



## **SYNC for Quickbooks and Sugar CRM**

### **App Name: Commercient SYNC for Quickbooks and Sugar CRM**

Commercient SYNC, the #1 data integration platform for sales, makes it possible for your sales team to see Quickbooks data directly in Sugar CRM. With SYNC, Quickbooks and Sugar CRM are integrated, and you'll be able to access important Quickbooks data directly in the Sugar CRM.

Commercient SYNC is compatible with QuickBooks® Online. We also offer solutions for QuickBooks Desktop, QuickBooks Pro, QuickBooks Premier, and QuickBooks Enterprise.

The Commercient SYNC Agent is rapidly deployable and gives you easy access to your Quickbooks information in Sugar CRM. This includes customer information, sales history, invoicing, serial numbers invoiced, inventory, multiple ship-to-addresses, and much more. New accounts, orders, opportunities, etc. created in Sugar CRM are SYNC'd to Quickbooks

### **About the SYNC:**

- Unlike traditional data integration tools such as an ETL, there is no coding, mapping, or server. We handle everything, so you can focus on growing your business.
- Changes are reflected in Sugar CRM in real time as the records in Quickbooks change.
- Commercient SYNC for Quickbooks is built by ERP & CRM integration experts.
- Commercient software provides Quickbooks users with a “CRM in the cloud” experience.
- Any field synced from Quickbooks can be displayed on the Sugar CRM screen. All the data Commercient syncs to Sugar becomes part of Sugar CRM's native database. As such, you can perform any Sugar 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

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Sugar CRM. For instance, if you search for a serial number you can find the Invoice Records and Sales Order records that pertain to it.

- The SYNC tool only uploads or updates data when it has changed.
- Implementing Commerciant SYNC creates a simple data integration pathway between Quickbooks and Sugar. Our SYNC solution also enables you to prevent the duplication of data, handle custom objects in Sugar, and take advantage of the premier support.
- Commerciant has an eye for detail and has programmed its services to make efficient use of tracking changes and submitting records to the Sugar CRM API in a single call. The result is that Commerciant significantly reduces the likelihood of exceeding the Sugar CRM AP Quickbooks limits. In the event that a daily limit is reached, which can occur during the initial SYNC of a large Quickbooks system, Commerciant will continue to SYNC where it left off on the following day.

### What is Synchronized?

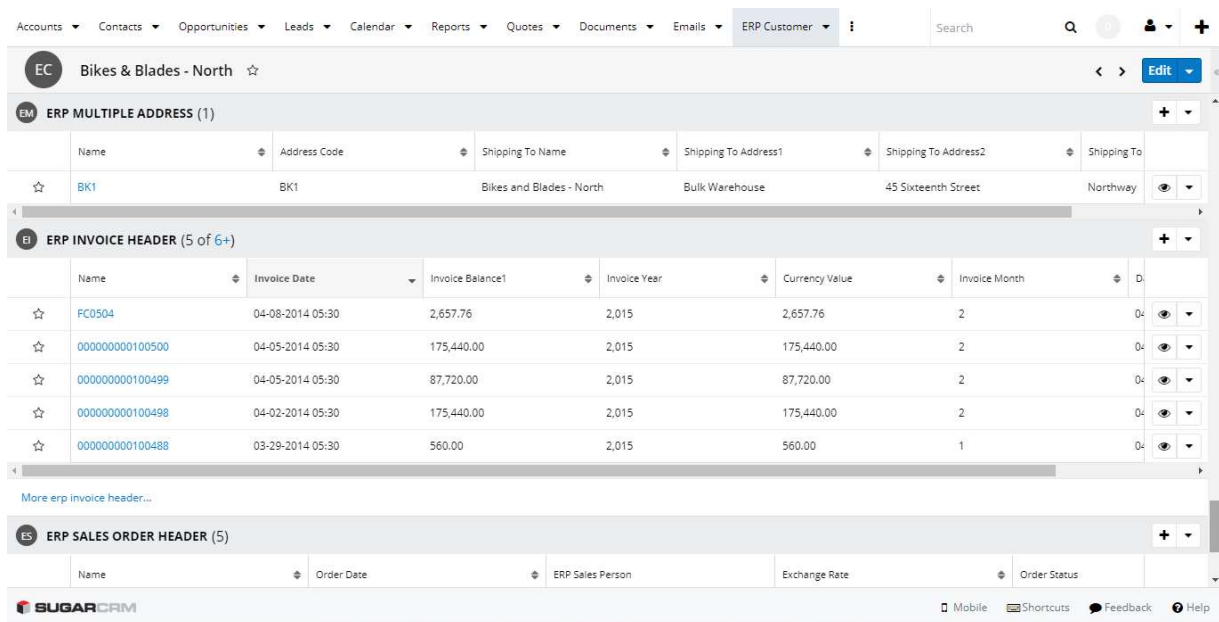
What Commerciant initially SYNCs:

