

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

Commercient SYNC, the #1 data integration platform integrates your JobBOSS system with Microsoft Dynamics 365. The Commercient SYNC Agent is rapidly deployable and gives you access to your JobBOSS customer and order information in Microsoft Dynamics 365. We are compatible with the following editions: Kewill, Alliance, MFG, Vanguard, Exact, Macola ES, Macola Progression, Macola 10, and MAX. Commercient is certified for use on the Microsoft Dynamics 365 mobile platform.

### ***Microsoft Dynamics 365 Compatibility***

Microsoft Dynamics 365 can integrate with enterprise and professional. However, with professional there are a few limitations such as;

- Customization per user;
- Sales Management - Competitors, Sales Goals and Territory Management;
- Sales Management - Product Taxonomy & Relationships, Hierarchies;
- Social Engagement/Gamification/ Voice of Customer;
- Mobile Offline Sync;
- Versium/Insideview;and
- Embedded Intelligence;

### ***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.
- JobBOSS 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 JobBOSS are altered.
- JobBOSS and Microsoft Dynamics 365 are both beneficial since JobBOSS can reduce overall expenses while Microsoft Dynamics 365 can bring in more revenue through better sales figures and increase profitability.

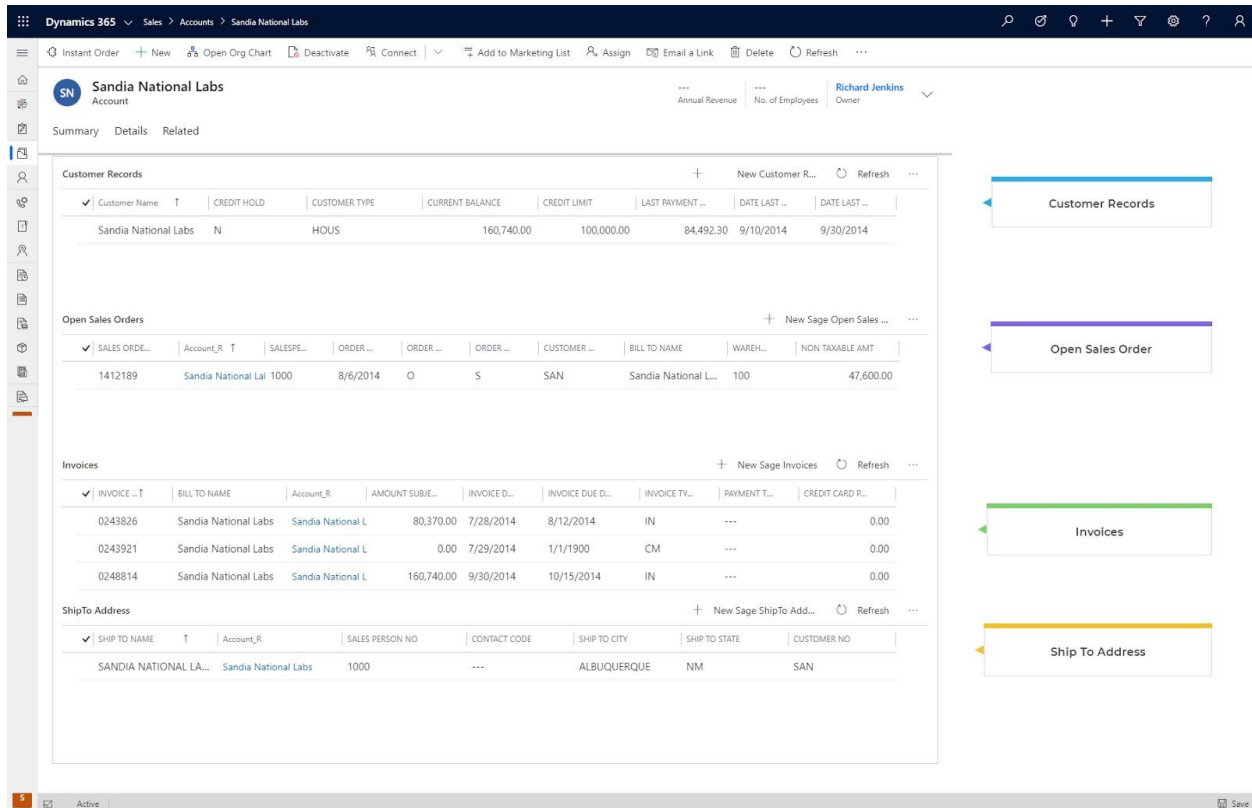
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- Commercient SYNC for JobBOSS is built by JobBOSS & CRM integration experts.
- Commercient's software provides JobBOSS users with a "Cloud-based" experience. Since it is a cloud-based experience, you can be ensured that Commercient will have your data secured.
- Any field synced from JobBOSS can be displayed on the Microsoft Dynamics 365 screen. All of the data Commercient 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 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 JobBOSS 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 JobBOSS limits, as JobBOSS 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 JobBOSS system) Commercient will continue to SYNC where it left off on the following day.

