

Sage 200 CRM v2013 R2 Implementation Guide

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About this guide

This guide is for Business Partners and customers who are using Sage 200 CRM integrated with Sage 200 Accounts.

It is designed to provide you with information about how you can set up and use an integrated Sage 200 CRM system. It provides information on how processing decisions affect the way data is synchronised between the two applications.

Note: This guide explains the features and functionality of Sage 200 CRM v7.2c and Sage 200 Accounts v2013 R2 .

Who is this guide for?

Use this guide if you are:

- Installing and setting up the integration with Sage 200 Accounts and Sage 200 CRM.
- Using integrated Sage 200 CRM.

How is this guide organised?

This guide covers the following areas:

- Why use integrated Sage 200 CRM and how it is different to Sage CRM.
- How the integration works.
- Implementation considerations and tasks.
- Things to consider when using integrated CRM.

The following naming conventions are used throughout this guide:

- *Accounts* is the Sage 200 Accounts application.
- *CRM* is Sage 200 CRM which has been integrated with Sage 200 Accounts.
- *Standalone CRM* is the standalone version of the Sage CRM application.

Why integrate Sage 200 with Sage 200 CRM

Sage 200 CRM is a Sage CRM system modified to integrate with Sage 200 Accounts. This allows you to:

- View data from Accounts from within CRM.
- Launch Accounts forms from within CRM
- Enter data in one system and automatically update the other.

Benefits of Integration

- Saves time by reducing duplications in procedures and therefore reduces the possibility of errors.
- Information on both systems is always up to date.
- Business processes can be simplified, as one user can enter data that is used by both systems.

In this chapter

- 📄 What data is synchronised? on page 2
- 📄 What is different about Sage 200 CRM? on page 3.

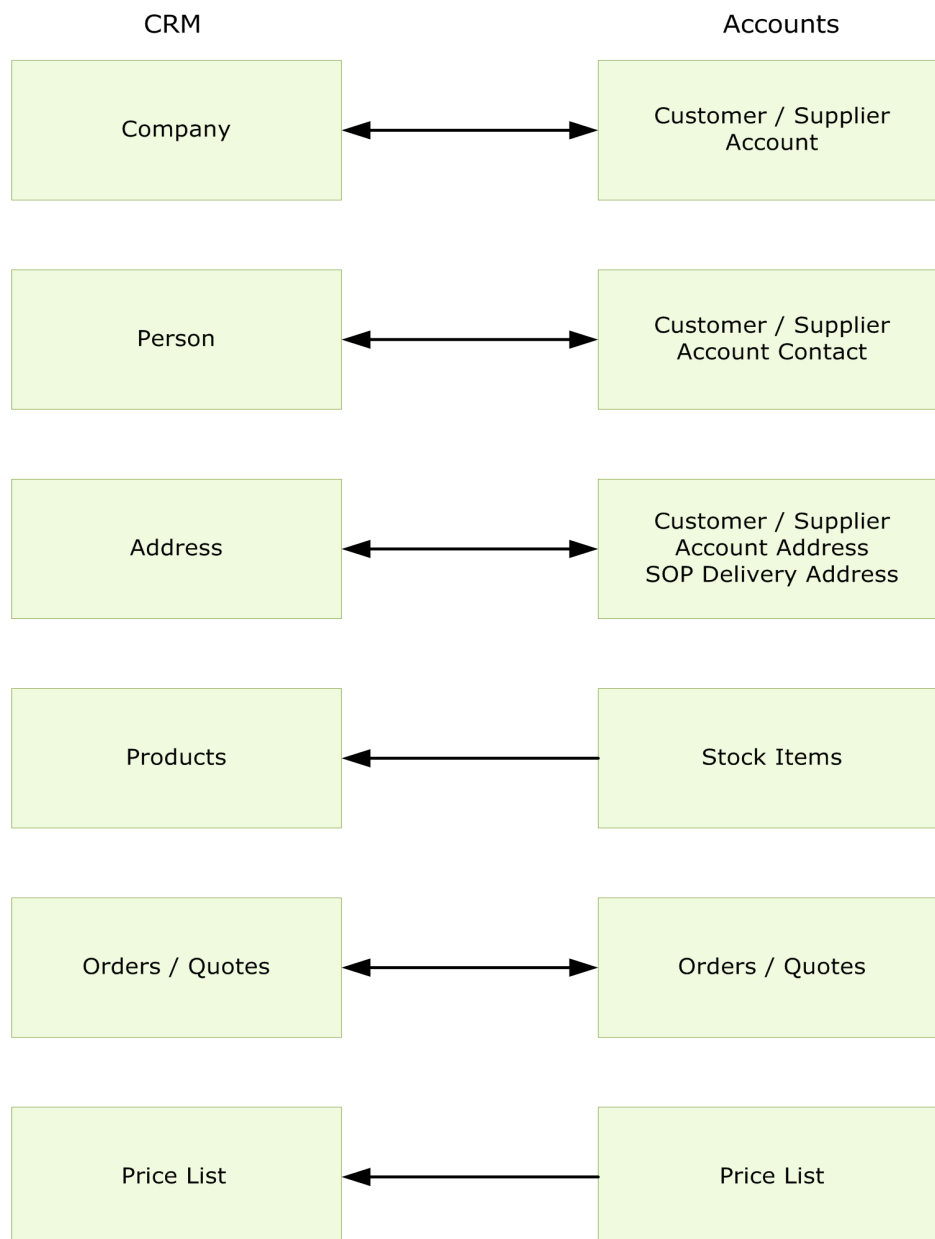
What data is synchronised?

Once an integration has been set up, the following data is synchronised between CRM and Accounts: customer, supplier, order, quote, address, contact, product, pricing.

Customer, supplier, order, quote, address and contact information can be changed in either system and is then synchronised to the other.

Product and pricing information can only be entered and changed in Accounts.

Note: To use CRM integrated with Accounts, you must have activated the Financials *and* Commercials modules in Accounts.



What is different about Sage 200 CRM?

When you install CRM and integrate it with Accounts, a number of customisations are added which makes Sage 200 CRM different to standalone CRM.

These customisations are added during the CRM installation, the Accounts installation and when CRM integrates with Accounts.

These changes include additional screens, tabs and fields to make data from Accounts available in CRM.

The following table shows the main areas where integrated Sage 200 CRM differs to standalone Sage CRM.

Program Area	Sage 200 CRM customisations
Integration settings	Used to create the integration between CRM and Sage 200.
User details settings	You can choose the Sage 200 data that is available to each user and whether each user enters data using the Sage 200 forms and the CRM forms.
Company Entity	Financials tab
	This displays details of the customer or supplier account from Accounts.
	Sage 200 Accounts Forms tab
	Use this to launch Accounts forms from within CRM.
	Sage 200 Data tab
	Use this to access the Real Time Data Views.
	Orders tab
	This displays all orders entered for this company.
	Quotes tab
	This displays all quotes entered for this company.
	Consolidated Lists tab
	This is only available when the company has a Head Office relationship with another company. Use this to view information about the Head Office and it's branch offices.
MY CRM	Sage 200 Groups tab
	You can create dynamic groups based on data from Accounts such as products purchased. An additional Sage 200 Groups tab is available from My CRM.

Functionality not available in Sage 200 CRM

The following standalone Sage CRM functionality is not available in Sage 200 CRM:

- Solo Client
- Wireless Mobile, including CRM apps for iPhone and Android handsets.
- Sales Lite and Sales Tracker apps
- CRM Tablet Themes
- Linked addresses

This is because the addresses in Sage 200 CRM are synchronised with Accounts.

The next chapter explains how the integration between CRM and Accounts works and how information is updated between the two databases.

What does the integration do with my data?

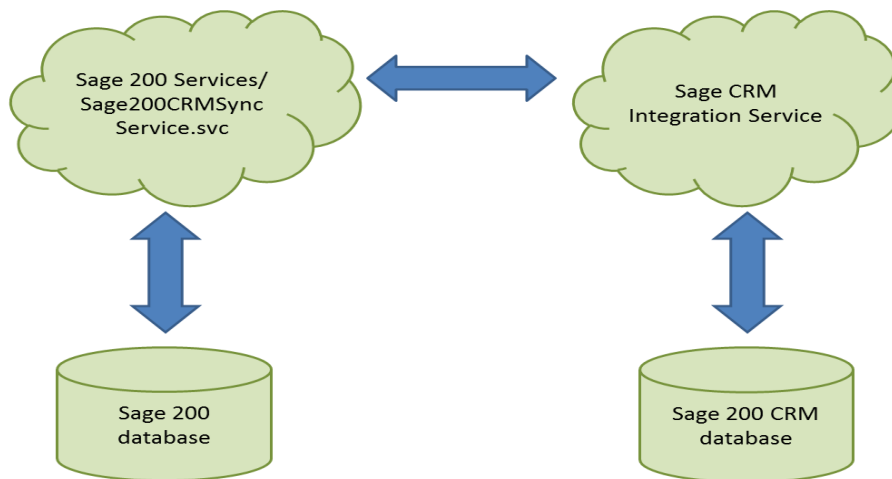
This chapter explains how the integration transfers data between the two databases. It explains the web service methods used. It also describes how the integration knows what information to pass between the databases when you run the synchronisation.

In this chapter

- 📄 Overview on page 6
- 📄 The account entity on page 8
- 📄 Entity mappings on page 9
- 📄 How does the synchronisation know which records to update? on page 10

Overview

Data is synchronised between the CRM database and the Accounts database, via the Sage 200 Web Service and the Sage CRM Integration Service. The synchronisation of the data between the databases is controlled by the *Integration*.



How the integration works

When a synchronisation is triggered, the integration links CRM to the Sage 200 Service using web service methods.

When the integration is first set up, or when it is enabled, the following web service methods are run:

Get AuthenticationScheme	<p>This checks the following information that is specified in the integration:</p> <ul style="list-style-type: none"> ■ The location of the Accounts database ■ The Windows user account name and password, set for the integration in Sage 200 System Administration. ■ The CRM user name and password
GetConfiguration	<p>This requests configuration information from Accounts. It is only used when the integration is first set up, or when the integration is enabled.</p>
GetCustomisations	<p>This checks the version number and installs any required customisations.</p> <p>When the synchronisation is run, the version number is checked. If the version number of the customisation is different, these changes are installed into CRM.</p>

Data is synchronised periodically. You specify the interval between data synchronisations in the **Integration settings** in CRM. The data is synchronised in the following way:

GetChangeLog	<p>This requests a list of the changes made to the Accounts data since the last synchronisation.</p> <p>This data is converted to a format that can be read by the CRM database.</p> <p>See How does the synchronisation know which records to update? on page 10.</p>
ExecuteTransactions	<p>This requests a list of the changes made to the CRM database since the last synchronisation.</p> <p>This data is converted to a format that can read by the Accounts database.</p> <p>See How does the synchronisation know which records to update? on page 10.</p>

The following web service methods are run when the data synchronises and also in real time when data is processed in CRM.

