

## **SYNC for Deltek And Microsoft Dynamics 365**

### ***Commercient SYNC for Deltek and Microsoft Dynamics 365***

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

The Commercient SYNC Agent is rapidly deployable and gives you access to your Deltek customer and order information in Microsoft Dynamics 365. We are compatible with the following Costpoint, Maconomy, Ajera, Deltek for Professional Services, Vision, and Workbook. 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 Deltek.

### ***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.
- Deltek 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 Deltek are altered.
- Deltek and Microsoft Dynamics 365 are both beneficial since Deltek can

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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 Deltek can be integrated into Microsoft Dynamics 365 as well as, Microsoft Dynamics 365 back into Deltek.
- Commercient SYNC for Deltek is built by ERP & CRM integration experts.
- Commercient's software provides Deltek 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 Deltek 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 Deltek and Microsoft Dynamics 365 which includes:

### Accounting Data:

Deltek 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 Deltek and Microsoft Dynamics 365. Our SYNC solution also enables you to prevent the duplicate data, handle custom objects in Microsoft

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

### ***What benefits does the integration of Deltek 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?***

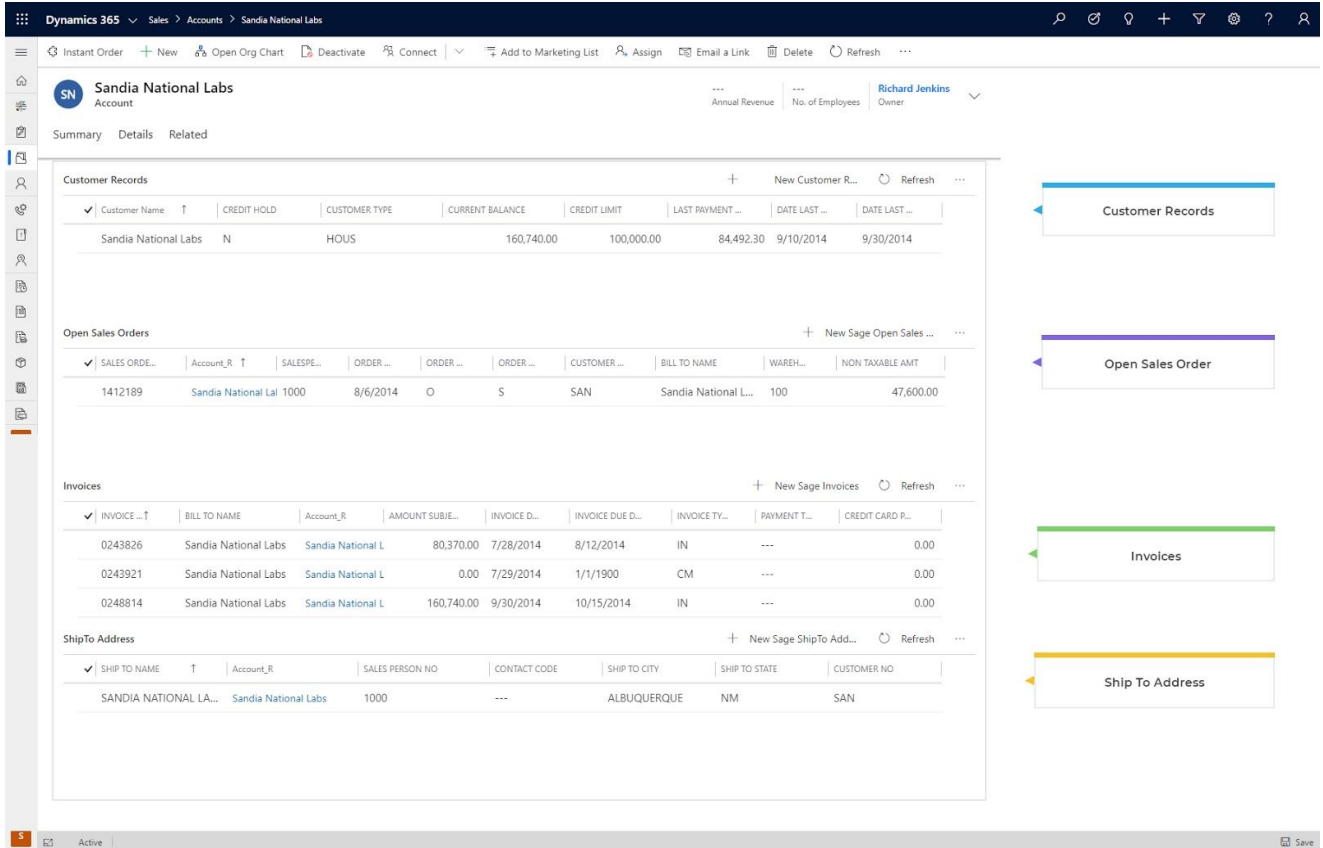
1. Financial accounting data
2. Customer data
3. Sales order data (as seen below)

