

## **SYNC for SAP B1 and Microsoft Dynamics 365**

### ***Commercient SYNC for SAP B1 and Microsoft Dynamics 365***

Commercient SYNC, the #1 data integration platform for sales who can seamlessly integrate your SAP B1 system with your Microsoft Dynamics 365 as SAP B1 operates as an ERP system (Enterprise Resource Planning). Due to SAP B1 acting as an ERP system, it has a transaction integrator allowing Microsoft Dynamics 365 acting as a CRM system (Customer Relationship Management) to download records to SAP B1. Importing data back into SAP B1 will include new customers, sales orders, jobs, and invoices. Once the data in SAP B1 and Microsoft Dynamics 365 are integrated, you will be able to access important SAP B1 data directly in the Microsoft Dynamics 365.

The Commercient SYNC Agent is rapidly deployable and gives you access to your SAP B1 customer and order information in Microsoft Dynamics 365. We are compatible with all versions of, SAP S/4HANA, SAP Cloud Platform, SAP Analytics Cloud, Enterprise Planning, SAP C/4HANA SAP Business by Design, SAP Business One version 8 (and up), SAP Business One Version 9.1, and SAP Business One version 9.2 and higher – this also includes Datalogix, and Vantive. Commercient is also certified for use on the Microsoft Dynamics 365 mobile platform. 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 365 are SYNC'd to SAP B1.

### ***About the SYNC:***

- Unlike traditional data integration tools such as ETL, there is no coding, mapping, or server. We handle everything, so you can focus on growing your business.
- SAP B1 data is automatically integrated into your Microsoft Dynamics 365 so you don't have to program anything.
- Changes are reflected in Microsoft Dynamics 365 as soon as the records in SAP B1 are altered.

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## **SYNC for SAP B1 and Microsoft Dynamics 365**

- SAP B1 and Microsoft Dynamics 365 are both beneficial since SAP B1 can reduce overall expenses while Microsoft Dynamics 365 can bring in more revenue through better sales figures and increase profitability.
- Commerciant SYNC allows a 360-degree cycle in which SAP B1 can be integrated into Microsoft Dynamics 365 as well as, Microsoft Dynamics 365 back into SAP B1.
- Commerciant SYNC for SAP B1 is built by ERP & CRM integration experts.
- Commerciant's software provides SAP B1 users with a "Cloud-based" experience. Since it is a cloud-based experience, you can ensure that Commerciant will have your data secured.
- Any field synced from SAP B1 can be displayed on the Microsoft Dynamics 365 screen. All of the data Commerciant SYNCs to Microsoft Dynamics 365 becomes part of the Microsoft Dynamics 365 native database. As such, you can perform any Microsoft Dynamics 365 function on the data—from graphing to dashboards to using third-party apps that can make use of the data.
- SYNC is an integration app for SAP B1 and Microsoft Dynamics 365 which includes:
  - Accounting Data:  
SAP B1 customers with Microsoft Dynamics 365 accounts, customer payment terms and credit limits, open invoices, invoices on hold, multiple ship-to addresses, multiple bill-to addresses, and account history.
  - Sales Order Data:  
Open sales orders, sales order detail lines, and sales order history.
  - Invoice Data:  
Open invoices, invoice detail lines, payments, invoice history, and serial numbers shipped.
- Commerciant has provided a user-friendly search engine in Microsoft Dynamics 365 to lookup data. For instance, search for a serial number and find the Invoice Records and Sales Order records that pertain to it.
- Implementing Commerciant SYNC creates a simple data integration pathway

## **SYNC for SAP B1 and Microsoft Dynamics 365**

between SAP B1 and Microsoft Dynamics 365. Our SYNC solution also enables you to prevent the duplicate data, handle custom objects in Microsoft Dynamics 365, and take advantage of the premier support.

- The SYNC app only uploads or updates data as it changes. Commercient has an eye for detail and has implemented a series of measures in order to track changes as well as, submitting records to Microsoft Dynamics 365 API (Application Programming Interface) in a single call.
- Commercient can significantly reduce the likelihood of exceeding the Microsoft Dynamics 365 API SAP B1 limits, as SAP B1 has a limit of 100 requests per minute per company. In the event that a daily limit is reached (which can occur during the initial SYNC of a large SAP B1 system) Commercient will continue to SYNC where it left off on the following day.

### ***What benefits does the integration of SAP B1 and Microsoft Dynamics 365 have?***

- Integration can improve customer relationships since all the data is stored in one location and by the information being in one location, customer needs can be figured out.
- All the data from one account or even numerous accounts will be found in one location, which saves time looking at both software for the same information and it lessens the chance of having duplicate data. This means that the data keeps its integrity and cohesion.
- You are able to view your customers in a 360-degree view, which means you can access their history, accounts, invoices, preferences and buying habits. This provides a greater overview of your customer's needs, you are able to build a strong relationship and assist in their future growth.

