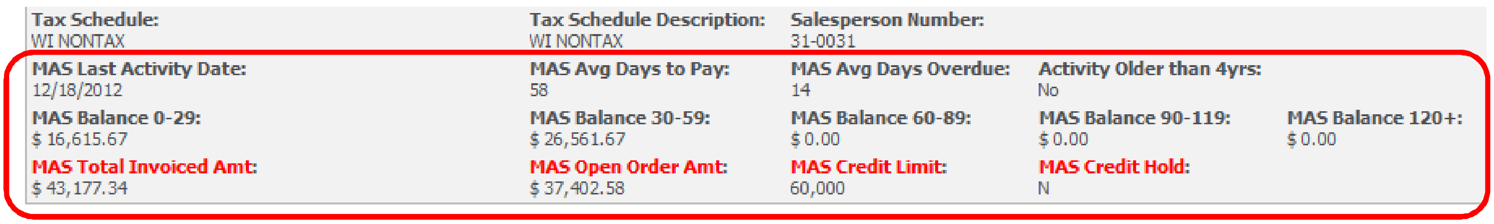
Bring over additional Sage 100 / MAS field information into Sage CRM

[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.



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.