SYNC for QuickBooks and Microsoft Dynamics CRM

App Name: Commercient SYNC for QuickBooks and Microsoft Dynamics CRM

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

Commercient SYNC is available for QuickBooks Desktop & Quickbooks Online. Commercient SYNC Agent is rapidly deployable and gives you easy access to your QuickBooks 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 QuickBooks.

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

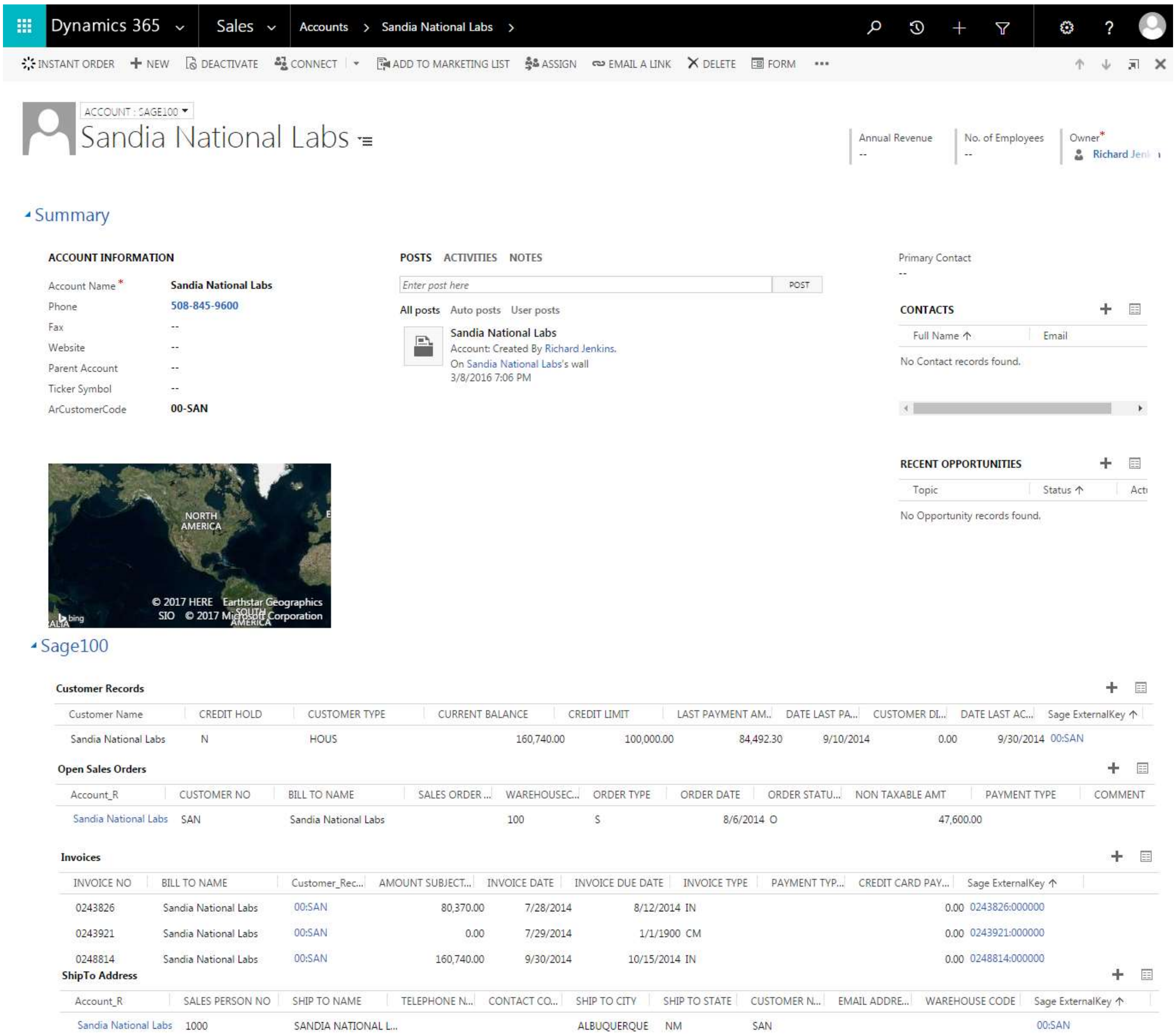
What is Synchronized?