### ***What does SYNC offer?***

1. Financial accounting data
2. Customer data

3. Sales order data (as seen below)
4. Invoice data
5. Products
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects
7. Plus any other data customers request.

The first item to be SYNC is your **AR Customer Record** and once this is completed, all the fields can be shown. As you can see below. Customers in SAP B1 are integrated into Microsoft Dynamics 365. Their Ship To and Bill To address in SAP B1 is merged into Microsoft Dynamics 365, which can be displayed according to their needs. By clicking on the SAP B1 Customer Record, you can see all the fields that are synchronized.

# SYNC for SAP B1 and Microsoft Dynamics 365

**Dynamics 365** > Sales > Accounts > Sandia National Labs

Instant Order + New Open Org Chart Deactivate Connect Add to Marketing List Assign Email a Link Delete Refresh

**Sandia National Labs**  
Account - Sage

Annual Revenue No. of Employees **Richard Jenkins** Owner

Summary Details Sage Related

**Customer Records** + New Sage Customer R... Refresh

| 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** + New Sage Open Sales ...

| 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** + New Sage Invoices Refresh

| 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             |

**ShipTo Address** + New Sage ShipTo Add... Refresh

| 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         |

Active Save

Once the Customer Record is in Microsoft Dynamics 365, Commercient then SYNCs the **Sales Orders and their Detail Lines** which relates them to the corresponding Microsoft Dynamics 365 Account record. The Sales Order data and Invoices Sales Order data is merged as one as a custom object into Microsoft Dynamics 365, 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

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# SYNC for SAP B1 and Microsoft Dynamics 365

different statuses of their sales orders as they change in SAP B1. Removing canceled SAP B1 Sales Order data from Microsoft Dynamics 365 has performed automatically.

**Dynamics 365** | **ERP** | **Open Sales Orders**

NEW | DELETE | EMAIL A LINK | RUN REPORT | EXCEL TEMPLATES | EXPORT TO EXCEL | IMPORT DATA | CHART PANE | VIEW

Active Open Sales Orders

Search for records

| 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...  | SSV         | 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        |     |
| SAFWARE, INC.          | SFWR        | SAFWARE, 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   |
| INTERSTATE PRODU...    | INTRO       | INTERSTATE PRODUCTS, IN... |                  | 000            | S          | 10/10/2014 | O            | 6,874.20          | CHECK        | N   |

1 - 50 of 424 (0 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Commercient 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 example, 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.



Dynamics 365

ERP

Invoices

## The AR Invoice (see below)

- 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 Commercient 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**.

# SYNC for SAP B1 and Microsoft Dynamics 365

## Customer Records

| Customer Name        | CREDIT HOLD | CUSTOMER TYPE | CURRENT BALANCE | CREDIT LIMIT | LAST PAYMENT AMT. | DATE LAST PA... | CUSTOMER DI... | DATE LAST AC...  | 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... | 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 | ExternalKey ↑ |
|----------------------|-----------------|----------------------|----------------|---------------|--------------|---------------|---------------|----------------|----------------|---------------|
| Sandia National Labs | 1000            | SANDIA NATIONAL L... |                |               | ALBUQUERQUE  | NM            | SAN           |                |                | 00:SAN        |

## Invoice Payments

| INVOICENO | TRANSACTIONAMT | TRANSACTIONTYPE | CHECKNO | TRANSACTIONDATE | Invoice_R      | ExternalKey ↑             |
|-----------|----------------|-----------------|---------|-----------------|----------------|---------------------------|
| 0243826   | -382.20        | Credit Memo     |         | 7/29/2014       | 0243826:000000 | 00:SAN:0243826IN:7/29/2.. |
| 0243826   | 84,492.30      | Payment         | 1381218 | 9/10/2014       |                | 00:SAN:0243826IN:9/10/2.. |

SYNC also offers a full 360 Sync, in which Microsoft Dynamics 365 can have data integrated back to SAP B1. It is done in the following ways;

- Reviewing the license - Make sure you have confirmed the package bought from Microsoft Dynamics 365;
- One process at a time is followed - An example is an account import;
- Commercient SYNC standards objects - These types of objects already exist in Microsoft Dynamics 365, like your accounts; and
- Custom objects would need to be identified as well - this is what we can customize for the customer according to their needs.

Installation can begin, once the standard object is put in place. However, for the data to be moved, there are two options known as the File Option and the API Option.