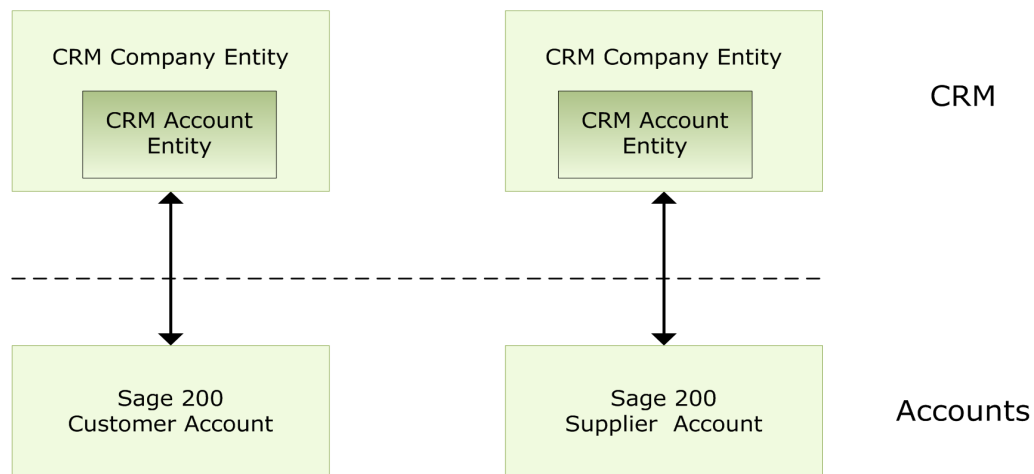
ViewRealTimeData	<p>This creates a query which asks the Accounts database to return the data required for the requested view.</p> <p>This occurs each time a real time data view is opened from CRM.</p>
CheckPrice	This requests the latest stock item price from the Accounts database when the Check Price button is selected in CRM.
GetPricingDetails	This calculates the total order or quote value using the full pricing information from Accounts, when the Recalculate Prices button is selected on an order or a quote in CRM.

Sage 200 CRM uses an additional entity called the **Account Entity** to link companies in CRM with customer and supplier records in Accounts.

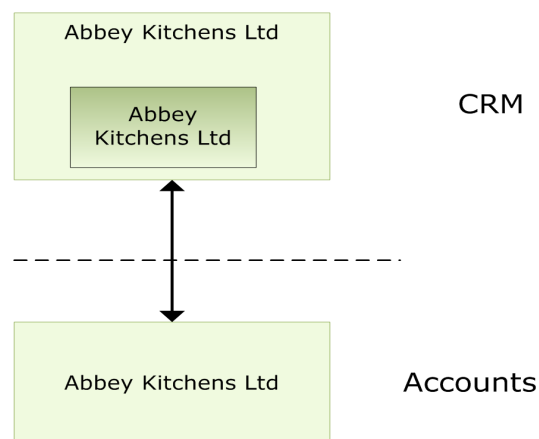
The account entity

CRM consists of a number of **Entities** used to store and display information to help you to perform day to day business tasks. The primary entities in CRM are **Company**, **Case**, **Lead**, **Opportunity** and **Person**.

When CRM integrates with Accounts, an additional **Account Entity** is created by the integration. Every company in CRM also has a linked **Account entity** in the CRM database. The **Account Entity** is used to synchronise customer and supplier records in Accounts with CRM. This information is displayed via the linked company entity in CRM, as the account entity is hidden in the user interface.



When the two systems are integrated every customer and supplier in Accounts has a corresponding linked company and account in CRM with the same name.



Entity mappings

Sage 200 CRM is **not** supported when the Entity Mappings have been changed.

The integration between Accounts and CRM processes any changes to each CRM entity in a specified order.



This list of entities and the order in which they are processed can be viewed on the **Entity Mappings** tab for the Integration (**Administration > Integration > Integration List > Name of Integration > Entity Mappings**).

You can see how CRM handles each mapping by clicking each link. This shows the direction that data is synchronised and whether the information in CRM or the information in Accounts takes priority.

Accounts, orders and quotations are designed to be synchronised in both directions.

The order that the entities are synchronised is important as some entities rely on information from other entities. For example, products must always be synchronised before orders, as the orders are linked to the product information. The **ERP Settings Mapping** must always be synchronised last.

These settings **must not** be changed as this affects how the data is synchronised and causes the synchronisation to fail.

Summary	Entity Mappings	...						
<div> <div>Entity Mappings</div> <table> <tr> <td> Mapping name: Account Type Mapping </td> <td> CRM Entity: AccountType </td> <td> Order: 11 </td> </tr> <tr> <td> Who wins: ERP takes priority </td> <td> Synchronise data: ERP to CRM </td> <td></td> </tr> </table> </div> <div>  Cancel  Help </div>			Mapping name: Account Type Mapping	CRM Entity: AccountType	Order: 11	Who wins: ERP takes priority	Synchronise data: ERP to CRM	
Mapping name: Account Type Mapping	CRM Entity: AccountType	Order: 11						
Who wins: ERP takes priority	Synchronise data: ERP to CRM							

How does the synchronisation know which records to update?

When data is changed in Accounts

Every time a record is added or changed in Accounts, an incremental number is added to the record. This is to tell the system which order the records were added or amended. The field in the database, that is used to hold this information is called *OpLock*.

When a synchronisation with CRM takes place, the integration service needs to know which records have been amended since the last synchronisation. To do this, the integration service stores the last Oplock value for each Accounts record that was included in the synchronisation.

The next time a synchronisation is run the integration service requests all records that have a higher Oplock value than the last one stored.

In the following example, the last customer record that was synchronised was Whiteware Stores. This Oplock value is stored in the CRM database.

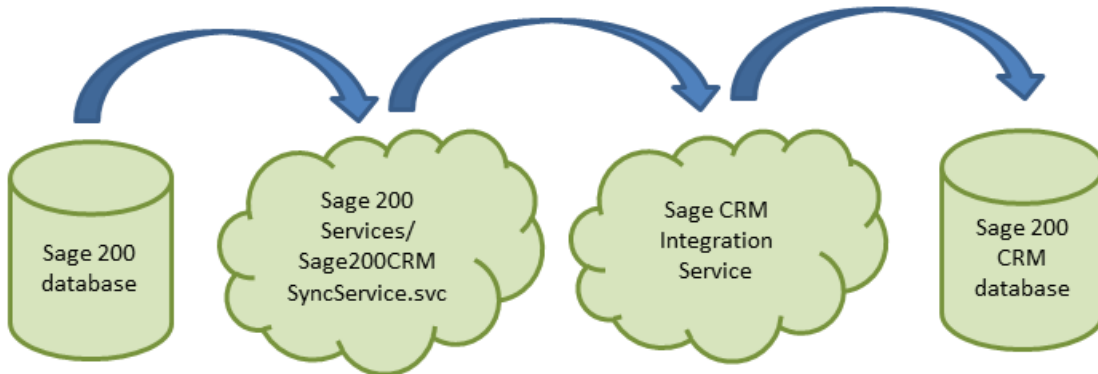
	CustomerAccountName	Oplock
13	Euro Trading Account	0x00000000008AAB73
14	A56 Plumbing	0x00000000008A561B
15	BGT Distribution Ltd	0x0000000000897BDD
16	Fornica Warehouse Ltd	0x0000000000894A15
17	Christian Cullen Motoring	0x00000000008949F0
18	GasWorks	0x0000000000893D08
19	United Electricity Co.	0x0000000000893CE1
20	Whiteware Stores	0x0000000000629D0A
21	Wellington Kitchen Ref...	0x0000000000629D09

The next time a synchronisation is run, all the customer records in Accounts with Oplock values higher than Whiteware Stores are synchronised with CRM.

	CustomerAccountName	Oplock
13	Euro Trading Account	0x00000000008AAB73
14	A56 Plumbing	0x00000000008A561B
15	BGT Distribution Ltd	0x0000000000897BDD
16	Fornica Warehouse Ltd	0x0000000000894A15
17	Christian Cullen Motoring	0x00000000008949F0
18	GasWorks	0x0000000000893D08
19	United Electricity Co.	0x0000000000893CE1
20	Whiteware Stores	0x0000000000629D0A
21	Wellington Kitchen Ref...	0x0000000000629D09

Records to be synchronised

In this case the data has been changed in Accounts, so the Accounts data is synchronised and updated in CRM.

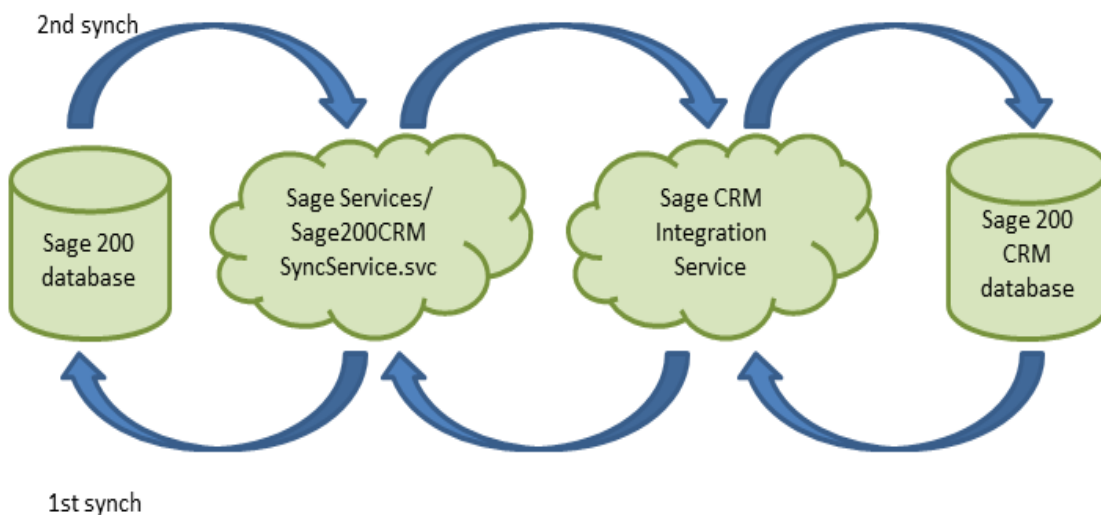


When data is changed in CRM

In CRM, changes to records are logged in the **Journal** table in the CRM database with the date and time that the change took place. The integration stores the date and time that the last synchronisation took place.

The next time a synchronisation is run, the integration requests all changed records in the Journal table with a time and date after the date and time of the last synchronisation. This data is then sent to Accounts.

However, when the data is updated in Accounts, this in turn updates the Oplock value for the Accounts records. The next time the synchronisation runs, the data is sent back to CRM. Therefore to complete the synchronisation of data from CRM to Accounts, the synchronisation must be run twice.



Adding, amending, and deleting information

Adding and amending information

When data is changed in CRM or Accounts, this is synchronised between the two systems based on the following rules:

- Data is only synchronised in one direction for each entity.
This means that when changes are made to both CRM and Accounts, only one change can be synchronised. The change that takes priority for that entity is specified in the Entity mappings. This is the change that is synchronised.
- Data is synchronised per entity rather than on a per field basis.
This means that even when a single field is changed on an entity or record - the entire entity or record is included in the next synchronisation.
- When data is synchronised and Accounts is updated, that data is synchronised back to CRM the next time the synchronisation runs.
This means that you should not change information in CRM until the synchronisation has been run twice, as your changes may be overwritten. This only becomes noticeable if you have long interval times between synchronisations.

