

Commerciant SYNC for Infor VISUAL and Microsoft Dynamics 365

Commerciant SYNC, the #1 data integration platform that integrates your data between Infor VISUAL and Microsoft Dynamics 365. The Commerciant SYNC Agent is rapidly deployable and gives you access to your Infor VISUAL customer and order information in Microsoft Dynamics 365. We work with the following: Infor LN, Infor VISUAL, Infor CloudSuite, Infor 10 Distribution Business, Baan, Infor Adage, Infor Syteline (Frontstep) aka (Symix), Infor Distribution FACTS, Infor Distribution SX.e, Infor Distribution A+, Baan IV, Baan V, Infor Baan, Infor LN 6.1, Infor LN 10.3, Infor M3, BPCS, Mapics, Lilly, VISUAL Mfg, NxTrend, JBA, Fourth Shift, Minxware, Lawson, Infor ERP LX, GrowthPower, PointMan ERP, Infor XA, Infor visual 7.1.2, and INFOR SYTELINE V705.

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 Infor VISUAL and Microsoft Dynamics 365. Once the data integration takes place, your Infor VISUAL 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 Infor VISUAL to Microsoft Dynamics 365 becomes native data inside Microsoft Dynamics 365 CRM. Being native data inside the CRM means bringing data from your Infor VISUAL 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 Infor VISUAL 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 Infor VISUAL and Microsoft Dynamics 365 detects changes in either database whether it is Infor VISUAL or Microsoft Dynamics 365 and SYNC only those changes in the data within either system

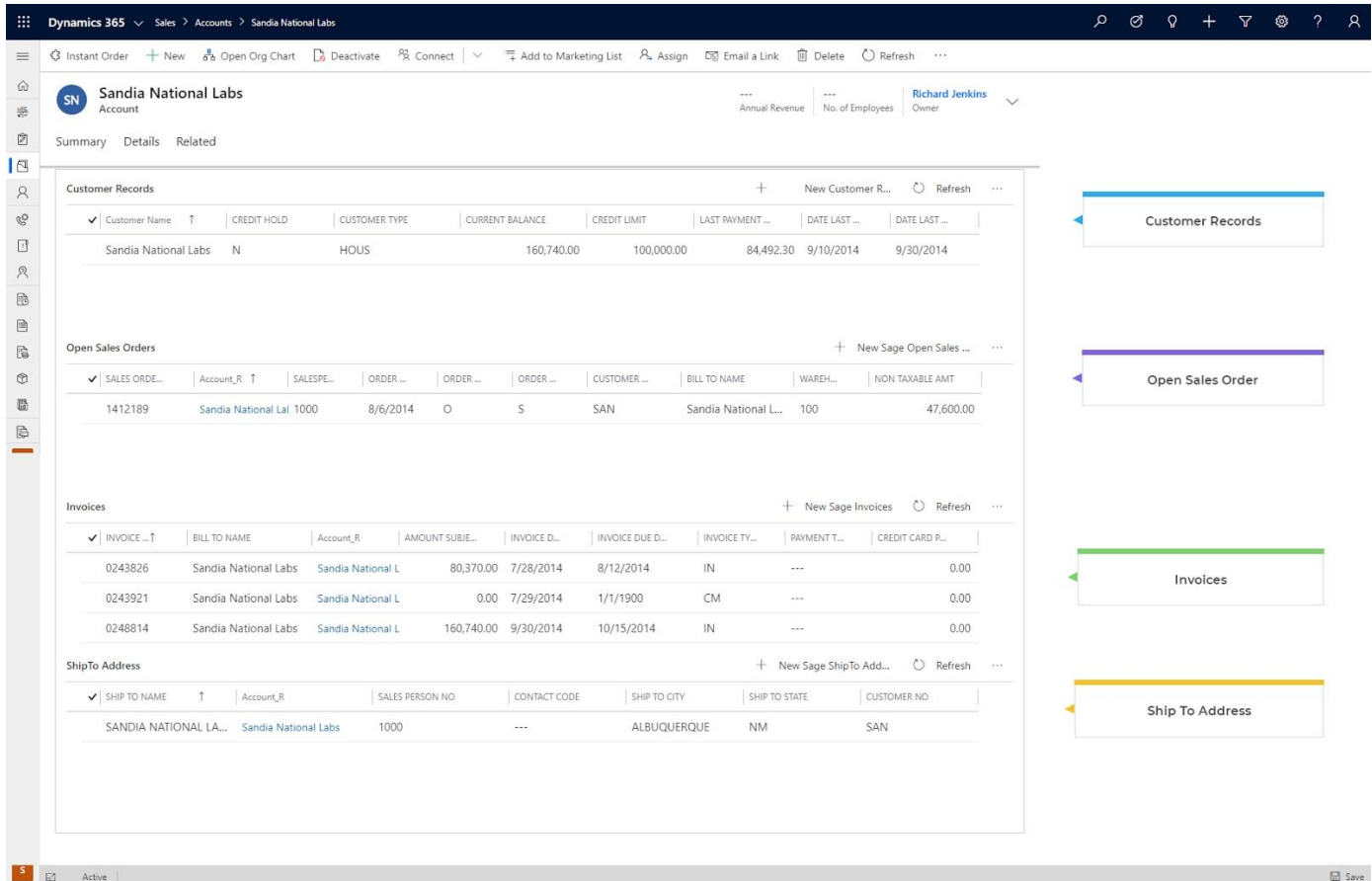
What if I have an existing Microsoft Dynamics 365 database?

