

Commercient SYNC for Xero and Salesforce

Commercient SYNC, the #1 data integration platform that integrates your data between Xero and Salesforce. The Commercient SYNC Agent is rapidly deployable and gives you access to your Xero customer and order information in Salesforce. We work with Xero the cloud-based ERP.

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 Xero and Salesforce. Once the data integration takes place, your Xero 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 Xero to Salesforce becomes native data inside Salesforce CRM. Being native data inside the CRM means bringing data from your Xero 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 Xero 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 Xero and Salesforce detects changes in either database whether it is Xero or Salesforce and SYNC only those changes in the data within either system

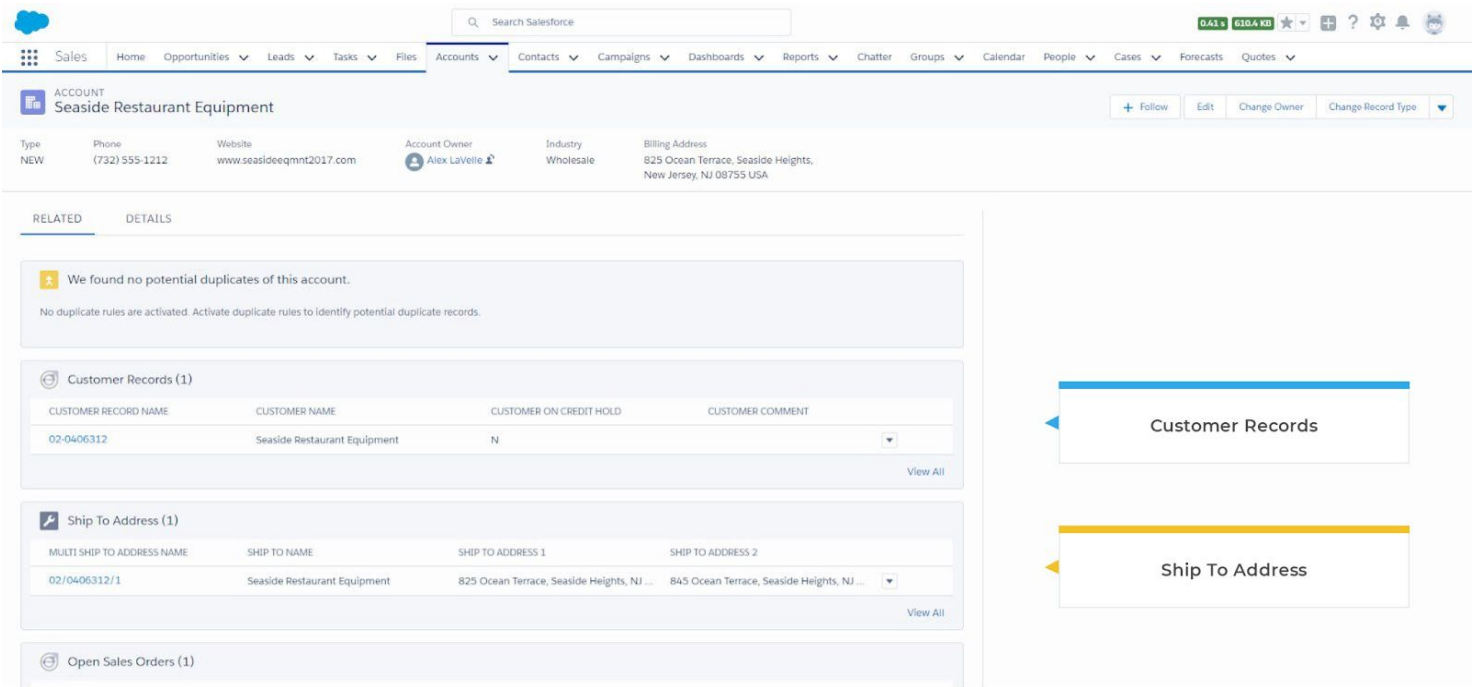
What if I have an existing Salesforce database?

