

Benefits of connecting Acumatica to Salesforce

Presenter: Chad McClure, Director of CRM Consulting, NexTec

June 2020

Agenda

Benefits of connecting Acumatica to Salesforce

- About NexTec Group
- Salesforce lead to sales path
 - Review Salesforce Lead management path ribbon
 - Convert a Lead to Account, Contact, and Opportunity
 - Review Salesforce Opportunity path ribbon
- Salesforce to Acumatica integration
 - Difference between NexTec solution and out-of-the-box connectors
 - Review Salesforce data in Acumatica

About NexTec

An award-winning business technology consultancy

ERP, CRM, BI, Cloud and On-premise solutions to small and mid-sized businesses

Over 600 customers nationwide across multiple platforms

Industries:

- Wholesale / Distribution
- Professional Services / Field Services
- Manufacturing
- Pharmaceuticals / Nutritional Supplements
- Distribution / Supply Chain Management
- Food and beverage
- Chemicals
- Medical Devices



12 countries supported



95% annual client retention rate

ESTABLISHED IN
1994

50 USA states supported



25 years helping mid-sized business with **ERP, CRM and BI software**

13 years

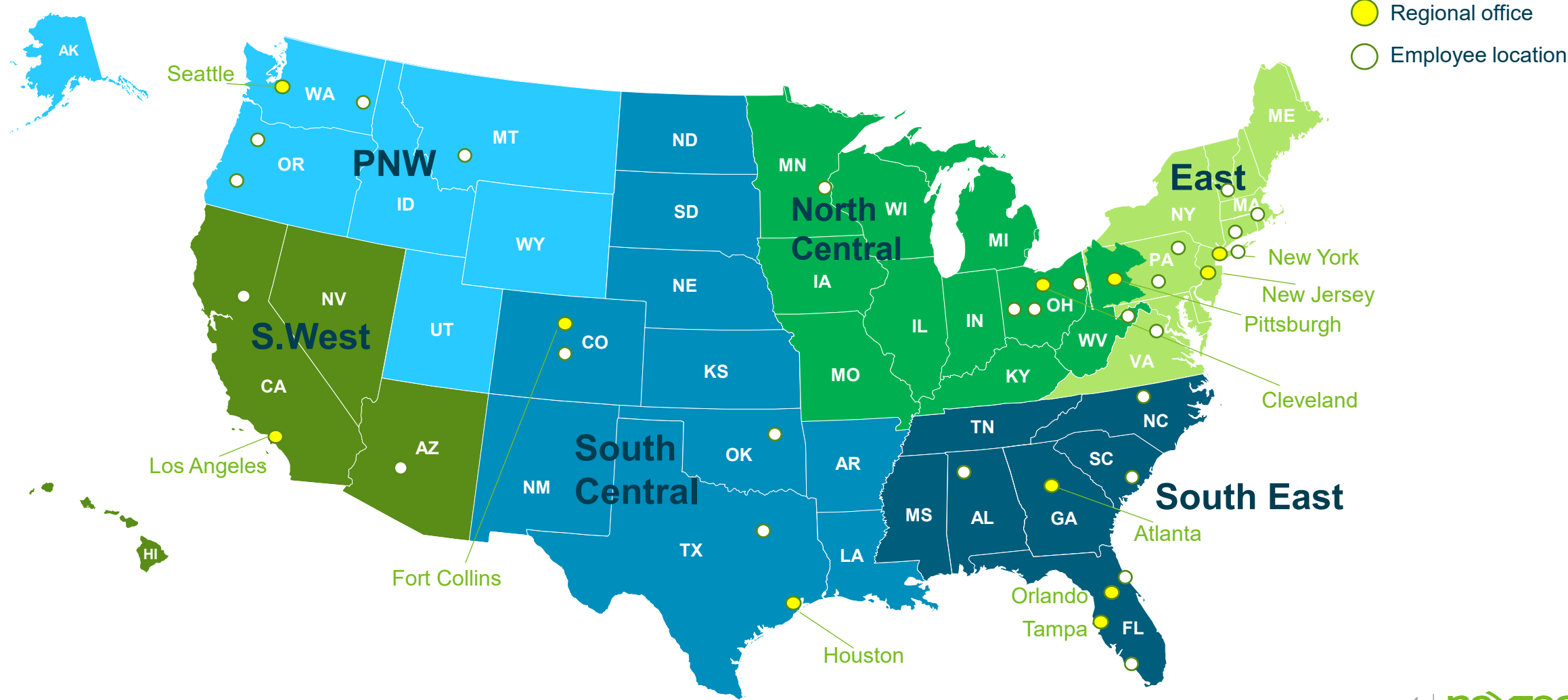
Accounting Today's
Top 100 Resellers

50% of clients chose **NexTec** after working with another provider

600+ Acumatica, Microsoft, Sage and Salesforce **customers**

NexTec North American presence

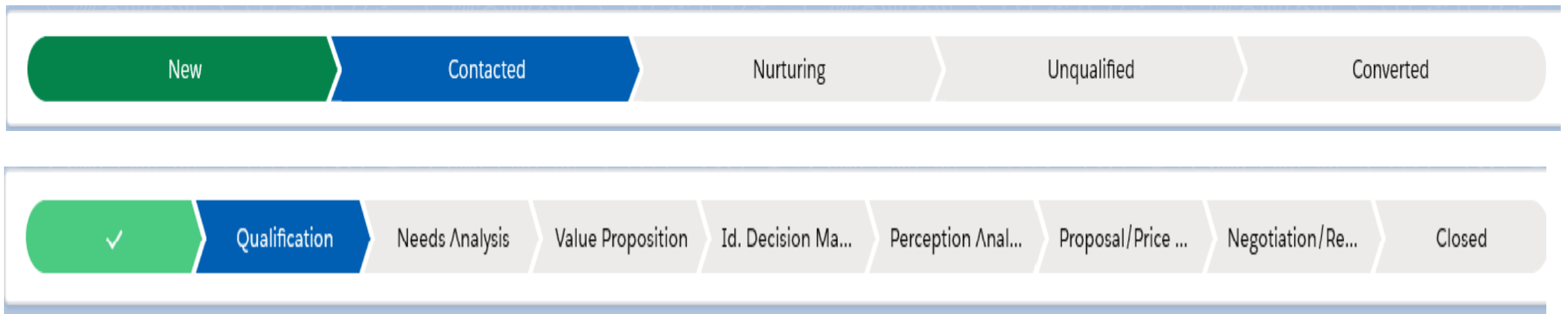
Consultants across the US, supported by regional offices



What is Salesforce Path for Lightning?

A visualization tool

Salesforce Path is a visualization tool, used on objects, to help guide users along a **Path** to a destination. **Path** is only available in **Salesforce Lightning**. It provides guidance for success for each section under the **Path** stages to provide the guidance users will use to succeed



nextec

Salesforce Lead to Sales Path

Demonstration

NexTec Salesforce-to-Acumatica Connector

An advanced integration tool from NexTec Group

- By combining out-of-the-box functionality with outside-the-box engineering, the NexTec Salesforce to Acumatica Connector is an advanced integration engine that accommodates your organization's unique workflows and business processes
- APIs are leveraged, allowing the data to be written directly between the two applications in real time
- Immediate access to real-time data ensures both your front and back offices teams are working with the most current information

