# SYNC for Epicor and Salesforce

***Commercient SYNC for Epicor and Salesforce***

Commercient SYNC, the #1 data integration platform that integrates your data between Epicor and Salesforce. The Commercient SYNC Agent is rapidly deployable and gives you access to your Epicor customer and order information in Salesforce. We work with the following: Epicor 10, Epicor Prophet 21, P21, Epicor Eclipse, Epicor Eagle, Epicor 9, Dataworks, DCD, Scala, ROI (Manage2000), and Epicor 10 Cloud Version.

***About SYNC:***

Commercient SYNC is created by ERP and CRM data integration experts. By having that, SYNC creates a simple data integration pathway between your Epicor and Salesforce. Once the data integration takes place, your Epicor data is automatically loaded into your Salesforce without programming, coding, mapping, or servers required. SYNCing data is a cloud-based experience that ensures your data is protected. SYNC has the following benefits:

- Data integrated from Epicor to Salesforce becomes native data inside Salesforce CRM. Being native data inside the CRM means bringing data from your Epicor over to Salesforce in which you can perform any function from that data and manipulate it to the way you need it, for example, connecting to third-party apps and creating dashboards
- Inside Salesforce, the system provides the function of a user-friendly search engine to look up data that is SYNCed from Epicor because the data is native, it is searchable. For instance, looking for a serial number that relates to a Sales Order record or Invoice Record
- The Commercient SYNC app developed for Epicor and Salesforce detects changes in either database whether it is Epicor or Salesforce and SYNC only those changes in the data within either system

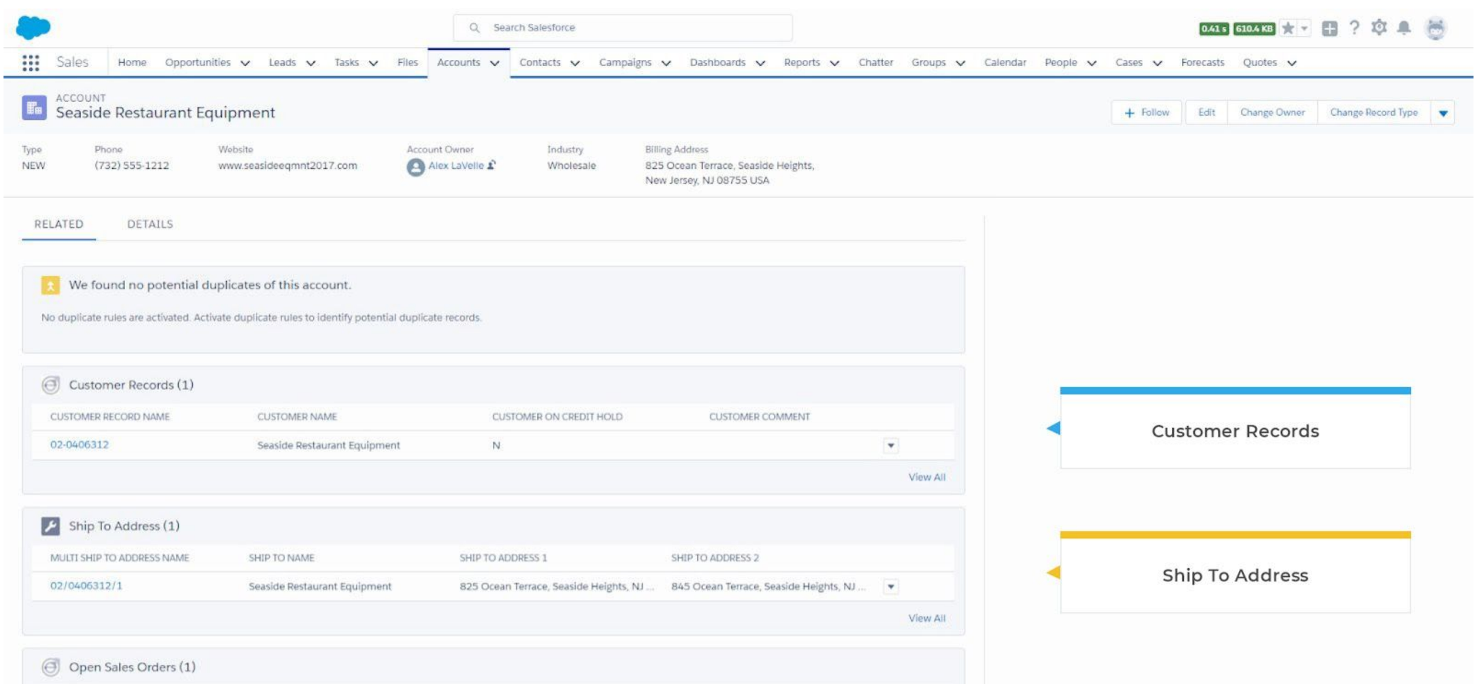
***What if I have an existing Salesforce database?***

