
The Commerciant File SYNC App (Formerly Document SYNC)

Capabilities:

Easily import files into CRM with Commerciant's File SYNC product. File SYNC allows users to SYNC files into your CRM. File SYNC app uploads the files into Salesforce as an attachment and links them to the parents object. It supports all types of files that CRMs allow, including but not limited to PDFs, JPG/PNG/BMP, DOCs, XLS/XLSX, TXT, CSV, etc.

If the "Don't allow HTML uploads as attachments" or "document records security setting" is enabled for your organization, you cannot upload files with the following file extensions: .htm, .html, .htt, .htx, .mhtm, .mhtml, .shtm, .shtml, .acgi, .svg.

Please check this [Salesforce link](#) for more details.



Use Cases:

Provide a consistent experience for your users and your customers by SYNCing original files with all of their details into the CRM.

- When you are in your CRM system it is very useful and helpful to be able to pull up and view the same document that your customer has access to. For example, sync Invoice PDFs to your Account records and provide customers with help on their invoice questions by reading from the same paper that they are holding.
- When an ERP or CAD system, or any other system, produces detailed documents and drawings they can now be SYNC'd to the CRM and attached for reference. For example, sync a CAD drawing to an Opportunity automatically, produce more accurate quotes and sales information for your customers, and close sales faster.
- Any file can be SYNC'd to the CRM from your other systems to provide better sales and customer service facilities to your users and customers.

Functionality:

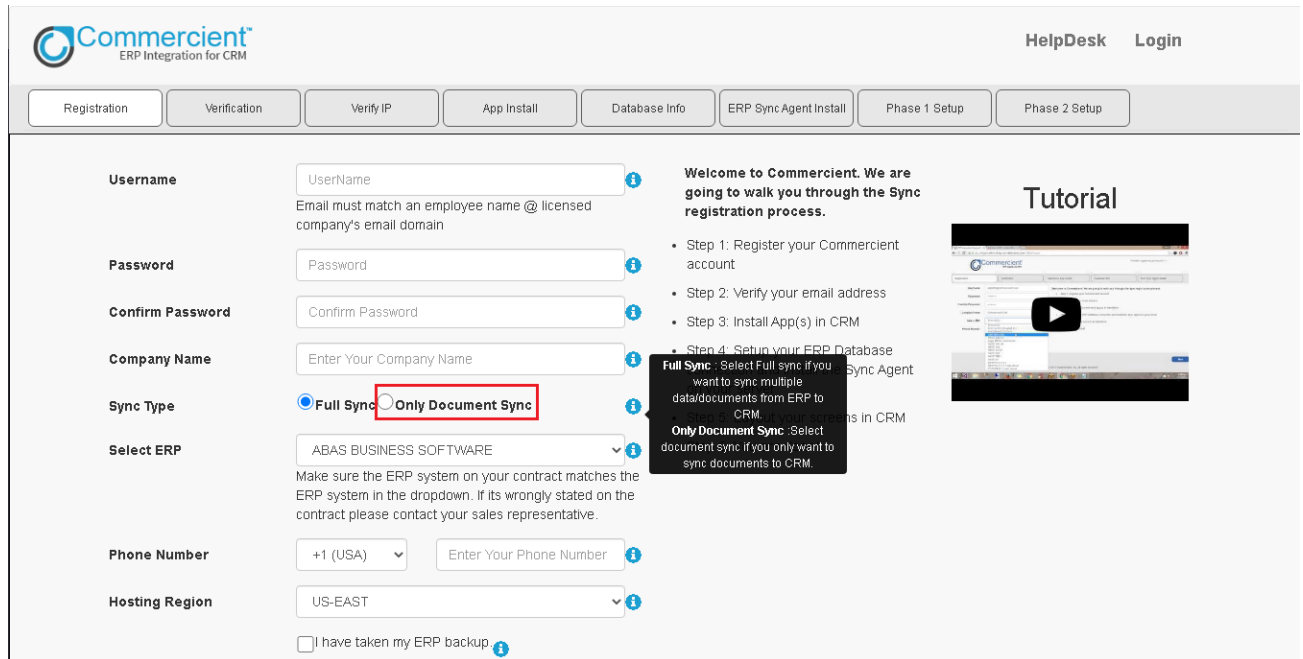
In your ERP you produce many documents such as Invoices, Receipts, Sales Orders, Purchase Orders, Payments, Shipping Notices, Bills of Lading, Bill of Materials, CAD drawings, Technical specifications, Certificates of Analysis (C of A), Quality Documents, Photographs, Spreadsheets etc. All of these documents may be able to be saved to file using the native document creation and management features of your ERP, CAD, or other software, or by using a third party ERP Document Management System.



