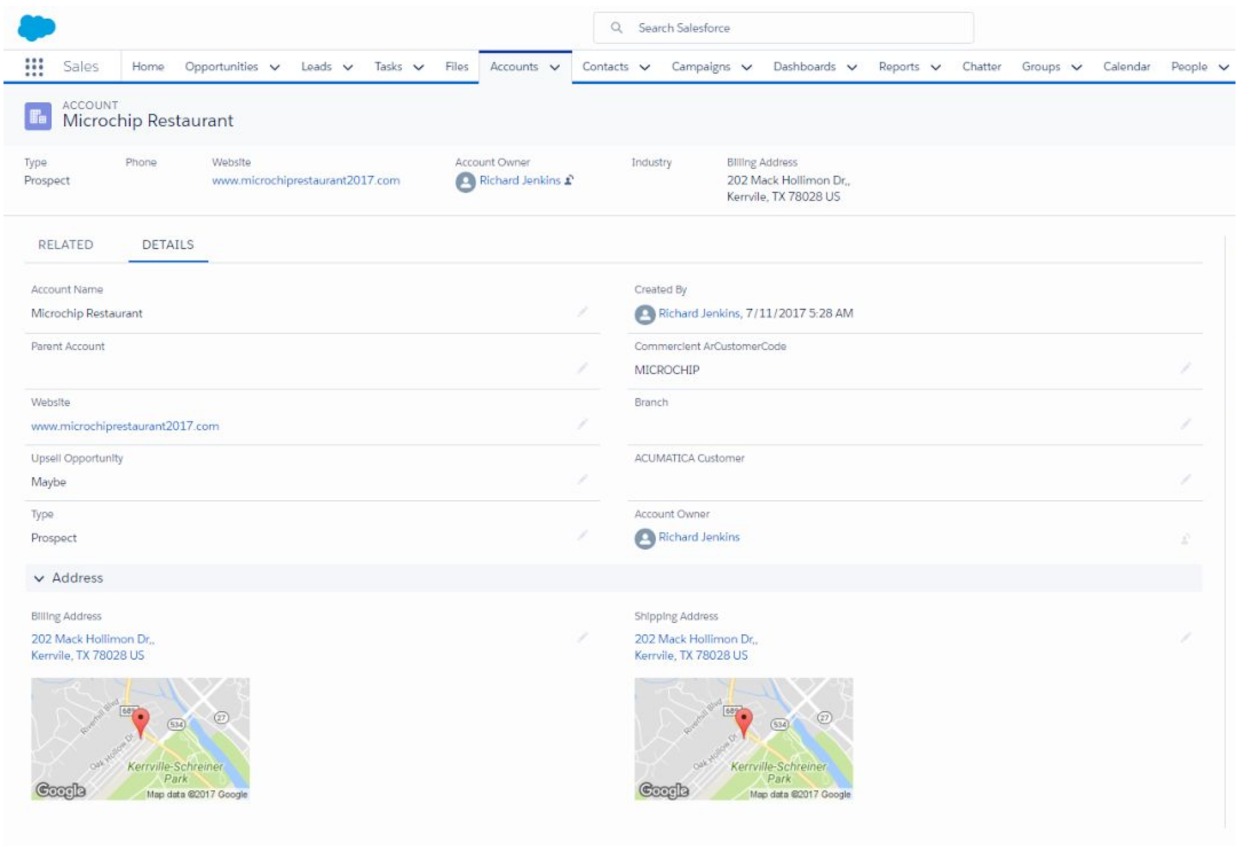
SYNC for ACUMATICA and Salesforce CRM

App Name: Commercient SYNC for ACUMATICA and Salesforce CRM

Commercient SYNC for ACUMATICA and Salesforce CRM effectively integrates your ACUMATICA system with your Salesforce CRM. Compatible with ACUMATICA ERP, the Commercient SYNC Agent can be deployed rapidly and gives you easy access to your ACUMATICA customer and order information in a user-friendly format within your Salesforce CRM.