1. Financial accounting data
2. Customer data
3. Sales order data
4. Invoice data
5. Products
6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects
7. Plus any other data customers request

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The **Quickbooks AR Customer record** is the first item to be synced. As you can see below. Customers in Quickbooks are synchronized into Sugar CRM Account records. The Customer's Ship To and Bill To addresses in Quickbooks are mapped to Sugar CRM's address fields using a mapping schema. The Quickbooks Customer fields can be displayed on the Sugar CRM screen however, 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 Quickbooks Customer Record, you can see all the fields that are synchronized.



The screenshot shows the Sugar CRM interface for an ERP Customer record. The customer name is "Bikes & Blades - North". Below the name, there is a section for "ERP MULTIPLE ADDRESS (1)" with a table of address information:

Name	Address Code	Shipping To Name	Shipping To Address1	Shipping To Address2	Shipping To
BK1	BK1	Bikes and Blades - North	Bulk Warehouse	45 Sixteenth Street	Northway

Below the address section, there is a section for "ERP INVOICE HEADER (5 of 6+)" with a table of invoice information:

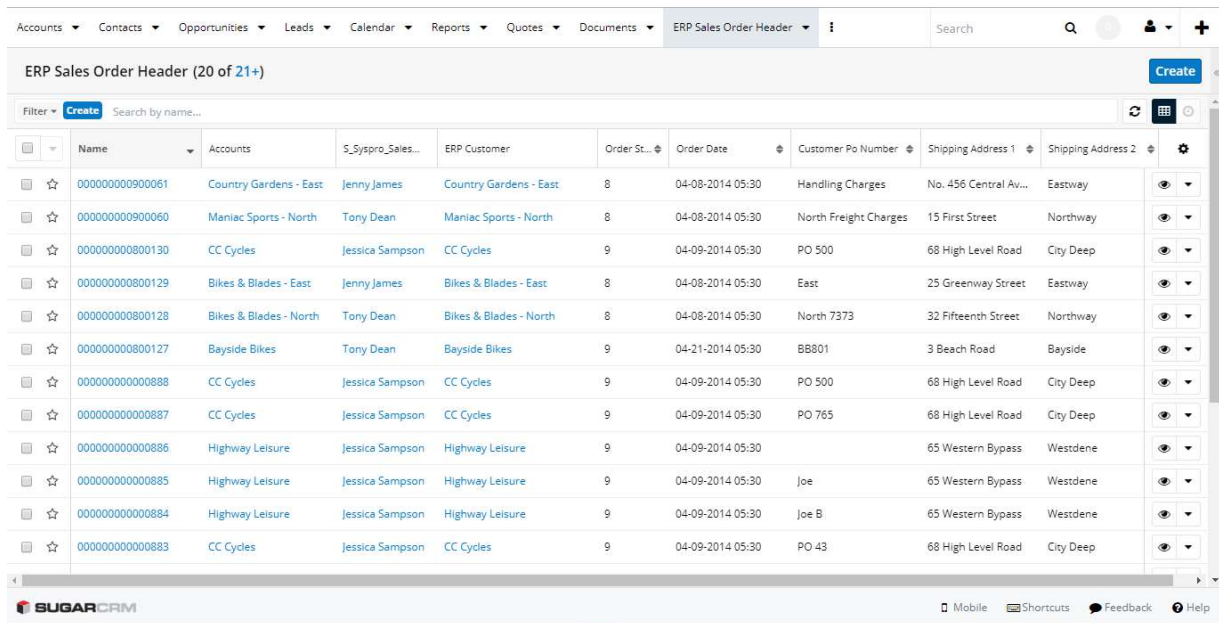
Name	Invoice Date	Invoice Balance1	Invoice Year	Currency Value	Invoice Month	D
FC0504	04-08-2014 05:30	2,657.76	2,015	2,657.76	2	04
000000000100500	04-05-2014 05:30	175,440.00	2,015	175,440.00	2	04
000000000100499	04-05-2014 05:30	87,720.00	2,015	87,720.00	2	04
000000000100498	04-02-2014 05:30	175,440.00	2,015	175,440.00	2	04
000000000100488	03-29-2014 05:30	560.00	2,015	560.00	1	04

At the bottom of the screenshot, there is a section for "ERP SALES ORDER HEADER (5)" with a table of sales order information:

Name	Order Date	ERP Sales Person	Exchange Rate	Order Status
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## ERP Customer Record

Once the Customer Record is in Sugar CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Sugar CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects in Sugar CRM to simplify the Sugar CRM screens. As seen below. 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 Quickbooks. Cleansing of Cancelled Quickbooks Sales Order data from Sugar CRM is performed automatically.