When you have existing data in both systems (Epicor and Salesforce) the following steps will take place, first, the data will need to be backed up, second, you will come to a point when integrating the data and you will have to do deduplication on 3 items that we have a native function inside our Commercient SYNC app that also leverages artificial intelligence(AI) for following items listed below:

- Accounts: Deduplication happens here when customer names are spelled incorrectly and deduplication for child-parent relationships, form part of the standard purchase of Commercient SYNC at no additional costs.
- Customers: They need deduplication as there are customers with no accounts that are contacts and there is an AI for this.
- Products/Items: Deduplication happens for this when there is a different item description over the same product.

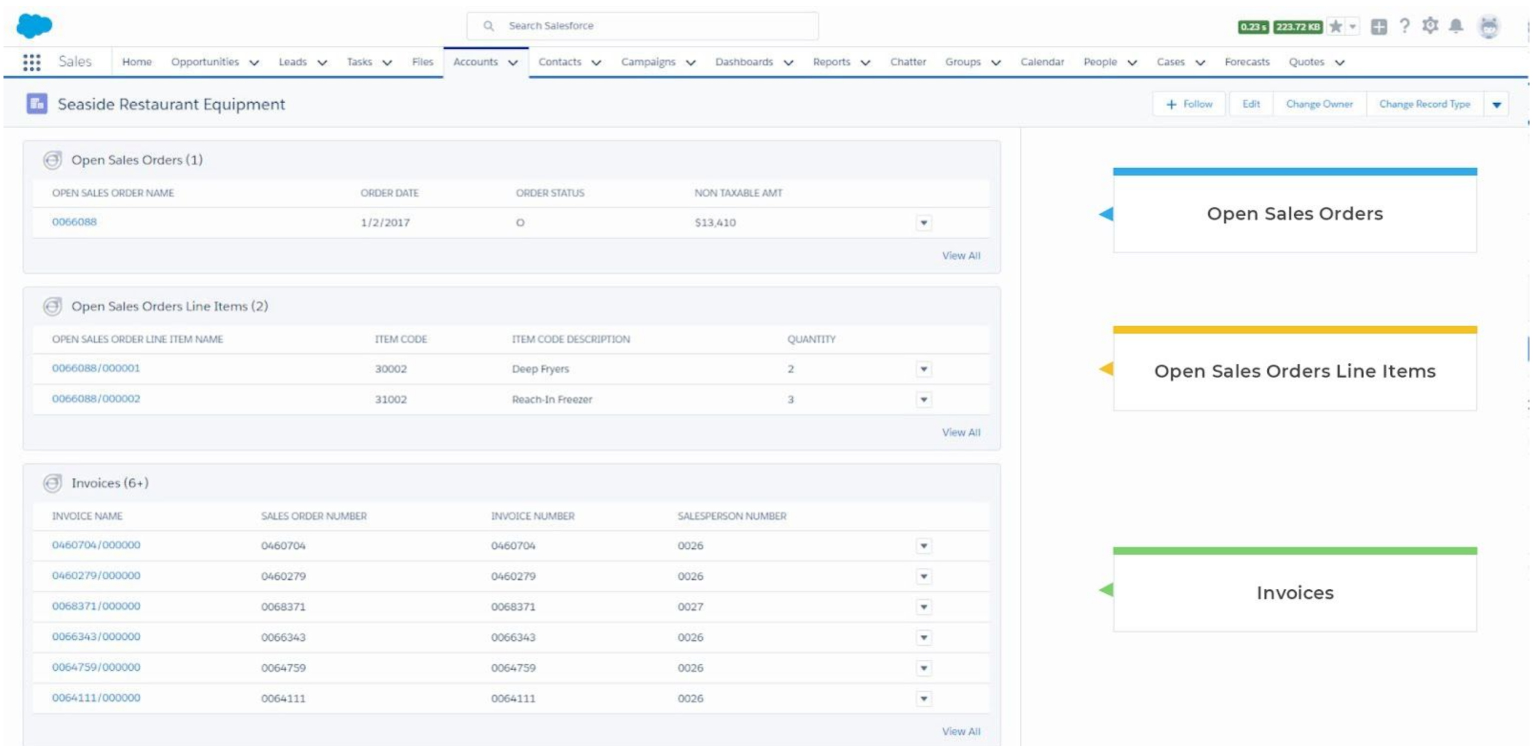
