Commercient
ERP Integration for CRM

SYNC for Sage X3
And Microsoft Dynamics 365

Commercient SYNC for Sage X3 and Microsoft Dynamics 365
Commercient SYNC, the #1 data integration platform for sales who can seamlessly integrate your Sage X3 system with your Microsoft Dynamics 365 as Sage X3 operates as an ERP system (Enterprise Resource Planning). Due to Sage X3 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 Sage X3. Importing data back into Sage X3 will include new customers, sales orders, jobs, and invoices. Once the data in Sage X3 and Microsoft Dynamics 365 are integrated, you will be able to access important Sage X3 data directly in the Microsoft Dynamics 365.

The Commercient SYNC Agent is rapidly deployable and gives you access to your Sage customer and order information in Microsoft Dynamics 365. We are compatible with the following Sage editions: Sage editions: 50, 100, 300, 500, X3, AccPac, US/UK/EU. 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 Sage X3.

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.
- Sage X3 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 Sage X3 are altered.
- Sage X3 and Microsoft Dynamics 365 are both beneficial since Sage X3 can

reduce overall expenses while Microsoft Dynamics 365 can bring in more revenue through better sales figures and increase profitability.

- Commercient SYNC allows a 360-degree cycle in which Sage X3 can be integrated into Microsoft Dynamics 365 as well as, Microsoft Dynamics 365 back into Sage X3.
- Commercient SYNC for Sage X3 is built by ERP & CRM integration experts.
- Commercient's software provides Sage X3 users with a "Cloud-based" experience. Since it is a cloud-based experience, you can ensure that Commercient will have your data secured.
- Any field synced from Sage X3 can be displayed on the Microsoft Dynamics 365 screen. All of the data Commercient SYNCs to Microsoft Dynamics 365 becomes part of 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 Sage X3 and Microsoft Dynamics 365 which includes:

  Accounting Data:

  Sage X3 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.
- Commercient 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 Commercient SYNC creates a simple data integration pathway between Sage X3 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.

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- 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 Sage X3 limits, as Sage X3 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 Sage X3 system) Commercient will continue to SYNC where it left off on the following day.

What benefits does the integration of Sage X3 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)

