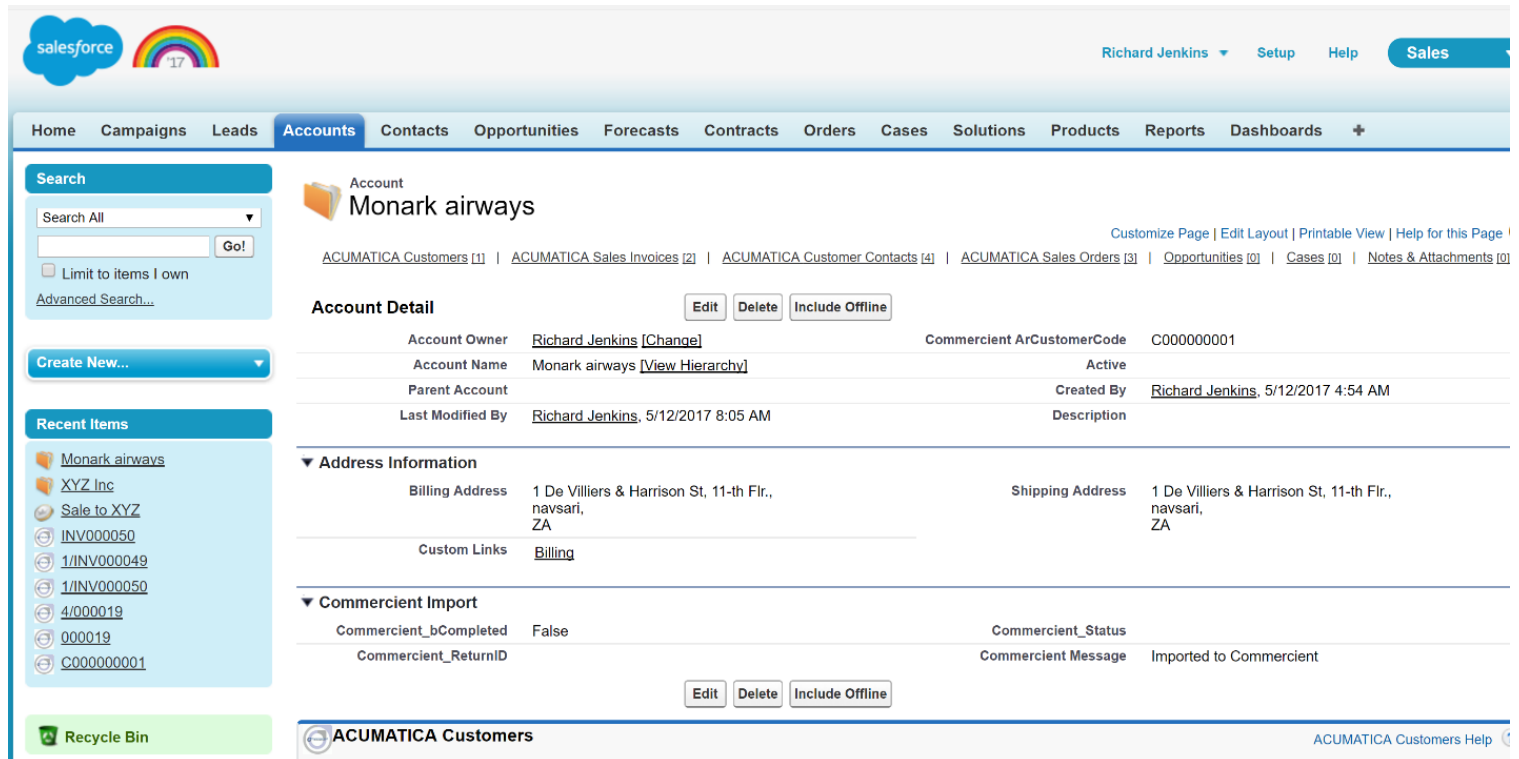


## App Name: Commercient SYNC for ACUMITICA and Salesforce CRM

**Commercient SYNC for ACUMITICA and Salesforce CRM** integrates your ACUMITICA system with Salesforce CRM. Compatible with ACUMITICA ERP, the Commercient SYNC Agent is rapidly deployable and gives you access to your ACUMITICA customer and order information in Salesforce CRM.



