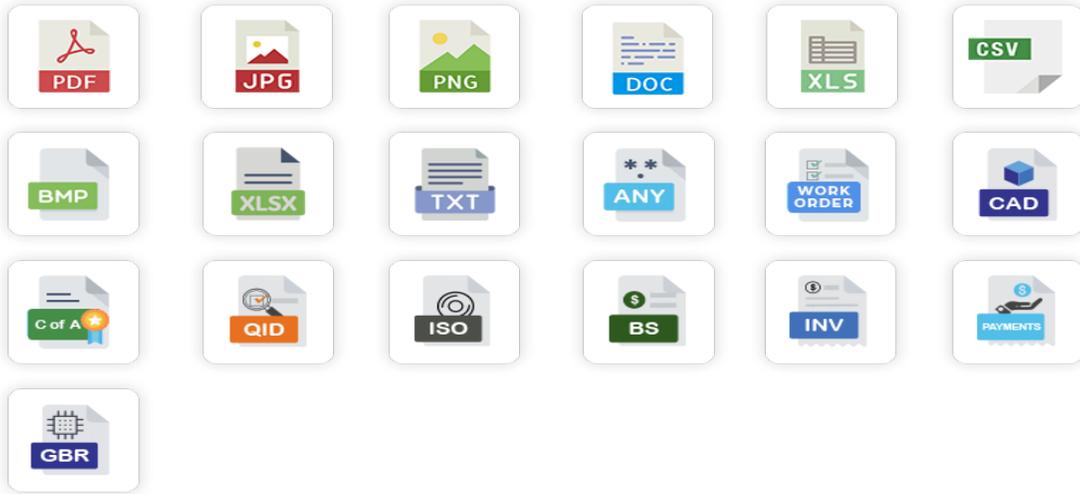*File SYNC for Zoho CRM*

File SYNC, the #1 data integration platform that integrates your files between file servers and Zoho CRM. File SYNC is rapidly deployable and gives you access to important files and this equips you with the information you need to close sales in Zoho CRM. File SYNC app uploads the files into Zoho CRM as an attachment and links them to the parent object.

About File SYNC?

File SYNC integrates files from your file servers into Zoho CRM. These files vary between quotes, estimates, orders, plans, architectural docs, cut sheets, PCB Gerber files, invoices, payments, receipts, shipping labels, BOLs (bills of lading), travelers, work orders, CAD Drawings, C of A (Certificate of Analysis), quality inspection documents, ISO documents, billing statements, images, photos, transcripts. All file formats are supported .pdf ,png .jpg .doc .docs .xls .xlsx .csv *.* The fact is, with File SYNC, you can SYNC anything. This takes place by making sure the respective documents are provided in a file that is then synced to the objects within Zoho CRM. File SYNC is a cloud-based experience that offers various benefits:

- Your team will be able to provide technical information, engineering information, transaction information, and historical information.
- Files will automatically be SYNCed into Zoho CRM.
- It is possible to see your company's files in Zoho CRM, as File SYNC organizes the data according to your company's needs.
- Your sales teams are able to work smarter, by arming them with all the information needed at their fingertips.
- It supports all types of files that CRMs allow, including but not limited to PDFs, JPG/PNG/BMP, DOCs, XLS/XLSX, TXT, CSV, *.*.

Functionality:

The following files that can be synced are Invoices, Receipts, Sales Orders, Purchase Orders, Payments, Shipping Notices, Bills of Lading, Bills of Materials, CAD drawings, Technical specifications, Certificates of Analysis (C of A), Quality Documents, Photographs, Spreadsheets, and other documents you want to sync.