## What does SYNC offer?

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



The screenshot displays the Microsoft Dynamics 365 interface for the 'Sandia National Labs' account. The interface is divided into four main sections, each with a corresponding callout box on the right:

- Customer Records:** A table showing customer details for Sandia National Labs.
 

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:** A table showing open sales orders for Sandia National Labs.
 

SALES ORDE	Account_R	SALESPE	ORDER	ORDER	ORDER	CUSTOMER	BILL TO NAME	WAREH	NON TAXABLE AMT
1412189	Sandia National Labs	1000	8/6/2014	O	S	SAN	Sandia National Labs	100	47,600.00
- Invoices:** A table showing invoices for Sandia National Labs.
 

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
- Ship To Address:** A table showing the ship to address for Sandia National Labs.
 

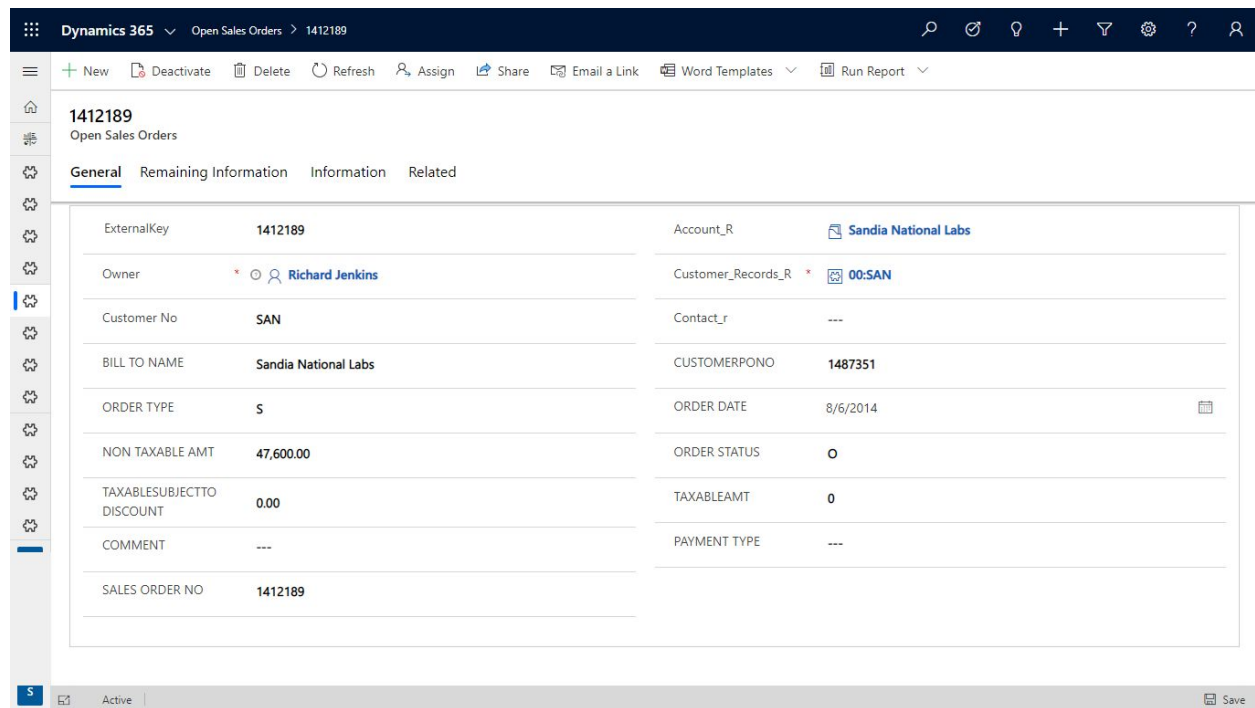
SHIP TO NAME	Account_R	SALES PERSON NO	CONTACT CODE	SHIP TO CITY	SHIP TO STATE	CUSTOMER NO
SANDIA NATIONAL LA...	Sandia National Labs	1000	---	ALBUQUERQUE	NM	SAN