Commerciant can SYNC any of these files to the CRM and associate them to any of the corresponding records and objects: Contacts, Accounts, Opportunities, Inventory, Orders, etc. in the CRM. If your ERP system does not have a document management facility, you will still be able to save your PDF files by hand to a given folder with a key file name such as InvoiceNumber.PDF and Commerciant can SYNC these documents to your CRM into the corresponding Account/Invoice/Opportunity records. Contact your AE for more details.

How To Start/Setup

1. Register with us by going to <https://registration.shop.commercient.com> with sync type is "Only Document Sync"



The screenshot shows the registration page for Commercient. The page has a header with the logo and navigation links. Below the header is a progress bar with steps: Registration, Verification, Verify IP, App Install, Database Info, ERP Sync Agent Install, Phase 1 Setup, and Phase 2 Setup. The main form area contains fields for Username, Password, Confirm Password, Company Name, Sync Type (with radio buttons for Full Sync and Only Document Sync, where Only Document Sync is selected and highlighted with a red box), Select ERP (a dropdown menu showing ABAS BUSINESS SOFTWARE), Phone Number (with a country code dropdown and a text input), and Hosting Region (a dropdown menu showing US-EAST). There is also a checkbox for "I have taken my ERP backup". To the right of the form, there is a "Tutorial" section with a video player and a list of steps: Step 1: Register your Commercient account, Step 2: Verify your email address, Step 3: Install App(s) in CRM, and Step 4: Setup your ERP Database. A tooltip explains the difference between Full Sync and Only Document Sync.

Commercient™
ERP Integration for CRM

HelpDesk Login

Registration Verification Verify IP App Install Database Info ERP Sync Agent Install Phase 1 Setup Phase 2 Setup

Username Email must match an employee name @ licensed company's email domain

Password

Confirm Password

Company Name

Sync Type ☒ Full Sync ☐ **Only Document Sync**

Select ERP Make sure the ERP system on your contract matches the ERP system in the dropdown. If its wrongly stated on the contract please contact your sales representative.

Phone Number

Hosting Region

☐ I have taken my ERP backup

Welcome to Commercient. We are going to walk you through the Sync registration process.

- Step 1: Register your Commercient account
- Step 2: Verify your email address
- Step 3: Install App(s) in CRM
- Step 4: Setup your ERP Database

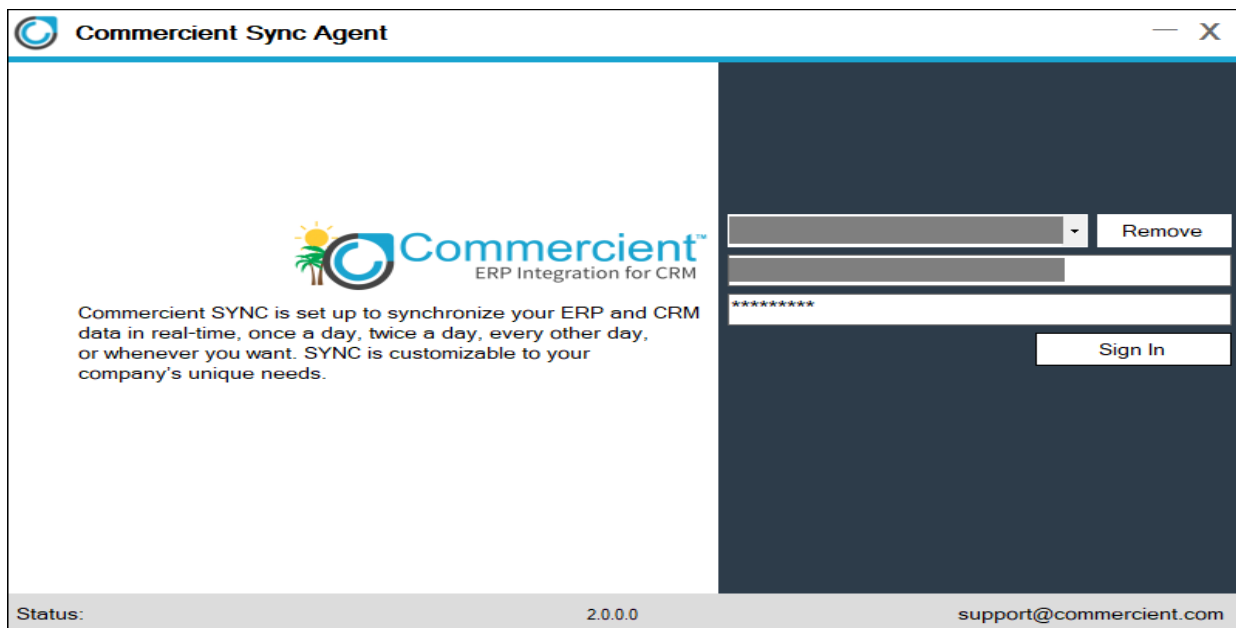
Full Sync: Select Full sync if you want to sync multiple data/documents from ERP to CRM.