### *What does SYNC offer?*

Customers in Epicor are integrated into Salesforce. The first item to be SYNCed is your **AR Customer Record** and once this is completed, all the fields can be shown. Customers Ship To and Bill To address in Epicor are merged into Salesforce, which can be displayed according to their needs. By clicking on the Epicor Customer Record, you can see all the fields that are synchronized.



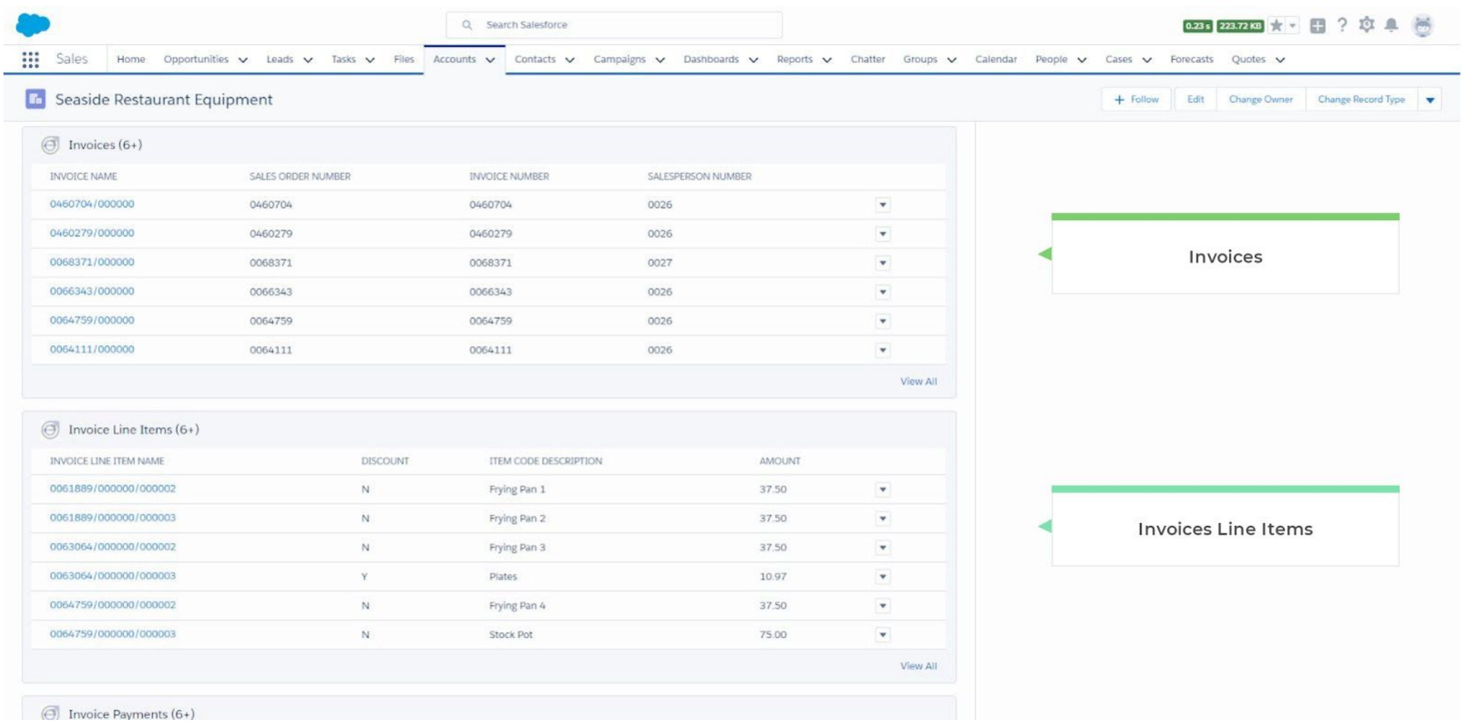
### *Sales Order With Line Item Details*

Once the Customer Record is in Salesforce, Commercient then SYNCs the **Sales Orders and their Detail Lines** which relates them to the corresponding Salesforce Account record. A customer object is then created in Salesforce as the Sales Order data and Invoice Sales Order data is combined into one 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 Epicor. When removing Epicor Sales Order data that has been canceled from Salesforce, it performs automatically.



