



## **SYNC for Epicor 9 and Microsoft Dynamics CRM**

### **App Name: Commercient SYNC for Epicor 9 and Microsoft Dynamics CRM**

Commercient SYNC, the #1 data integration platform for sales, makes it possible for your sales team to see Epicor 9 data directly in Microsoft Dynamics CRM. With SYNC, Epicor 9 and Microsoft Dynamics CRM are integrated, and you'll be able to access important Epicor 9 data directly in the Microsoft Dynamics CRM.

Commercient SYNC is available for Epicor 9, Epicor 10, Epicor Bistrack, Epicor Eagle, Epicor Eclipse, Epicor Prophet 21 and Epicor Prelude. Commercient SYNC Agent is rapidly deployable and gives you easy access to your Epicor 9 information in Microsoft Dynamics CRM. 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 Epicor 9.

### **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 Epicor 9 change.
- Commercient SYNC for Epicor 9 is built by ERP & CRM integration experts.
- Commercient software provides Epicor 9 users with a “CRM in the cloud” experience.
- Any field synced from Epicor 9 can be displayed on the Microsoft Dynamics CRM screen. All the data Commercient syncs to Epicor 9 becomes part of Microsoft Dynamics CRM'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 Microsoft Dynamics CRM. 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 Epicor 9 and Microsoft Dynamics CRM. Our SYNC solution also enables you to prevent the duplication of data, handle custom objects in Microsoft Dynamics CRM, and take advantage of the premier support.

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## **SYNC for Epicor 9 and Microsoft Dynamics CRM**

- 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 CRM API in a single call. The result is that Commercient significantly reduces the likelihood of exceeding the Microsoft Dynamics CRM AP Epicor 9 limits. If a daily limit is reached, which can occur during the initial SYNC of a large Epicor 9 system, Commercient will continue to SYNC where it left off on the following day.

### **What is Synchronized?**

What Commercient initially SYNCs:

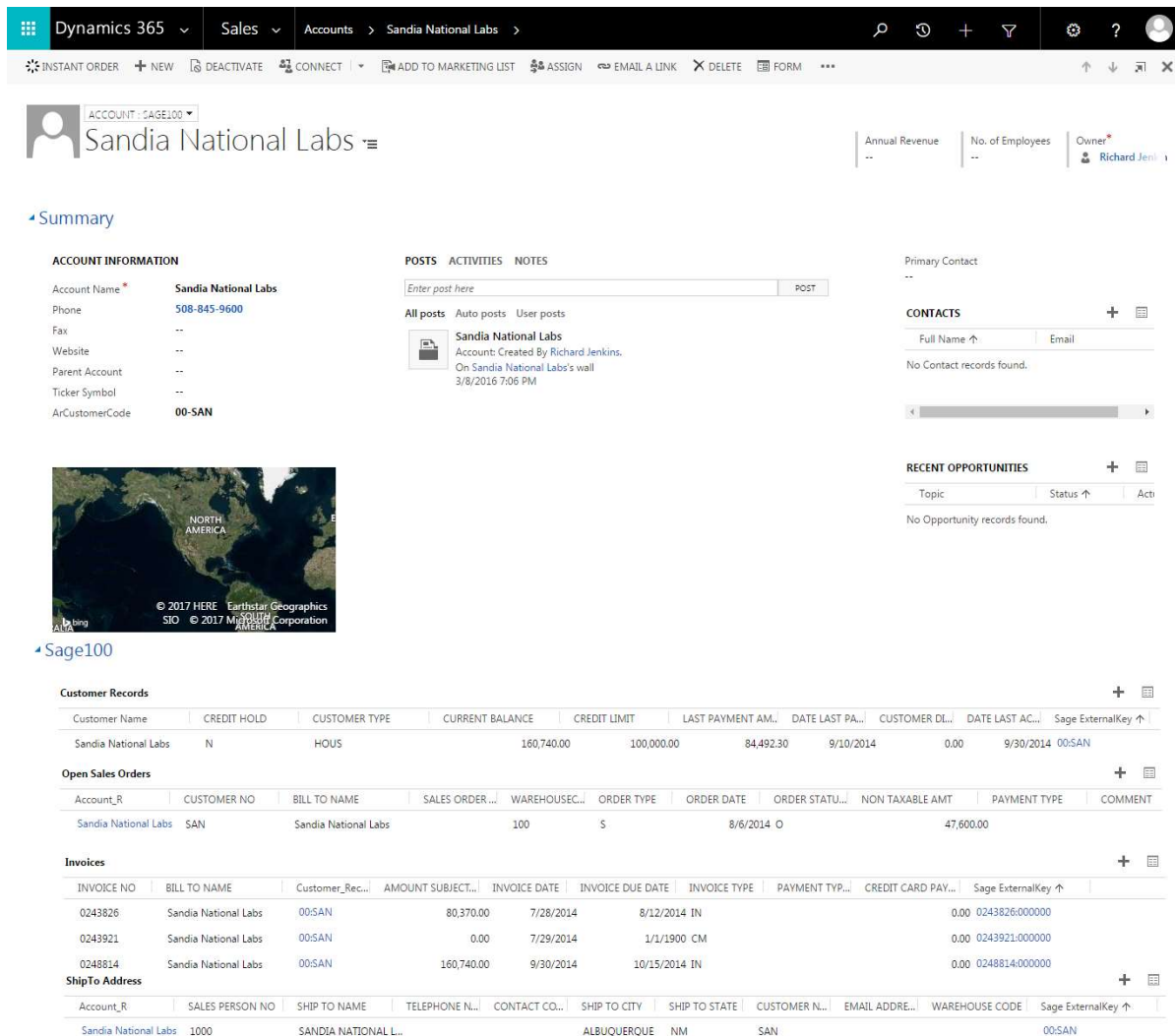
1. Financial accounting data
2. Customer data
3. Sales order data
4. Invoice data
5. Products
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects
7. Plus any other data customers request