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



Commercient™
ERP Integration for CRM

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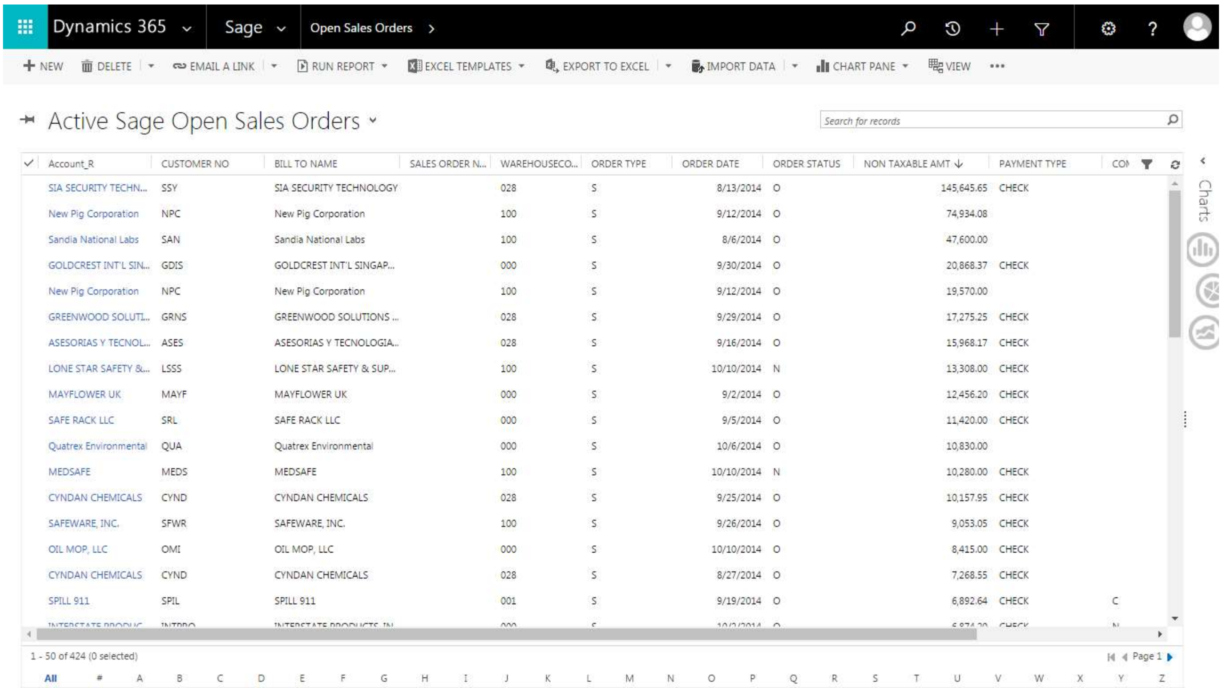
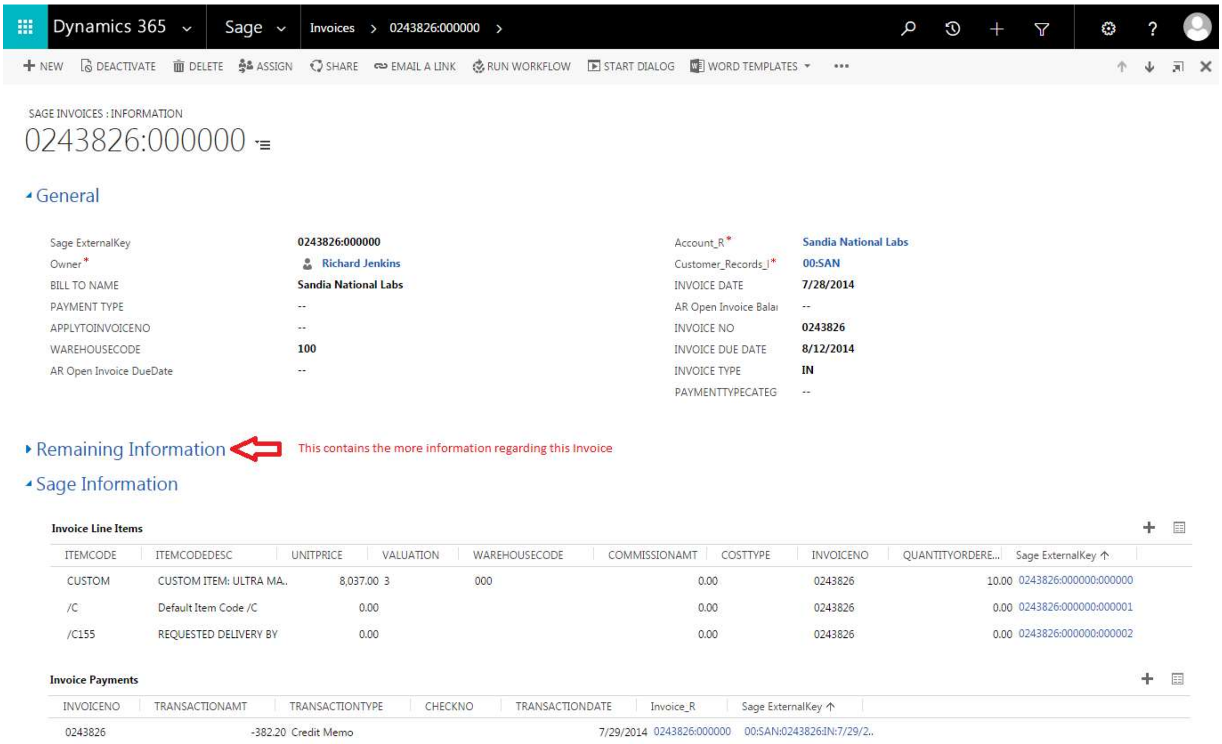
Once the Customer Record is in Microsoft Dynamics CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Microsoft Dynamics CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged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