About the SYNC:

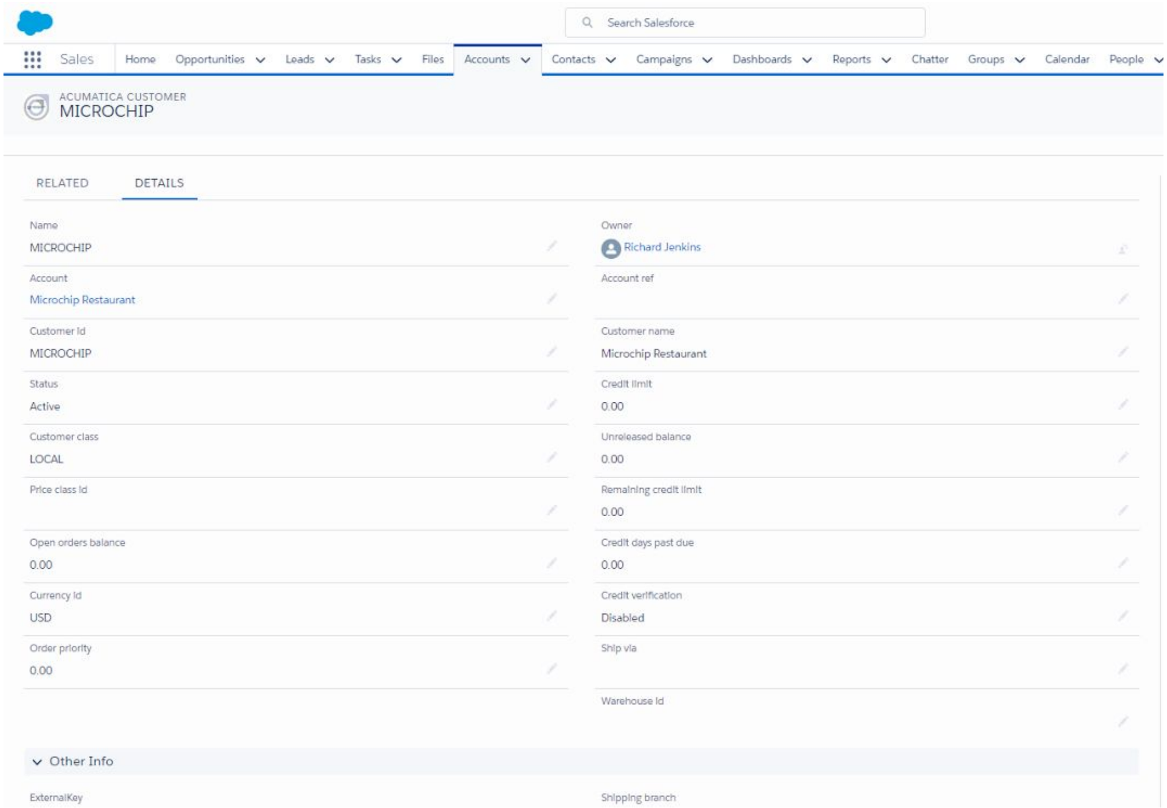
- ACUMATICA data is automatically mapped to Salesforce CRM so you don't have to program anything.
- Changes are reflected in your Salesforce CRM as soon as the records in ACUMATICA change.
- Commercient SYNC for ACUMATICA is built by ERP integration experts.
- Commercient software provides ACUMATICA users with all the benefits of a "CRM in the cloud" experience.
- Any field synced from ACUMATICA 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 you'll 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 ACUMATICA limits. In the event that a daily limit is reached, which can occur during the initial SYNC of a large ACUMATICA system, Commercient will continue to SYNC where it left off on the following day.

What is Synchronized?

The ACUMATICA AR Customer record is the first item to be synced. Customers in ACUMATICA are synchronized into Salesforce CRM Account records. The Customer's Ship To and Bill To addresses in ACUMATICA are mapped to Salesforce CRM's address fields using a mapping schema. The ACUMATICA 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 ACUMATICA Customer Record, you can see all of the fields that are synchronized.



