

***Commerciant SYNC for Deltek and Microsoft Dynamics 365***

Commerciant SYNC, the #1 data integration platform that integrates your data between Deltek and Microsoft Dynamics 365. The Commerciant 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:***

Commerciant 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
- The Commerciant 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

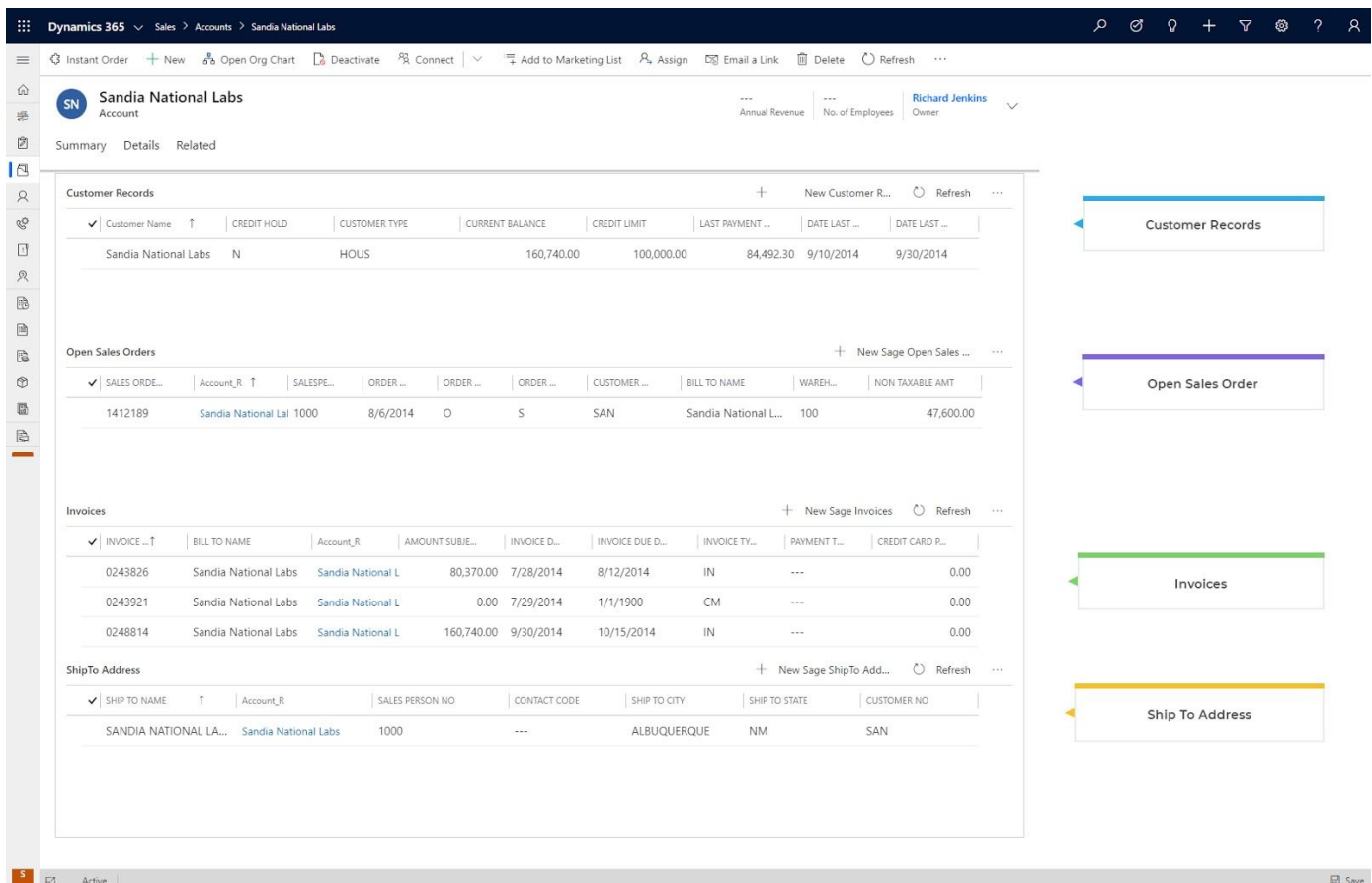
***What if I have an existing Microsoft Dynamics 365 database?***

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 Commerciant 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 Commerciant 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.



