

Bring over additional Sage 100 / MAS field information into Sage CRM

Adding Additional Key MAS data to the Company Screen in SageCRM

Effective Solutions can setup scripts to bring in additional sales and past due balance information from Sage100/MAS into CRM on a regular basis, so that CRM users can quickly see important sales and credit information right from the Company screen in CRM.

Business Description:		Competitor Info:	
Customer Type: DLR	MAS_CustomerNo: 00-ALP1007	Salesperson Number: 00-ROBR	Credit Hold: Y
Price Level: 5	Terms Code: 05	Terms Code Description: NET 60 DAYS	Credit Limit: 10,000
Last Activity Date: 06/25/2012	Last Payment Date: 05/24/2012		
YTD Sales: \$ 2,852.35	Last Year Sales: \$ 19,473.49	2 Years Ago Sales: \$ 35,834.01	
Created Date:	Created By:	Undated Date:	Undated By:

Tax Schedule:		Tax Schedule Description:		Salesperson Number:	
WI NONTAX		WI NONTAX		31-0031	
MAS Last Activity Date: 12/18/2012	MAS Avg Days to Pay: 58	MAS Avg Days Overdue: 14	Activity Older than 4yrs: No		
MAS Balance 0-29: \$ 16,615.67	MAS Balance 30-59: \$ 26,561.67	MAS Balance 60-89: \$ 0.00	MAS Balance 90-119: \$ 0.00	MAS Balance 120+: \$ 0.00	
MAS Total Invoiced Amt: \$ 43,177.34	MAS Open Order Amt: \$ 37,402.58	MAS Credit Limit: 60,000	MAS Credit Hold: N		

Here is a list of the fields we will build in your SageCRM database, you can decide which ones you want to include on your Company screen in CRM.

Credit Hold	Credit Limit
Last Activity Date	Last Payment Date
YTD Sales	Last Year Sales
2 Years Ago Sales	
Avg Days to Pay	Avg Days Overdue
Balance 0-29	Balance 30-59
Balance 60-89	Balance 90-119
Balance 120+	MAS Total Invoiced Amt
MAS Open Order Amt	

Tasks Performed by Effective Solutions to implement this customization

- Setup and configure ODBC connection to Sage100/MAS
- Setup Linked Server in SQL, test and verify
- Build new Company Fields in CRM
- Add fields to the screen in CRM
- Implement SQL scripts to pull data from Sage100/MAS into CRM. Test and Verify.
- Setup Jobs in SQL to automate the import of data (typically nightly)
- Setup onscreen notification if customer is on credit hold (optional)

Implementation Hours Range = 8 – 12 hours

There is a chance that we may need to downgrade your CRM SQL database to a 32-bit instance, to get it to talk to Sage100/MAS. There is a 4-hour charge to downgrade your SQL instance to 32-bit and reconnect the database to your SageCRM implementation. We can connect to your SQL database remotely and verify if this needs to be done for implementation.