The screenshot displays the Salesforce CRM interface. The top navigation bar includes the Salesforce logo, a rainbow icon, and the user name 'Richard Jenkins' with links for 'Setup', 'Help', and 'Sales'. The main navigation bar lists various tabs: Home, Campaigns, Leads, Accounts (selected), Contacts, Opportunities, Forecasts, Contracts, Orders, Cases, Solutions, Products, Reports, and Dashboards. On the left sidebar, there is a 'Search' section with a search bar and a 'Go!' button, and a 'Recent Items' section listing recent accounts and invoices. The main content area shows the 'Account Detail' for 'Monark airways'. It includes fields for 'Account Owner' (Richard Jenkins), 'Account Name' (Monark airways), 'Parent Account', 'Last Modified By' (Richard Jenkins), 'Commercient ArCustomerCode' (C000000001), 'Active' status, 'Created By' (Richard Jenkins), and 'Description'. Below this, there is an 'Address Information' section with 'Billing Address' and 'Shipping Address' both set to '1 De Villiers & Harrison St, 11-th Flr., navsari, ZA'. There is also a 'Commercient Import' section with fields for 'Commercient\_bCompleted' (False), 'Commercient\_ReturnID', 'Commercient\_Status', and 'Commercient Message' (Imported to Commercient). At the bottom, there is a 'Recycle Bin' button and a link to 'ACUMITICA Customers'.

### About the SYNC:

- ACUMITICA data is automatically mapped to Salesforce CRM so you don't have to program anything.
- Changes are reflected in Salesforce CRM as the records in ACUMITICA change.
- Commercient SYNC for ACUMITICA is built by ERP integration experts.
- Commercient software provides ACUMITICA users with a "CRM in the cloud" experience.
- Any field synced from ACUMITICA can be displayed on the Salesforce CRM screen. All of the data Commercient syncs to Salesforce becomes part of Salesforce CRM's native database. As such, you can perform any Salesforce CRM function on the data—from graphing to dashboards to using third party apps that can make use of the data.
- Commercient has provided the means to make the data searchable in Salesforce CRM. For instance, search for a serial number and find the Invoice Records and Sales Order records that pertain to it.

- The SYNC tool only uploads or updates data when it changes. Commercient has an eye for detail and has programmed its services to make efficient use of tracking changes and submitting records to the Salesforce CRM API in a single call. The result is that Commercient significantly reduces the likelihood of exceeding the Salesforce CRM AP ACUMITICA limits. In the event that a daily limit is reached, which can occur during the initial SYNC of a large ACUMITICA system, Commercient will continue to SYNC where it left off on the following day.

## What is Synchronization?

The **ACUMITICA AR Customer** record is the first item to be synced. Customers in ACUMITICA are synchronized into Salesforce CRM Account records. The Customer's Ship To and Bill To addresses in ACUMITICA are mapped to Salesforce CRM's address fields using a mapping schema. The ACUMITICA Customer fields can be displayed on the Salesforce CRM screen however you like—you may decide to show Credit Limit, Outstanding Invoice Value, and the On Hold status onto the screen while hiding other fields. By clicking on the ACUMITICA Customer Record, you can see all of the fields that are synchronized.