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# SYNC for Epicor 9 and Microsoft Dynamics CRM

The **EPICOR 9 AR Customer record** is the first item to be synced. As you can see below. Customers in Epicor 9 are synchronized into Microsoft Dynamics CRM Account records. The Customer's Ship To and Bill To addresses in Epicor 9 are mapped to Microsoft Dynamics CRM's address fields using a mapping schema. The Epicor 9 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 Epicor 9 Customer Record, you can see all the fields that are synchronized.



The screenshot shows 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 is a toolbar with various actions like 'INSTANT ORDER', 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', and 'FORM'. The main content area displays the account details for 'Sandia National Labs', including account information, posts, activities, notes, primary contact, contacts, recent opportunities, customer records, open sales orders, invoices, and ship-to address.

**ACCOUNT INFORMATION**

Account Name*	Sandia National Labs
Phone	508-845-9600
Fax	--
Website	--
Parent Account	--
Ticker Symbol	--
ArCustomerCode	00-SAN

**POSTS ACTIVITIES NOTES**

Enter post here [POST]

All posts Auto posts User posts

**Sandia National Labs**  
Account Created By Richard Jenkins.  
On Sandia National Labs's wall  
3/8/2016 7:06 PM

**Primary Contact**  
--

**CONTACTS**

Full Name ↑	Email
No Contact records found.	

**RECENT OPPORTUNITIES**

Topic	Status ↑	Act
No Opportunity records found.		

**Customer Records**

Customer Name	CREDIT HOLD	CUSTOMER TYPE	CURRENT BALANCE	CREDIT LIMIT	LAST PAYMENT AM.	DATE LAST PA...	CUSTOMER DI...	DATE LAST AC...	Sage ExternalKey ↑
Sandia National Labs	N	HOUS	160,740.00	100,000.00	84,492.30	9/10/2014	0.00	9/30/2014	00:SAN

**Open Sales Orders**

Account_R	CUSTOMER NO	BILL TO NAME	SALES ORDER...	WAREHOUSE...	ORDER TYPE	ORDER DATE	ORDER STATU...	NON TAXABLE AMT	PAYMENT TYPE	COMMENT
Sandia National Labs	SAN	Sandia National Labs	100	S	8/6/2014	O		47,600.00		