When you have existing data in both systems (Xero 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 Commerciant 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 Commerciant 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 Xero 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 Xero are merged into Salesforce, which can be displayed according to their needs. By clicking on the Xero Customer Record, you can see all the fields that are synchronized.



The screenshot shows the Salesforce interface for an account named "Seaside Restaurant Equipment". The account is of Type "NEW". Key details include: Phone (732) 555-1212, Website www.seasideeqmnt2017.com, Account Owner Alex LaVelle, Industry Wholesale, and Billing Address 825 Ocean Terrace, Seaside Heights, New Jersey, NJ 08755 USA.

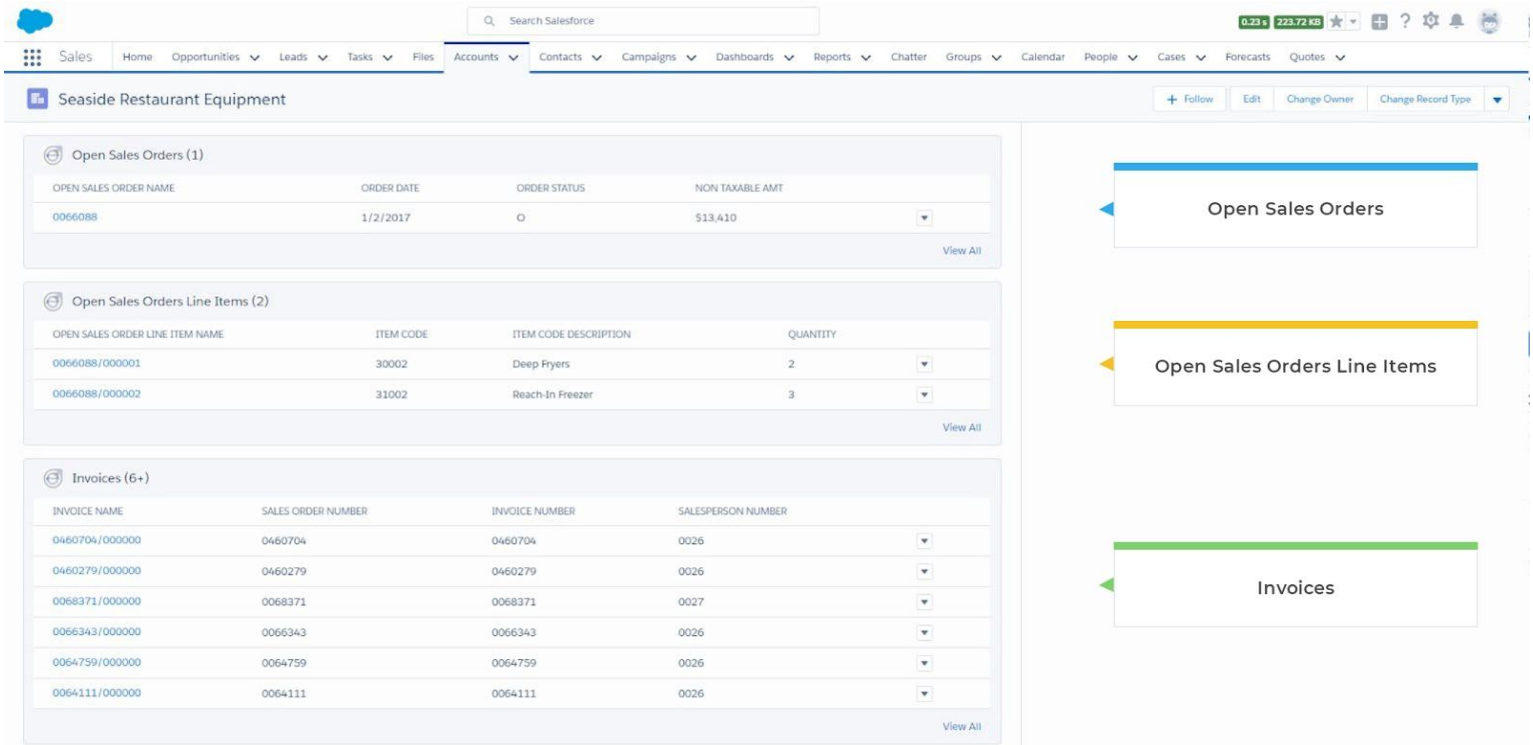
Under the "RELATED" tab, there are three sections:

