

Commercient SYNC for Infor Distribution SX.e and Microsoft Dynamics 365

Commercient SYNC, the #1 data integration platform integrates your Infor Distribution SX.e system with Microsoft Dynamics 365. The Commercient SYNC Agent is rapidly deployable and gives you access to your Infor Distribution SX.e customer and order information in Microsoft Dynamics 365. We are compatible with the following editions: LN, Infor Visual, Infor 10 Distribution Business, BAAN, Infor Adage, Infor Syteline (Frontstep) aka (Symix), Infor Distribution FACTS, Infor M3, Infor Distribution A+, Baan IV, Baan V, Infor Baan, Infor LN 6.1, Infor LN 10.3, Lawson, BPCS, Mapics, Lilly, VISUAL Mfg, NxTrend, JBA, Infor Fourth Shift, Minxware, Lawson, Infor ERP LX, GrowthPower, PointMan ERP, Infor XA, Infor visual 7.1.2, and INFOR SYTELINE V705. 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.

| | | Enterprise | Professional |
|-------------------------------|---|---------------------|-----------------|
| <i>Description</i> | <i>Features</i> | <i>Per User</i> | <i>Per User</i> |
| Customization | Custom Entities | Unlimited | Max 15 |
| | Business Process Flows | Unlimited | Max 5 |
| | Custom Workflows | Unlimited | Max 15 |
| | 3 rd Party Application Installs | Unlimited | Max 10 |
| Forms | | Unlimited | Max 2 |
| Reporting and Analysis | Export to Microsoft Excel, Advanced Analytics with Power BI license | ✓ | ✓ |
| | Real-time Sales Reports and Dashboards | Standard and custom | Max 5 |

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.

- Infor Distribution SX.e 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 Infor Distribution SX.e are altered.
- Infor Distribution SX.e and Microsoft Dynamics 365 are both beneficial since Infor Distribution SX.e can reduce overall expenses while Microsoft Dynamics 365 can bring in more revenue through better sales figures and increase profitability.
- Commercient SYNC for Infor Distribution SX.e is built by ERP & CRM integration experts.
- Commercient's software provides Infor Distribution SX.e 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 Infor Distribution SX.e 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 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 Infor Distribution SX.e 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

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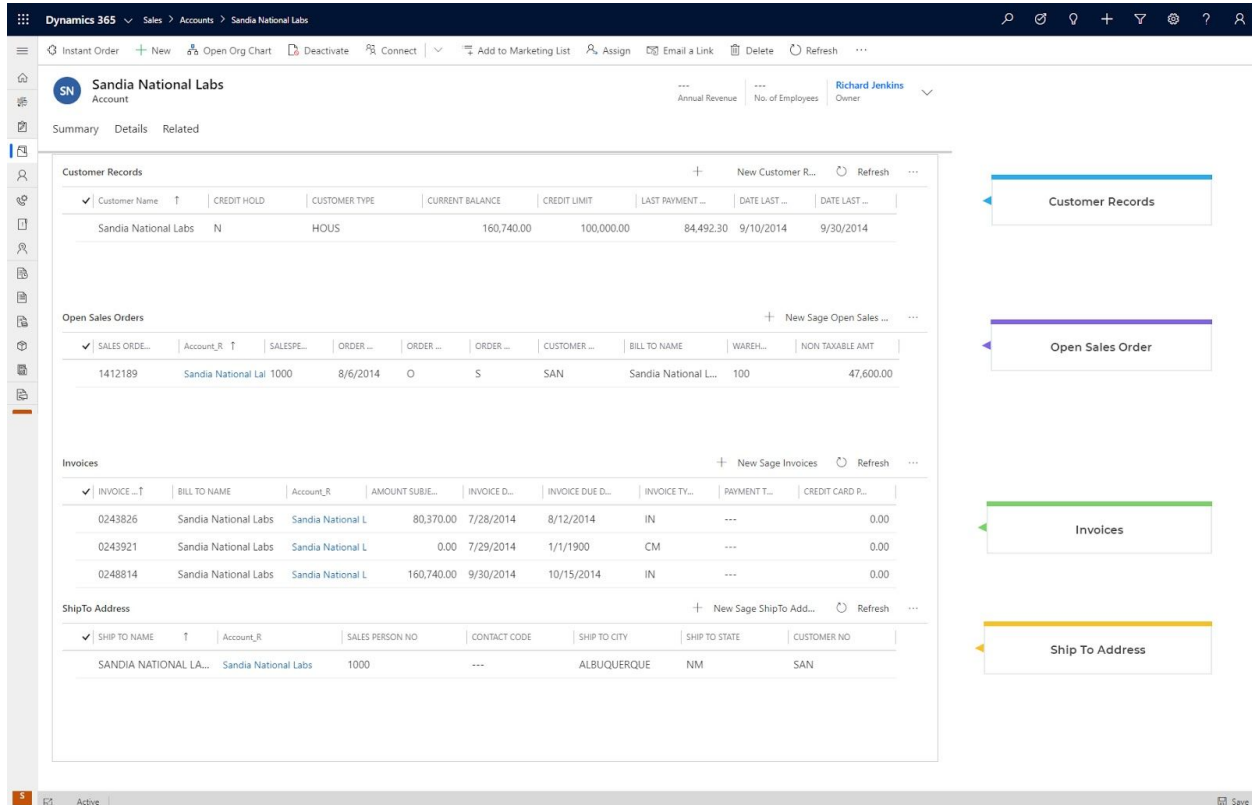
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track changes as well as, submitting records to Microsoft Dynamics 365 API (Application Programming Interface) in a single call.