**Invoices**

INVOICE NO	BILL TO NAME	Customer_Rec...	AMOUNT SUBJECT...	INVOICE DATE	INVOICE DUE DATE	INVOICE TYPE	PAYMENT TYP...	CREDIT CARD PAY...	Sage ExternalKey ↑
0243826	Sandia National Labs	00:SAN	80,370.00	7/28/2014	8/12/2014	IN		0.00	0243826:000000
0243921	Sandia National Labs	00:SAN	0.00	7/29/2014	1/1/1900	CM		0.00	0243921:000000
0248814	Sandia National Labs	00:SAN	160,740.00	9/30/2014	10/15/2014	IN		0.00	0248814:000000

**ShipTo Address**

Account_R	SALES PERSON NO	SHIP TO NAME	TELEPHONE N...	CONTACT CO...	SHIP TO CITY	SHIP TO STATE	CUSTOMER N...	EMAIL ADDRE...	WAREHOUSE CODE	Sage ExternalKey ↑
Sandia National Labs	1000	SANDIA NATIONAL L...			ALBUQUERQUE	NM	SAN			00:SAN

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## SYNC for Epicor 9 and Microsoft Dynamics CRM

Once the Customer Record is in Microsoft Dynamics CRM, 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 Epicor 9. Cleansing of Cancelled Epicor 9 Sales Order data from Microsoft Dynamics CRM is performed automatically.

The screenshot shows the Microsoft Dynamics CRM interface for 'Active Sage Open Sales Orders'. The table lists various sales orders with columns for Account, Customer, Bill to Name, Sales Order Number, Warehouse, Order Type, Order Date, Order Status, Non Taxable Amount, and Payment Type. The table is filtered to show 50 of 424 records.

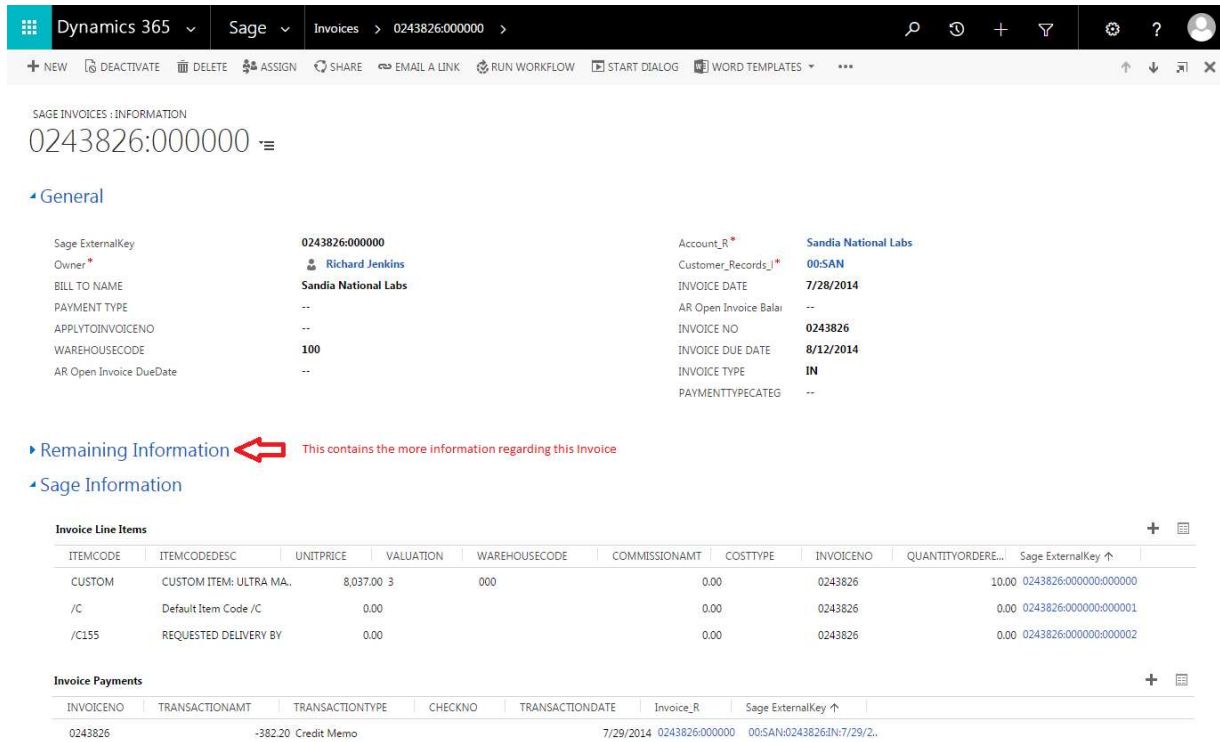
Account_R	CUSTOMER NO	BILL TO NAME	SALES ORDER N...	WAREHOUSECO...	ORDER TYPE	ORDER DATE	ORDER STATUS	NON TAXABLE AMT ↓	PAYMENT TYPE	COB
SIA SECURITY TECHN...	SSY	SIA SECURITY TECHNOLOGY	028	S	S	8/13/2014	O	145,645.65	CHECK	
New Pig Corporation	NPC	New Pig Corporation	100	S	S	9/12/2014	O	74,934.08		
Sandia National Labs	SAN	Sandia National Labs	100	S	S	8/6/2014	O	47,600.00		
GOLDCREST INTL SIN...	GDIS	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 SOLUTL...	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.	SFWR	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 PRODU...	INTRO	INTERSTATE PRODUCE...	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.

