

Advanced Customization to bring additional Sage100/MAS data into SageCRM

Here are additional fields you will see on the Company/Customer Record in SageCRM, and you can use this information to perform targeted searches within your SageCRM database.

| | | | | |
|---|----------------------------------|----------------------------------|-----------------------------------|---------------------------------|
| Last Inv Date: 03/01/2015 | Last Payment Date: | Avg Days to Pay: 0 | Credit Limit: \$ 0.00 | Credit Hold: N |
| YTD Sales: \$ 1,123.57 | PYTD Sales: \$ 315.90 | YTD B(W): \$ 807.67 | PY Sales: \$ 346.44 | PY2 Sales: \$ 0.00 |
| Current Balance 0-29: \$ 3,412.55 | Balance 30-59: \$ 0.00 | Balance 60-89: \$ 0.00 | Balance 90-119: \$ 0.00 | Balance 120+: \$ 0.00 |

Here is an example of the extra tabs that will appear on the Company/Customer Record in SageCRM. The CRM user can quickly access quote, order and invoice transaction history from within CRM.

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

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

Summary Quick Look Dashboard Notes Communications Opportunities People **Quotes Open Orders Invoices** Item Summary PL Summary Items Purchased

6 Records Found, Page 1 of 1

| Invoice Date | Invoice # | Sales Order # | Confirm To | Invoice Type | Comment | PO # | Salesperson # | Non-Taxable \$ | Taxable \$ | Total |
|--------------|-----------|---------------|-----------------|--------------|---------|------|---------------|----------------|------------|--------|
| 03/01/2015 | 0100078 | 0000197 | Annette O'Toole | IN | | | 0300 | 0.00 | 481.50 | 481.50 |
| 02/11/2015 | 0100074 | 0000191 | Annette O'Toole | IN | | | 0300 | 0.00 | 554.70 | 554.70 |
| 01/15/2015 | 0100063 | 0000179 | Annette O'Toole | IN | | | 0300 | 0.00 | 568.50 | 568.50 |
| 02/03/2014 | 0100065 | 0000184 | Annette O'Toole | IN | | 333 | 0300 | 0.00 | 315.90 | 315.90 |
| 05/22/2010 | 0100064 | 0000180 | Annette O'Toole | IN | | | 0300 | 0.00 | 816.90 | 816.90 |
| 05/21/2010 | 0100062 | 0000177 | Annette O'Toole | IN | | | 0300 | 0.00 | 407.40 | 407.40 |

All 3 tabs (Quotes, Open Orders and Invoices) allow you to click on the Sale Order or Invoice number to drill down and see the line items.

Summary Quick Look Dashboard Notes Communications Opportunities People Quotes Open Orders Invoices **Item Summary** PL Summary Items Purc

2 Records Found, Page 1 of 1

| Invoice # | Seq # | Item Code | Item Code Desc | Comment | Qty Ordered | Qty Shipped | Qty Backordered | Unit Price | Extension Amt |
|-----------|--------|---------------|--------------------------------|---------|-------------|-------------|-----------------|------------|---------------|
| 0100078 | 000000 | 1001-HON-H254 | HON 4 DRAWER LETTER FLE W/O LK | | 2 | 2 | 0 | 131.00 | 262.00 |
| 0100078 | 000001 | 2551-3-50 | DESK FILE 3 1/2" CAP 50 | | 10 | 10 | 0 | 21.95 | 219.50 |

This added functionality gives your CRM users the ability to quickly pull up a customer record in SageCRM and review all Quote, Open Order, Completed Order and Invoice information without having to go into Sage 100 or bother the inside sales or accounting teams.

Effective Solutions Technical Document

You also get 3 Item related tabs (Item Summary, PL Summary and Items Purchased) on the Company record that let you analyze Item Level data for the customer in SageCRM.

ITEM SUMMARY TAB: Lets you quickly see what items the customer has purchased and compare it to last year's item sales.