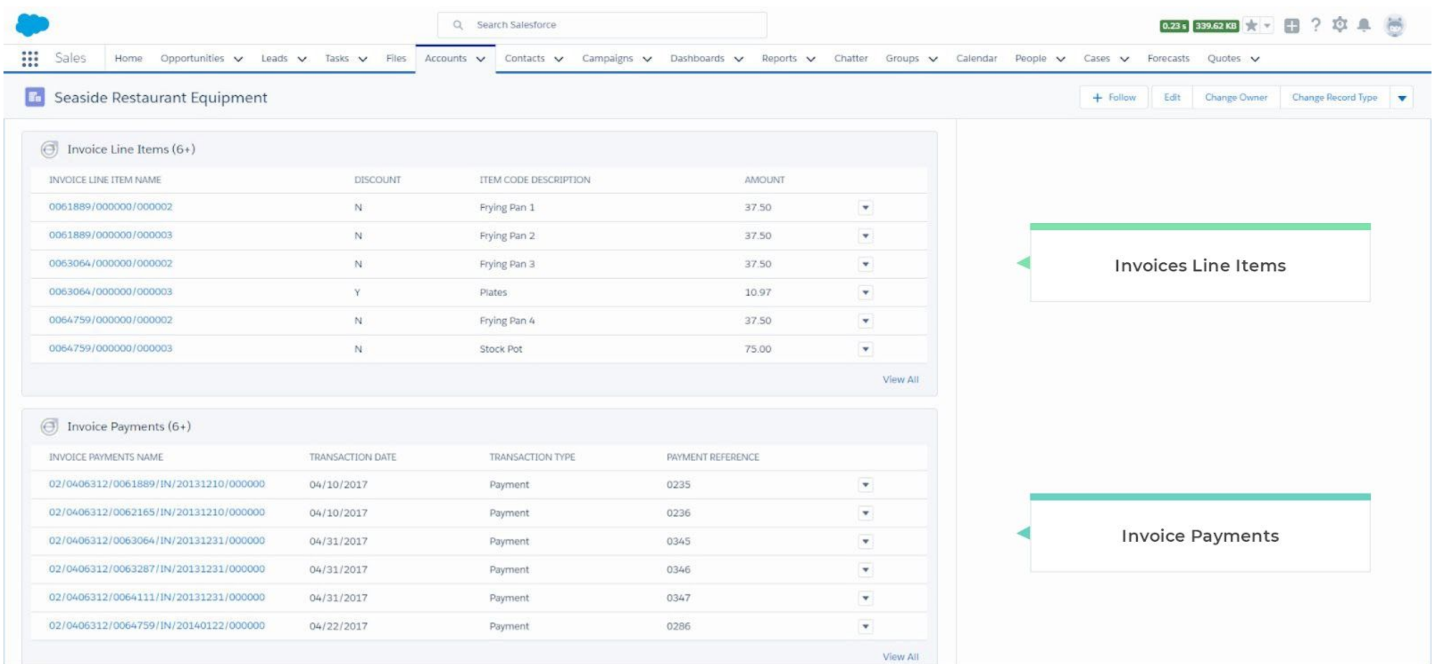
### *Sales Order Screen Showing Account Object*

Commercient has designed the relationships with the data objects in Salesforce 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 instance, 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 AR Invoice

- 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 **Salesforce 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.**



***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 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?***

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

- 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 Epicor Invoices
- Automatic Epicor Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/ Wholesaler Self-Service Portal
- Custom Data Synchronization
- Account Conversion to Epicor AR Customer

***Company Information:***

Commercient is a cloud-based company that connects Salesforce directly to your Epicor system. Our open SYNC Agent works with software such as ECi M1, 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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