**Customer Records**

Customer Name	CREDIT HOLD	CUSTOMER TYPE	CURRENT BALANCE	CREDIT LIMIT	LAST PAYMENT ...	DATE LAST ...	DATE LAST ...
Sandia National Labs	N	HOUS	160,740.00	100,000.00	84,492.30	9/10/2014	9/30/2014

**Open Sales Orders**

SALES ORDE...	Account_R	SALESPE...	ORDER ...	ORDER ...	ORDER ...	CUSTOMER ...	BILL TO NAME	WAREH...	NON TAXABLE AMT
1412189	Sandia National Lal	1000	8/6/2014	O	S	SAN	Sandia National L...	100	47,600.00

**Invoices**

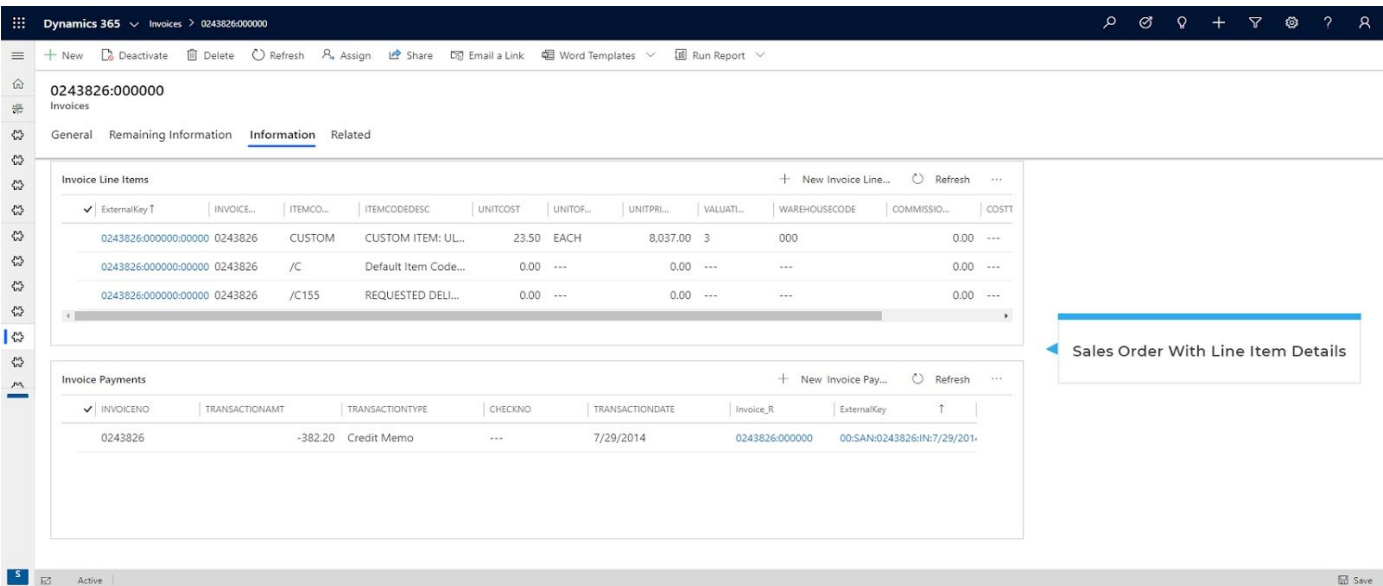
INVOICE ...	BILL TO NAME	Account_R	AMOUNT SUBJE...	INVOICE D...	INVOICE DUE D...	INVOICE TY...	PAYMENT T...	CREDIT CARD P...
0243826	Sandia National Labs	Sandia National L	80,370.00	7/28/2014	8/12/2014	IN	---	0.00
0243921	Sandia National Labs	Sandia National L	0.00	7/29/2014	1/1/1900	CM	---	0.00
0248814	Sandia National Labs	Sandia National L	160,740.00	9/30/2014	10/15/2014	IN	---	0.00

**Ship To Address**

SHIP TO NAME	Account_R	SALES PERSON NO	CONTACT CODE	SHIP TO CITY	SHIP TO STATE	CUSTOMER NO
SANDIA NATIONAL LA...	Sandia National Labs	1000	---	ALBUQUERQUE	NM	SAN

## *Sales Order With Line Item Details*

Once the Customer Record is in Microsoft Dynamics 365, Commerciant 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.



The screenshot displays the Microsoft Dynamics 365 interface for an invoice. The top navigation bar shows 'Dynamics 365' and 'Invoices > 0243826:000000'. The main content area is titled '0243826:000000 Invoices' and includes tabs for 'General', 'Remaining Information', 'Information', and 'Related'. The 'Information' tab is active, showing 'Invoice Line Items' and 'Invoice Payments'.