Account_R	CUSTOMER NO	BILL TO NAME	SALES ORDER N...	WAREHOUSECO...	ORDER TYPE	ORDER DATE	ORDER STATUS	NON TAXABLE AMT	PAYMENT TYPE	COI
SIA SECURITY TECHN...	SSY	SIA SECURITY TECHNOLOGY		028	S	8/13/2014	O	145,645.65	CHECK	
New Pig Corporation	NPC	New Pig Corporation		100	S	9/12/2014	O	74,934.08		
Sandia National Labs	SAN	Sandia National Labs		100	S	8/6/2014	O	47,600.00		
GOLDCREST INT'L SIN...	GDIS	GOLDCREST INT'L SINGAP...		000	S	9/30/2014	O	20,868.37	CHECK	
New Pig Corporation	NPC	New Pig Corporation		100	S	9/12/2014	O	19,570.00		
GREENWOOD SOLUTI...	GRNS	GREENWOOD SOLUTIONS ...		028	S	9/29/2014	O	17,275.25	CHECK	
ASESORIAS Y TECNOL...	ASES	ASESORIAS Y TECNOLOGIA...		028	S	9/16/2014	O	15,968.17	CHECK	
LONE STAR SAFETY &...	LSSS	LONE STAR SAFETY & SUP...		100	S	10/10/2014	N	13,308.00	CHECK	
MAYFLOWER UK	MAYF	MAYFLOWER UK		000	S	9/2/2014	O	12,456.20	CHECK	
SAFE RACK LLC	SRL	SAFE RACK LLC		000	S	9/5/2014	O	11,420.00	CHECK	
Quatrex Environmental	QUA	Quatrex Environmental		000	S	10/6/2014	O	10,830.00		
MEDSAFE	MEDS	MEDSAFE		100	S	10/10/2014	N	10,280.00	CHECK	
CYNDAN CHEMICALS	CYND	CYNDAN CHEMICALS		028	S	9/25/2014	O	10,157.95	CHECK	
SAFEWARE, INC.	SFWR	SAFEWARE, INC.		100	S	9/26/2014	O	9,053.05	CHECK	
OIL MOP, LLC	OMI	OIL MOP, LLC		000	S	10/10/2014	O	8,415.00	CHECK	
CYNDAN CHEMICALS	CYND	CYNDAN CHEMICALS		028	S	8/27/2014	O	7,268.55	CHECK	
SPILL 911	SPIL	SPILL 911		001	S	9/19/2014	O	6,892.64	CHECK	C