### ***Options for moving data to SAP B1 from Microsoft Dynamics 365***

There are two important transactions when data is moved from Microsoft Dynamics 365 to SAP B1 known as: "File Option" and the "API Option";



## **SYNC for SAP B1 and Microsoft Dynamics 365**

1. **File Option:** In order for Microsoft Dynamics 365 to move to SAP B1, a configuration has to take place, which can be done by the ERP partner or user. But in terms of utility screens, the customer or ERP partner has direct control. To assist in the file import, Commerciant will download XML/CSV/TSV files to the customer's server. XML deals with simplifying moving data and storing it. CSV stores tabular data and separates it with commas whereas, TSV, separates data through tabs.
2. **API Option:** An API simplifies software when it is used and maintained. The API for SAP B1 is owned and licensed by their vendor, which needs to be given in order to have access. However, you take responsibility for checking whether you have access to the API from the SAP B1 vendor. Also, you are expected to pay for this option in terms of the license, documents and period of time, due to SAP B1 vendors changing rules, policies and bundles since they have different geographical locations.

### ***How often does the SYNC run?***

Transaction Processes are scheduled per the frequency of your Commerciant SYNC contract, which means the SYNC frequency can be scheduled from near real-time, to hourly, to four times a day, and daily regardless of whether it is from SAP B1 to Microsoft Dynamics 365 or visa-versa. Every time your SYNC runs, data is moved from SAP B1 to Microsoft Dynamics 365 or it can be moved back from Microsoft Dynamics 365 to SAP B1 for import, which includes moving new records like; Customers; Sales Orders; Jobs; and Invoices.

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

SYNC is enabled once the customers consult with Commerciant's Professional Services to perform a clean up of records. When two systems have been running separately from each other, Account matching is imperative in order for two records to be merged together to form one, while preventing any duplicated data. This can be done as follows:

- There is a software program that will identify records that are similar and it

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## **SYNC for SAP B1 and Microsoft Dynamics 365**

involves a person to check what the software has found.

- The person will have to use the knowledge that is not commonly known by others in the company, but it becomes known when information is referenced (tribal knowledge) and a bit of business knowledge.
- Commercient has an account matching tool, that will use AI (artificial intelligence) that will create comparisons, comparisons with scores and making names that are meaningful.
- Commercient also offers resources, such as Nvidia's Cuda core hardware to prevent using traditional hardware. This can be accessed through the AWS cloud and provide the service to customers without them knowing, in order to compare two systems of accounts with AI matching.

### ***Can existing SAP B1 transactions in Microsoft Dynamics 365 be edited?***

- Even though Commercient offers SYNC as an app, they provide Custom Update Processes to assist in editing data in SAP B1 to Microsoft Dynamics 365 or Microsoft Dynamics 365 to SAP B1.
- This process covers updates and deleting data, which is marked as a record.
- The purpose is to download the changed version for SAP B1 from Microsoft Dynamics 365.
- Since the records are downloaded to SAP B1, it becomes a system of record and any edits to the record, should be done in the program.
- Editing in Microsoft Dynamics 365 can also be done if customers purchase Custom Update Processes.
- Customers are allowed to customize the process, in which they choose five fields to be maintained on the SAP B1 record.
- Additional costs can apply.

### ***Once the status of an order changes, will this be updated?***

To keep your order updated, a workflow of SAP B1, will need to be designed as Commercient SYNC is responsible for taking records from Microsoft Dynamics 365

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to SAP B1. The status update does not get passed through SYNC as it changes once it is in SAP B1. The API Option, will SYNC the results of the SAP B1 API back to Microsoft Dynamics 365.

### ***Can I limit or control the data that I SYNC?***

Data can be controlled or limited by SQL (Structured Query Language) through Commercient's methodology. Not only that, but SQL can also improve and retrieve data. In this, you have filters, tables, and cross-database subqueries through the WHERE clause (charges may apply).

### ***How do I track the results?***

In Microsoft Dynamics 365, there are primary objects through status fields, in which the transaction process is visible. The status fields contains;

- Whether there is success or failure;
- Return values from the ERP (new invoice numbers); and
- File names if there is an XML output file.

### ***What else does Commercient do with Microsoft Dynamics 365?***

Data synchronization is the first step towards a total solution. Ask about these additional modules for SAP B1;

- 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 SAP B1 Invoices;
- Automatic SAP B1 Sales Order Email Engine;
- Automatic Invoice Email Engine;
- Dealer/Wholesaler Self-Service Portal;

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- Custom Data synchronization; and
- SF Account Conversion to SAP B1 AR Customer.

### **System Requirements:**

Microsoft Dynamics 365 Group, Professional, Enterprise editions or higher.

Microsoft Dynamics 365 API is included at no charge. Own the SAP B1 software.

### ***Are Payments and Order Processing completed in SAP B1?***

Microsoft Dynamics 365 can take payments online, which is downloaded to Commerciant Standard Processes. You would need to make your own process for importing payment data into SAP B1, or on to your credit card company for further payments.

### ***Company Information:***

Commerciant is a Cloud-based company that connects Microsoft Dynamics 365 directly to your SAP B1 ERP system. Our open SYNC Agent works with ERPs 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>