Deleting information

Deleting records in Accounts

When a record is deleted in Accounts, the record is permanently removed from the database. Accounts keeps a track of any deleted records using a table in the Accounts database called **DeleteLog**. When the data is synchronised with CRM, the integration uses the **DeleteLog** table to delete corresponding CRM records.

The contents of the **DeleteLog** table should be cleared every time Accounts and CRM is installed and upgraded. It should not be necessary to clear the **DeleteLog** table at any other time, unless told to do so by Sage Technical Support. See [Why can the synchronisation fail? on page 55](#).

Deleting records in CRM

When a change is made to a record in CRM, the change to the record is logged in the Journal table in the CRM database. This includes details of any deleted records.

Implementing Sage 200 CRM

Before integrating Sage 200 Accounts and Sage 200 CRM, you should consider how you want to enter and integrate data between the two systems and complete all the required installation and implementation tasks.

This chapter explains the required implementation tasks and the different options available for entering and integrating data between the two systems.

In this chapter:

- 📄 Installing Sage 200 CRM on page 14
- 📄 Set up Accounts on page 16
- 📄 Set up CRM on page 20
- 📄 Set up your CRM users on page 29
- 📄 Set up the CRM Integration on page 22
- 📄 Synchronising your data for the first time on page 25

Installing Sage 200 CRM

If you want to integrate Accounts with CRM, you must make sure that you install the version of CRM that is supported with your installation of Accounts. This is because the customisations that are made to CRM are included in the Sage 200 CRM installer, the integration with Accounts and the Accounts installer.

The following table shows the most recent versions of Sage 200 Accounts and the accompanying versions of Sage 200 CRM.

Sage 200 Accounts	Sage 200 CRM
2011	7.1
2013	7.1i
2013 R2	7.2

Service packs, hotfixes and patches

Sage 200 CRM is a modified version of standalone Sage CRM. Periodically, updates, in the form of service packs, hotfixes and patches, are released for the standalone CRM application. These may contain fixes for your Sage 200 CRM application.

You must only install service packs, hotfixes or patches that are supported for Sage 200 CRM. Where they are supported, the Sage 200 CRM versions are usually released later.

In addition, there may be service packs and hotfixes for your Accounts application that also include Sage 200 CRM. You must always install the supported service packs, hotfixes and patches for the equivalent version of CRM as well as any service packs or other updates for the Accounts. Details of the supported CRM service packs, hotfixes and patches are available from the support area of our [website](#).

The following table shows the latest service packs for Accounts and the accompanying CRM patches and hotfixes.

Sage 200 Accounts	Sage 200 CRM
2013	7.1 i Hotfix 4
2013 SP1	7.1 i Hotfix 5
2013 R2	7.2 c Hotfix 2

To be able to integrate Sage 200 with Sage 200 CRM, you must make sure you have installed all the relevant integration components. These are included in both the Accounts installer and the CRM installer.

Component required	Where it is installed
Form Launcher	Accounts
Sage 200 Services	Accounts
Sage200CRMDotNet.dll	CRM
Integration contract	CRM
CRM Integration Service	CRM

For detailed information about the system requirements, installing the Sage 200 and installing Sage 200 CRM, see the [Sage 200 Deployment and Installation Guide](#).

Install Sage 200 Form Launcher

If you want to launch Accounts forms, such as sales orders and quotations from CRM, you must install the Form Launcher. If you have already installed the Accounts, you can install the Form Launcher by running the Accounts installation file again for each client machine. You must then select the form launcher from the **Sage 200 Client Components** screen.

Note: If you run the Accounts installer again, make sure all of your currently installed components of Accounts remain selected. Clearing any of the selected components will uninstall that component.

For information on setting up Form Launching and Troubleshooting, see [Form Launching on page 20](#).

Set up Accounts

For more information about these settings, see the [Deployment and Installation Guide](#) and the [Sage 200 Help](#).

Set up a Windows user account for the CRM integration

As part of the installation of Accounts, you have to create a Windows user account to access the Sage 200 Services. The CRM Integration Service must also have access to the Sage 200 Services, using this the same Windows user credentials.

This Windows user must:

- Be a member of the Sage 200 Users Group.

This is also specified as part of the Accounts installation process. For more information, see the Deployment and Installation Guide.

- Have a password that never expires.
- Be linked to a user account in Sage 200 System Administration.

This user account must have access to the Accounts database that you want to integrate with.



Open: Sage 200 System Administration > Users > Company Access.

Set up user accounts for your CRM users in Sage 200 System Administration

For v2013, you use your Windows user credentials to access Accounts. As part of the installation of Accounts, you have to specify two groups of Windows users; those who can access the Accounts desktop and those who can access Sage 200 System Administration.

We recommend that you set up a role in System Administration specifically for CRM users who will launch Accounts forms from CRM. These users must have access to the Accounts company database and the Accounts forms.

If these users do not need to access the Accounts desktop, create a role with the **Remote users Access only** option selected. This allows CRM users to launch Accounts forms without using an Accounts licence.

To set up your users:

1. Make sure that the Windows user accounts for your CRM users are members of the Sage 200 Users group.
2. In System Administration, make sure these users have access to the Accounts company that you want to integrate with.



Open: Sage 200 System Administration > Users > Properties > Company Access.

3. Create a role for your CRM users and authorise the features for the relevant Accounts forms.

If your CRM users will not access the Accounts desktop, select **Remote User Access only** from the role properties.



Open: Sage 200 System Administration > Roles > Properties.

Enter the CRM Integration settings

You must choose settings for the CRM integration in Accounts. These settings allow you to:

- Choose the amount of data that you wish to synchronise with Accounts.

When you synchronise Accounts and CRM for the first time, this initial synchronisation can take some time, depending the amount of data you have and the specifications of your network. You can reduce the time taken for this initial synchronisation by reducing the amount of data that is transferred to CRM. You can change this for subsequent synchronisations.

You can choose to synchronise:

Customers and suppliers only.	<p>This creates a company in CRM for each customer and supplier record in Accounts.</p> <p>As no products have been synchronised, you can only enter free text lines on CRM web orders. These orders can be synchronised with Accounts.</p> <p>Orders and quotes entered in Accounts are not synchronised.</p> <p>We recommend that you use this for the initial synchronisation with CRM</p>
Customers, suppliers and products.	<p>This creates company records in CRM and also creates a product in CRM for each stock item in Accounts.</p> <p>Orders and quotes entered in Accounts are not synchronised.</p> <p>CRM web orders can be synchronised with Accounts.</p>
Customers, suppliers and products, plus all quotes and sales orders.	<p>This creates companies and products in CRM and also synchronises all your quotes and sales orders from Accounts to CRM.</p> <p>CRM web orders can be synchronised with Accounts.</p>

Customers, suppliers, and products, plus selected quotes and sales orders.

This creates companies and products in CRM and also synchronises all your quotes and sales orders from a specified document date.

CRM web orders for any date can still be synchronised with Accounts.

Quotes and sales orders with a document date on or after the specified date are synchronised with CRM.

- Make the profitability information available to all users when entering web orders.
- Choose to prevent users deleting a contact from a customer or supplier account in Accounts when the corresponding CRM person record has outstanding opportunities, communications or cases.

When you delete a contact from a customer or supplier account in Accounts and the data is synchronised, the corresponding person record is also deleted in CRM, including the links to the outstanding cases, opportunities and communications.

To prevent this, select the **Check CRM on deleting an account** option. When a contact is deleted in Accounts, the corresponding person record in CRM is checked for:

- Communications that **Pending**.
- Opportunities that are **In Progress**.
- Cases that are **In Progress**.

Once selected, you cannot delete the contact record in Accounts, if the person record in CRM has any of these.

To enter the integration settings:

 **Open: Sage 200 Accounts > Accounting System Manager> Settings > CRM Integration Settings.**

Choose to generate sales orders numbers automatically

If you want to enter sales orders via CRM using the web order forms, you must choose to generate numbers for your sales orders and returns in Accounts automatically. This is to make sure an Accounts order number is assigned to all quotes and sales orders created in CRM.

CRM and Accounts use different numbering systems. Orders are only displayed in Accounts when they have sales order number assigned to them. If sales order numbers are not automatically generated in Accounts, any orders created using web orders in CRM will not have a sales order number and will not be displayed in Accounts.

To generate numbers automatically:

 **Open: Sage 200 Accounts > Sales Order Processing > SOP Utilities > System Set up > SOP Settings | Document Numbering.**

Choose to use segmented addresses in the system settings

We recommend that you use segmented addresses in Accounts. This is to make sure your customer and supplier addresses synchronise to the corresponding address fields in CRM.

Once selected, this creates separate address lines for **City** and **County** when entering customer and supplier addresses. This allows the synchronisation to match the **City** and **County** address lines in Accounts with the corresponding **City** and **County** address lines in CRM.

If you do not choose to segmented addresses in Accounts, the city and county address information is entered on the third and fourth address lines in Accounts. When the data is synchronised, the city and county information will be on **Address Line 3** and **Address Line 4** in CRM. This makes it harder to search your addresses in the CRM database.

To use segmented addresses:

 **Open: Sage 200 Accounts > Accounting System Manager > System Settings | Operational Settings.**

Set up a prospect account

If you want to enter quotes for CRM companies that are not linked to Accounts, you must specify the customer record that you want to use for your prospects in the SOP settings.

See [Quotes on page 44](#).

To set up a prospect account:

 **Open: Sage 200 Accounts > Sales Order Processing > SOP Utilities > System Set up > Sop Settings | Default Accounts.**

- Select **Allow quotations to be entered for Prospects**.
- Select the customer record you want to use as your prospect account.

Set up CRM

Currency settings

Currencies are not synchronised between the two systems. To make sure that your customers, suppliers and orders can be synchronised, you must:

- Make sure any currencies, that you have used in Accounts, are also set up in CRM.
- All the currencies set up in CRM must use the ISO code (GBR, USD, EUR), rather than symbols (£, \$, €).

This is because Accounts uses ISO codes and any currency fields that are synchronised with Accounts must contain the relevant ISO code.

To set you currencies:

 **Open: CRM > Administration > Data Management > Currency.**

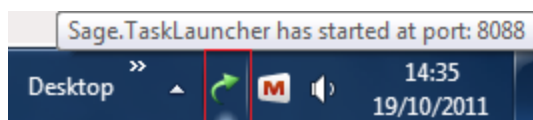
Form Launching

If you want open Accounts forms from within CRM, you must make sure that the Sage Task Launcher is installed and configured correctly and that your CRM users have access to the Accounts database and the relevant Accounts forms.

To launch Accounts forms from CRM:

- The Accounts Client must be installed on the same PC that you are using to access CRM.
- The Sage Task Launcher must be installed on the client PC.
- The Task Launcher must be running on the same port that is specified in the **Administration > System > ERP Form Launch Settings**. This is **8088** by default.

You can check the port number the Task Launcher is using, from the system tray.



For more information about changing the port for the Task Launcher, or about using the Task Launcher on a Terminal/ Citrix server, see the [Deployment and Installation Guide](#).

- The Task Launcher Listener application must be running: **Start > All Programs > Sage Task Launcher > Sage Task Launcher Listener**.