If you want to save the above-mentioned documents, you can save them to a 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.
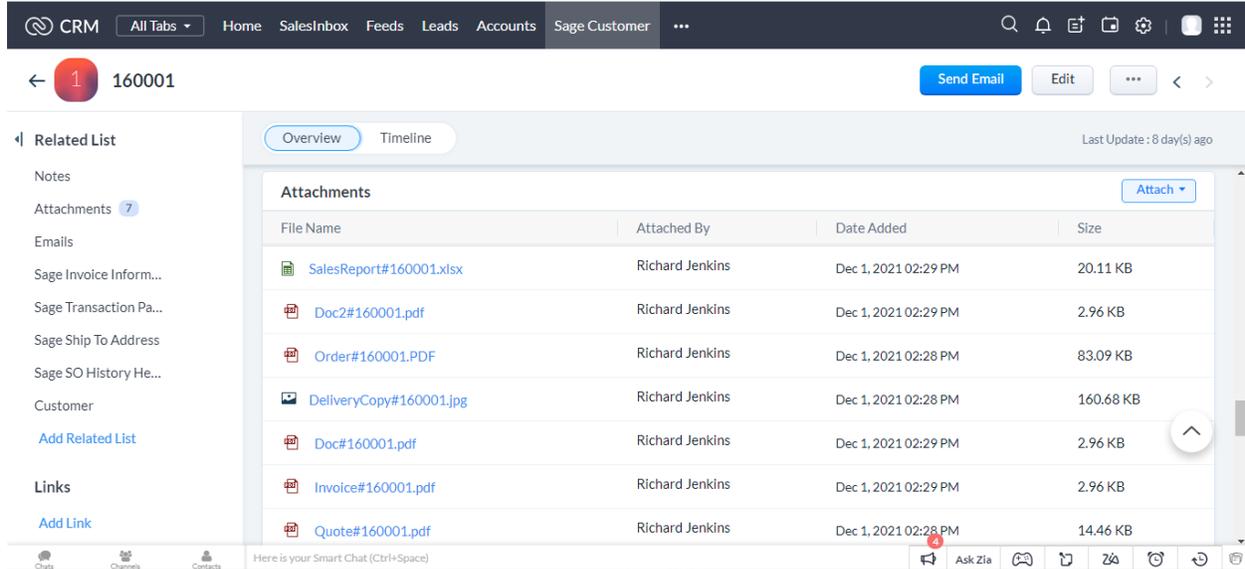
Commercient can SYNC any of these files to Zoho CRM and associate them to any of the corresponding records and objects: Contacts, Accounts, Products, Orders, Quotes, and any Standard or Custom Object in Zoho CRM. If your ERP system does not have a document management facility, you will still be able to save your PDF files manually to a given folder with a key file name such as InvoiceNumber.PDF and Commercient can SYNC these documents to Zoho CRM, into the corresponding Account and Invoice records.

Use Cases:

File SYNC can provide a consistent experience by SYNCing original files with all of their details into Zoho CRM.

- You can SYNC Invoice PDFs to your Account records, for example, and assist clients by answering their invoice questions by reading from the document that they are holding.
- Quotes can be created in your ERP and by using File SYNC, your sales team will have the same Quote attached to a Zoho CRM Opportunity or Account. Less time will be spent searching for the correct file.
- You can SYNC Order PDFs so that your Sales team will know about the expected delivery date, due date, and other relevant details.
- Any file from your other systems can be synced to Zoho CRM, to deliver better sales and customer service to your users and customers.

The image below displays how you can view your files. One can see that these files have been synced to a Custom Object, however, you can choose to sync files to both Standard and Custom Objects.

Company Information:

Commercient is a cloud-based company that connects your CRM (Salesforce, Sugar CRM, Zoho CRM, Magento, HubSpot, and Microsoft Dynamics CRM) directly to your ERP system. Our SYNC Agent works with other 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. Additionally, Commercient has an established reputation regarding other successful ERP to CRM SYNC applications including custom apps developed for ERP systems like Sage, Epicor, Acumatica, SYSPRO, SAP, Xero, and 110+ more systems.

What are you waiting for? Start syncing your data today!

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