SYNC for Sage 500 and Microsoft Dynamics CRM

## App Name: Commercient SYNC for Sage 500 and Microsoft Dynamics CRM

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

Commercient SYNC is available for Sage 50 (Cloud Pro & Premium, UK, US EU, Canada) Sage 100 (Contractor & France) Sage 200 (Pro) Sage 300, Sage 300 Construction Real Estate, Sage 500 (Line) Sage 1000, Sage Intacct, Sage Enterprise Management (Sage X3) and Sage Business Works. Commercient SYNC Agent is rapidly deployable and gives you easy access to your Sage 500 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 Sage 500.

**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 Sage 500 change.
- Commercient SYNC for Sage 500 is built by ERP & CRM integration experts.
- Commercient software provides Sage 500 users with a “CRM in the cloud” experience.
- Any field synced from Sage 500 can be displayed on the Microsoft Dynamics CRM screen. All the data Commercient syncs to Sage 500 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 Sage 500 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.
- 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 Sage 500 limits. If a daily limit is reached, which can occur during the initial SYNC of a large Sage 500 system, Commercient will continue to SYNC where it left off on the following day.

**What is Synchronized?**

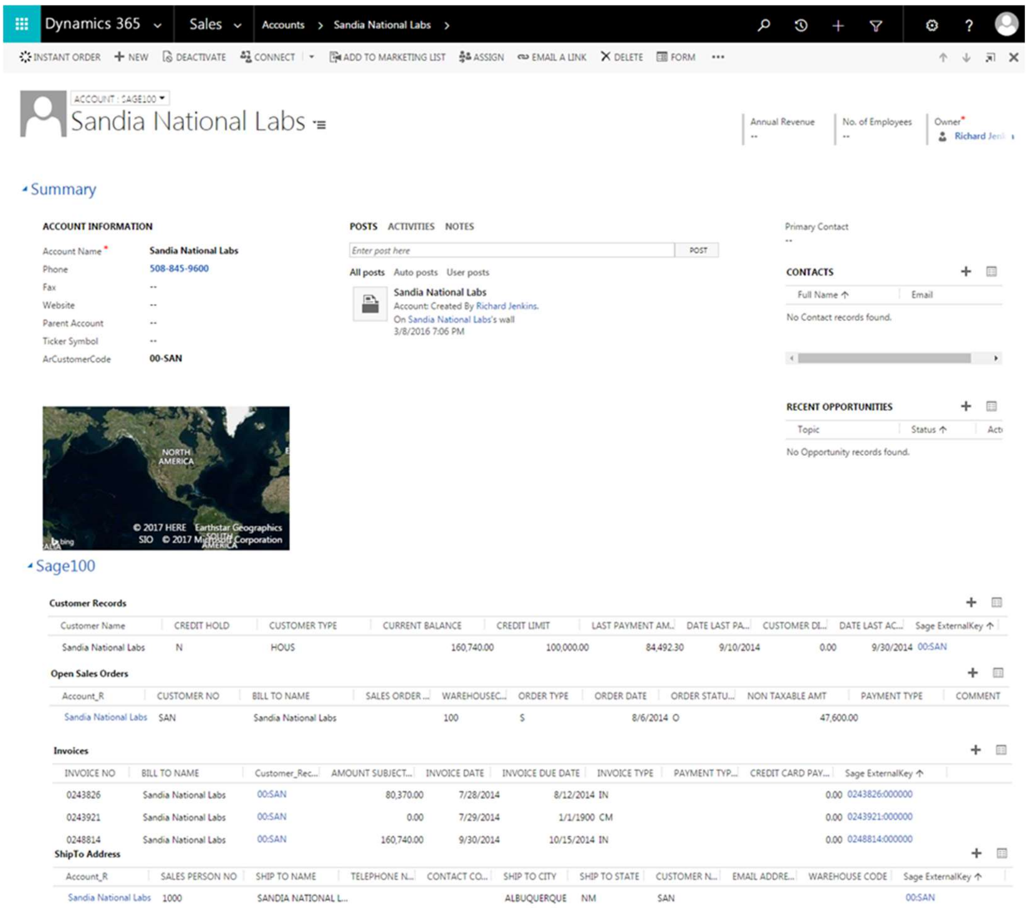
What Commercient initially SYNCs:

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 SAGE 500 AR Customer record** is the first item to be synced. As you can see below. Customers in Sage 500 are synchronized into Microsoft Dynamics CRM Account records. The Customer's Ship To and Bill To addresses in Sage 500 are mapped to Microsoft Dynamics CRM's address fields using a mapping schema. The Sage 500 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 Sage 500 Customer Record, you can see all the fields that are synchronized.