Summary Quick Look Dashboard Notes Communications Opportunities People Quotes Open Orders Invoices **Item Summary** PL Summary Items Purchased Addresses Cases

| Purchases by Item Code | | | | | | | | | |
|------------------------|--------------------------------|--------------|-----------|-----------|----------------|----------------|----------------|---------------------|--|
| Item Code | Item Code Desc | Product Line | YTD Count | YTD Sales | Prev YTD Count | Prev YTD Sales | YTD SALES DIFF | Previous Year Total | |
| 1001-HON-H252 | HON 2 DRAWER LETTER FLE W/O LK | WF&A | 0 | \$0.00 | 3 | \$252.00 | -\$252.00 | \$252.00 | |
| 1001-HON-H254 | HON 4 DRAWER LETTER FLE W/O LK | WF&A | 0 | \$0.00 | 2 | \$262.00 | -\$262.00 | \$262.00 | |
| 2480-8-50 | DESK FILE 8" CAP 50 | FD&A | 0 | \$0.00 | 10 | \$309.50 | -\$309.50 | \$309.50 | |
| 2551-3-50 | DESK FILE 3 1/2" CAP 50 | FD&A | 0 | \$0.00 | 10 | \$219.50 | -\$219.50 | \$219.50 | |
| 6650-26-16-11 | SOUND CVR 26"W 16"D 11"H DM | PS&A | 0 | \$0.00 | 1 | \$259.00 | -\$259.00 | \$259.00 | |

PRODUCT LINE SUMMARY TAB: Lets you quickly see what Product Lines the customer has purchased and compare it to last year's Product Line sales.

Summary Quick Look Dashboard Notes Communications Opportunities People Quotes Open Orders Invoices Item Summary **PL Summary**

| Purchases by Product Line | | | | | | | |
|---------------------------|-----------|-----------|----------------|----------------|----------------|---------------------|--|
| Product Line | YTD Count | YTD Sales | Prev YTD Count | Prev YTD Sales | YTD SALES DIFF | Previous Year Total | |
| C&A | 0 | \$0.00 | 1 | \$103.50 | -\$103.50 | \$103.50 | |
| FD&A | 0 | \$0.00 | 2 | \$529.00 | -\$529.00 | \$529.00 | |
| PS&A | 0 | \$0.00 | 1 | \$259.00 | -\$259.00 | \$259.00 | |
| WF&A | 0 | \$0.00 | 3 | \$713.20 | -\$713.20 | \$713.20 | |

ITEMS PURCHASED TAB: The ultimate analysis tool. This tab displays all of the items that the customer purchased during the current and previous year and displays it in a list that you can sort and perform searches and filters on.

Summary Quick Look Dashboard Notes Communications Opportunities People Quotes Open Orders Invoices Item Summary PL Summary **Items Purchased** Ad

| Items Purchased | | | | | | | | | |
|-----------------|--------------------------------|--------------|------------|---------|-----|------------|----------|--|--|
| Item# | Item Desc | Product Line | Inv Date | Inv # | Qty | Unit Price | Ext Amt | | |
| 1001-HON-H254 | HON 4 DRAWER LETTER FLE W/O LK | WF&A | 03-01-2015 | 0100078 | 2 | \$131.00 | \$262.00 | | |
| 2551-3-50 | DESK FILE 3 1/2" CAP 50 | FD&A | 03-01-2015 | 0100078 | 10 | \$21.95 | \$219.50 | | |
| 1001-HON-H252 | HON 2 DRAWER LETTER FLE W/O LK | WF&A | 02-11-2015 | 0100074 | 3 | \$84.00 | \$252.00 | | |
| GB-EQ380-10-MM | CENTRONICS CABLE 10 FT M/M | C&A | 02-11-2015 | 0100074 | 3 | \$34.50 | \$103.50 | | |
| GLOB-V-3072-25W | GLOBE FOLDING TABLE 30x72 | WF&A | 02-11-2015 | 0100074 | 2 | \$99.60 | \$199.20 | | |
| 2480-8-50 | DESK FILE 8" CAP 50 | FD&A | 01-15-2015 | 0100063 | 10 | \$30.95 | \$309.50 | | |
| 6650-26-16-11 | SOUND CVR 26"W 16"D 11"H DM | PS&A | 01-15-2015 | 0100063 | 1 | \$259.00 | \$259.00 | | |
| 1001-HON-H252 | HON 2 DRAWER LETTER FLE W/O LK | WF&A | 02-03-2014 | 0100065 | 3 | \$84.00 | \$252.00 | | |

NOTE: You need to be on SQL Standard edition to implement this solution. We need to be able to create and schedule SQL jobs. SQL Express does not have the SQL Agent/Job functionality included, so we can't implement this solution with SQL Express (free version).

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