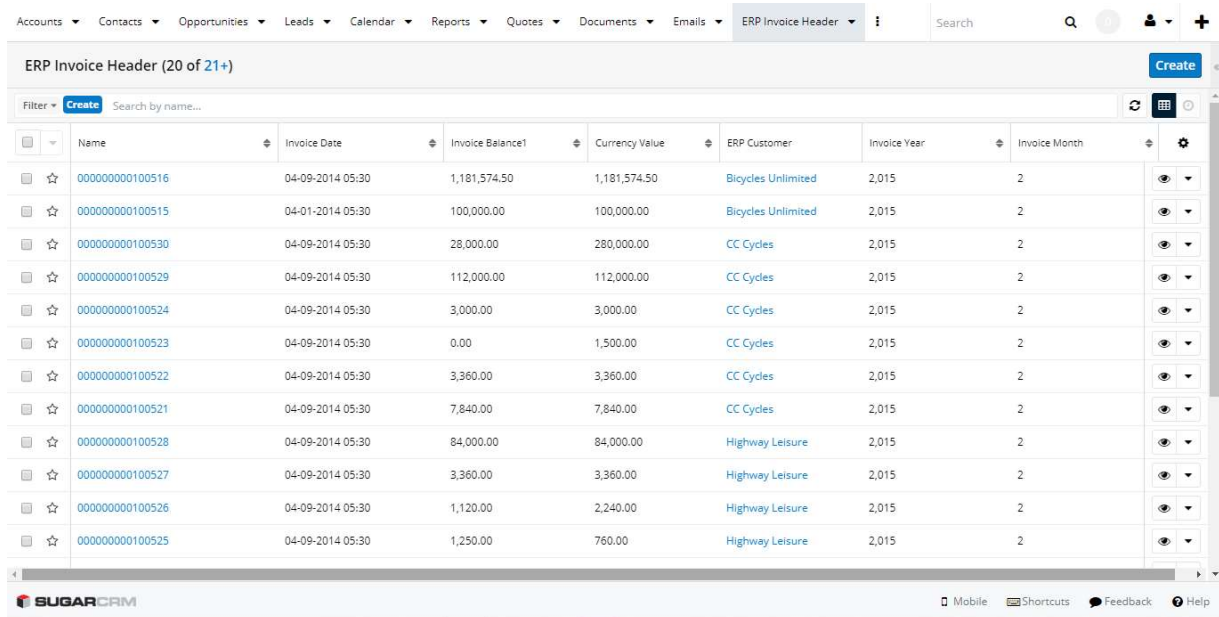


Name	Accounts	S_Syspro_Sales...	ERP Customer	Order St...	Order Date	Customer Po Number	Shipping Address 1	Shipping Address 2
000000000900061	Country Gardens - East	Jenny James	Country Gardens - East	8	04-08-2014 05:30	Handling Charges	No. 456 Central Av...	Eastway
000000000900060	Maniac Sports - North	Tony Dean	Maniac Sports - North	8	04-08-2014 05:30	North Freight Charges	15 First Street	Northway
000000000800130	CC Cycles	Jessica Sampson	CC Cycles	9	04-09-2014 05:30	PO 500	68 High Level Road	City Deep
000000000800129	Bikes & Blades - East	Jenny James	Bikes & Blades - East	8	04-08-2014 05:30	East	25 Greenway Street	Eastway
000000000800128	Bikes & Blades - North	Tony Dean	Bikes & Blades - North	8	04-08-2014 05:30	North 7373	32 Fifteenth Street	Northway
000000000800127	Bayside Bikes	Tony Dean	Bayside Bikes	9	04-21-2014 05:30	BB801	3 Beach Road	Bayside
000000000800888	CC Cycles	Jessica Sampson	CC Cycles	9	04-09-2014 05:30	PO 500	68 High Level Road	City Deep
000000000800887	CC Cycles	Jessica Sampson	CC Cycles	9	04-09-2014 05:30	PO 765	68 High Level Road	City Deep
000000000800886	Highway Leisure	Jessica Sampson	Highway Leisure	9	04-09-2014 05:30		65 Western Bypass	Westdene
000000000800885	Highway Leisure	Jessica Sampson	Highway Leisure	9	04-09-2014 05:30	Joe	65 Western Bypass	Westdene
000000000800884	Highway Leisure	Jessica Sampson	Highway Leisure	9	04-09-2014 05:30	Joe B	65 Western Bypass	Westdene
000000000800883	CC Cycles	Jessica Sampson	CC Cycles	9	04-09-2014 05:30	PO 43	68 High Level Road	City Deep

### Sale Orders

Commercient has crafted the relationships with the data objects in Sugar CRM so that you have the power to decide which objects you would like to display onscreen. You are still 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; but 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.** As seen below.