- Commerciant can significantly reduce the likelihood of exceeding the Microsoft Dynamics 365 API Infor Distribution SX.e limits, as Infor Distribution SX.e 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 Infor Distribution SX.e system) Commerciant 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 Infor Distribution SX.e are integrated into Microsoft Dynamics 365. Their Ship To and Bill To address in Infor Distribution SX.e is merged into Microsoft Dynamics 365, which can be displayed according to their needs. By clicking on the Infor Distribution SX.e 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 colored callout box on the right:

- Customer Records** (Blue callout): Shows a table with columns for Customer Name, CREDIT HOLD, CUSTOMER TYPE, CURRENT BALANCE, CREDIT LIMIT, LAST PAYMENT, DATE LAST, and DATE LAST. The data row shows Sandia National Labs with a current balance of 160,740.00 and a credit limit of 100,000.00.
- Open Sales Orders** (Purple callout): Shows a table with columns for SALES ORDE, Account_R, SALESPE, ORDER, ORDER, ORDER, CUSTOMER, BILL TO NAME, WAREH, and NON TAXABLE AMT. The data row shows an order for Sandia National Labs with a non-taxable amount of 47,600.00.
- Invoices** (Green callout): Shows a table with columns for INVOICE, BILL TO NAME, Account_R, AMOUNT SUBJE, INVOICE D, INVOICE DUE, INVOICE TY, PAYMENT T, and CREDIT CARD P. The data rows show three invoices for Sandia National Labs with various amounts and due dates.
- Ship To Address** (Yellow callout): Shows a table with columns for SHIP TO NAME, Account_R, SALES PERSON NO, CONTACT CODE, SHIP TO CITY, SHIP TO STATE, and CUSTOMER NO. The data row shows the shipping address for Sandia National Labs in Albuquerque, NM.

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 Infor Distribution SX.e. Removing canceled Infor Distribution SX.e Sales Order data from Microsoft Dynamics 365 has performed automatically.

Dynamics 365 > Open Sales Orders > 1412189

1412189
Open Sales Orders

General Remaining Information Information Related

| | | | |
|---------------------------|---------------------------------|--------------------|--------------------------------------|
| ExternalKey | 1412189 | Account_R | Sandia National Labs |
| Owner | Richard Jenkins | Customer_Records_R | 00:SAN |
| 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 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 |

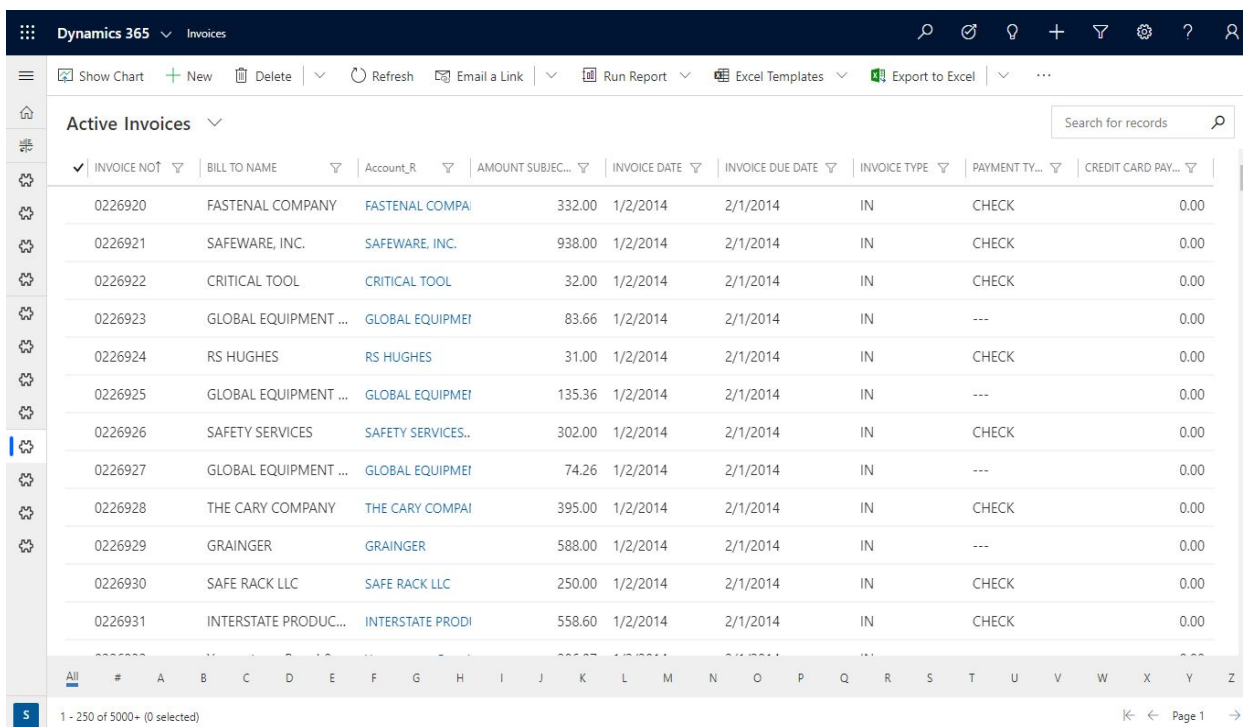
Active Save

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

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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.