- Users must have access the Accounts Forms in CRM. This is specified in the **Administration > Users > User Details**.

Quotation Entry: Choose at entry	Print Quotation: ERP Form	Convert Quotation to Order: ERP Form	Delete Quotation: ERP Form
Order Entry: Choose at entry	Order Entry Type: Full		.
Customer Price Enquiry: ERP Form	Customer Transaction Enquiry: ERP Form		
Sage Passport Membership No: 0			
Invoice Entry: ERP Form			

- Users must have access to the Accounts database and Accounts forms in System Administration. See [Set up user accounts for your CRM users in Sage 200 System Administration on page 16](#).

Troubleshooting

The first time you launch an Accounts form from CRM, the form may take some time to open.

If you cannot launch Accounts forms from CRM, check the following:

- Does the user have access to the relevant Accounts database?
- Does the user have access in Accounts to the form you want to launch?
- Does the user have access in CRM to the form you want to launch ?
- Is there is an error on the webpage?
If so, check the error details in your browser.
- Does the port number matches the port number specified in the **ERP Form Launch** settings?
- Are there other applications are running on the port specified for the Task Launcher? If this port is already in use, change the port for the Task Launcher.
- Is the Task Launcher running?
To check this, stop and re-start the Task Launcher, by right-clicking the icon in the system tray.
- Are you are using Internet Explorer? Is **Protected Mode** turned on?
If so, add the CRM website to the list of trusted sites for each CRM user.

For more information see [Ask Sage Article 28206](#).

Set up the CRM Integration

For the first synchronisation

1. Set up the integration.



Open: Administration > Integration > Integration List.

Enter the following settings on your integration:

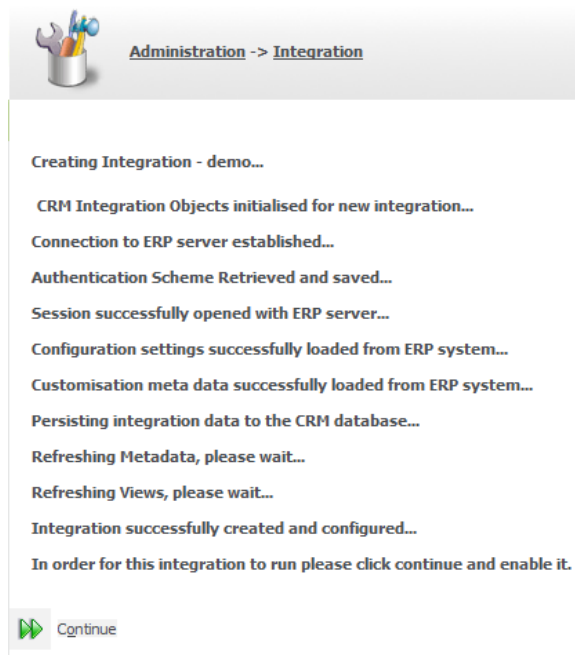
ERP URL	If you have used the default installation options for Accounts, the URL will be https://<Your server name>:10443/Sage200Services/Sage200CRMSyncService.svc .
ERP User Name	Enter the domain and name of the Windows user account that you set up for the Sage 200 Services, e.g. mydomain\myusername . This must be the same Windows user account that you specified for the Sage 200 Services when installing Sage 200 Accounts.
ERP Password	For ERP Password , enter the password for the Windows user account specified.
CRM username	We recommend that you use the System Administrator account.
	<div> <p>Note: If you change the password for the System Administrator account, you must also change the password in the Integration. If you do not do this, your CRM users will not be able to access Sage 200 CRM.</p> </div>
Synch Interval	We recommend that the time between synchronisations (Synch Interval), is set to a longer period, such as 60 minutes, for the first integration. This provides time for you to investigate any issues before the synchronisation starts again. You can change this once the initial synchronisation has completed successfully.
Max Errors Allowed	This should be set to 1 . This makes sure that the synchronisation fails on the first error and makes it easier to resolve any issues.

Default Territory

This is the territory that all entities synchronised from Accounts will be assigned to.

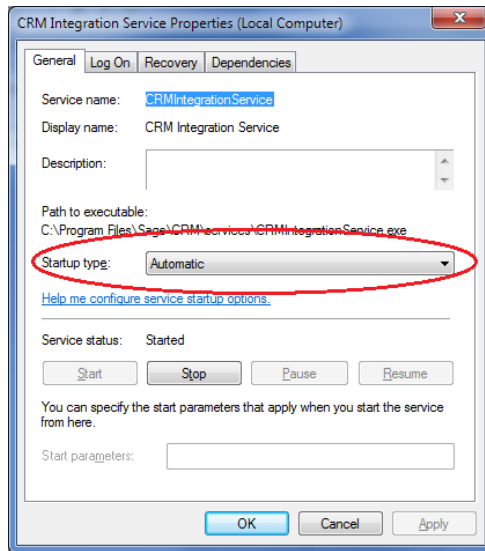
If this is set to **Worldwide**, all data synchronised from Accounts will be available to all users. For more information, see [Territories on page 41](#)

2. Save the integration. The integration setup may take a few minutes to complete.



Note: When setting up the integration on Windows Server 2008, the installation progress is not displayed on screen. The installation is taking place at this time. Do not close the **Integration Configuration** page. When the integration installation is complete the page will update.

3. Set the CRM integration Service start up to **Automatic** and make sure that the service is started.



For subsequent integrations

- Change the Integration interval to the interval (in minutes), that you require.

Synchronising your data for the first time

The first time you synchronise CRM with Accounts, all the relevant data from Accounts is synchronised and transferred to the CRM database. This can take a considerable length of time depending on the amount of data in your Accounts system and the specifications of your network.

This is controlled from the CRM Integration settings in Accounts. See [Set up Accounts on page 16](#).

We recommend that you synchronise a small amount of data for the initial synchronisation as this will help you to troubleshoot any possible issues more effectively, as well as reducing the initial synchronisation time.

In most instances, you will be synchronising from a Accounts database that is already in use, to a new CRM database.

To start the synchronisation

1. Clear the contents of the Sage 200 **DeleteLog** table.

See [Records that have been entered and deleted in Accounts before they have been synchronised on page 55](#).

2. Enable the synchronisation:



Open: Administration > Integration > Integration List.

3. Select the integration you have created and click **Enable**.
4. To start the synchronisation, click **Immediate Synch**.

The synchronisation begins. It may take some time depending on the amount of data you are synchronising and the specifications of your system.

Do not use CRM or Accounts while the first synchronisation is in progress.

5. To see the progress of the synchronisation, select the **Progress** tab.

This shows you the numbers of records remaining to be synchronised. To refresh the page, click the **Refresh** button.

The synchronisation is finished when the **Synch Status** shows **Success**, **Warning** or **Failed**, and the **Last Synch Time** and **Next Synch Time** are completed.

Once the initial synchronisation is complete, subsequent synchronisations only process records since the last synchronisation and are therefore, much quicker.

How your data is synchronised

Synchronising customer and supplier accounts

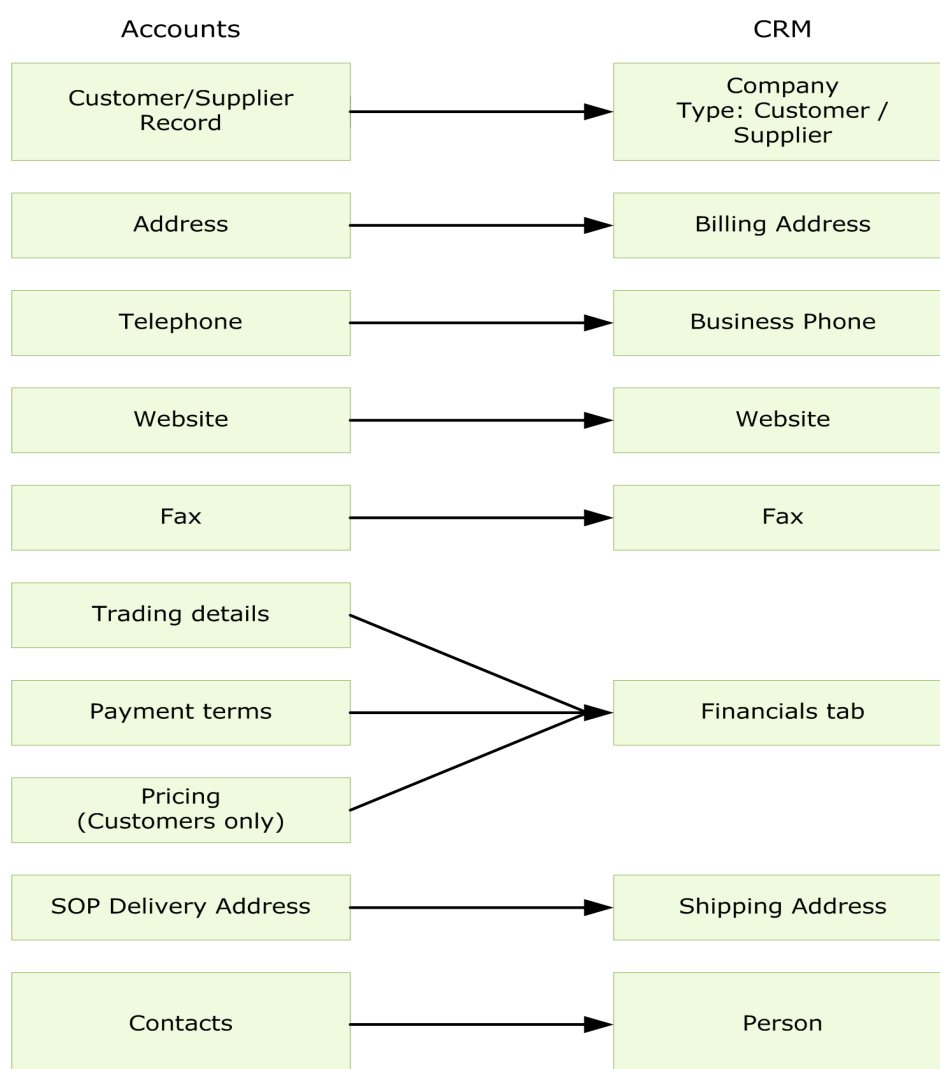
When you synchronise your data for the first time, a company entity and linked account entity is created in CRM for every customer and supplier in Accounts. These new CRM companies and account entities are automatically linked to Accounts. You cannot have a customer or supplier in Accounts that is not linked to CRM.

Note: The linked account entity is hidden and cannot be accessed in the user interface.

A CRM company with a type of **Customer** is created for each customer in Accounts. A CRM company with a type of **Supplier** is created for each supplier in Accounts.

The customer or supplier record in Accounts, and the corresponding company and account entity in CRM, will always have the same name. Any changes made to the company in CRM or the customer/supplier in Accounts, will be synchronised. This makes sure that the company, customer and supplier information is always the same in both systems.

The following diagram shows how the customer and supplier information in Accounts is transferred to CRM.