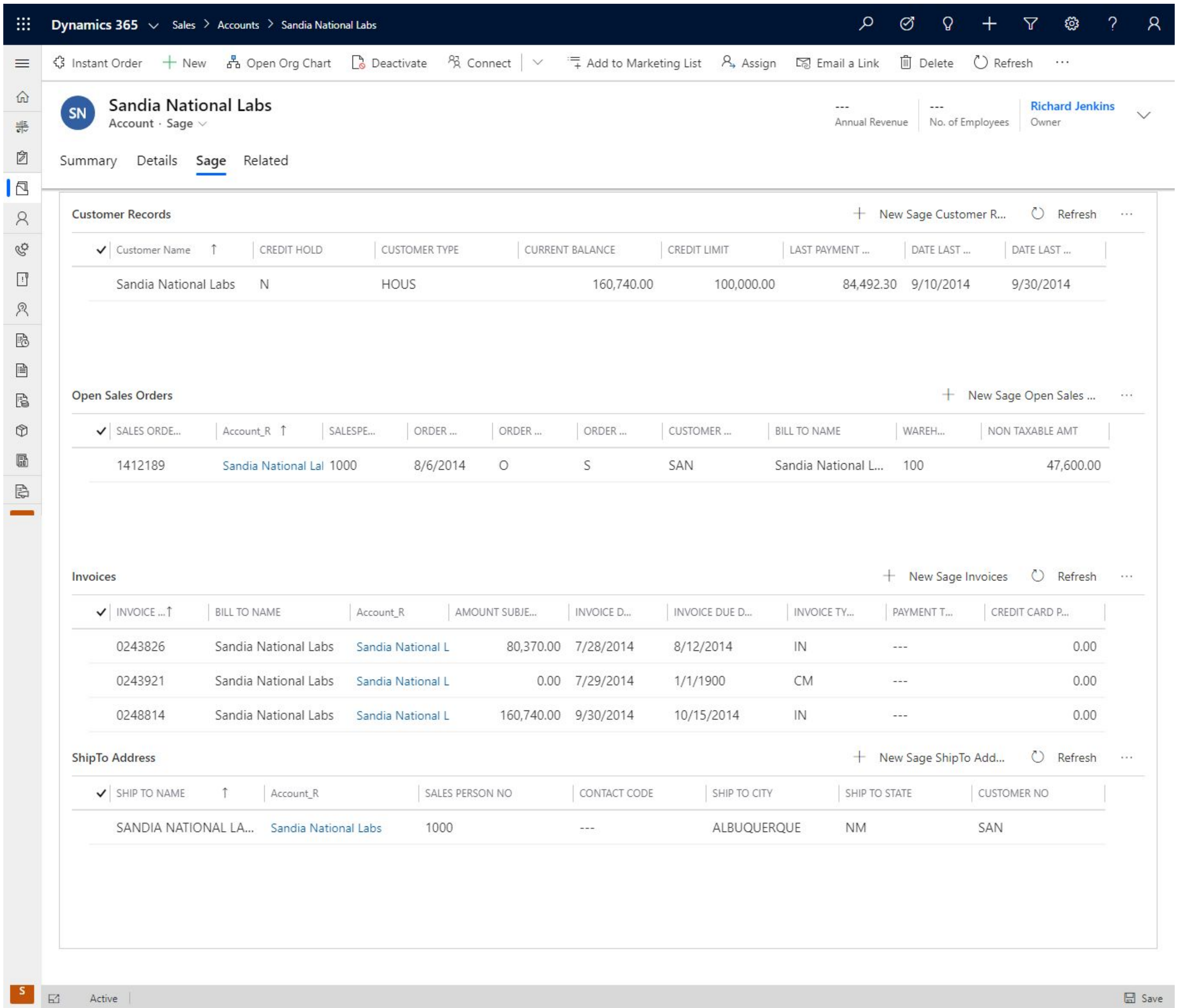
4. Invoice data

5. Products