NexTec Advanced Integration

- ✓ Supports non-linear field mapping
- ✓ Real-time API direct data transfers
- ✓ Capable of advanced calculations



Out-Of-The-Box Integration

- ⊗ Direct field-to-field mapping
- ⊗ Operates by exporting & importing
- ⊗ Minimal ability to customize

NexTec vs Out-of-box

Differences between NexTec's Acumatica-to-Salesforce Connector and out-of-box solutions

Issue	Out-of-box Solutions	NexTec Salesforce-to-Acumatica Connector
Data updates / availability?	<ul style="list-style-type: none"> Exports / imports data between the applications Data may not be immediately available in the other application 	<ul style="list-style-type: none"> ✓ Immediate access to real-time data ✓ Uses real-time APIs (not import/export), allowing data to be written directly between Salesforce and Acumatica in real time ✓ Ensures everyone sees the most current information in both Salesforce and Acumatica
Visibility / functionality?	<ul style="list-style-type: none"> Limited data visibility and functionality 	<ul style="list-style-type: none"> ✓ More visibility and functionality ✓ Create, update or delete data in either application in real time ✓ Fast, frictionless and customizable bidirectional data exchange
Complex calculations?	<ul style="list-style-type: none"> Nope 	<ul style="list-style-type: none"> ✓ Perform mathematical calculations on data and date fields ✓ Combine multiple fields into one ✓ Powerful customization capabilities handle calculations and non-linear data exchange
Field mapping?	<ul style="list-style-type: none"> One-to-one 	<ul style="list-style-type: none"> ✓ Smart / conditional field population ✓ Use parameters to determine if data population occurs ✓ Trigger an event to occur before or after an action ✓ Includes if / then logic ✓ Can be triggered by any event (save, change, delete)
Handles exceptions?	<ul style="list-style-type: none"> Nope 	<ul style="list-style-type: none"> ✓ Maps non-linear fields (e.g. CA to California) ✓ Handles disparate naming conventions ✓ Supports drop-down and multiple selection boxes
Workflows?	<ul style="list-style-type: none"> Nope 	<ul style="list-style-type: none"> ✓ Powers unique workflows and business processes
3rd Party Integrators?	<ul style="list-style-type: none"> Expands on basics, but still don't provide sophisticated capabilities beyond simple field mapping 	<ul style="list-style-type: none"> ✓ Goes above and beyond field mapping