The screenshot shows the 'Active Invoices' list in Microsoft Dynamics 365. The table includes columns for Invoice Number, Bill To Name, Account, Amount, Subject, Invoice Date, Invoice Due Date, Invoice Type, Payment Type, and Credit Card Payment. The data shows 12 invoices from January 2, 2014, with various customers and amounts.

| INVOICE NO | BILL TO NAME | Account_R | AMOUNT | SUBJECT | INVOICE DATE | INVOICE DUE DATE | INVOICE TYPE | PAYMENT TY | CREDIT CARD PAY |
|------------|----------------------|-------------------|--------|---------|--------------|------------------|--------------|------------|-----------------|
| 0226920 | FASTENAL COMPANY | FASTENAL COMPAI | 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)

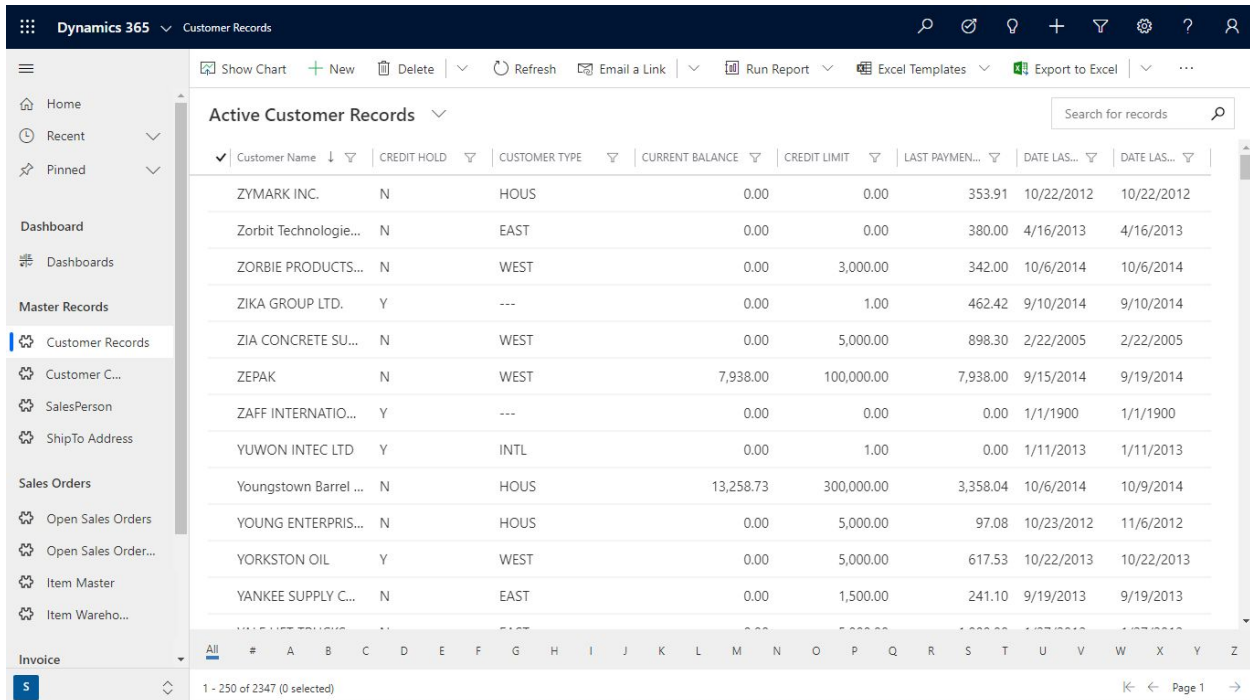
- The AR Invoice is a record that is synced and related to the **Invoiced Sales Order Data**, and **Invoice Payments**.
- The AR Invoice data is useful for identifying unpaid invoices and locating the data, in which the customer needs to pay for the services used.
- The other records which are used in 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

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

What if I have an existing Microsoft Dynamics 365 database?

Clients with existing records in both Infor Distribution SX.e 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 Commercient do with Microsoft Dynamics 365?

Data synchronization is the first step towards a total solution. Ask about these additional modules for Infor Distribution SX.e;

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

Company Information:

Commercient is a cloud-based company that connects Microsoft Dynamics 365 directly to your Infor Distribution SX.e system. Our open SYNC Agent works with software such as Epicor, 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.



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For more information, please use the Contact Us link on
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