- Customer Records (1)**: A table with columns: CUSTOMER RECORD NAME, CUSTOMER NAME, CUSTOMER ON CREDIT HOLD, and CUSTOMER COMMENT. The record shown is 02-0406312, Seaside Restaurant Equipment, N.
- Ship To Address (1)**: A table with columns: MULTI SHIP TO ADDRESS NAME, SHIP TO NAME, SHIP TO ADDRESS 1, and SHIP TO ADDRESS 2. The record shown is 02/0406312/1, Seaside Restaurant Equipment, 825 Ocean Terrace, Seaside Heights, NJ ...
- Open Sales Orders (1)**: A section for open sales orders.

On the right side of the screenshot, there are two callout boxes with arrows pointing to the "Customer Records" and "Ship To Address" sections.

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 Xero. When removing Xero Sales Order data that has been canceled from Salesforce, it performs automatically.



The screenshot displays the Salesforce interface for a record titled "Seaside Restaurant Equipment". The interface includes a top navigation bar with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Quotes. A search bar is also present.

Below the navigation bar, there are three main sections:

- Open Sales Orders (1)**: A table showing one sales order.

OPEN SALES ORDER NAME	ORDER DATE	ORDER STATUS	NON TAXABLE AMT
0066088	1/2/2017	O	\$13,410
- Open Sales Orders Line Items (2)**: A table showing two line items for the selected sales order.

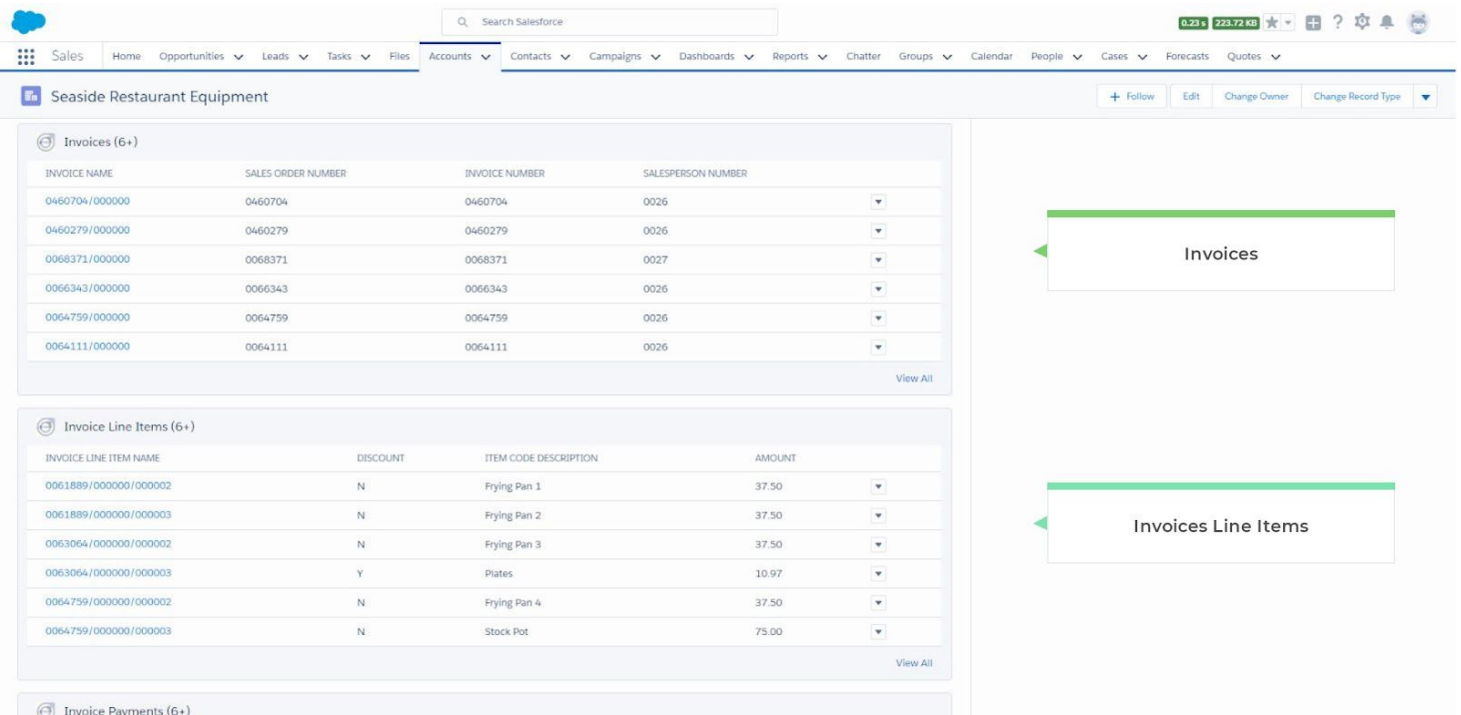
OPEN SALES ORDER LINE ITEM NAME	ITEM CODE	ITEM CODE DESCRIPTION	QUANTITY
0066088/000001	30002	Deep Fryers	2
0066088/000002	31002	Reach-In Freezer	3
- Invoices (6+)**: A table showing six invoices related to the sales orders.