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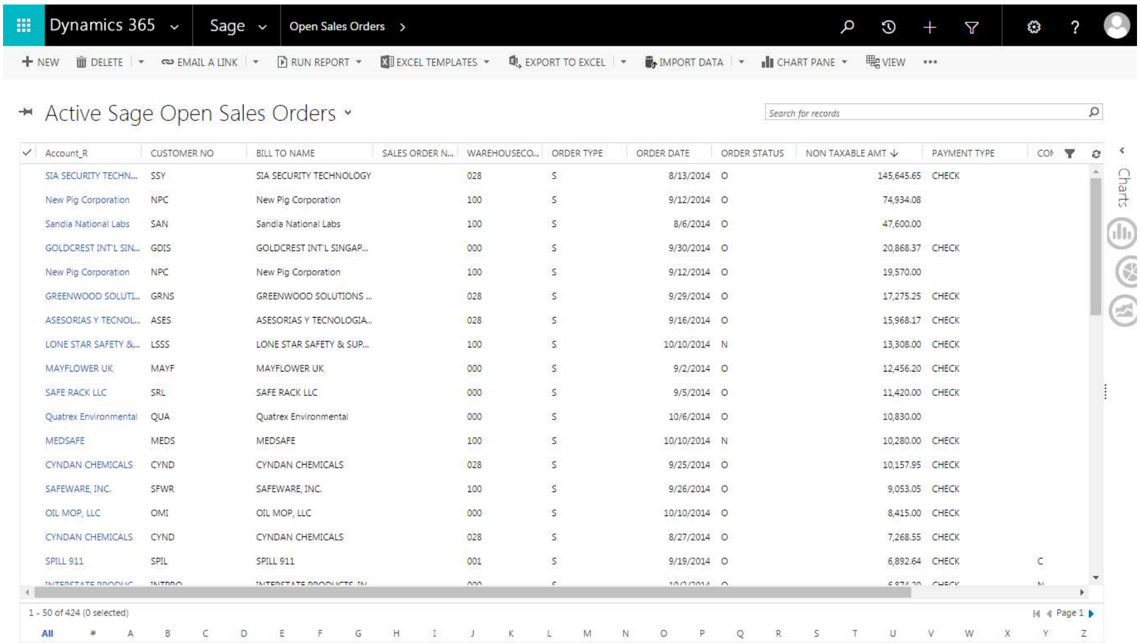
Once the Customer Record is in Microsoft Dynamics CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Microsoft Dynamics CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged 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 Sage 500. Cleansing of Cancelled Sage 500 Sales Order data from Microsoft Dynamics CRM is 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.

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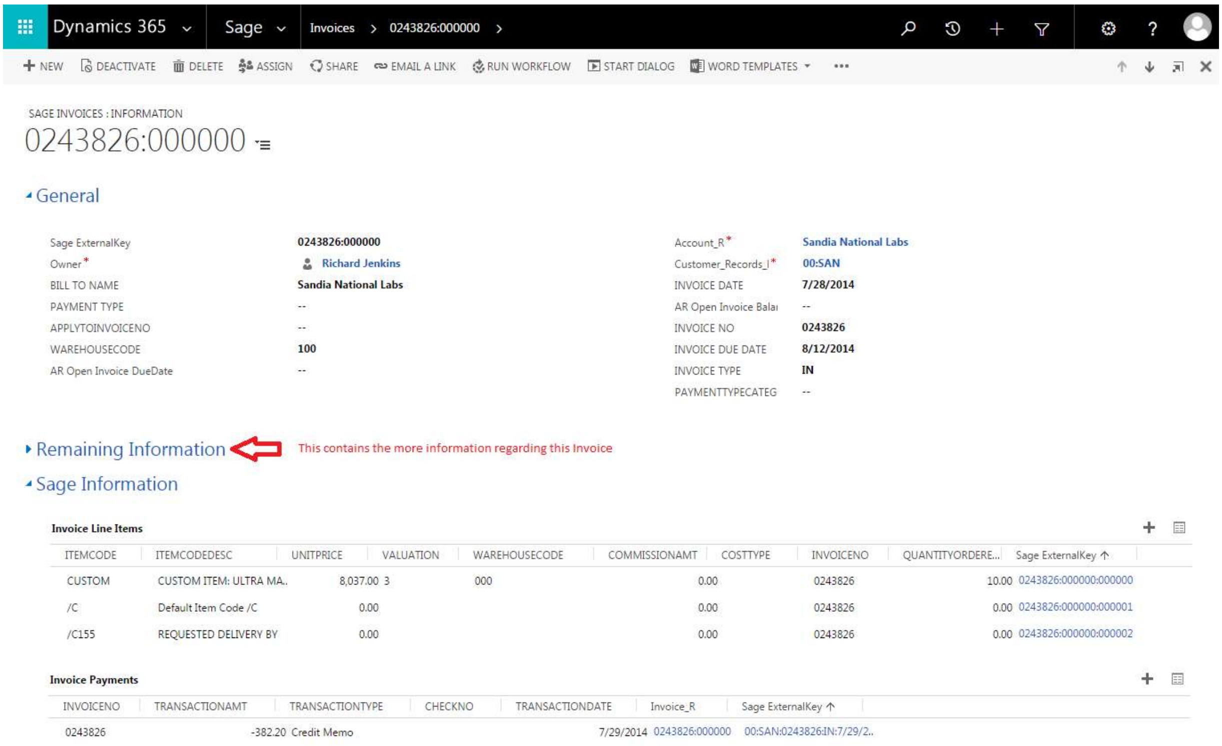
**The AR Invoice** records are synced and related to the **Invoiced Sales Order Data**, and the Invoice Payments. As seen below.




