Custom SageCRM Integration Features with Sage 100 / MAS Accounting Systems

[Adding Additional Key MAS data to the Company Screen in SageCRM]

Effective Solutions can setup scripts to bring in additional information from 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.

Alert: Customer on Credit Hold in MAS

Company

Company Name [redacted]	**Type:** Customer	**Status:** Active	**Category:**
Account Manager: [redacted]	**Territory:** Midwest		
Lead Source:	**Lead Details:**	**Number of Locations:**	**Website:** [redacted]
Business Description:		**Competitor Info:**	
Customer Type: DLR	**MAS_CustomerNo:** 00-ALPI007	**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: 12/23/2010 3:35 PM	**Created By:** System Administrator	**Updated Date:** 12/14/2012 2:39 PM	**Updated By:** System Administrator

This additional information can be used to display alerts, like you see in the screen above. In this case, if the field Credit Hold = Y then the Alert message at the top of the screen pops up.

Companies can also use the Last Activity Date and Yearly Sales field to perform target marketing to customers that haven't purchased in a while, or are spending less than they did last year.

Below is an example of a customer that wanted to see Past Due Balance details on the Company Screen in CRM.

Tax Schedule: WI NONTAX	**Tax Schedule Description:** WI NONTAX	**Salesperson Number:** 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	

Using data pulled from MAS, we are able to display a breakdown of the past due periods, Avg Days to Pay data, what has been invoiced, what they have for open orders, and they can quickly see if the customer is going to exceed their credit limit.

Displaying Quote and Order information on the Company Screen in SageCRM

Effective Solutions can setup scripts to bring in Quote and Sales Order information from MAS on a regular basis, and present that information on tabs on the Company Record in SageCRM.

In the example below, we have created 3 extra tabs on the company record in CRM: Quotes, Open Orders, and Completed Orders.

Each tab displays the Order information based on the Status of the Sales Order. In the example below, I am viewing the OPEN orders.

Summary | Quick Look | Dashboard | Communications | People | Addresses | Phone/E-mail | Documents | Quotes | **Open Orders** | Completed Orders | Self Service | Inquiries | Relation

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Company Name	Sales Order Number	Order Date	Order Status	salespersonno	nontaxableamt
	0530534	2013-10-02	A	INTE	66.00
	0530515	2013-10-02	A	INTE	18.50
	0530283	2013-10-02	A	INTE	27.00
	0530279	2013-10-02	A	INTE	18.25
	0530276	2013-10-02	A	INTE	128.64

I can then **click on the Sales Order number** I would like to view, and it will display the line items for that order, just like the screen shot example below.

Summary | Quick Look | Dashboard | Communications | People | Addresses | Phone/E-mail | Documents | Quotes | Open Orders | Completed Orders | Self Service | Inquiries