### ACUMATICA Sales Invoice Detail

[Edit](#) [Delete](#) [Clone](#)

Name	INV000049	Owner	<a href="#">Richard Jenkins [Change]</a>
AccountID	<a href="#">Monark airways</a>	Amount	0.00
ACUMATICA Customer	<a href="#">C000000001</a>	Araccount	110000
ExternalKey	INV000049:Invoice	Balance	17,500.00
Hold	<input checked="" type="checkbox"/>	Batch nbr	
Last modified	5/12/2017 3:56 AM	Branch	SOFT
Payment method	CASH	Captured amount	0.00
Payment ref		Currency	USD
Payment total	0.00	Customer id	C000000001
Reference nbr	INV000049	Customer order	CO123-jk55gfg5
Status	On Hold	Date	4/18/2017 7:30 AM
Type	Invoice	Description	Monark airways sales order
		Discount total	0.00
		Due date	5/18/2017 7:30 AM
Created By	<a href="#">Richard Jenkins</a> , 5/12/2017 6:19 AM	Last Modified By	<a href="#">Richard Jenkins</a> , 5/12/2017 8:05 AM

[Edit](#) [Delete](#) [Clone](#)

ACUMATICA Sales Invoice Details								<a href="#">ACUMATICA Sales Invoice Details Help</a> <a href="#">?</a>	
Action	Name	Branch id	Line nbr	Product	Quantity	Amount	Reference nbr	Unit price	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">1/INV000049</a>	SOFT	1.00	CONSULT	100.00	10,000.00	INV000049	100.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">2/INV000049</a>	WEST	2.00	CONSULT	150.00	7,500.00	INV000049	50.00	

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 Always show me [▼ more](#) records per related list

Once the Customer Record is in Salesforce CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Salesforce CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects in Salesforce CRM in order to simplify the Salesforce CRM screens. With this approach, a user can easily see Sales orders and Detail Lines with their Invoices, as well as

viewing the status of Sales Orders as they change in ACUMITICA. Cleansing of Cancelled ACUMITICA Sales Order data from Salesforce CRM is performed automatically.

Commercient has crafted the relationships with the data objects in Salesforce CRM so that you are able to decide which objects you would like to display onscreen. You are always able to click to other parent- 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 salespeople to see what was sold and shipped from the main Account screen without clicking anywhere; they can still click the Sales Order link on the detail line to open the full Sales Order Screen.

**The AR Invoice** records are synced and related to the **Invoiced Sales Order Data**, and the **Invoice Payments**. The AR Invoice data is useful for spotting unpaid invoices and being able to drill down into the data. The other records which are synchronized include the **AR Customer Ship to Tax Exemptions**, **Item Master**, and **Item Warehouse**. Commercient creates **Salesforce CRM Products** from the **Item Master** and associates 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**.

ACUMATICA Sales Invoice Details Detail

Edit
Delete
Clone

Name	1/INV000049	Owner	<a href="#">Richard Jenkins [Change]</a>
ACUMATICA Sales Invoice	<a href="#">INV000049</a>	Branch id	SOFT
Order nbr		Shipment nbr	
Order line nbr	0.00	Order type	
Tran type	INV	Product	CONSULT
Uom	HOUR	Transaction descr	Consulting service
Discount percent	0.00	Quantity	100.00
Discount amount	0.00	Unit price	100.00
Discount code		Manual price	<input checked="" type="checkbox"/>
Discount sequence		Amount	10,000.00
Manual discount	<input type="checkbox"/>	Deductible amount	0.00
Description	Sales - Consulting Services	Account	403000
		Subaccount	0000000
		Tax category	EXEMPT
		Salesperson id	

▼ Other Details

Commissionable	<input type="checkbox"/>	Project task	
Deferral code		Reference nbr	INV000049
ExternalKey	SOFT:1:INV000049	Rotor rutdeductible	<input type="checkbox"/>
Item type		Subitem	
Last modified	5/12/2017 3:56 AM	Term end date	12/31/1899 4:00 PM
Line nbr	1.00	Term start date	12/31/1899 4:00 PM
Original deferral schedule	0.00	Typeof work	
Line type	Misc. Charge		
Created By	<a href="#">Richard Jenkins</a> , 5/12/2017 6:46 AM	Last Modified By	<a href="#">Richard Jenkins</a> , 5/12/2017 8:05 AM