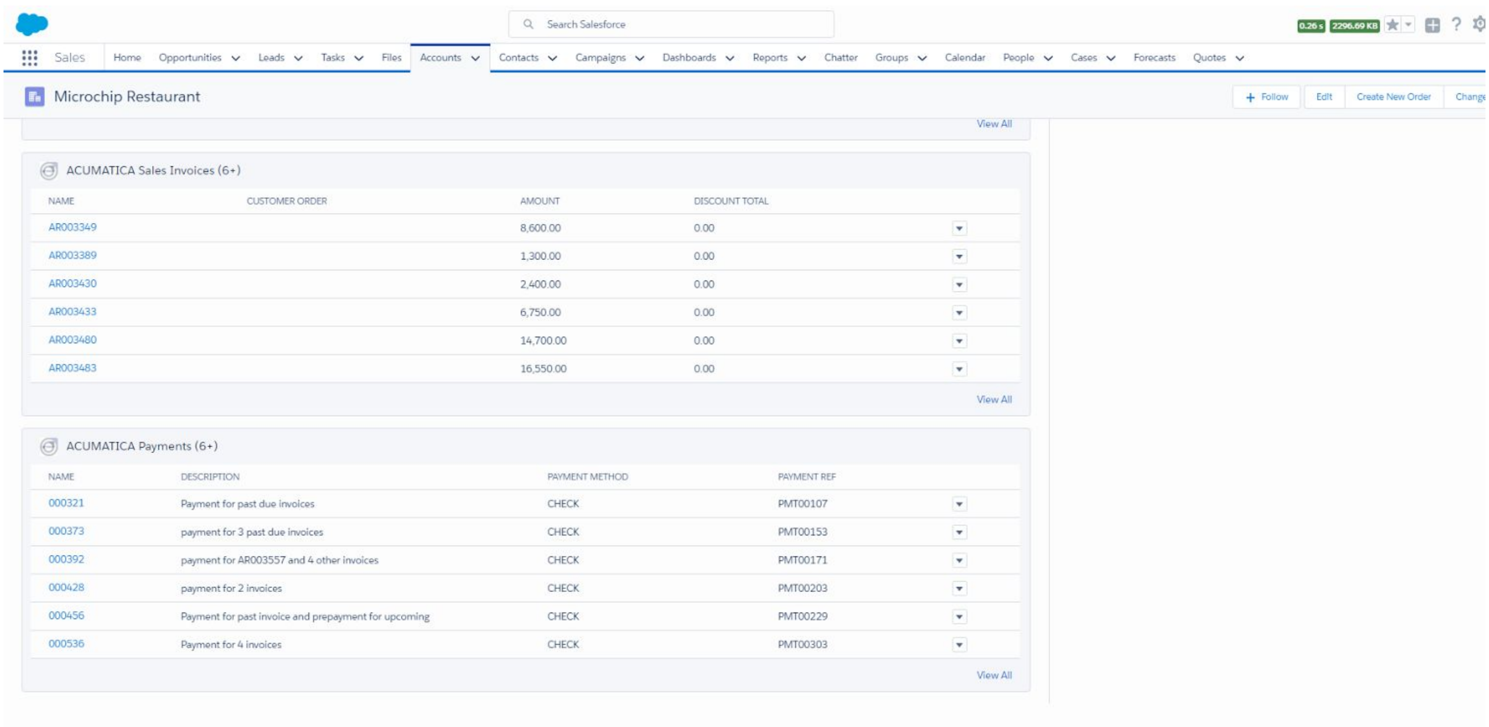
Once the Customer Record is in Salesforce CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Salesforce CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects in 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 ACUMATICA. Cleansing of Cancelled ACUMATICA Sales Order data from Salesforce CRM is performed automatically, drastically cutting down the amount of manual labor you team has to do.