Name	Invoice Date	Invoice Balance	Currency Value	ERP Customer	Invoice Year	Invoice Month
000000000100516	04-09-2014 05:30	1,181,574.50	1,181,574.50	Bicycles Unlimited	2,015	2
000000000100515	04-01-2014 05:30	100,000.00	100,000.00	Bicycles Unlimited	2,015	2
000000000100530	04-09-2014 05:30	28,000.00	280,000.00	CC Cycles	2,015	2
000000000100529	04-09-2014 05:30	112,000.00	112,000.00	CC Cycles	2,015	2
000000000100524	04-09-2014 05:30	3,000.00	3,000.00	CC Cycles	2,015	2
000000000100523	04-09-2014 05:30	0.00	1,500.00	CC Cycles	2,015	2
000000000100522	04-09-2014 05:30	3,360.00	3,360.00	CC Cycles	2,015	2
000000000100521	04-09-2014 05:30	7,840.00	7,840.00	CC Cycles	2,015	2
000000000100528	04-09-2014 05:30	84,000.00	84,000.00	Highway Leisure	2,015	2
000000000100527	04-09-2014 05:30	3,360.00	3,360.00	Highway Leisure	2,015	2
000000000100526	04-09-2014 05:30	1,120.00	2,240.00	Highway Leisure	2,015	2
000000000100525	04-09-2014 05:30	1,250.00	760.00	Highway Leisure	2,015	2

## Invoices

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 **Sugar 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 Sugar CRM database?

Clients with existing records in both Quickbooks and Sugar 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 the filtering of data in the SQL WHERE statement while maintaining the integrity

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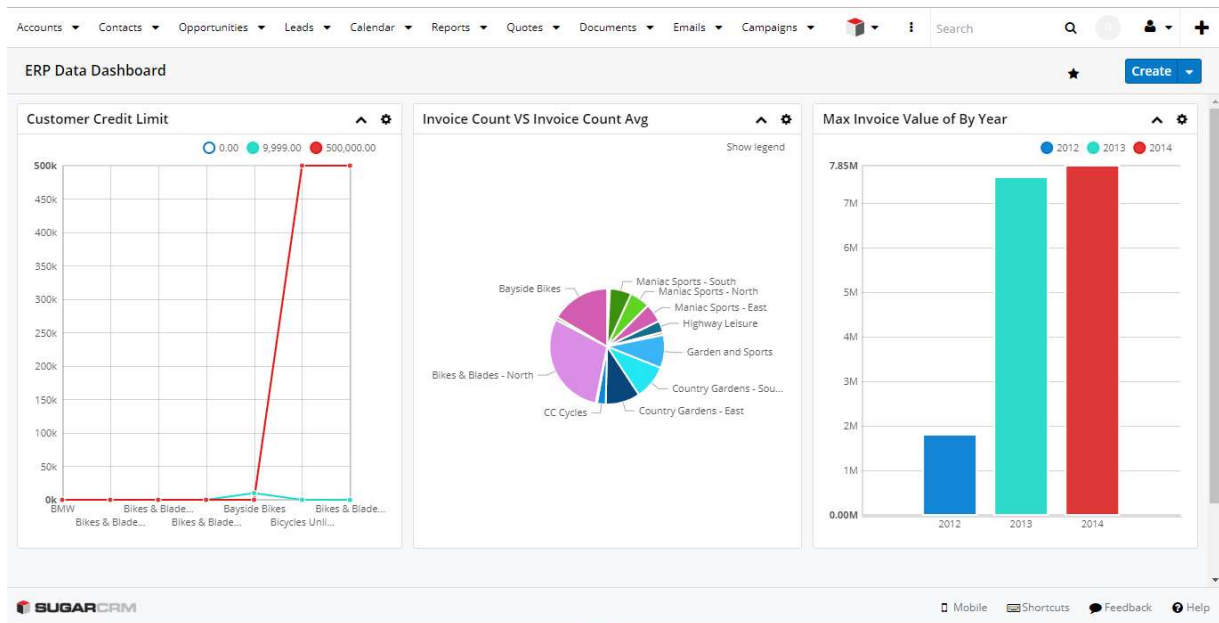
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of relationship mapping and efficient syncing methodologies. Within the WHERE you can perform subqueries, filters, and cross-table and cross-database subqueries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)

### **What else does Commerciant do with Sugar CRM?**

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

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



ERP Data Dashboard

## System Requirements:

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

## Company Information:

Commercient is a cloud-based company that connects Sugar CRM directly to your Quickbooks system. Our open SYNC Agent works with ERPs such as Sage, SYSPRO, Traverse, and other Quickbooks 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).