**Invoice Line Items Table:**

ExternalKey T	INVOICE...	ITEMCO...	ITEMCODEDESC	UNITCOST	UNITOF...	UNITPRB...	VALUATI...	WAREHOUSECODE	COMMISSIO...	COSTI
0243826:000000:000000	0243826	CUSTOM	CUSTOM ITEM: UL...	23.50	EACH	8,037.00	3	000	0.00	---
0243826:000000:000000	0243826	/C	Default Item Code...	0.00	---	0.00	---	---	0.00	---
0243826:000000:000000	0243826	/C155	REQUESTED DELI...	0.00	---	0.00	---	---	0.00	---

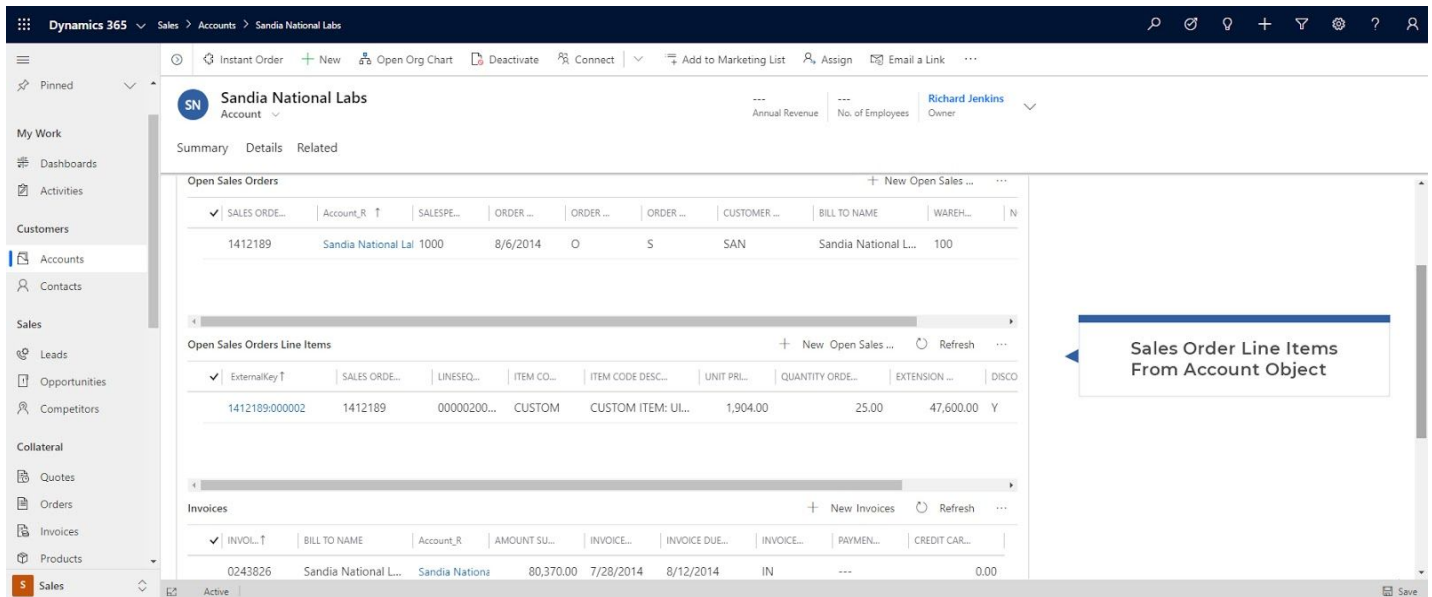
**Invoice Payments Table:**

INVOICEID	TRANSACTIONAMT	TRANSACTIONTYPE	CHECKNO	TRANSACTIONDATE	Invoice_R	ExternalKey
0243826	-382.20	Credit Memo	---	7/29/2014	0243826:000000	00:SAN:0243826:IN:7/29/2014

A blue callout box on the right side of the screenshot points to the 'Invoice Line Items' table with the text 'Sales Order With Line Item Details'.

## *Sales Order Screen Showing Account Object*

Commerciant 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 screenshot shows the Microsoft Dynamics 365 interface for the 'Sandia National Labs' account. The 'Open Sales Orders' table is displayed with the following data:

SALES ORDE...	Account_R	SALESPE...	ORDER...	ORDER...	ORDER...	CUSTOMER...	BILL TO NAME	WAREH...
1412189	Sandia National Labs	1000	8/6/2014	O	S	SAN	Sandia National Labs	100

The 'Open Sales Orders Line Items' table is also visible, showing details for the selected sales order:

ExternalKeyT	SALES ORDE...	LINESEQ...	ITEM CO...	ITEM CODE DESC...	UNIT PRI...	QUANTITY ORDE...	EXTENSION...	DISCO
1412189:000002	1412189	00000200...	CUSTOM	CUSTOM ITEM: UI...	1,904.00	25.00	47,600.00	Y

