

## 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](mailto: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** ▶

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

The price to implement this enhancement is \$400