Salesforce-to-Acumatica Connector

An advanced integration tool from NexTec Group

The screenshot displays a Salesforce contact record for Chandler Nieder. At the top, the contact's name and profile picture are shown. Below this, a summary row lists key fields: Title (Specialist), Account Name (ABC Solutions Inc), Phone (2) (+1(777)444-7534), Email (cnieder@abcsolutions.com), and Contact Owner (Chad McClure). The main section is divided into tabs: Related, Details (selected), and News. The Details tab shows a list of fields with their values and edit icons: Contact Owner (Chad McClure), Name (Chandler Nieder), Account Name (ABC Solutions Inc), Title (Specialist), Phone (+1(777)444-7534), Mobile ((720)555-7534), Email (cnieder@abcsolutions.com), and Reports To (Tom Franceshine). Below the list are expandable sections for Address Information, Additional Information, and System Information. At the bottom, it shows the record was created by Chad McClure on 5/7/2020 at 7:22 AM and last modified by Chad McClure on 5/7/2020 at 7:23 AM. Action buttons for Google Search, Google Maps, and Send Gmail are also visible.

Field	Value
Title	Specialist
Account Name	ABC Solutions Inc
Phone (2)	+1(777)444-7534
Email	cnieder@abcsolutions.com
Contact Owner	Chad McClure

Field	Value
Contact Owner	Chad McClure
Name	Chandler Nieder
Account Name	ABC Solutions Inc
Title	Specialist
Phone	+1(777)444-7534
Mobile	(720)555-7534
Email	cnieder@abcsolutions.com
Reports To	Tom Franceshine

Created By: Chad McClure, 5/7/2020, 7:22 AM
Last Modified By: Chad McClure, 5/7/2020, 7:23 AM

Fast, frictionless, and customizable data interchange

Salesforce-to-Acumatica Connector

An advanced integration tool from NexTec Group

The screenshot displays the Acumatica CRM interface for a contact record. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 3/23/2020, 3:41 PM, admin admin, Company). The left sidebar lists various modules: Favorites, Time and Expenses, Projects, Fixed Assets, Inventory, Marketing (highlighted), Opportunities, Support, Configuration, Services, Equipment, Routes, and More Items.

The main content area shows the contact details for Aleks Neverov. The contact ID is Aleks Neverov. The first name is Mr. Aleks, and the last name is Neverov. The contact type is Contact, and it is active. The business account is ABCSTUDIOS - ABC Studios Inc, owned by Maxwell Baker. The workgroup is Executive, and the job title is Specialist. The contact class is LEADBUS - Sales Lead - Business.

The contact details are organized into several sections:

- CONTACT:** Email (aneverov@abcstudios.com), Web, and phone numbers for Business 1 (+1 (777) 446-7534), Business 2, Home, and Business Fa.
- ADDRESS:** Address Line 1 (77 W 66th St # 13), Address Line 2, City (New York), State (NY - NEW YORK), Postal Code (10023), and Country (US - United States of America).
- CRM:** Contact Method (Any), checkboxes for Do Not Call, Do Not Fax, Do Not Email, Do Not Mail, No Mass Mail, and No Marketing. Last Incoming and Outgoing Activity fields are empty.
- PERSONAL DATA PRIVACY:** Consented to the Processing of Personal Data (checked), Date of Consent (1/1/2018), and Consent Expires.
- PERSON:** Date Of Birth, Gender (Male), Marital Status, and Spouse/Partner Name.

Fast, frictionless, and customizable data interchange

NexTec Salesforce-to-Acumatica Connector

Demonstration

nextec

Questions?

nextec

Chad McClure

cmclure@nextecgroup.com