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.**



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### What if I have an existing Microsoft Dynamics CRM database?

Clients with existing records in both Sage 500 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 Microsoft Dynamics CRM?

Data synchronization is the first step towards a total solution. Ask about these additional modules for Sage 500:

- 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 Sage 500 Invoices
- Automatic Sage 500 Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to Sage 500 AR Customer

Commercient™
ERP Integration for CRM

# SYNC for Sage 500 and Microsoft Dynamics CRM

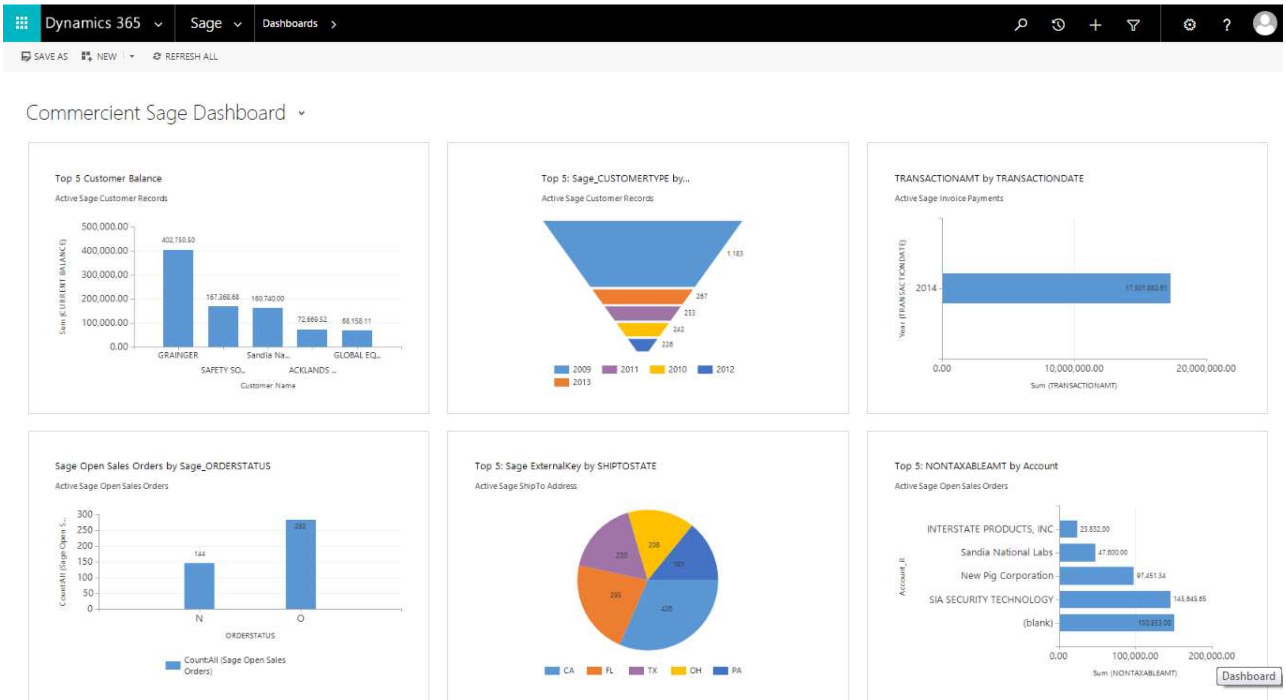
## System Requirements:

Microsoft Dynamics CRM Group, Professional, Enterprise editions or higher. Microsoft Dynamics CRM API is included at no charge. Own the Sage 500 software.

## Company Information:

Commercient is a cloud-based company that connects Microsoft Dynamics CRM directly to your Sage 500 system. Our open SYNC Agent works with ERPs such as Sage 500, SYSPRO, Traverse, and other Sage 500 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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