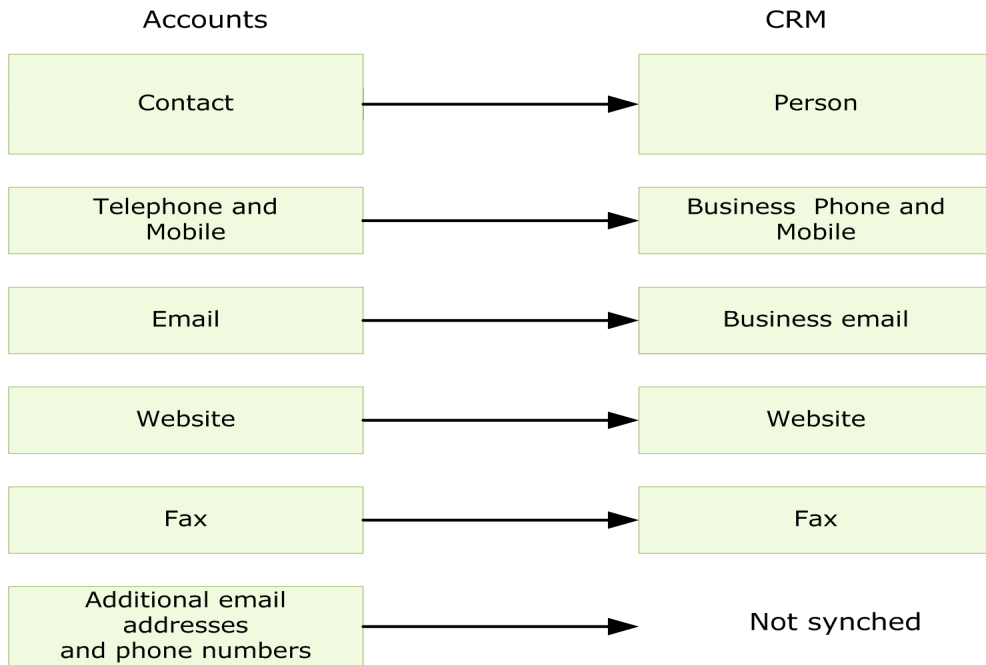


Synchronising contacts

CRM uses a separate entity or record for information about people or contacts. When you enter the details of a person, this is saved as a separate entity. This person entity is then linked to the corresponding company in CRM.

When the data is synchronised from Accounts, a person entity, linked to the relevant corresponding company, is created for each customer or supplier contact in Accounts.

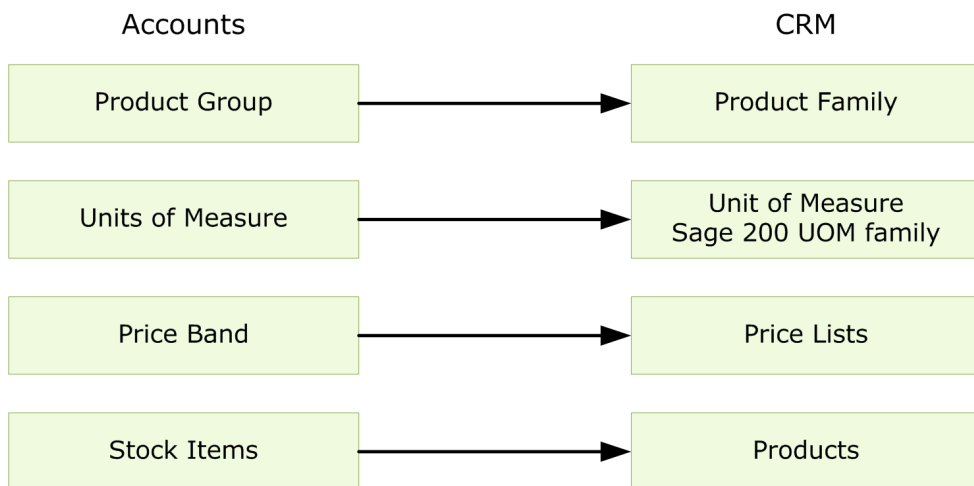
The following diagram shows how the contact details are transferred to CRM.



Synchronising products

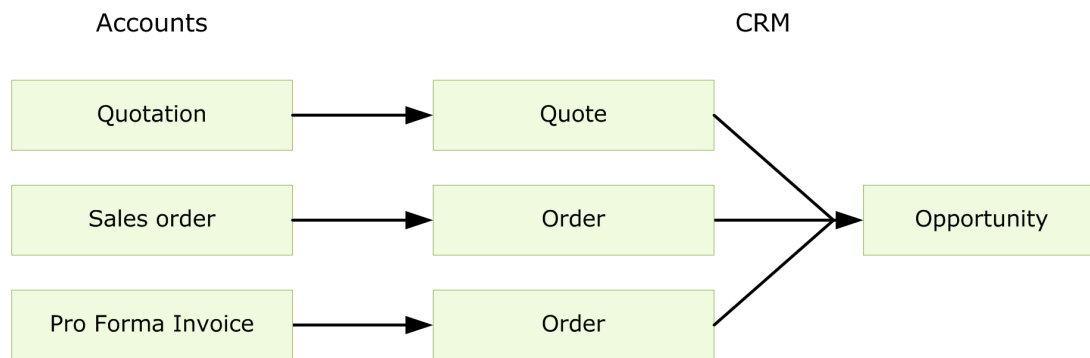
Product and pricing information is a one-way synchronisation from Accounts to CRM. You cannot change product and pricing information in CRM.

The following diagram shows how the product and pricing information is displayed in CRM.



Synchronising sales orders and quotes

In CRM orders and quotes are always linked to an **Opportunity**. When sales orders and quotes are synchronised with CRM for the first time, an opportunity is created for each CRM company. All orders and quotes for that company are added to this one opportunity. This includes completed sales orders.



Set up your CRM users

In CRM, you must choose additional settings to allow your users to access Sage 200 data and forms.

If required, you can also set up CRM to use single sign on.

Set up users to access Sage 200 data and forms

The **User Details** settings **Administration > Users > Users**, includes additional options which allow you to control the Accounts data that is available to each CRM user.

You can choose which Accounts reports and forms can be viewed from CRM, and whether to use Accounts or CRM forms for entering invoices, orders or quotations.

Do you want users to...?	Required settings
Enter quotes in CRM using the web quotes form only?	Quotation Entry > Use CRM Form.
Enter quotes in CRM using the Accounts form only?	Quotation Entry > Launch ERP form.
Choose which form to use when entering quotes?	Quotation Entry > Choose at Entry
Enter quotes in Accounts only?	Quotation Entry > No Access.
Convert quotes to orders using the Accounts form?	Convert quotation to order > ERP Form
Delete quotes using the Accounts form?	Delete Quotation > ERP Form
Print quotes using the Accounts form?	Print quotation > ERP Form
Enter orders in CRM using the web orders form only?	Order Entry > Use CRM form
Enter orders in CRM using the Accounts form only?	Order Entry > Launch ERP form
Which Accounts form do you want to use - Full or Rapid Order Entry?	Order Entry Type
Choose which form to use when entering orders in CRM?	Order Entry > Choose at Entry
Enter orders in Accounts only?	Order Entry > No Access

Do you want users to...?	Required settings
Overwrite the product price when ordering lines?	Enable Overwrite Price > Yes
Enter invoices using the Accounts form?	Invoice Entry > ERP Form
Access the Customer Price Enquiry Form in Accounts?	Customer Price Enquiry > ERP Form
Access the Customer Transaction Enquiry in Accounts?	Customer Transaction Enquiry > ERP Form
Access the Real Time Data Views (RTDV)?	Select the appropriate views from the list.

Note:

When creating users in CRM, unless you have created your own user templates, the settings for each user are based on the default user template that is installed with CRM.

When the data is synchronised and the Sage 200 CRM customisations applied, the **Decimal Places** is changed from **2** to **5** decimal places, for the default user template. This is to make sure that the number of decimal places matches those set in Accounts. If required, you can change this on the **User Preferences** tab.

More User Details

- ☒ Allow Access To Customer Analysis Codes RTDV
- ☒ Allow Access To Customer Annual Turnover RTDV
- ☒ Allow Access To Customer Memos RTDV
- ☒ Allow Access To Customer Period Turnover RTDV
- ☒ Allow Access To Customer Projects RTDV
- ☒ Allow Access To Customer Sales Transaction Memos RTDV
- ☒ Allow Access To Customer Sales Transactions RTDV
- ☒ Allow Access To Sales Order Lines RTDV
- ☒ Allow Access To Sales Orders RTDV
- ☒ Allow Access To Customer Products Purchased RTDV
- ☒ Allow Access To Supplier Analysis Codes RTDV
- ☒ Allow Access To Supplier Annual Turnover RTDV
- ☒ Allow Access To Supplier Memos RTDV
- ☒ Allow Access To Supplier Period Turnover RTDV
- ☒ Allow Access To Supplier Purchase Order Lines RTDV
- ☒ Allow Access To Supplier Purchase Orders RTDV
- ☒ Allow Access To Supplier Transaction Memos RTDV
- ☒ Allow Access To Supplier Transactions RTDV

Quotation Entry: Use CRM Form
Order Entry: Use CRM Form
Customer Price Enquiry: ERP Form
Invoice Entry: ERP Form

Print Quotation: ERP Form
Order Entry Type: Full
Customer Transaction Enquiry: ERP Form

Convert Quotation to Order: ERP Form
Delete Quotation: ERP Form

Set up Sage 200 CRM to use single sign on

You can now log on to CRM automatically using your Windows user account credentials. Once set up, your users do not need to enter a user name and password to access CRM.

This process has three stages:

1. Set up a Windows user group for your CRM users.
2. Set up your users in CRM with the same user name as their Windows login and remove the password.
3. Choose to use **Auto Login** and add your domain name in the **User Configuration** settings.

For example:

You have a user called Jo Bloggs. Their Windows login details are **mydomain\jo.bloggs**. Their CRM username is **Jo**.

To set up single sign on for Jo:

- Add Jo.Bloggs to the CRM users group and the Sage 200 Users group.
- In CRM, on the Users screen, change the **User Name** to **jo.bloggs**. Remove the password.
- On the **User Configuration** screen, select **IIS AutoLogin** and enter **mydomain** in the **Default Domain for IIS Login** box.

Step 1: Set up a Windows user groups for your CRM users.

We recommend that you create a Windows group especially for your CRM users.

If you are using form launching in CRM, members of this group must:

- Also be members of the Sage 200 Users Group. This is the group that is specified as part of the installation of Sage 200.
- Have access to the Sage 200 company database that you want to integrate with. This is set up in Sage 200 System Administration.

Step 2: Set up your users in CRM with the same user name as their Windows login.

There are three ways to do this:

1. Change the login details for your existing CRM users.
Use this if you want your existing CRM users to access CRM using their Windows account credentials.
2. Manually create new CRM users.
3. Create new CRM users by importing your Windows Active Directory users.

When users use Auto login for CRM, they do not need a password for their CRM user account, therefore this box must be cleared on the CRM user screen. To save your CRM users without a password, you will need to change any password policies you have set up in **Administration > Users > Security > Password Policies**.

To change the login details for existing CRM users

 **Open: Administration > Users.**

1. Select the user that you want to change.
2. Click **Change**.
3. In the **User Name** box, enter the login name for the user's Windows account, e.g. jo.bloggs.
4. Clear the password details.