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

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SAGE INVOICES : INFORMATION  
0243826:000000

General

Sage ExternalKey	0243826:000000	Account_R	Sandia National Labs
Owner	Richard Jenkins	Customer_Records	00:SAN
BILL TO NAME	Sandia National Labs	INVOICE DATE	7/28/2014
PAYMENT TYPE	--	AR Open Invoice Balai	--
APPLYTOINVOICENO	--	INVOICE NO	0243826
WAREHOUSECODE	100	INVOICE DUE DATE	8/12/2014
AR Open Invoice DueDate	--	INVOICE TYPE	IN
		PAYMENTTYPECATAG	--

Remaining Information  This contains the more information regarding this Invoice

Sage Information

Invoice Line Items

ITEMCODE	ITEMCODEDESC	UNITPRICE	VALUATION	WAREHOUSECODE	COMMISSIONAMT	COSTTYPE	INVOICENO	QUANTITYORDERE...	Sage ExternalKey ↑
CUSTOM	CUSTOM ITEM: ULTRA MA.	8,037.00	3	000		0.00	0243826	10.00	0243826:000000:000000
/C	Default Item Code /C	0.00				0.00	0243826		0243826:000000:000001
/C155	REQUESTED DELIVERY BY	0.00				0.00	0243826		0243826:000000:000002

Invoice Payments

INVOICENO	TRANSACTIONAMT	TRANSACTIONTYPE	CHECKNO	TRANSACTIONDATE	Invoice_R	Sage ExternalKey ↑
0243826	-382.20	Credit Memo		7/29/2014	0243826:000000	00:SAN:0243826:IN:7/29/2..

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 Epicor 9 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.



## **SYNC for Epicor 9 and Microsoft Dynamics CRM**

### **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 Microsoft Dynamics CRM?**

Data synchronization is the first step towards a total solution. Ask about these additional modules for Epicor 9:

- 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 Epicor 9 Invoices
- Automatic Epicor 9 Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to Epicor 9 AR Customer

### **System Requirements:**

Microsoft Dynamics CRM Group, Professional, Enterprise editions or higher. Microsoft Dynamics CRM API is included at no charge. Own the Epicor 9 software.

### **Company Information:**

Commercient is a cloud-based company that connects Microsoft Dynamics CRM directly to your Epicor 9 system. Our open SYNC Agent works with ERPs such as Epicor 9, SYSPRO, Traverse, and other Epicor 9 accounting systems. Commercient improves the

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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](http://www.commercient.com).