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.



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 QuickBooks 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 QuickBooks:

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

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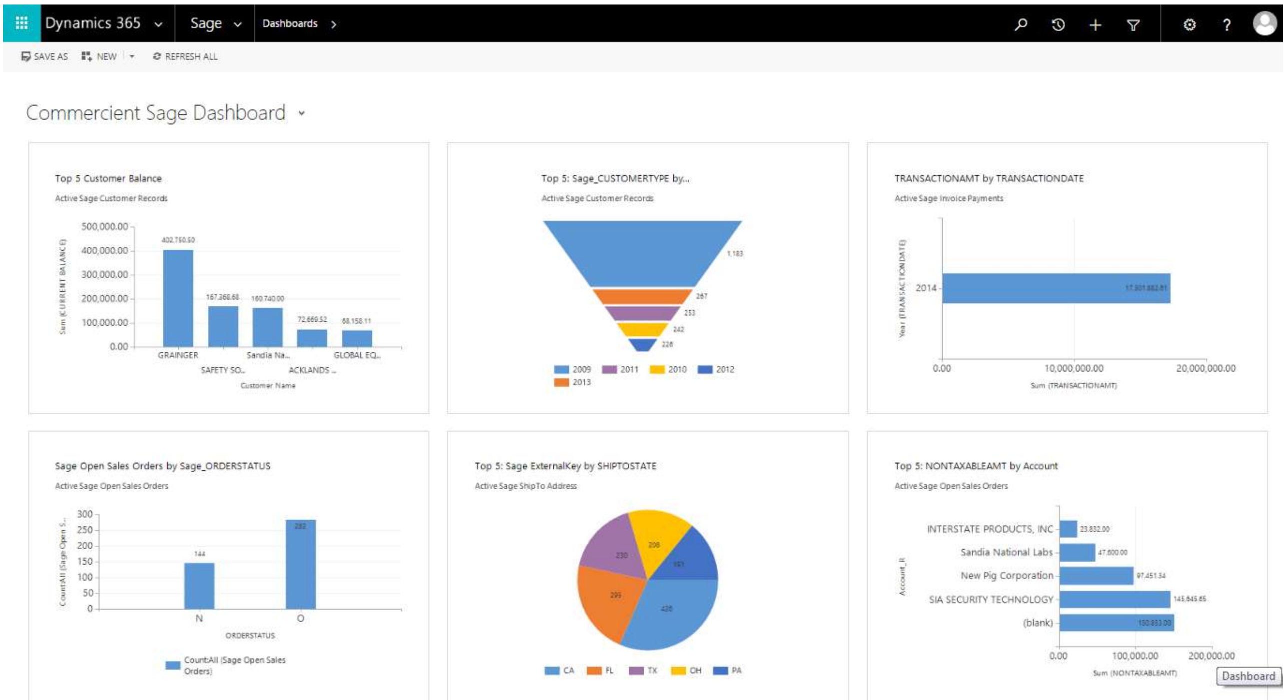
System Requirements:

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

Company Information:

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