As your Windows credentials are used for authentication, the CRM password is not required.
5. Save the user account.

To create new CRM users

 **Open: Administration > Users.**

1. Click **New**.
2. In the **User Name** box, enter the login name for the Windows account, e.g. jo.bloggs.
3. Do not enter a password.

As your Windows credentials are used for authentication, the CRM password is not required.
4. Enter the remaining user details as required.
5. Save the user account.

To import users from Windows Active Directory

 **Open: Administration > Users > Import Users**

1. Enter the details of your Active Directory on the **Active Directory Parameters** panel:

LDAP Server Name	Enter the name of the Server or server IP address where Active Directory is configured.
LDAP Server Port	Port number. If this field is left blank, then 389 is the default port used.
Active Directory User ID	Enter the details of an Active Directory user logon ID with access to navigate the Active Directory tree. For example, <i>testID@testdomain</i> or <i>testdomain\testid</i> . The logon ID is the <i>UserPrincipalName</i> attribute taken from the Active Directory user's properties.
Active Directory User Password	Enter the password for the logon ID specified in the Active Directory User ID field.

2. Click **Connect**. This connects to the server and displays a list of your Active Directory users.
3. Select the node from the Active Directory List which contains your CRM users group. Click **Expand Selected Node** to open the tree and locate the required users group.
4. Select **Continue**.

5. Use the filter options to find the users that you want to import
6. Select the users you want to import from the list:

Use the **Select** and **Deselect** buttons and the check boxes to select the users to import.

7. Choose whether to import the users as **Named Users** or **Concurrent** users:

Number of users currently selected to import This includes the number of existing CRM users in the system who are also in Active Directory. To clear this number down to zero:

- Clear the **Remove Existing CRM Users From The List** check box
- Click **Find** (so that all users are displayed in the list).
- Click **Deselect All**.

Number of seats available This shows the number of licenses minus the number of existing active users.

8. Click **Continue**.
9. Enter the following details on the **Import Parameters** tab:

Use the Same Password for All Users Select this and do not enter a password. Once you have selected to logon automatically, this setting is ignored.

Select User Template Select a user template. The imported users are set up using this template.

Note: We recommend that you set up at least one user as a System Administrator. This is to make sure that one user can still access the Administration menu after you have selected to use auto login.

Send Welcome E-mail To New Users Select this to send a welcome e-mail to users. You must have configured a mail server in Administration > E-mail And Documents > E-mail Configuration.

Select E-mail Template Select a template for the welcome email. A standard template is supplied.

10. Select **Continue**. The user import begins.

The Import Users, Step 4 of 4 page is displayed.

11. Select **View Log File** to open or save the log. The log file can also be accessed from **Administration >System >System Logs**, and from **..\Program Files\Sage\CRM**

[InstallName]\Logs.

12. Select **Continue** to return to the **Administration > Users** home page.

Step 4: Set up Sage 200 CRM to use auto login

We recommend that you set up at least one user as a System Administrator, before you choose to use auto login on the User Configuration screen. This is to make sure that at least one user still has access to the Administration menu.

 **Open:** Administration > Users > User Configuration

1. Click **Change**.
2. Set **Use IIS Auto Login** to **Yes**.
3. Enter your domain name in the **Default Domain For IIS Login** box.
4. Click **Save**.

The next time your users open CRM, they will not need to enter login details.

Troubleshooting

I have to login into the browser before accessing CRM

To make sure that you do not have to log on to your browser when accessing CRM, enter the following settings:

For Internet Explorer:

Select the following security setting for the **Internet** and **Local intranet** zones from the **Internet Options > Security > Custom Level** window:

- **Automatic Logon with current user name and password**

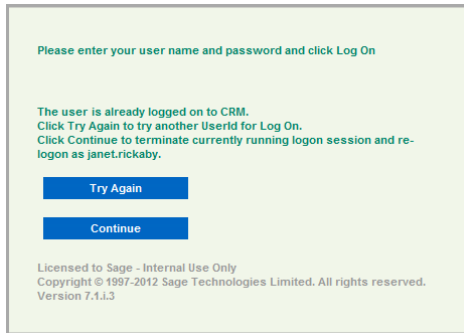
For Chrome:

Enter the following from the Command prompt:

- For 32-bit operating systems:
`"C:\Program Files\Google\Chrome\Application\chrome.exe" -auth-server-whitelist="localhost, <machine fully qualified domain name>"`
For example: `"C:\Program Files\Google\Chrome\Application\chrome.exe" -auth-server-whitelist=localhost, sagesvr01.mydomain.com"`
- For 64-bit operating systems:
`"C:\Program Files (x86)\Google\Chrome\Application\chrome.exe" -auth-server-whitelist="localhost, <machine fully qualified domain name>"`
For example: `"C:\Program Files (x86)\Google\Chrome\Application\chrome.exe" -auth-server-whitelist=localhost, sagesvr01.mydomain.com"`

I see an message telling me I'm already logged on, when opening CRM.

When you log off and log back onto CRM, you see the following message:



Please enter your user name and password and click Log On

The user is already logged on to CRM.
Click Try Again to try another UserID for Log On.
Click Continue to terminate currently running logon session and re-logon as janet.rickaby.

Try Again

Continue












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Version 7.1.i.3

Click to **Continue** to log on to CRM.

Using integrated Sage 200 CRM

This chapter highlights the areas of CRM that link to Accounts. It explains how the data is linked, and the things you need to consider when deciding how to enter information in both systems.

In this chapter:

-  Companies on page 38
-  People / Contacts on page 39
-  Territories on page 41
-  Communications on page 42
-  Opportunities on page 43
-  Quotes on page 44
-  Orders on page 46
-  Real Time Data Views on page 48
-  Relationships and consolidated lists on page 49
-  Sage 200 Groups on page 50
-  Customisations on page 52

Companies

Customer or supplier records created in Accounts are always synchronised with CRM.

When creating companies in CRM, you have to manually link them to Accounts. Once linked, a new customer or supplier record is created in Accounts.

Linking a CRM company to Accounts

If you want to link a CRM company to Accounts:

- The company must have a type of **Customer** or **Supplier**.
- The main company address must be the **Billing** address.
- If required, enter the **Account Reference** on the **Financials** tab before the company is linked to Accounts.

If the **Account Reference** field is left blank, the **A/C ref** in Accounts will be an automatically generated number. This cannot be changed in Accounts.

- You must link the company to Accounts. Choose **Company > Financials > Link to ERP**.

When the data is synchronised, a new customer or supplier account is created in Accounts.

The billing address in CRM becomes the customer or supplier account address in Accounts. This is the address that all invoices in Accounts are sent to.

Things to consider

- When you change the **Billing** address in CRM, this changes the main customer or supplier account address in Accounts, and therefore the address where invoices are sent.

If you do not want CRM users to be able to change the **Billing** address, you can customise CRM to make the address read only.

- When a company is created in CRM, it is not automatically linked to Accounts. If, at a later date the same company is created in Accounts, you will have a duplicate company in CRM.

To resolve this, you can merge the two companies.

People / Contacts

People or contacts can be created in CRM and Accounts.

Things to consider

Creating contacts in Accounts

- Contacts added to customer and supplier records in Accounts are automatically synchronised with CRM. This creates a corresponding person record in CRM.
- Customer and supplier records in Accounts always have a default contact. The default contact is the **Preferred contact** for the **Account** role. This is the person who invoices are sent to.
- If no details have been entered for the default contact on the customer or supplier record, a blank person record is created in CRM with the **Default for Accounting** option selected.
If this blank person record is deleted in CRM, the corresponding contact in Accounts is not deleted because it is the default contact. The next time the data is synchronised, the blank person is re-instated in CRM.
- If you delete a contact in Accounts, the corresponding person record is deleted in CRM, including outstanding cases, notes and communications. You can prevent this by selecting the **Check CRM on deleting an account** option in the **CRM Integration Settings** in Accounts. See [Set up Accounts on page 16](#).

Creating people records in CRM

- In CRM, you can only add people to companies from within the company context.
- If you create a person entity as an individual (i.e. not linked to a company), using the **Add > New Person** option, this individual person record cannot be synchronised with Accounts and cannot be linked to a company in CRM at a later date.
- A company in CRM must have a least one linked person.
- When a CRM company is linked to Accounts, all person records for that company are synchronised with Accounts. This creates corresponding contacts for the Accounts customer or supplier record.
- The first person entered for a company in CRM is automatically designated as the **Default for Accounting** person for that company. When the company is linked to Accounts, the **Default for Accounting** person becomes the default contact for that customer or supplier, and is therefore the person that invoices are sent to.
- If you delete the **Default for Accounting** person in CRM, a blank default contact is created in Accounts and in CRM when the data is synchronised, even when other contacts exist. This is because Accounts must always have a default contact and the synchronisation does not know which one to choose.

- If the default person has left the company and their replacement needs to take over their communications, leads, opportunities etc, you can merge the person records.

Territories

You can use territories in CRM to control and filter the data that CRM users can access.

Users can be assigned to territories and all the primary entities in CRM (Case, Company, Lead, Opportunity, Person), have a **Territory** field.

Accounts does not use territories. When the data is synchronised, CRM needs to know which territory to add the synchronised data to. This is controlled by a territory field on the Integration.

When you create a new customer or supplier in Accounts, the corresponding company in CRM will be assigned to the territory specified on the integration. Other entities, linked to a company that are entered in Accounts, such as a contacts or the default opportunity, will be assigned to the same territory as the company.

By default, the territory specified on the integration is **Worldwide**. This means that all new companies and contacts, synchronised from Accounts, are available to all users.

Status		
ERP url: https://Sage006894a:10443/Sage200/WebServices/SageCRM.aspx	Product name: Sage 200 ERP Integration	Contract version: 16.0.13.1
ERP Meta Data Version: 16.0.13.1	Sync Schema Version: 16.0.13.1	Conflicts in last sync: 0
Last Sync Time:	Next Sync Time:	Sync Status: Success

Configuration		
ERP Integration name: Sage 200	Integration Timeout (seconds): 300	Sync Interval (minutes): 60
Max Errors Allowed: 1	Default Territory: Worldwide	Default Account Manager: System Administrator
Allow Deletion of Linked Accounts: <input checked="" type="checkbox"/>		
ERP Username: CRM	ERP password: *****	Company name: training
CRM Username: System Administrator	CRM password: *****	
Allow users to create accounts in CRM: Yes and manually link	Price ERP products in multi currency: Yes	Create new company for each account: Yes

For more information about setting security policies and territories, see the CRM Administrator help.

Things to Consider

If you use territories and want to control who can access the data that is entered in Accounts, you can consider the following options:

1. Always use CRM when creating new companies or people.
This allows you to make sure that CRM entities are always allocated to the correct territory.
When you create a primary entity in CRM you can specify the territory. This does not have to be the same as the linked company's territory.
2. If you use Accounts to enter new customers, suppliers and contacts, set up a special territory for the integration to use.
 - a. This allows you to make sure that information entered in Accounts can only be accessed by specified user/users.
 - b. The specified user/users can allocate the information to the correct territory.

Communications

In CRM, you can keep a record of any interactions with your customers.