When you have existing data in both systems (Infor VISUAL 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 Infor VISUAL 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 addresses in Infor VISUAL are merged into Microsoft Dynamics 365, which can be displayed according to their needs. By clicking on the Infor VISUAL 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 Labs | 1000 | 8/6/2014 | O | S | SAN | Sandia National L... | 100 | 47,600.00 |

Invoices

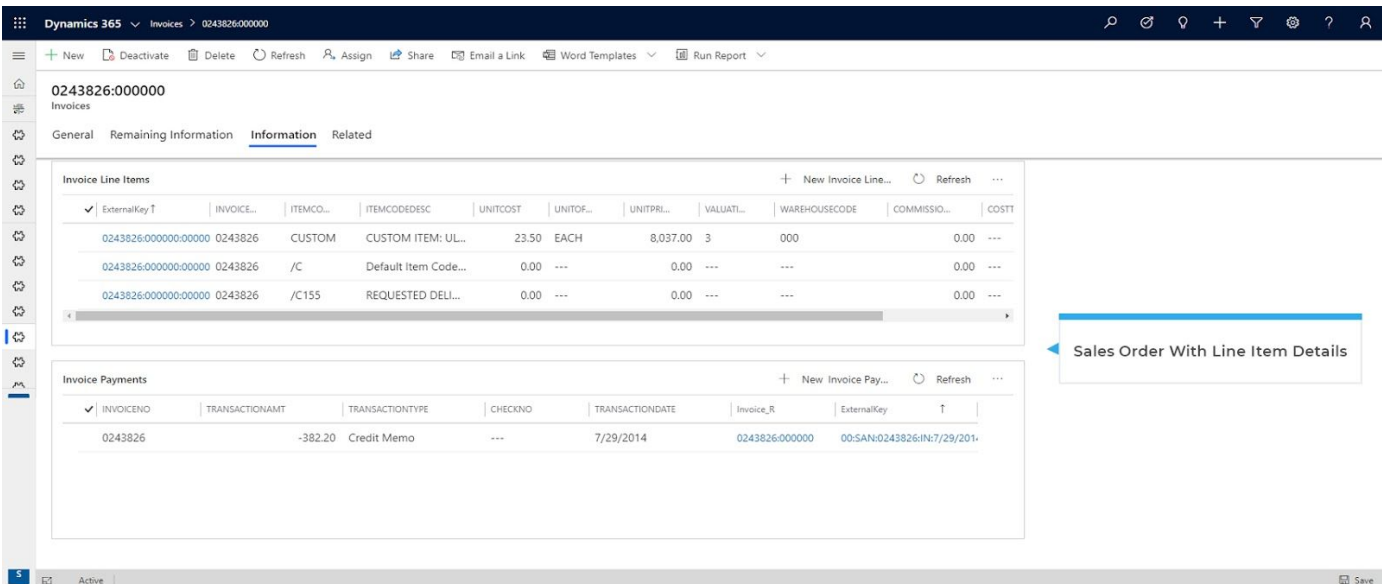
| INVOICE ... | BILL TO NAME | Account_R | AMOUNT SUBJE... | INVOICE D... | INVOICE DUE D... | INVOICE TY... | PAYMENT T... | CREDIT CARD P... |
|-------------|----------------------|-------------------|-----------------|--------------|------------------|---------------|--------------|------------------|
| 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 Infor VISUAL. When removing Infor VISUAL 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 left sidebar contains navigation icons. The main content area is divided into two sections: "Invoice Line Items" and "Invoice Payments".