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

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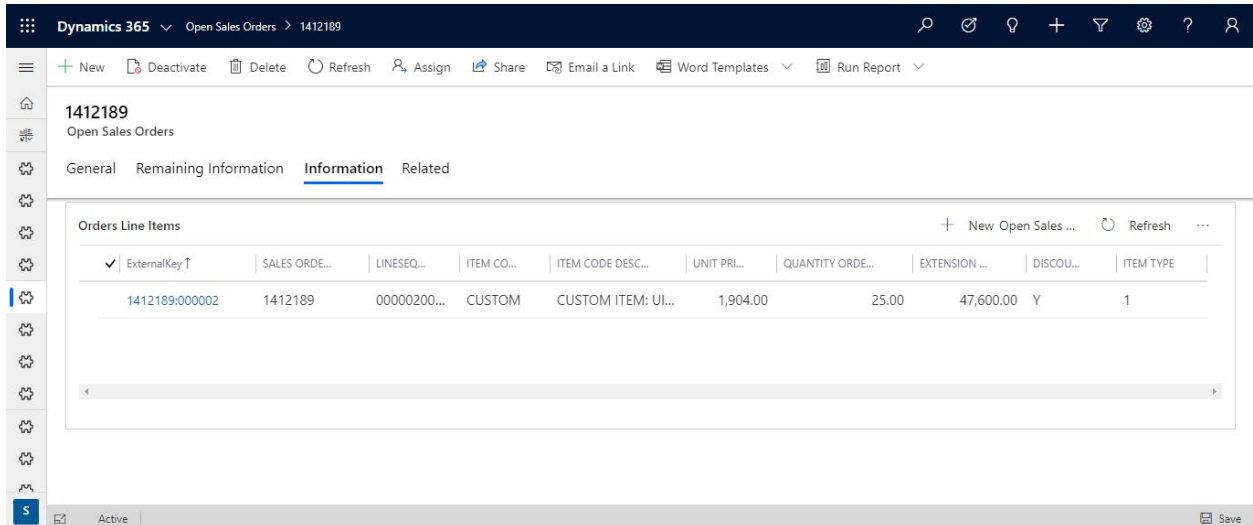
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Invoices Sales Order data is merged as one as a custom object into Microsoft Dynamics 365 since each customer's needs are unique. This allows customers to see their invoices that have their orders and details as well as, viewing the different statuses of their sales orders as they change in JobBOSS. Removing canceled JobBOSS Sales Order data from Microsoft Dynamics 365 has performed automatically.



The screenshot displays the Microsoft Dynamics 365 user interface for a Sales Order. The top navigation bar shows 'Dynamics 365' and the path 'Open Sales Orders > 1412189'. Below the navigation bar, there are tabs for 'General', 'Remaining Information', 'Information', and 'Related'. The 'General' tab is active, showing a list of fields and their values. The fields are organized into two columns. The left column contains: ExternalKey (1412189), Owner (Richard Jenkins), Customer No (SAN), BILL TO NAME (Sandia National Labs), ORDER TYPE (S), NON TAXABLE AMT (47,600.00), TAXABLESUBJECTTO DISCOUNT (0.00), COMMENT (---), and SALES ORDER NO (1412189). The right column contains: Account\_R (Sandia National Labs), Customer\_Records\_R (00:SAN), Contact\_r (---), CUSTOMERPONO (1487351), ORDER DATE (8/6/2014), ORDER STATUS (O), TAXABLEAMT (0), and PAYMENT TYPE (---). The bottom status bar shows 'Active' and a 'Save' button.