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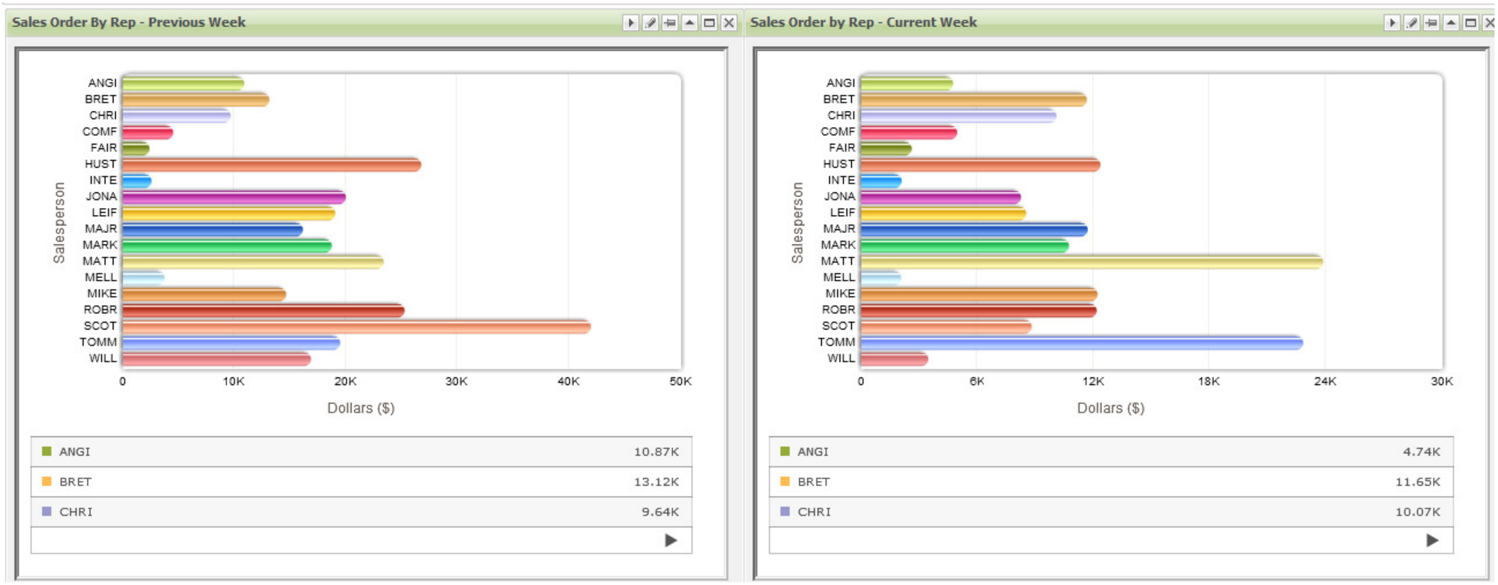
Sales Order Number	sequenceno	itemcode	itemcodedesc	quantityorderedoriginal	lastunitprice	lastextensionamt
0530515	00000000000001	/C	Default Item Code /C	0.00	0.00	0.00
0530515	00000000000002	/ONE DAY LEAD ACCOUNT	ONE DAY LEAD ACCOUNT	0.00	0.00	0.00
0530515	00000000000003	317-18BLK-WEB-RTL	INVALID RING (DONUT RING), 18"	1.00	18.50	18.50
0530515	00000000000004	/THANK YOU FOR YOUR ORDER	THANK YOU	0.00	0.00	0.00

This added functionality gives your CRM users the ability to quickly pull up a customer record in SageCRM and review their current Quotes, Open Orders and Completed/Shipped orders without having to go into Sage 100 / MAS or bother the inside sales or accounting teams.

[Displaying Key Sales Data in Dashboards in SageCRM]

Effective Solutions can assist you with building reports and dashboards in SageCRM that display Quote, Sales Order and Invoicing information from MAS.

In the example below, the customer has dashboard gadgets that display Sales Orders by Sales Rep for the Current Week and for the Previous Week. Each SageCRM user can format their own personal dashboards with the information that is important to them.



The CRM user can click on a particular dashboard gadget to display the report details behind the gadget data.

SalespersonNo	mh_salesorderno	Order Date	Order Status	FullCustNo	Company Name	ShipToName	ConfirmTo	SalespersonNo	NonTaxable Amt ($)
ANGI	0463055	12/12/2012	A	00-AAHO001	[redacted]	[redacted]	MIKE PROVINES	ANGI	95.27
	0463473	12/14/2012	A	00-ALLC003	[redacted]	[redacted]	BERT DRIGGERS	ANGI	21.55
	0462189	12/10/2012	C	00-ARMO002	[redacted]	[redacted]	TORY HUNTER	ANGI	5,340.00

If you use SageCRM to create your quotes and orders, a lot of the data is already within SageCRM to create your dashboards and reports.

If you don't use the quote/order feature integrated with SageCRM, Effective Solutions can write scripts and create views to pull in your Quote, SO and Invoice data from MAS into CRM on a regular basis so that you can create the associated reports and dashboard gadgets.