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

# SYNC for Deltek And Microsoft Dynamics 365



**Customer Records**

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**

SALES ORDE...	Account_R	SALESPE...	ORDER ...	ORDER ...	ORDER ...	CUSTOMER ...	BILL TO NAME	WAREH...	NON TAXABLE AMT
1412189	Sandia National Lab	1000	8/6/2014	O	S	SAN	Sandia National L...	100	47,600.00

**Invoices**

INVOICE ...	BILL TO NAME	Account_R	AMOUNT SUBE...	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

**Ship To Address**

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

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 Deltek. Removing canceled Deltek Sales Order data from Microsoft Dynamics 365 has performed automatically.

# SYNC for Deltek And Microsoft Dynamics 365

**Dynamics 365** > Open Sales Orders > 1412189

1412189  
Open Sales Orders

**General** Remaining Information Information Related

ExternalKey	1412189	Account_R	<a href="#">Sandia National Labs</a>
Owner	<a href="#">Richard Jenkins</a>	Customer_Records_R	<a href="#">00:SAN</a>
Customer No	SAN	Contact_r	---
BILL TO NAME	Sandia National Labs	CUSTOMERPONO	1487351
ORDER TYPE	S	ORDER DATE	8/6/2014
NON TAXABLE AMT	47,600.00	ORDER STATUS	O
TAXABLESUBJECTTO DISCOUNT	0.00	TAXABLEAMT	0
COMMENT	---	PAYMENT TYPE	---
SALES ORDER NO	1412189		

Active | Save

**Dynamics 365** > Open Sales Orders > 1412189

1412189  
Open Sales Orders

General Remaining Information **Information** Related

Orders Line Items

ExternalKey ↑	SALES ORDE...	LINESEQ...	ITEM CO...	ITEM CODE DESC...	UNIT PRL...	QUANTITY ORDE...	EXTENSION ...	DISCOU...	ITEM TYPE
1412189:000002	1412189	00000200...	CUSTOM	CUSTOM ITEM: UI...	1,904.00	25.00	47,600.00	Y	1

Active | Save

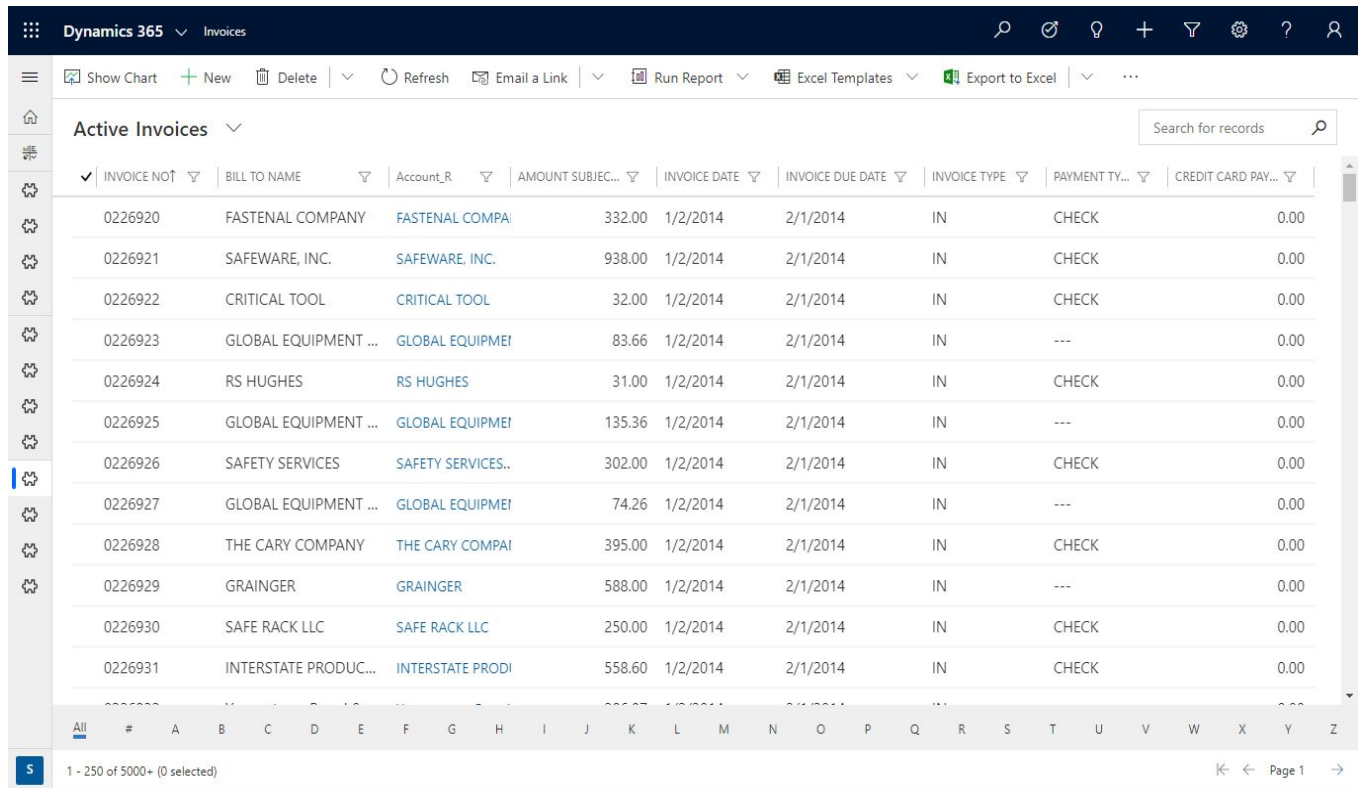
Commercient has designed the relationships with the data objects in Microsoft Dynamics 365 that can give you the freedom to decide which objects you would like to display on the screen. You are always able to click to other parents- or child-related objects. For example, an Admin user can remove the Sales Orders