Things to Consider

- Any communications that are sent from Accounts, such as statements and debtor letters, are not recorded in CRM.
- Communications created in CRM are not recorded in Accounts.

You may want to consider adding a customisation that enables the recording of these communications.

You can use the [Sage CRM Community](#) to find add-ons, components and applications that have been developed for CRM.

Opportunities

In CRM, you can create sales opportunities from new, or you can convert a lead to an opportunity. Once an opportunity has been created, you can add quotes and orders to that opportunity.

Quotes and orders can be added to an existing opportunity using the CRM web forms or by opening the Accounts forms from CRM.

Alternatively, quotes and orders can be entered outside the context of an opportunity, as long as you are in the context of a company. In these cases opportunities are created automatically and given a description of 'Auto'.

Things to consider

- Quotes and orders, entered using the CRM web forms, are included in the opportunity total.
- Quotes entered using the Accounts forms, are not included in the opportunity total. However order values are included.

Auto Opportunities

- 'Auto' opportunities are created in CRM for the following scenarios:
 - For quotes and orders entered outside the context of an opportunity, using the CRM web forms, an 'auto' opportunity is created for each quote or order entered.
 - For quotes and orders entered outside the context of an opportunity, using the Accounts forms, a single default 'auto' opportunity is created for each company. All quotes and orders entered in Accounts, are added to this one opportunity.
 - For quotes entered for prospect companies in CRM (i.e. a CRM company that is not linked to Accounts), an 'auto' opportunity is created for each quote entered.
 - For quotes entered for the prospect companies in Accounts (using the **Enter Quotation for Prospect** option), an 'auto' opportunity is created in CRM for each quote entered.
- If you want to identify the default opportunity for each CRM company on the opportunity list, you can do this by adding a customisation to the **vListOpportunity** View. for more information see [Ask Sage Article 28650](#).
- If you want to hide all 'Auto' opportunities from the opportunity list, you can do this by adding a customisation to the **vListOpportunity** View. For more information see [Ask Sage Article 28650](#).

Quotes

You can enter quotes in CRM or in Accounts.

In CRM, quotes can only be entered when you are in the context of company. You can enter quotes:

- Using the CRM web orders form.
- Using Accounts quotes form. This can be launched from CRM.

Things to consider

Using CRM web quotes form

- Quotes entered using the CRM web form, are not synchronised with Accounts. To see your quotes in Accounts, they must be entered using the Accounts forms.
- If the quote has not been added to an existing opportunity, a new opportunity is created for each quote.
- Quotes entered using the CRM web form can be edited in CRM. Quotes entered using the Accounts forms can only be edited in Accounts.
- Quotes can only be converted to orders when the CRM company is linked to Accounts. The **Convert** button is not visible unless the CRM company is linked to Accounts.
- When the quote is converted to an order in CRM, the order is not automatically linked to Accounts.
- If you want to enter a quote for a company that is not linked to Accounts, you must have a **Prospect** customer set up in Accounts.

Using the Accounts form

- All quotes entered using Accounts forms, are automatically synchronised with CRM and therefore cannot be edited in CRM.
- When the quotes are synchronised, they are automatically linked to the default opportunity created for company. If you are launching the Accounts form from CRM, you can add a quote to a different existing opportunity.
- The quote can only be converted to an order in Accounts, or by launching the **Convert Quotation to Order** form from CRM.

Entering Prospect Quotes

You can enter quotes in CRM for companies that are not linked to Accounts. These are prospect quotes. To use prospect quotes you must have set up a **Prospect Account** in Accounts. See [Set up Accounts on page 16](#) for more details. You can only have one prospect in Accounts and it must be in your base currency. A corresponding prospect company is also created in CRM when the data is synchronised.

You can enter quotes for a new prospect company using the CRM web orders, or by launching the Accounts form. If the CRM web form provides the required functionality, we recommend that all prospect quotes are entered this way.

Things to Consider

Using the CRM web form

- The quote is not synchronised with Accounts.
- Before the quote can be converted to an order, the CRM company must be linked to Accounts.
- If the quote has not been linked to an existing opportunity, an 'Auto' opportunity is created.
- When converting the quote to an order, you can choose to link it to Accounts.
- When you choose to **Overwrite Price** on a Quote, the price defaults to zero.

Using the Accounts form

- The quote is entered for the **Prospect** record in Accounts. The postal name is automatically populated with the name of the prospect company.
- Make sure the currency used for the quote is the same as the currency listed for the company in CRM.

When entering a prospect quote in Accounts you can change the currency of the quote. If the quote is entered in a different currency to the company in CRM, you will not be able to link the company to Accounts until you either;

- change the currency of the company to match the quote, or
 - delete the quote.
- Before converting any quotes to orders in Accounts, make sure that you have linked the company in CRM to Accounts.
- When converting the quote, you must use the Accounts form. When using this form you must make sure that you:
 - Select the correct customer.
 - Do not use the **New** option to create a the customer in Accounts. As the company already exists in CRM, using this will create a duplicate company in CRM.
- If the quote has not been linked to an existing opportunity, an 'Auto' opportunity is created for the quote.
- Once the company is linked to Accounts, the quote is moved from the prospect record in Accounts to the corresponding customer record.

Orders

When CRM and Accounts are integrated, you can enter sales orders in both Accounts and CRM.

Note: You can only enter orders in CRM for companies that are linked to Accounts.

An opportunity is automatically created for every order entered, unless you add the order to an existing opportunity. You cannot do this for orders that are entered directly in Accounts.

There are three ways you can enter orders in CRM:

- Enter the orders in CRM, using the CRM web orders form.
- Enter the orders in CRM, using the Accounts form launched from CRM.
- Enter the orders in Accounts.

Things to Consider

Entering orders using the CRM web orders form

- The CRM form contains less functionality than the Accounts sales orders form. For example, payments cannot be processed with the CRM web forms.
- Orders entered this way are not automatically synchronised with Accounts. You must manually choose **Link to ERP** for each order. Once you have selected to link an order to Accounts, the synchronisation starts immediately.
- Until the orders are linked to Accounts, they have do not have a Accounts order number.
- You can check the price and availability of a product using the **Check Price** option in CRM. This checks that the price on the stock item line matches the stock price in Accounts. It also displays a message on screen that shows the location and amount of free stock for the item in Accounts.

Note: If you see a message saying **The Pricing Service is not available** and the **Check Price** button is missing, you must set the CRM Web site to use the **Application Pool Identity**. See the Sage 200 Deployment and Installation Guide for more information.

- If you use multiple stock locations in Accounts, you must choose the correct location for the product, when entering an order line via the CRM web form. This is not validated when entering the order line. You cannot synchronise an order with an incorrect stock location.

Entering using Accounts forms

- You can enter an order in CRM by launching the Accounts sales order form. This can either be the **Full** sales order entry form or **Rapid** entry form. This allows a CRM user to enter orders using the full sales order functionality in Accounts.

- Payments for sales order can be entered with the Accounts forms, including integration with Sage Pay.
- All sales orders entered in Accounts are automatically synchronised with CRM. When you enter an order using the Accounts form, it is not visible in CRM until the next synchronisation has completed.
- If you launch the Accounts form from CRM, you can add the order to an existing opportunity. If the order is not entered in the context of an opportunity, the order is automatically linked to the default opportunity for that company.

Real Time Data Views

Once a company has been linked to Accounts, you can access the Accounts data for the company in CRM from the Accounts Data tab. This data is accessed using Real Time Data Views.

A number of these Real Time Data Views are available 'out of the box' for Sage 200 CRM. There are different views depending on whether the company is a customer or supplier.

The data views are an XML representation of the data in a form defined by the author of the view and they can be customised if required.

Note: If you see a message saying **There was a problem retrieving RDTV data** when accessing your Real Time Data Views, you must set the CRM Web site to use the **Application Pool Identity**. See the Sage 200 Deployment and Installation Guide for more information.

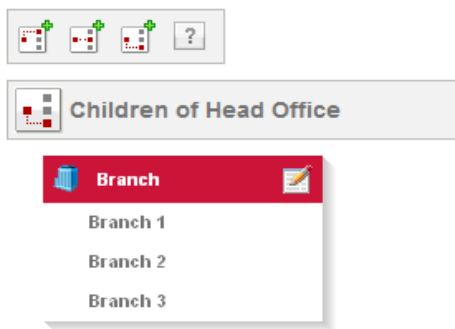
Relationships and consolidated lists

In CRM you can set up relationships between your primary entities (Case, Lead, Opportunity, Company, Person), to reflect reciprocal relationships.

When Accounts and CRM are integrated you can use **Branch / Head Office** relationships to view data for related companies. Once a Branch / Head Office relationship has been set up, an additional **Consolidated Lists** tab is available in CRM. From here you can see combined lists of CRM data for the Head Office and Branch companies.

For example, you might have a company in CRM that is the Head Office for several trading companies. As you only communicate with this head office for marketing purposes, you have no requirement for the company to have a customer record in Accounts. You do however trade with the subsidiary companies, and for these you do have customer records in Accounts.

To reflect this relationship in CRM, you can create a company for the head office in CRM. This company is not linked to Accounts. You can link the subsidiary companies to this head office, using the **Branch** relationship. The subsidiary companies are linked to Accounts.



Using the consolidated lists tab, you can see information for all the subsidiary companies from within the head office.

 **Company:** Head Office
Phone:

Summary Financials Quick Look Dashboard Marketing Notes Communications Cases People Addresses Phone/E-mail Company Team

3 Records Found, Page 1 of 1

Status	Description	Company Name	Person	Opened	Stage	Priority	Territory
	sales for branch 2	Branch 2	Keith taylor	08/12/2011 13:30	Qualified		Worldwide
	Sales for branch 1	Branch 1	Phil Jones	06/12/2011 13:00	Lead		Worldwide
	Auto :	Branch 3	-				Worldwide

Status: --All--
Stage: --All--
Territory: --All--
 Filter

Sage 200 Groups

In CRM, you can set up groups to allow you to create sets of data based on defined filter criteria.

When Accounts and CRM are integrated, you can create dynamic groups based on data from Accounts such as products purchased. An additional **Sage 200 Groups** tab is available from My CRM.

You specify the columns and search criteria for the group in a similar way to creating groups in CRM. Once the Sage 200 group has been created, you can access it from the **Groups** tab in My CRM and complete actions such as mail merge and export to file.

Note: You can only edit a sage 200 Group from the **Sage 200 Groups** tab.

Sage 200 group examples

Create a group based on a specific product purchased

Once created, this group will contain all the companies that have purchased a specified product.

1. Create a new group from the **Sage 200 Groups** tab.
2. Enter a **Name** and **Description** for the group. Click **Continue**.
3. From the **Group Columns**, choose the columns that you want to include in your group such as the company name: **Company:Company Name**
4. From the **Filter Columns**, choose the following:
 - **Product:ProductName.**
 - **OrderItems:Quantity.**
5. If you also want to specify a date range for when the products were purchased, select **Orders:CreatedDate**.
6. From the **Sort columns**, choose how you want to sort the group. For example, if you want the sort order based on the number of products purchased, select **OrderItems:Quantity**. Click **Next** to continue.
7. Enter the following criteria for **OrderItems - Quantity**:
 - **Operator: Great than or equal to 1.**
8. Enter the required criteria for **NewProduct - Product Name**.
9. Click **Next**.
10. The group is displayed. To use the group for your marketing activities, click **Save Group**. The group is then available on the **Groups** tab.