INVOICE NAME	SALES ORDER NUMBER	INVOICE NUMBER	SALESPERSON NUMBER
0460704/000000	0460704	0460704	0026
0460279/000000	0460279	0460279	0026
0068371/000000	0068371	0068371	0027
0066343/000000	0066343	0066343	0026
0064759/000000	0064759	0064759	0026
0064111/000000	0064111	0064111	0026

On the right side of the interface, there are three colored boxes with arrows pointing to the corresponding sections: a blue box for "Open Sales Orders", a yellow box for "Open Sales Orders Line Items", and a green box for "Invoices".

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.



Search Salesforce

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Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts Quotes

Seaside Restaurant Equipment + Follow Edit Change Owner Change Record Type

Invoices (6+)

INVOICE NAME	SALES ORDER NUMBER	INVOICE NUMBER	SALESPERSON NUMBER
0460704/000000	0460704	0460704	0026
0460279/000000	0460279	0460279	0026
0068371/000000	0068371	0068371	0027
0066343/000000	0066343	0066343	0026
0064759/000000	0064759	0064759	0026
0064111/000000	0064111	0064111	0026

View All

Invoice Line Items (6+)

INVOICE LINE ITEM NAME	DISCOUNT	ITEM CODE DESCRIPTION	AMOUNT
0061889/000000/000002	N	Frying Pan 1	37.50
0061889/000000/000003	N	Frying Pan 2	37.50
0063064/000000/000002	N	Frying Pan 3	37.50
0063064/000000/000003	Y	Plates	10.97
0064759/000000/000002	N	Frying Pan 4	37.50
0064759/000000/000003	N	Stock Pot	75.00