Only Document Sync: Select document sync if you only want to sync documents to CRM.

Tutorial

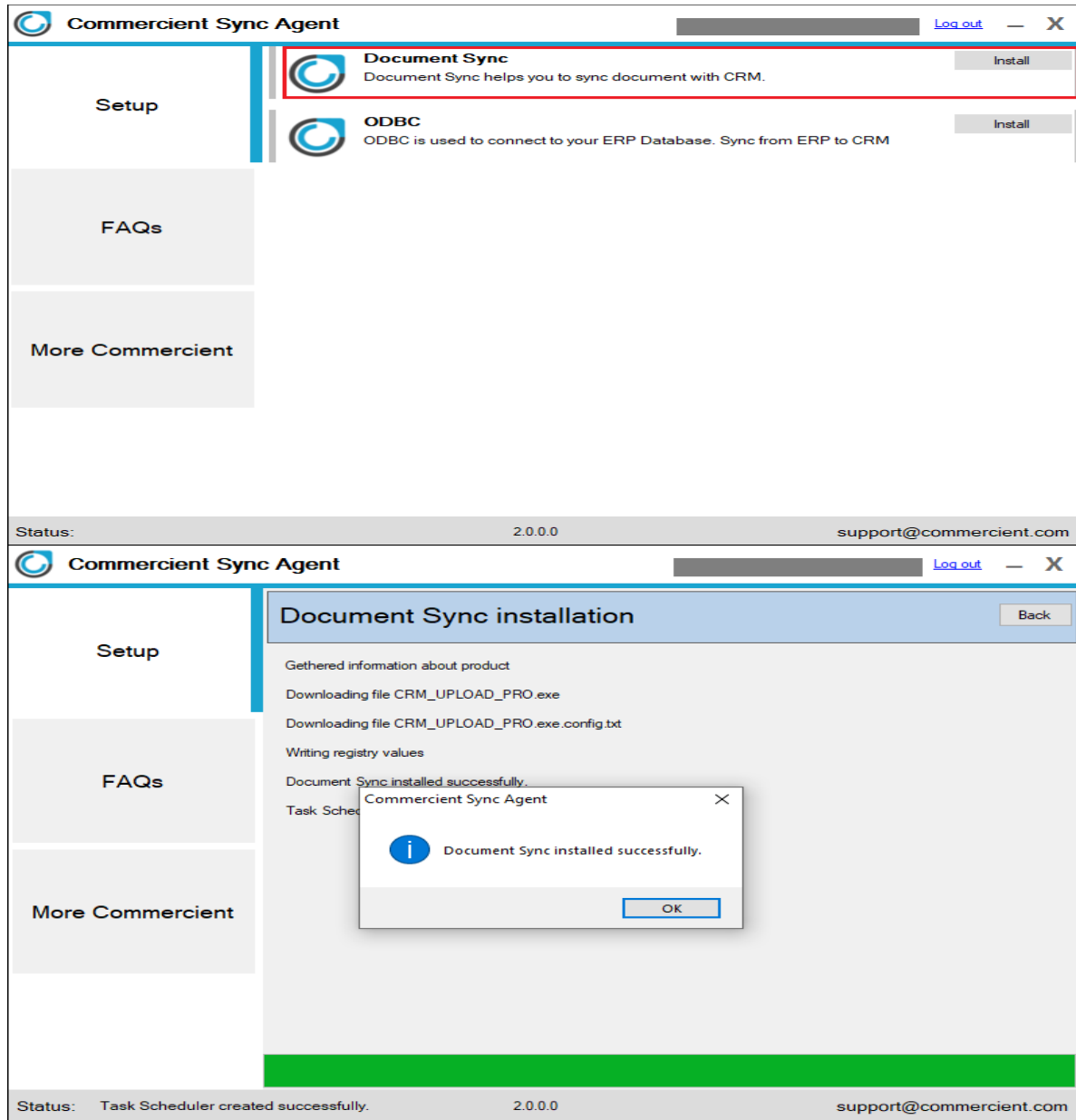
2. Complete the verification, verify IP and App Install (OAuth with your CRM) install steps.
3. In CRM, Notes & Attachments feature must be turned on. (e.g. Please check this [Salesforce link](#) for more detail.)
4. Go to Download Sync agent steps, download the sync agent, complete the installation and open the sync agent.

