

SageCRM Enhancement: Auto Update CRM Account Manager based on Sage 100 Salesperson Number

The Sage Integration Engine does not do a reliable job of updating the CRM Account Manager field to correspond to the Salesperson set in the Sage 100 Salesperson Number field.


To resolve this limitation, Effective Solutions has written scripts that update the CRM Account Manager using the Sage 100 SalespersonNo information.

We first create a new field in your SageCRM system so that you can enter in the SP# for each of your Sales users in CRM

More User Details
Access Sage 100 Tasks Using:
Web Forms Embedded in CRM

Sage100 Salesperson #:
0300

Then we implement scripts that run every 15min that read through the company and person records in CRM, and where the CRM Account manager does not match the Sage 100 SP Number, we update the CRM Account Manager value to be correct.

 **Company:** Maverick Papers
Phone: 312 861-1200
E-mail: info@sage.sample.com

Sage 100 Company: ABC
Company Name: ABC Distribution and Service Corp.

Sage 100 Customer No: MAVRK

You are using an unregistered version of Sage CRM. Please register your Sage CRM software

Company ▶

Company Name: Maverick Papers	Status: Active	Type: Customer	Account Manager: Bob Smith	Territory: Worldwide
Lead Source: Web	Lead Details:	Market Segment: Distribution	Record Type:	Website: http://www.maverickpapers.com
Parent Company: -None selected-	Link to Referring Company: ABC Bakery ☎ 444 555-5555	New Customer Status: Waiting for Approval	Credit App Received: <input type="checkbox"/>	W9 Received: <input type="checkbox"/>
Business Description: Largest paper supplier in the Midwest.	Competitor Info: Currently uses ABC Supplier as well, trying to get more of their biz.	No Comm 60 days: False	No Comm 90 days: False	
Last Comm Date: 12/11/2017	No Comm 30 days: False	ShipTo Cust#:	ShipTo Code:	ShipTo Salesperson #:
ShipTo Parent: -None selected-	ShipTo Division:	Customer Type: T	Price Level:	Default Payment Type: CHECK
Sage 100 ARDivision No: 01	Sage 100 Customer No: 01-MAVRK	Salesperson Number: 01-0300	Customer Status Description: Active	
Terms Code Description: 2% Ten Days, Net 30 Days	Tax Schedule Description: Milwaukee			

Reach out to Effective Solutions for Pricing