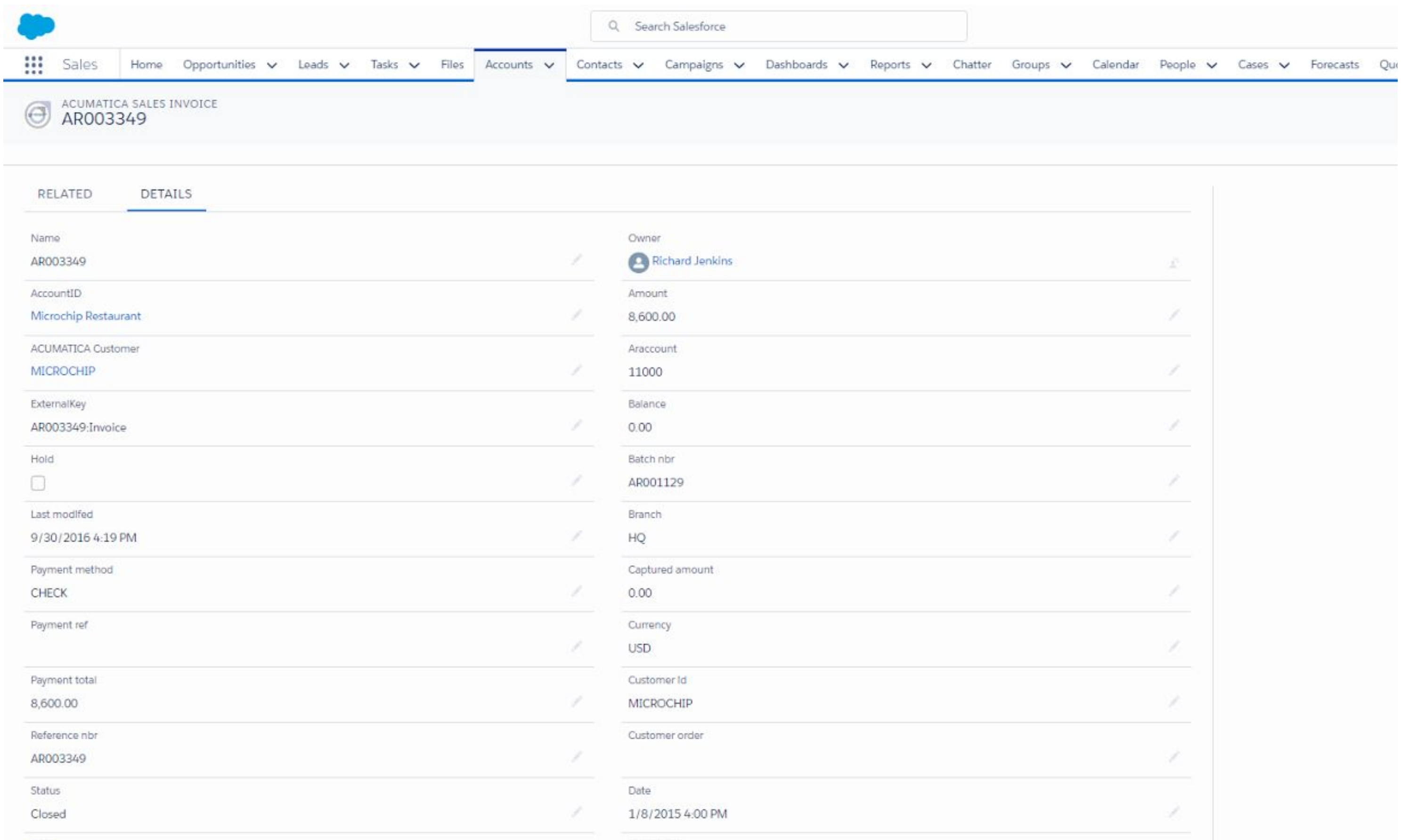
Commercient has crafted the relationships with the data objects in Salesforce CRM so that you are able to decide which objects you would like to display onscreen. You are always able to click to other parent- or child-related objects. For example, an Admin user can remove the Sales Orders from the Account 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**.





What if I have an existing Salesforce CRM database?

Clients with existing records in both ACUMATICA 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 ACUMATICA:

- 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 ACUMATICA Invoices
- Automatic ACUMATICA Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to ACUMATICA 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 ACUMATICA 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.