5. Login to the Commerciant SYNC Agent installed on your server.
6. Go to the Setup option and click on the Install button on the right side of the “Document Sync” option.



7. After a successful installation please follow the next steps.

If you see any error during installation please take a screenshot and contact Commerciant support at support@commerciant.com



- Complete the final Document Sync configuration steps and your sync will be set up. The default sync time is 8 AM on your sync agent's install machine.

Commercient™ ERP Integration for CRM Customer Panel arjuntestd

Registration Verification Verify IP App Install ERP Sync Agent Install Document Sync

Edit Record : DocumentSync Sormasterrep

Is Active ⓘ ☒ Enable

CRM Object Name: ⓘ

CRM Field Name: ⓘ

Display Name: ⓘ

Search Pattern: ⓘ

Document Source Path: ⓘ

Commercient™ ERP Integration for CRM Customer Panel ~~arjuntestd@commercient.com~~

Registration Verification Verify IP App Install ERP Sync Agent Install Document Sync

Is Active	Display Name	CRM Object API Name	CRM Field Name	Document Source Path	Action
True	DocumentSync Sormasterrep	CommercientSF__SorMasterRep__c	Name	H:\Storage\Amit\Document Sync\Deve...	Edit Delete
True	DocumentSync Sormasterrep	CommercientSF__SorMasterRep__c	Name	H:\Storage\Amit\Document Sync\Deve...	Edit Delete
True	DocumentSync Sormasterrep	CommercientSF__SorMasterRep__c	Name	H:\Storage\Amit\Document Sync\Deve...	Edit Delete

Company Information:

Commerciant is a cloud-based company that connects your CRM (Salesforce, Sugar, Zoho, Magento, Microsoft Dynamics CRM) directly to your ERP system. Our SYNC Agent works with ERPs such as Sage, SYSPRO, TRAVERSE, SAP, Acumatica and many other ERP accounting systems. Commerciant 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.commerciant.com.

Frequently Asked Questions

1. Can I delete a file that is uploaded as an attachment using Document Sync?

Yes. You can do it by deleting that file from Salesforce and from the source path on your server.

2. What will happen if a file is changed or replaced at the source location?

In order for file changes to reflect in Salesforce, changes must be made/identified first in the parent object record within the ERP. The Document SYNC will detect changes made in the parent object record and it will update (or insert in case the file is not available) that file from the source location to Salesforce.

3. What happens when there is a new file/version or a file is changed based on the record update? Does it overwrite/replace or does it save an additional file?

In Salesforce, for the Attachment object, it overwrites. And for the File (ContentDocument) object, it creates a new version.

4. Can Document SYNC make any changes at the source location?

No. The Document SYNC will not make any updates to the source location. It will only fetch files from the source location.