Invoice Line Items

| ExternalKey | INVOICE | ITEMCO | ITEMCODEDESC | UNITCOST | UNITOF | UNITPR | VALUAT | WAREHOUSECODE | COMMISSIO | COST |
|-----------------------|---------|--------|----------------------|----------|--------|----------|--------|---------------|-----------|------|
| 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 DEL... | 0.00 | --- | 0.00 | --- | --- | 0.00 | --- |

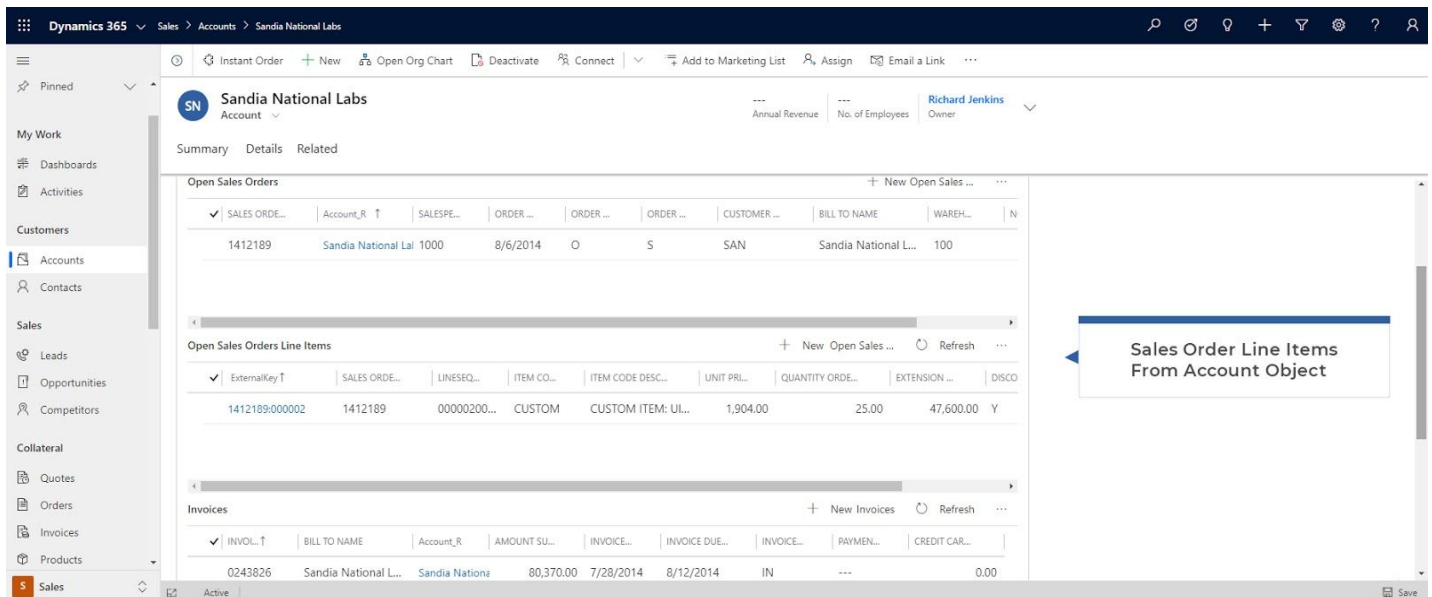
Invoice Payments

| INVOICENO | 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 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 displays the Microsoft Dynamics 365 interface for the 'Sandia National Labs' account. The left sidebar shows navigation options like 'My Work', 'Customers', 'Sales', and 'Collateral'. The main content area is divided into sections: 'Open Sales Orders', 'Open Sales Orders Line Items', and 'Invoices'. A callout box on the right points to the 'Open Sales Orders Line Items' section with the text 'Sales Order Line Items From Account Object'.