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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.



INVOICE NO	BILL TO NAME	Account_R	AMOUNT SUBJEC...	INVOICE DATE	INVOICE DUE DATE	INVOICE TYPE	PAYMENT TY...	CREDIT CARD PAY...
0226920	FASTENAL COMPANY	FASTENAL COMPA	332.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226921	SAFEWARE, INC.	SAFEWARE, INC.	938.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226922	CRITICAL TOOL	CRITICAL TOOL	32.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226923	GLOBAL EQUIPMENT ...	GLOBAL EQUIPMEI	83.66	1/2/2014	2/1/2014	IN	---	0.00
0226924	RS HUGHES	RS HUGHES	31.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226925	GLOBAL EQUIPMENT ...	GLOBAL EQUIPMEI	135.36	1/2/2014	2/1/2014	IN	---	0.00
0226926	SAFETY SERVICES	SAFETY SERVICES..	302.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226927	GLOBAL EQUIPMENT ...	GLOBAL EQUIPMEI	74.26	1/2/2014	2/1/2014	IN	---	0.00
0226928	THE CARY COMPANY	THE CARY COMPAI	395.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226929	GRAINGER	GRAINGER	588.00	1/2/2014	2/1/2014	IN	---	0.00
0226930	SAFE RACK LLC	SAFE RACK LLC	250.00	1/2/2014	2/1/2014	IN	CHECK	0.00
0226931	INTERSTATE PRODUC...	INTERSTATE PRODI	558.60	1/2/2014	2/1/2014	IN	CHECK	0.00