**ACUMITICA Customer Detail**
[Edit](#) [Delete](#) [Clone](#)

Name	C000000001	Owner	<a href="#">Richard Jenkins [Change]</a>
Account	<a href="#">Monark airways</a>	Account ref	ACC001
Customer id	C000000001	Customer name	Monark airways
Status	Active	Credit limit	0.00
Customer class	DEFAULT	Unreleased balance	10.00
Price class id		Remaining credit limit	0.00
Open orders balance	-1,250,000.00	Credit days past due	0.00
Currency id	USD	Credit verification	Disabled
Order priority	0.00	Ship via	
		Warehouse id	

**Other Info**

ExternalKey	C000000001	Shipping branch	
First invoice date	12/31/1899 4:00 PM	Shipping contact	
Fobpoint		Shipping contact same as main	<input type="checkbox"/>
Last modified	5/12/2017 2:43 AM	Shipping rule	Cancel Remainder
Lead timedays	0.00	Shipping terms	
Location name		Shipping zone id	

## ***What if I have an existing Salesforce CRM database?***

Clients with existing records in both ACUMITICA and Salesforce CRM 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 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 sub-queries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)

## ***What else does Commercient do with Salesforce CRM?***

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

- 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 ACUMITICA Invoices
- Automatic ACUMITICA Sails Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to ACUMITICA AR Customer

## System Requirements:

Salesforce CRM Group, Professional, Enterprise editions or higher. Salesforce CRM API is included at no charge.

## Company Information:

Commercient is a cloud-based company that connects Salesforce CRM directly to your ACUMITICA 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 [www.commercient.com](http://www.commercient.com).

ACUMITICA Customers							ACUMITICA Customers Help ?	
Action	Name	Customer id	Customer name	Customer class	Credit limit	Status		
<a href="#">Edit</a>   <a href="#">Del</a>	C000000001	C000000001	Monark airways	DEFAULT	0.00	Active		

ACUMITICA Sales Invoices								ACUMITICA Sales Invoices Help ?	
Action	Name	Reference nbr	Date	Payment method	Branch	Amount	Payment total	Status	
<a href="#">Edit</a>   <a href="#">Del</a>	INV000049	INV000049	4/18/2017 7:30 AM	CASH	SOFT	0.00	0.00	On Hold	
<a href="#">Edit</a>   <a href="#">Del</a>	INV000050	INV000050	5/10/2017 7:30 AM	CHECK	SOFT	500.00	0.00	On Hold	

ACUMITICA Customer Contacts							ACUMITICA Customer Contacts Help ?	
Action	Name	Display name	Position	Phone1	Email	Web		
<a href="#">Edit</a>   <a href="#">Del</a>	Hilson Tommy, Mr.	Hilson Tommy, Mr.	Manager	999457484	pintu@commercient.com			
<a href="#">Edit</a>   <a href="#">Del</a>	laymack symond, Mr.	laymack symond, Mr.	accountant	+166655845	symond@dom.com			
<a href="#">Edit</a>   <a href="#">Del</a>	Venture Lulia, Miss	Venture Lulia, Miss	HR	+1 (777) 1256 698	lulia@venture.com			
<a href="#">Edit</a>   <a href="#">Del</a>	Wiley Jason, Mr.	Wiley Jason, Mr.	Manger	+1 (777) 1254 789	Jason@dynamic.com			

ACUMITICA Sales Orders								ACUMITICA Sales Orders Help ?	
Action	Name	Order nbr	Date	Status	Order total	Order type	Ordered qty		
<a href="#">Edit</a>   <a href="#">Del</a>	000019	000019	5/11/2017 7:30 AM	Open	129,300.00	SO	180.00		
<a href="#">Edit</a>   <a href="#">Del</a>	000020	000020	5/11/2017 7:30 AM	On Hold	696,130.00	SO	5,425.00		
<a href="#">Edit</a>   <a href="#">Del</a>	000021	000021	5/11/2017 7:30 AM	On Hold	906,000.00	SO	320.00		