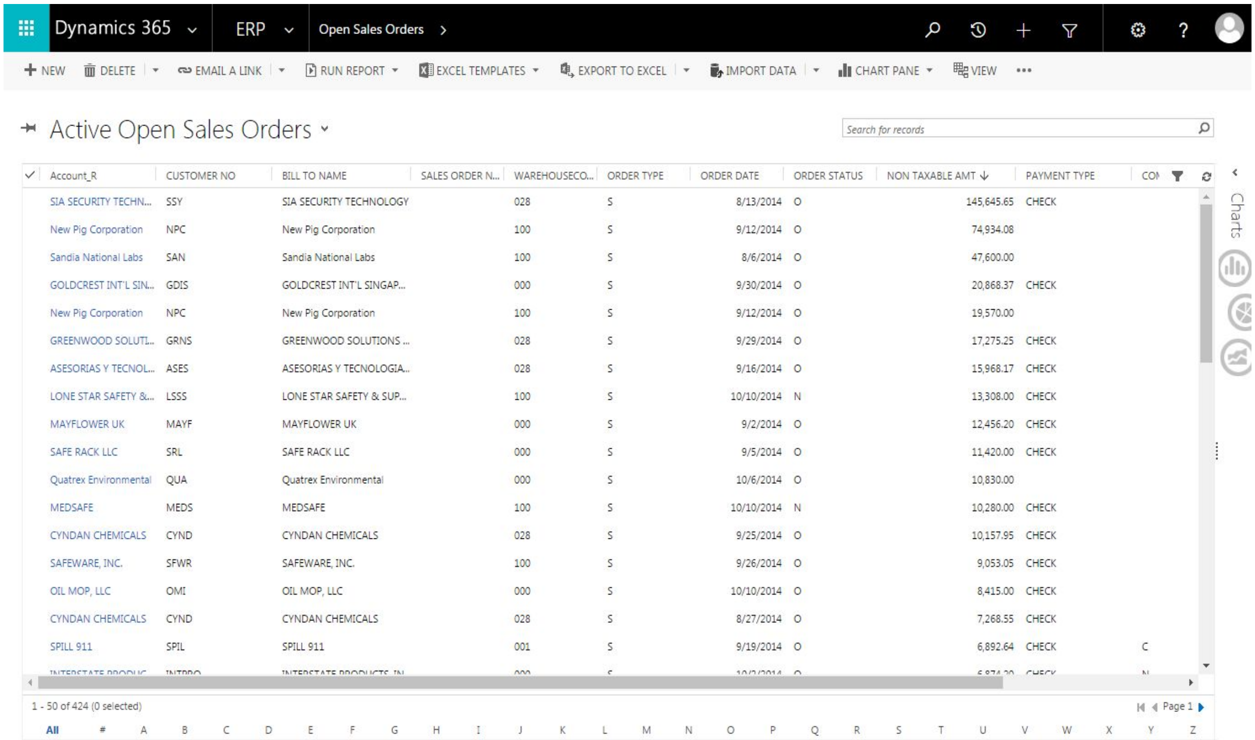
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects

