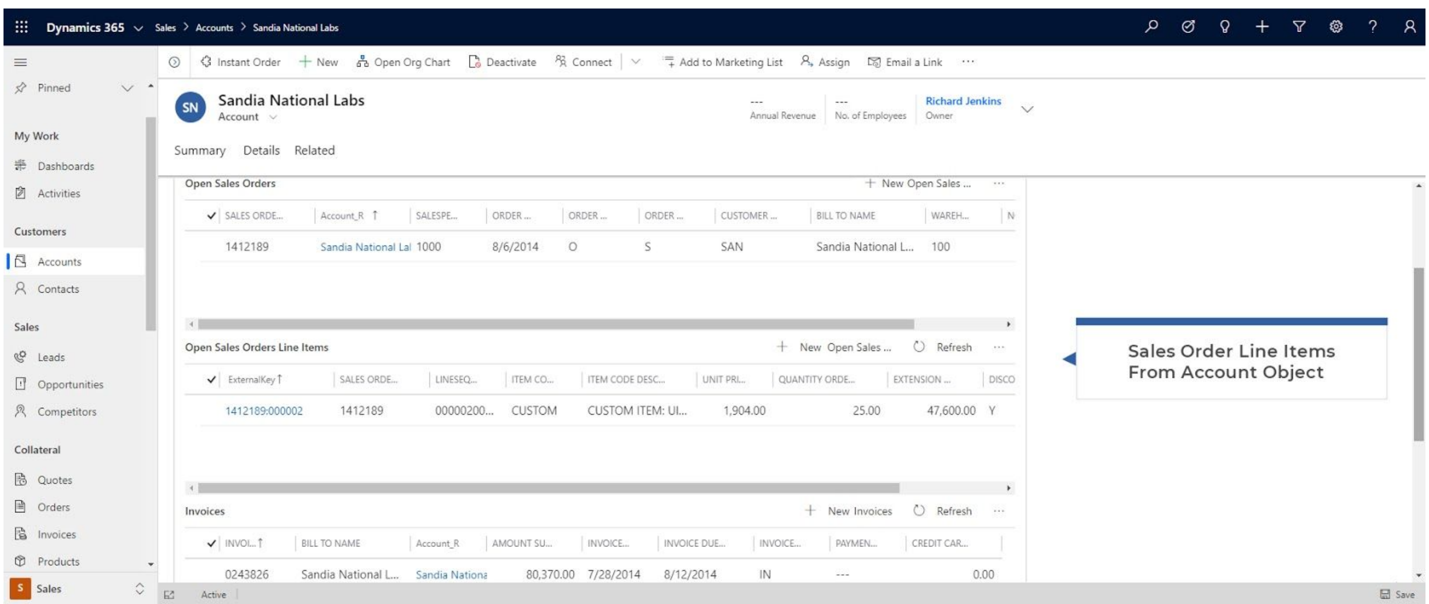
Sales Order With Line Item Details

Once the Customer Record is in Microsoft Dynamics 365, Commercient then SYNCs the **Sales Orders and their Detail Lines** which relates them to the corresponding Microsoft Dynamics 365 Account record. A customer object is then created in Microsoft Dynamics 365 as the Sales Order data and Invoice Sales Order data is combined into one, since each customer's needs are unique. This allows customers to see their invoices that have their orders and details as well as, viewing the different statuses of their sales orders as they change in Deltek. When removing Deltek Sales Order data that has been canceled from Microsoft Dynamics 365, it performs automatically.



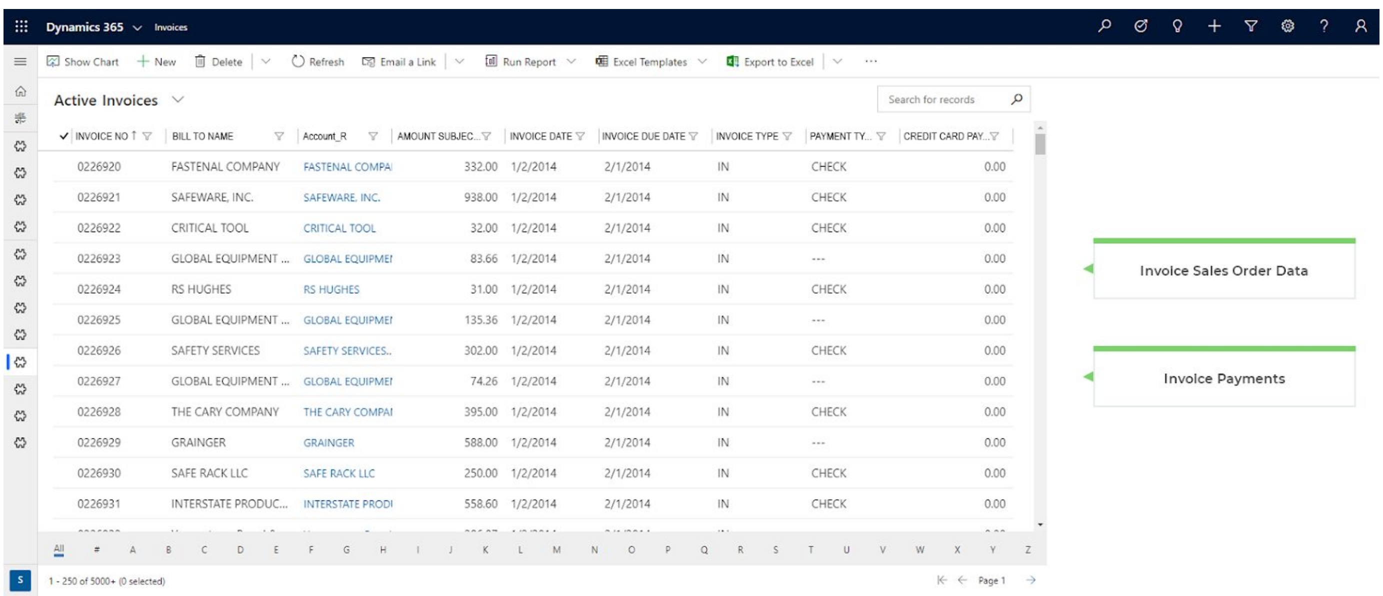
Sales Order Screen Showing Account Object

Commercient has designed the relationships with the data objects in Microsoft Dynamics 365 that can give you the freedom to decide which objects you would like to display on the screen. You are always able to click to other **parents- or child-related objects**. For instance, an Admin user can remove the Sales Orders from the Account screen but leave their **Detail Lines**. This allows our customers to see what was sold and shipped from the main account screen. By clicking on the Sales Order link on the detail line, they can view the full Sales Order.



The AR Invoice

- The AR Invoice is a record that is synced and related to the **Invoiced Sales Order Data**, and **Invoice Payments**.
- The AR Invoice data is useful for identifying unpaid invoices and locating the data, in which the customer needs to pay for the services used.
- The other records which are used in SYNC include the **AR Customer Ship to Tax Exemptions, Item Master,** and **Item Warehouse.**
- The **Item Master** is used to create **Microsoft Dynamics 365 Products** by Commercient and links 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.**



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 sub-queries, 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 Microsoft Dynamics 365?

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

- 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 Deltek Invoices
- Automatic Deltek Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/ Wholesaler Self-Service Portal
- Custom Data Synchronization
- Account Conversion to Deltek AR Customer

Company Information:

Commercient is a cloud-based company that connects Microsoft Dynamics 365 directly to your Deltek system. Our open SYNC Agent works with software such as Epicor, SYSPRO, Traverse, and other 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 http://www.commercient.com