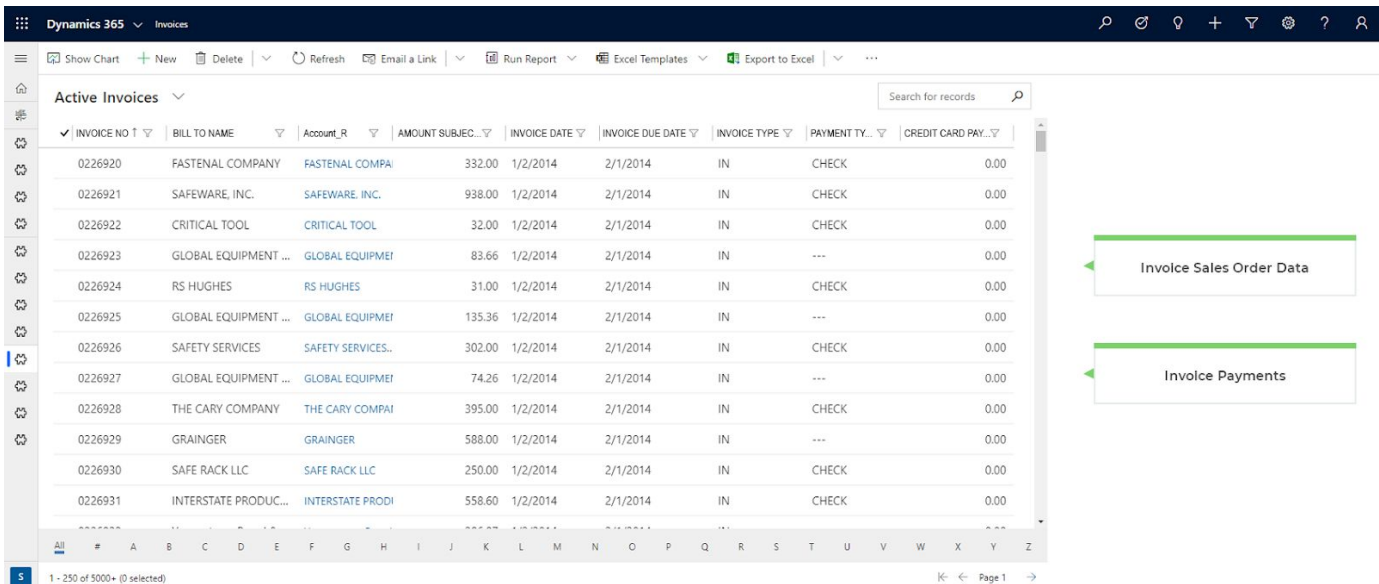
| SALES ORDE... | Account_R ↑ | SALESPE... | ORDER ... | ORDER ... | ORDER ... | CUSTOMER ... | BILL TO NAME | WAREH... | N |
|---------------|---------------------|------------|-----------|-----------|-----------|--------------|----------------------|----------|---|
| 1412189 | Sandia National Lab | 1000 | 8/6/2014 | O | S | SAN | Sandia National L... | 100 | |

| ExternalKey ↑ | SALES ORDE... | LINSEQ... | ITEM CO... | ITEM CODE DESC... | UNIT PRL... | QUANTITY ORDE... | EXTENSION ... | DISCO |
|----------------|---------------|-------------|------------|--------------------|-------------|------------------|---------------|-------|
| 1412189:000002 | 1412189 | 00000200... | CUSTOM | CUSTOM ITEM: UI... | 1,904.00 | 25.00 | 47,600.00 | Y |

| INVOI... ↑ | BILL TO NAME | Account_R | AMOUNT SU... | INVOICE... | INVOICE DUE... | INVOICE... | PAYMEN... | CREDIT CAR... |
|------------|----------------------|----------------|--------------|------------|----------------|------------|-----------|---------------|
| 0243826 | Sandia National L... | Sandia Nationa | 80,370.00 | 7/28/2014 | 8/12/2014 | IN | --- | 0.00 |

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. Annotations on the right side of the table point to specific data points: 'Invoice Sales Order Data' points to the 'INVOICE NO.' column, and 'Invoice Payments' points to the 'PAYMENT TY...' column.

| 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 EQUIPMEI | 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 EQUIPMEI | 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 EQUIPMEI | 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 Infor VISUAL:

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

Company Information:

Commerciant is a cloud-based company that connects Microsoft Dynamics 365 directly to your Infor VISUAL 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>