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 Sage X3 are integrated into Microsoft Dynamics 365. Their Ship To and Bill To address in Sage X3 is merged into Microsoft Dynamics 365, which can be displayed according to their needs. By clicking on the Sage X3 Customer Record, you can see all the fields that are synchronized.



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 different statuses of their sales orders as they change in Sage X3. Removing canceled Sage X3 Sales Order data from Microsoft Dynamics 365 has performed automatically.



Account_R	CUSTOMER NO	BILL TO NAME	SALES ORDER N...	WAREHOUSECO...	ORDER TYPE	ORDER DATE	ORDER STATUS	NON TAXABLE AMT	PAYMENT TYPE	CON
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 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.

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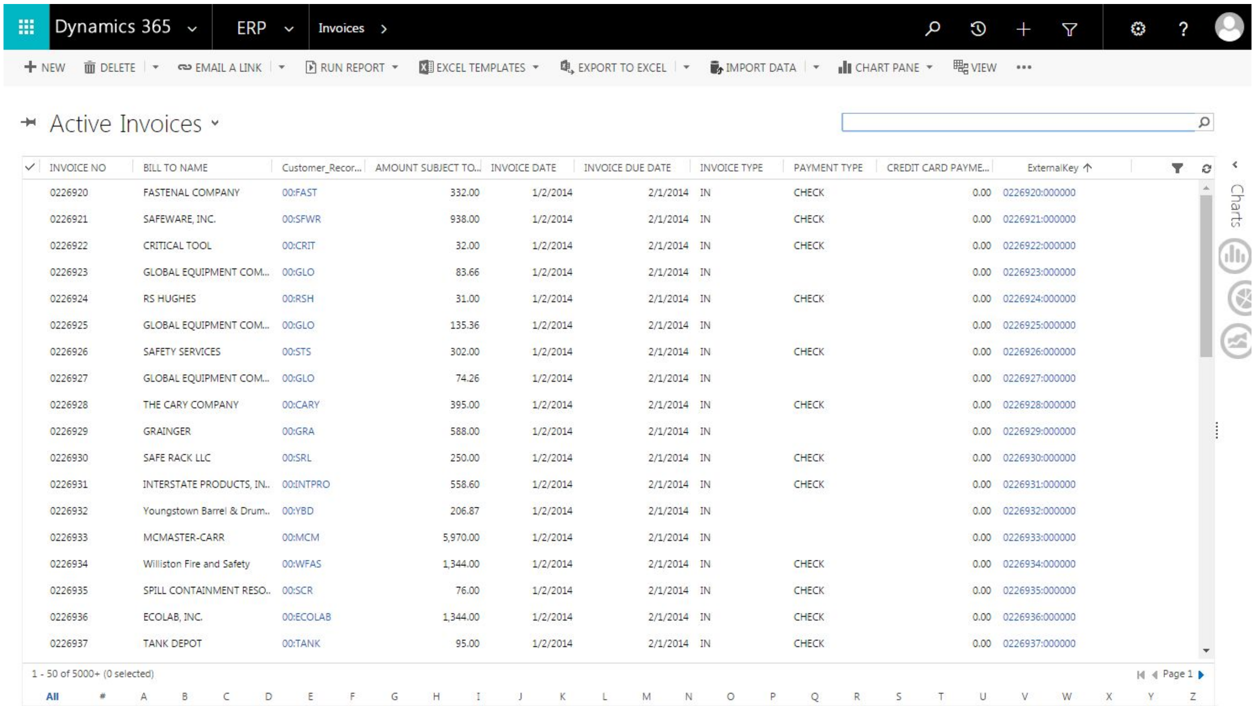
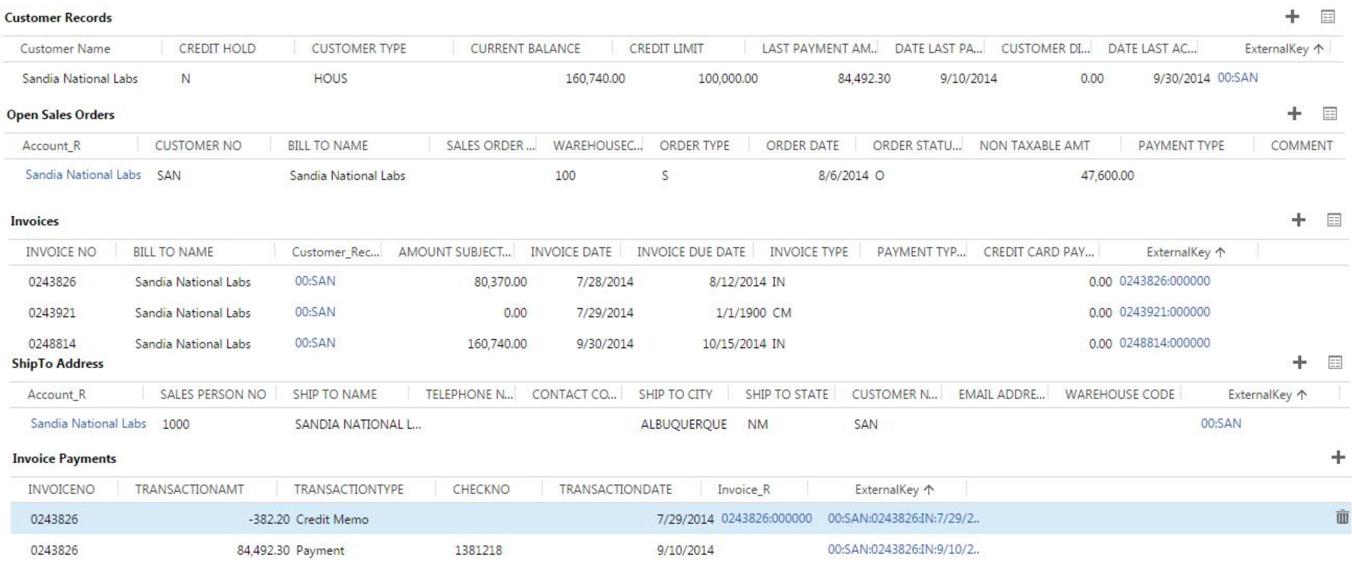