### 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**.

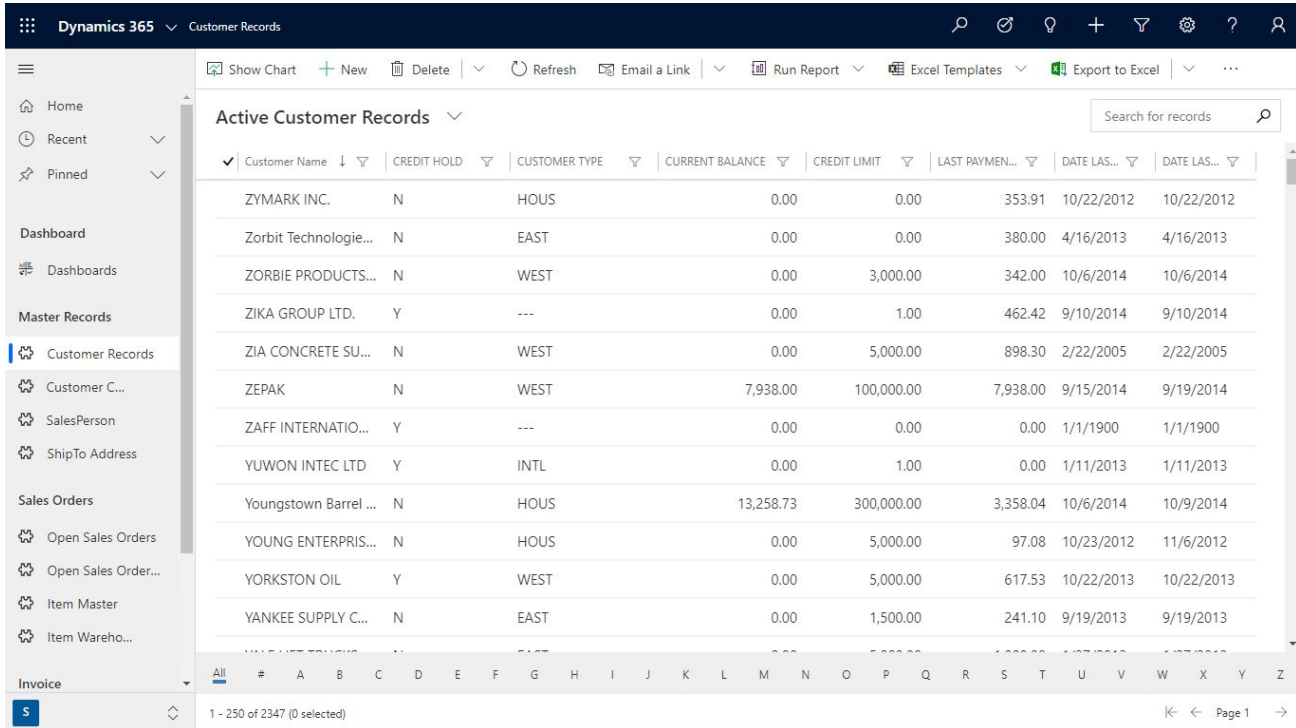
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- This gives you the ability to have accurate product data and Inventory availability. In addition, you can **SYNC any Database, table, or view.**



The screenshot shows the Microsoft Dynamics 365 interface for 'Customer Records'. The table displays the following data:

Customer Name	CREDIT HOLD	CUSTOMER TYPE	CURRENT BALANCE	CREDIT LIMIT	LAST PAYMEN...	DATE LAS...	DATE LAS...
ZYMARK INC.	N	HOUS	0.00	0.00	353.91	10/22/2012	10/22/2012
Zorbit Technologie...	N	EAST	0.00	0.00	380.00	4/16/2013	4/16/2013
ZORBIE PRODUCTS...	N	WEST	0.00	3,000.00	342.00	10/6/2014	10/6/2014
ZIKA GROUP LTD.	Y	---	0.00	1.00	462.42	9/10/2014	9/10/2014
ZIA CONCRETE SU...	N	WEST	0.00	5,000.00	898.30	2/22/2005	2/22/2005
ZEPAK	N	WEST	7,938.00	100,000.00	7,938.00	9/15/2014	9/19/2014
ZAFF INTERNATIO...	Y	---	0.00	0.00	0.00	1/1/1900	1/1/1900
YUWON INTEC LTD	Y	INTL	0.00	1.00	0.00	1/11/2013	1/11/2013
Youngstown Barrel ...	N	HOUS	13,258.73	300,000.00	3,358.04	10/6/2014	10/9/2014
YOUNG ENTERPRIS...	N	HOUS	0.00	5,000.00	97.08	10/23/2012	11/6/2012
YORKSTON OIL	Y	WEST	0.00	5,000.00	617.53	10/22/2013	10/22/2013
YANKEE SUPPLY C...	N	EAST	0.00	1,500.00	241.10	9/19/2013	9/19/2013

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

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### ***Options for moving data to Deltek from Microsoft Dynamics 365***

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

1. **File Option:** In order for Microsoft Dynamics 365 to move to Deltek, 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 Deltek 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 Deltek vendor. Also, you are expected to pay for this option in terms of the license, documents and period of time, due to Deltek 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 Deltek to Microsoft Dynamics 365 or visa-versa. Every time your SYNC runs, data is moved from Deltek to Microsoft Dynamics 365 or it can be moved back from Microsoft Dynamics 365 to Deltek 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 Commerciants Professional Services to perform a clean up of records. When two systems have been running

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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 Deltek 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 Deltek to Microsoft Dynamics 365 or Microsoft Dynamics 365 to Deltek.
- This process covers updates and deleting data, which is marked as a record.
- The purpose is to download the changed version for Deltek from Microsoft Dynamics 365.
- Since the records are downloaded to Deltek, 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 Deltek record.
- Additional costs can apply.

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

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

- 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 Deltek Invoices;

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

### **System Requirements:**

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

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

### ***Are Payments and Order Processing completed in Deltek?***

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 Deltek, 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 Aptean ERP system. Our open SYNC Agent works with ERPs such as Sage, SYSPRO, Traverse, and other ERP 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>