

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	819.90	819.90
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.

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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

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.

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		

The price to implement this enhancement is \$2,100.