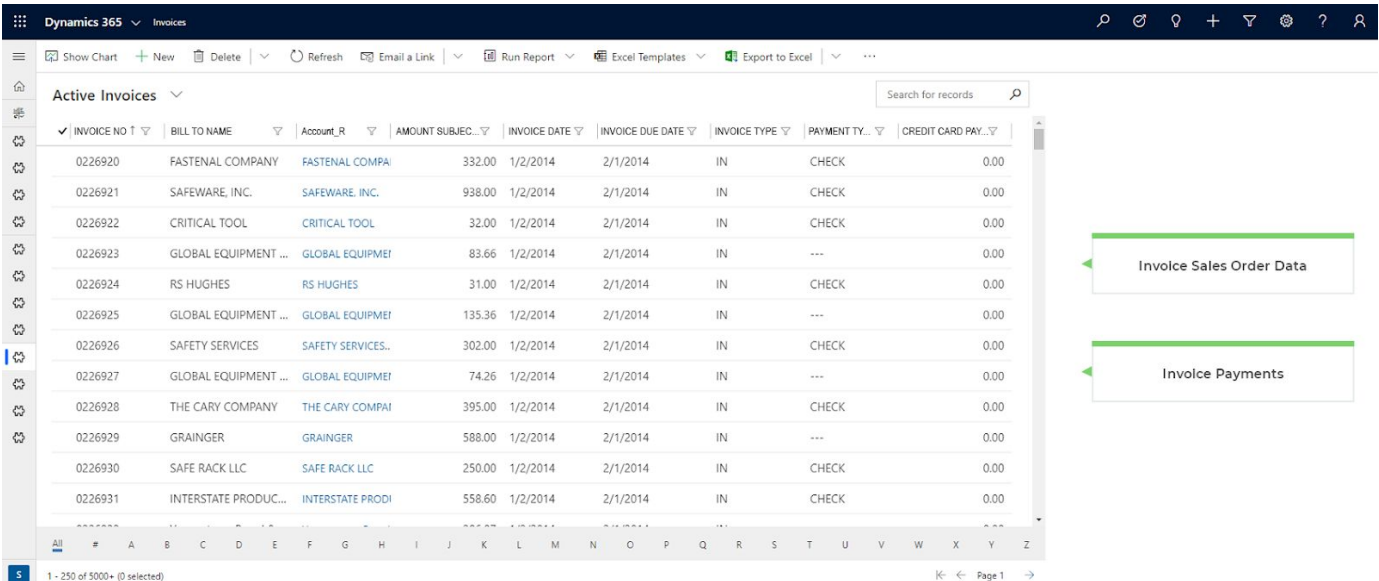
The 'Invoices' table is also displayed at the bottom:

INVOIC...	BILL TO NAME	Account_R	AMOUNT SU...	INVOICE...	INVOICE DUE...	INVOICE...	PAYMEN...	CREDIT CAR...
0243826	Sandia National Labs	Sandia National Labs	80,370.00	7/28/2014	8/12/2014	IN	---	0.00

A callout box points to the 'Open Sales Orders Line Items' table, stating: "Sales Order Line Items From Account Object".

## 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 Commerciant 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**.



The screenshot shows the 'Active Invoices' table in Microsoft Dynamics 365. The table contains columns for Invoice No, Bill to Name, Account, Amount, Subject, Invoice Date, Invoice Due Date, Invoice Type, Payment Type, and Credit Card Payment. To the right of the table, two green boxes with arrows point to specific rows: 'Invoice Sales Order Data' points to the row for invoice 0226920 (Fastenal Company), and 'Invoice Payments' points to the row for invoice 0226926 (Safety Services).

INVOICE NO	BILL TO NAME	Account	AMOUNT	SUBJECT	INVOICE DATE	INVOICE DUE DATE	INVOICE TYPE	PAYMENT TY	CREDIT CARD PAY
0226920	FASTENAL COMPANY	FASTENAL COMPA	332.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226921	SAFEWARE, INC.	SAFEWARE, INC.	938.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226922	CRITICAL TOOL	CRITICAL TOOL	32.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226923	GLOBAL EQUIPMENT ...	GLOBAL EQUIPME	83.66		1/2/2014	2/1/2014	IN	---	0.00
0226924	RS HUGHES	RS HUGHES	31.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226925	GLOBAL EQUIPMENT ...	GLOBAL EQUIPME	135.36		1/2/2014	2/1/2014	IN	---	0.00
0226926	SAFETY SERVICES	SAFETY SERVICES..	302.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226927	GLOBAL EQUIPMENT ...	GLOBAL EQUIPME	74.26		1/2/2014	2/1/2014	IN	---	0.00
0226928	THE CARY COMPANY	THE CARY COMPAI	395.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226929	GRAINGER	GRAINGER	588.00		1/2/2014	2/1/2014	IN	---	0.00
0226930	SAFE RACK LLC	SAFE RACK LLC	250.00		1/2/2014	2/1/2014	IN	CHECK	0.00
0226931	INTERSTATE PRODUC...	INTERSTATE PRODI	558.60		1/2/2014	2/1/2014	IN	CHECK	0.00

***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 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 Commerciant 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:***

Commerciant 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. Commerciant 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.commerciant.com>