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



**1412189**  
Open Sales Orders

General Remaining Information Information Related

Orders Line Items

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

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** Invoices

Search for records

Active Invoices

INVOICE NOT	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 EQUIPME	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 EQUIPME	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 EQUIPME	74.26	1/2/2014	2/1/2014	IN	---	0.00
0226928	THE CARY COMPANY	THE CARY COMPA	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

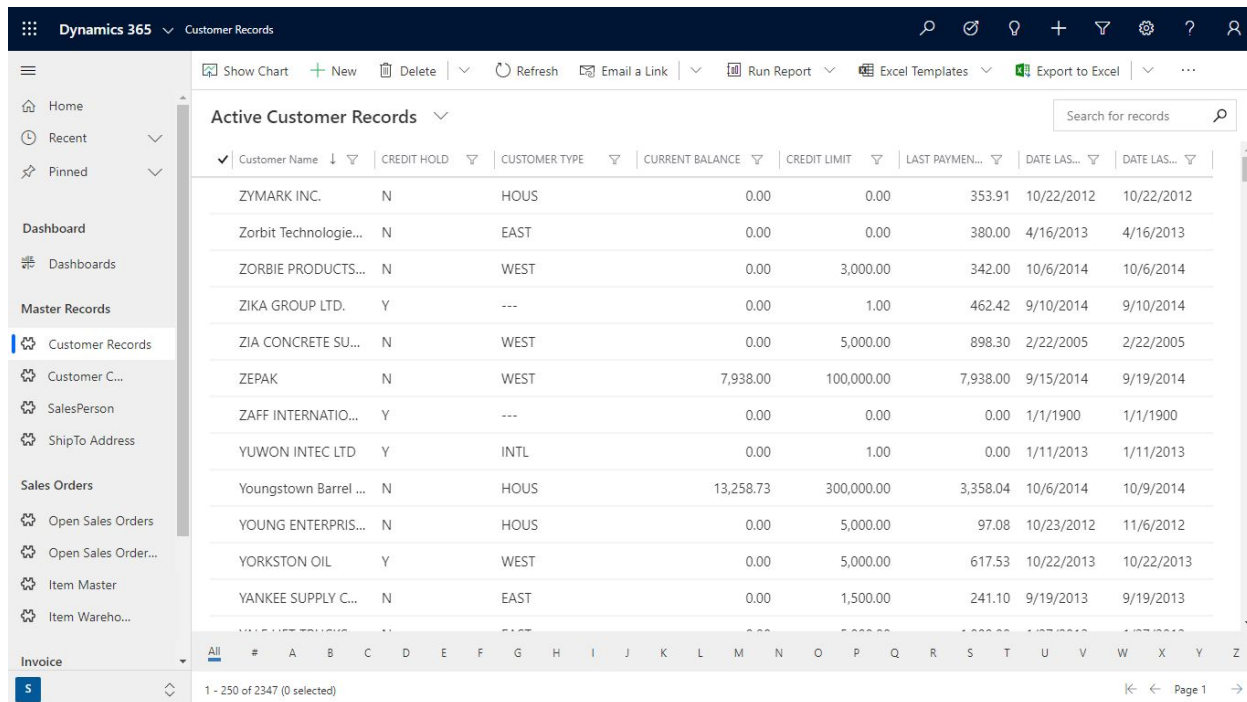
1 - 250 of 5000+ (0 selected)

## 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**.

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The screenshot shows the Microsoft Dynamics 365 interface for Customer Records. The left sidebar contains navigation options: Home, Recent, Pinned, Dashboard, Dashboards, Master Records, Customer Records (selected), Customer C..., SalesPerson, ShipTo Address, Sales Orders, Open Sales Orders, Open Sales Order..., Item Master, Item Wareho..., and Invoice. The main area displays a table of Active Customer Records with columns: Customer Name, CREDIT HOLD, CUSTOMER TYPE, CURRENT BALANCE, CREDIT LIMIT, LAST PAYMEN..., DATE LAS..., and DATE LAS... The table lists 15 records, including ZYMARK INC., Zorbit Technologie..., ZORBIE PRODUCTS..., ZIKA GROUP LTD., ZIA CONCRETE SU..., ZEPAK, ZAFF INTERNATIO..., YUWON INTEC LTD, Youngstown Barrel ..., YOUNG ENTERPRIS..., YORKSTON OIL, and YANKEE SUPPLY C... The bottom of the table shows a summary: 1 - 250 of 2347 (0 selected).

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

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

Clients with existing records in both JobBOSS and Microsoft Dynamics 365 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 sub-queries, filters, and cross-table and cross-database

subqueries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)

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

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

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

### ***System Requirements:***

Microsoft Dynamics 365 Group, Professional, Enterprise editions or higher.  
Microsoft Dynamics 365 API is included at no charge.

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

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Commerciant is a cloud-based company that connects Microsoft Dynamics 365 directly to your JobBOSS system. Our open SYNC Agent works with software 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>