View All

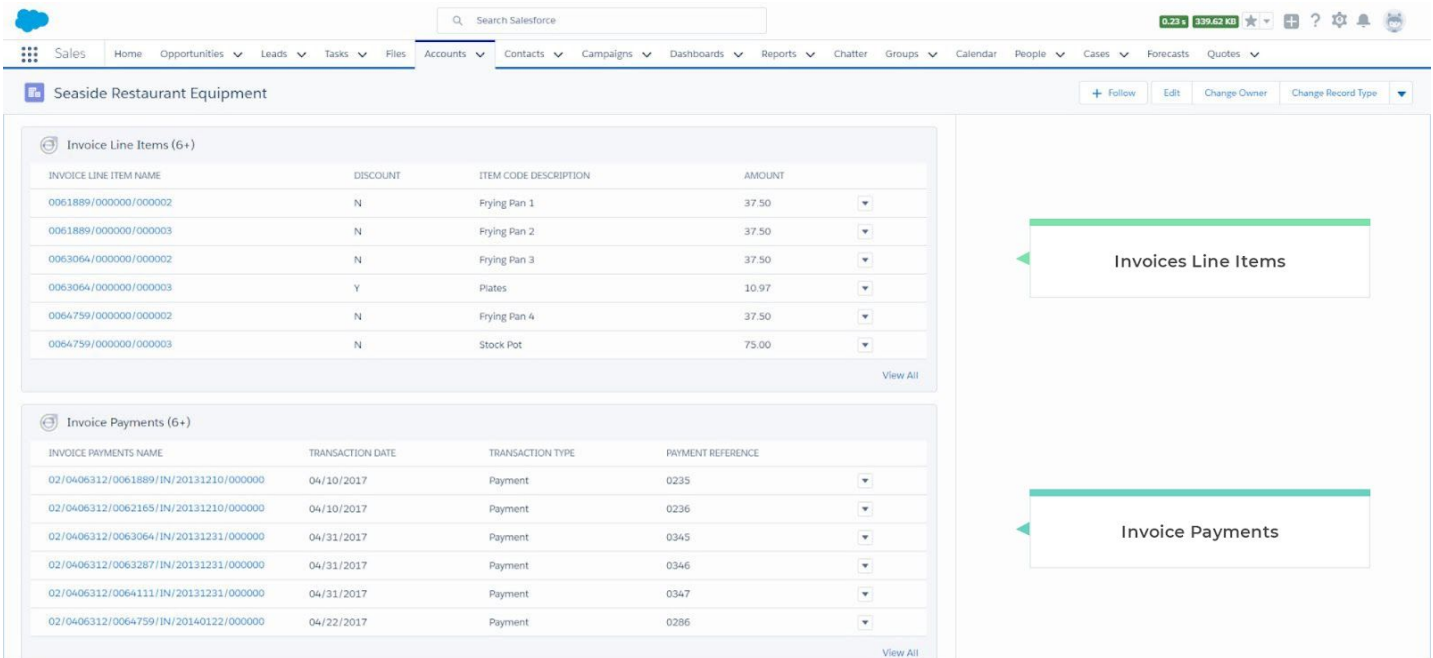
Invoice Payments (6+)

Invoices

Invoices Line Items

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**.



The screenshot displays the Salesforce interface for a record titled "Seaside Restaurant Equipment". The interface includes a navigation bar at the top with various tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and Quotes. A search bar is also present.

Below the navigation bar, there are two main sections:

- Invoice Line Items (6+)**: This section contains a table with the following columns: INVOICE LINE ITEM NAME, DISCOUNT, ITEM CODE DESCRIPTION, and AMOUNT. The data rows are:

INVOICE LINE ITEM NAME	DISCOUNT	ITEM CODE DESCRIPTION	AMOUNT
0061889/000000/000002	N	Frying Pan 1	37.50
0061889/000000/000003	N	Frying Pan 2	37.50
0063064/000000/000002	N	Frying Pan 3	37.50
0063064/000000/000003	Y	Plates	10.97
0064759/000000/000002	N	Frying Pan 4	37.50
0064759/000000/000003	N	Stock Pot	75.00
- Invoice Payments (6+)**: This section contains a table with the following columns: INVOICE PAYMENTS NAME, TRANSACTION DATE, TRANSACTION TYPE, and PAYMENT REFERENCE. The data rows are:

INVOICE PAYMENTS NAME	TRANSACTION DATE	TRANSACTION TYPE	PAYMENT REFERENCE
02/0406312/0061889/IN/20131210/000000	04/10/2017	Payment	0235
02/0406312/0062165/IN/20131210/000000	04/10/2017	Payment	0236
02/0406312/0063064/IN/20131231/000000	04/31/2017	Payment	0345
02/0406312/0063287/IN/20131231/000000	04/31/2017	Payment	0346
02/0406312/0064111/IN/20131231/000000	04/31/2017	Payment	0347
02/0406312/0064759/IN/20140122/000000	04/22/2017	Payment	0286

On the right side of the interface, there are two callout boxes with arrows pointing to the respective tables: "Invoices Line Items" and "Invoice Payments".

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 Xero:

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

Company Information:

Commercient is a cloud-based company that connects Salesforce directly to your Xero 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.

For more information, please use the Contact Us link on <http://www.commercient.com>