INVOICE NO	BILL TO NAME	Customer_Recor...	AMOUNT SUBJECT TO...	INVOICE DATE	INVOICE DUE DATE	INVOICE TYPE	PAYMENT TYPE	CREDIT CARD PAYME...	ExternalKey
0226920	FASTENAL COMPANY	00:FAST	332.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226920:000000
0226921	SAFEWARE, INC.	00:SFWR	938.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226921:000000
0226922	CRITICAL TOOL	00:CRIT	32.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226922:000000
0226923	GLOBAL EQUIPMENT COM...	00:GLO	83.66	1/2/2014	2/1/2014	IN		0.00	0226923:000000
0226924	RS HUGHES	00:RSH	31.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226924:000000
0226925	GLOBAL EQUIPMENT COM...	00:GLO	135.36	1/2/2014	2/1/2014	IN		0.00	0226925:000000
0226926	SAFETY SERVICES	00:STS	302.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226926:000000
0226927	GLOBAL EQUIPMENT COM...	00:GLO	74.26	1/2/2014	2/1/2014	IN		0.00	0226927:000000
0226928	THE CARY COMPANY	00:CARY	395.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226928:000000
0226929	GRAINGER	00:GRA	588.00	1/2/2014	2/1/2014	IN		0.00	0226929:000000
0226930	SAFE RACK LLC	00:SRL	250.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226930:000000
0226931	INTERSTATE PRODUCTS, IN..	00:INTPRO	558.60	1/2/2014	2/1/2014	IN	CHECK	0.00	0226931:000000
0226932	Youngstown Barrel & Drum..	00:YBD	206.87	1/2/2014	2/1/2014	IN		0.00	0226932:000000
0226933	MCMASTER-CARR	00:MCM	5,970.00	1/2/2014	2/1/2014	IN		0.00	0226933:000000
0226934	Williston Fire and Safety	00:WFAS	1,344.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226934:000000
0226935	SPILL CONTAINMENT RESO..	00:SCR	76.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226935:000000
0226936	ECOLAB, INC.	00:ECOLAB	1,344.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226936:000000
0226937	TANK DEPOT	00:TANK	95.00	1/2/2014	2/1/2014	IN	CHECK	0.00	0226937:000000

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.**



Customer Records

Customer Name	CREDIT HOLD	CUSTOMER TYPE	CURRENT BALANCE	CREDIT LIMIT	LAST PAYMENT AM...	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 ...	WAREHOUSEC...	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:0243826:IN:7/29/2..
0243826	84,492.30	Payment	1381218	9/10/2014		00:SAN:0243826:IN:9/10/2..

SYNC also offers a full 360 Sync, in which Microsoft Dynamics 365 can have data integrated back to Sage X3. 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 Sage X3 from Microsoft Dynamics 365

There are two important transactions when data is moved from Microsoft Dynamics 365 to Sage X3 known as: “File Option” and the “API Option;

1. File Option: In order for Microsoft Dynamics 365 to move to Sage X3, 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, Commercient 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 Sage X3 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 Sage X3 vendor. Also, you are expected to pay for this option in terms of the license, documents and period of time, due to Sage X3 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 Commercient 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 Sage X3 to Microsoft Dynamics 365 or visa-versa. Every time your SYNC runs, data is moved from Sage X3 to Microsoft Dynamics 365 or it can be moved back from Microsoft Dynamics 365 to Sage X3 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 Commercients 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 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 Sage X3 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 Sage X3 to Microsoft Dynamics 365 or Microsoft Dynamics 365 to Sage X3.
- This process covers updates and deleting data, which is marked as a record.
- The purpose is to download the changed version for Sage X3 from Microsoft Dynamics 365.
- Since the records are downloaded to Sage X3, 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 Sage X3 record.
- Additional costs can apply.

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

To keep your order updated, a workflow of Sage X3, will need to be designed as Commercient SYNC is responsible for taking records from Microsoft Dynamics 365 to Sage X3. The status update does not get passed through SYNC as it changes once it is in Sage X3. The API Option, will SYNC the results of the Sage X3 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 Sage X3;

- 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 X3 Invoices;
- Automatic Sage X3 Sales Order Email Engine;
- Automatic Invoice Email Engine;
- Dealer/Wholesaler Self-Service Portal;
- Custom Data synchronization; and
- SF Account Conversion to Sage X3 AR Customer.

System Requirements:

Microsoft Dynamics 365 Group, Professional, Enterprise editions or higher. Microsoft Dynamics 365 API is included at no charge. Own the Sage X3 software.

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***Are Payments and Order Processing completed in Sage X3*?**
Microsoft Dynamics 365 can take payments online, which is downloaded to Commercient Standard Processes. You would need to make your own process for importing payment data into Sage X3, or on to your credit card company for further payments.

Company Information:

Commercient is a cloud-based company that connects Microsoft Dynamics 365 directly to your Sage X3 system. Our open SYNC Agent works with ERPs such as Sage X3, Sage X3, Sage X3, and other Sage X3 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 http://www.commercient.com

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