Create a group based on the products purchased in a specific product group.

Once created, this group will contain all the companies that have purchased products in a specified product group.

1. Create a new group from the **Sage 200 Marketing Groups** tab.
2. Enter a **Name** and **Description** for the group. Click **Continue**.
3. From the **Group** column, choose the columns that you want to include in your group such as the company name:
 - **Company:Company Name**.
4. From the **Search Criteria** column, choose the following:
 - **Product Family :Product Family Name**.
 - **OrderItems:Quantity**.
5. If you also want to specify a date range for when the products were purchased select **Orders:CreatedDate**.
6. From the **Sort columns**, choose how you want to sort the group. For example, if you want the sort order based on the number of products purchased, select **OrderItems:Quantity**. Click **Next** to continue.
7. Enter the following criteria for **OrderItems - Quantity**:
 - Operator: **Great than or equal to 1**.
8. Enter the required criteria for **NewProduct - Product Name**:
9. Click **Next**.
10. The group is displayed. To use the group for your marketing activities, click **Save Group**. The group is then available on the **Groups** tab.

Customisations

You can customise CRM to make the application suit your business. This includes extending the synchronisation to include additional data.

Considerations

When the system is customised, there always an element of risk that could result in system downtime or loss of functionality.

When customising an integrated CRM system, extra care needs to be taken. You should consider the following recommendations:

- Set up the customisation in a test environment first to make sure that it meets your requirements.
- Always keep a record of any customisation that you make. This makes it easier to replicate the customisations when required.
- If possible, apply the customisations as a component. This makes re-applying your customisations much easier and quicker.
- Whenever you apply service packs or upgrades to CRM or Accounts, the customisations contained in the integration are re-applied and any additional customisations you have made may be overwritten.

Each of the Sage 200 customisations XML files has a version number. When the synchronisation is run, the web service method only applies those customisations with the higher version number.

If you have added your own customisation to one of the screens that has changed in the new version of Sage 200 CRM, you will need to re-apply that customisation after you have upgraded and synchronised your data.

For a list of the screens that have changed for each version, see the Upgrading Sage 200 CRM Guide.

Troubleshooting the synchronisation

Use this chapter to learn more about why a synchronisation could fail. It covers some common synchronisation issues and explains how you can use the synchronisation status and log files to help fix any issues.

It also explains how to set up escalation rules in CRM to inform you when the synchronisation fails.

In this chapter:

- 📄 Check the synchronisation status of your companies on page 54
- 📄 Why can the synchronisation fail? on page 55
- 📄 Set up Notifications for when the synchronisation fails. on page 60

Check the synchronisation status of your companies

The Synch status tab displays a list of CRM companies and their synchronisation status. You can use this to:

- Check whether a company is linked to Accounts.
- Check whether a company has linked to Accounts correctly.

Companies that have a synchronisation status of **error linking** are not synchronised with Accounts. To synchronise these companies, you must re-link the company on the **Company > Financials** tab. This will either link the company successfully with Accounts, or display the reason the company could not be linked.

To check the synchronisation status:

1. Select **Administration > Integration > Integration List > Synch Status**.
A list of companies and their current synchronisation status is displayed.
2. Use the **Filter** button to filter the list of companies by their synchronisation status.
3. If required, select the company link to access the company details and re-link the company to Accounts.

Why can the synchronisation fail?

There are several reasons why the synchronisation may fail.

On some occasions, a single entity such as an order or quotation will fail to synchronise. On other occasions, the whole synchronisation may fail. This depends on the type of issue.

Some common synchronisation issues

Invalid unicode items in records

This usually occurs when data is copied from a website or a Microsoft Word document which contains invisible characters.

To resolve this, check for invisible characters and make sure text is entered directly in CRM.

Auto numbers switched off in Accounts

If Accounts is not set to automatically generate sales order numbers and you have entered a web order in CRM, that order will fail to synchronise.

This is because Accounts cannot assign an order number as it is not set to generate automatic numbers.

To resolve this:

- Make sure **Automatically generate sales orders numbers** is selected in the SOP settings.

Password policy in Accounts

The synchronisation fails if the password has expired for the Sage 200 Accounts user that is used for the integration.

Invalid location when entering web orders

If you have entered a web order in CRM with an incorrect location for the product, that order will fail to synchronise.

To resolve this:

- Change the location of the product on the order and re-link the order to Accounts. You can see the current location of the product, and the amount of free stock, by clicking the **Check Price** button.

Records that have been entered and deleted in Accounts before they have been synchronised

If you create a new customer or supplier in Accounts in error, and then delete it before the data has synchronised to CRM, a **\$\$\$ Dummy names** company is created in CRM.

This occurs because Accounts always creates an entry in the **DeleteLog** table when a record is deleted. When the data is synchronised with CRM, the integration uses the **DeleteLog** table to delete corresponding CRM records. As this account record has never existed in the CRM database, a dummy company is created by the integration.

To resolve this:

- Make sure the contents of the **DeleteLog** table are removed prior to the initial synchronisation with CRM, and every time CRM or Accounts is upgraded. This prevents the creation of dummy companies in CRM.
- If dummy companies are created, they should be deleted in CRM.

Troubleshooting

There are many other issues that cause the synchronisation to fail. To troubleshoot these issues you should:

- Consult the log files available for CRM, the integration and Accounts.
- Consult [Ask Sage](#) for any articles that may provide a resolution for a particular issue.
- Contact Sage 200 Technical Support with the all relevant details and information from the log files.

Log Files

Make sure that all the information you require to troubleshoot any issues with the synchronisation are included in the available log files. There are log files for:

- CRM Integration log File
- The Sage Services log file

CRM Integration Log Files

There are three logs files in CRM which are specific to the integration. These can be found within the CRM installation directory. By default this is **C:\Program Files\Sage\CRM\<name of your CRM installation>\Logs**.

There are three log files:

- **CRMIntegrationService.log**
This shows you the start and end times of each synchronisation.
- **ewaresql.log**
This shows you all the activity CRM performs in SQL. This is useful if your synchronisation fails with the SQL statement.

■ IntegrationLog<Integration name>.log

This provides details of the synchronisation activity. This file is usually the first one to consult when the synchronisation has failed.

This log file can be opened from within CRM: **Administration > Integration > Integration List > Integration name > View Log file.**

By default this log file is set to record errors only. To help with troubleshooting, we recommend that you increase the logging level of the file to include all synchronisation activity. This can be done by changing the **Integration Logging** level to **Full Logging** in the integration.

Administration -> Integration -> Integration List -> Sage 200 -> Logging

Logging

System Logging Level: 5 - Maximum SQL Logging Level: Errors only Query duration logging threshold (milliseconds): 0

.Net Logging:
1 - Minimum

Integration Logging:
Errors Only

Log files

Select log files: integrationlogSage 200

Log Date	Log Size	View Log
21/12/2011	1 KB	
16/12/2011	3 KB	

You can identify whether the issue is related to CRM records, or Accounts records, from the error message in the log file:

- If the error says **Error Caught in ProcessIncomingArray** or **Error in Process OneERPchangeLogPage**, then the error was caused when adding data to CRM, or with an error in Accounts.
- If the error says **Error in GetChangeLog**, then the error was caused when adding data to Accounts or with an error in CRM.

Sage 200 Services Log File

This log file shows you where the integration has failed. It shows the reason the integration has failed and the relevant entity. Where possible, additional information is included to help identify issues, such as the CRM record ID, the Accounts record ID, the document number, the warehouse name, the contact name and so forth.

When you want to investigate an issue, you will need to create the log file for the Sage 200 Services. To do this, you must:

1. Change the logging level in Sage 200 System Administration:
 - a. Open **System Administration > Logging**.
 - b. Choose **Debug** from the drop-down list.
2. Change the logging level and the pagination within the **web.config** file for the Sage 200 Services.
 - a. Open **C:\inetpub\Sage 200 App Services\Sage200Services\web.config**.
 - b. Change the logging level to **Debug**.

```

</appSettings>

<log4net>
  <root>
    <!--Note: to change the level of logging for the FileStorageAppender, this
    <level value="ERROR"/>
    <appender-ref ref="FileStorageAppender"/>
  </root>

  <appender name="FileStorageAppender" type="Sage.MMS.Admin.LoggingAppender.Fi
    <file value="Log\Sage200Services.log"/>
    <appendToFile value="true"/>
    <layout type="log4net.Layout.PatternLayout">
      <param name="ConversionPattern" value="%date %-5level %C.%M %message %ne
    </layout>
  </appender>
</log4net>

```

- c. Change the **PaginationMaxRecordsToReturnValue** to 1.
3. Change the permissions for the log folder. The **IUSR**, **Network Service** user and Local System users must have permission to see this folder.
4. Reset IIS.
5. Run the synchronisation again to create the log file.

We recommend that once the issue is resolved, you change the logging level back to the default **Error**. This is to make sure that you don't have large log files created on your web server.

Note: You must stop IIS before the log file can be renamed or deleted.

Troubleshooting using the Log Files

To troubleshoot efficiently, you need to cross reference the web service log files with the integration log files.

In the following example, a synchronisation failed at 14.05.

1. Use this time to locate the error in the Integration Log File. Make a note of the exact time of the error e.g. Jan 4 2012 14:02:28:52.
2. Find this same time in the SQL Service log files. This may tell you what the SQL query was

at the point of the failure and this may tell you the issue.

3. If not, find the exact time in the Web Service log file to locate the error.

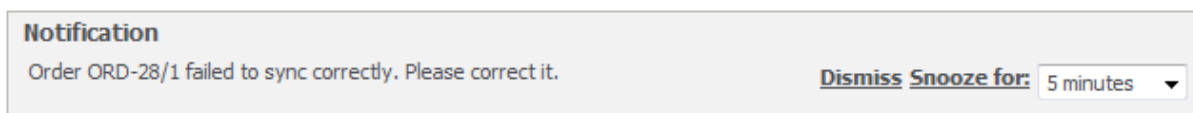
You can set escalation rules in CRM that warn you a synchronisation fails. See the next section for more details.

Set up Notifications for when the synchronisation fails.

You can use the CRM escalation rules to notify you when there are problems with the synchronisation.

Notifications for conflicts

Escalation rules are already set up in CRM for orders, quotes and companies. These rules inform you when a record in CRM cannot be linked to Accounts due to a problem with the record in CRM, such as incorrect stock location on an order. When this occurs, a notification appears at the top of the screen in CRM. All other information will continue to synchronise successfully.



Notifications for synchronisation failures

You can also create an escalation rule to inform you when the synchronisation fails.

To do this you must create two new views; one for the escalation rule and one for notification service to use.

Create a view for the escalation rule

1. Note the **bord_tableId** for your integration. This can be found by running the following SQL script on the relevant CRM database:

```
select Bord_TableId, Bord_Name from Custom_Tables where
Bord_Name = 'ERPIntegrations'
```

2. Open **CRM > Administration > Customisation > Company > Views**.
3. To create a new view, click **New**.
4. Enter a **View name**. In the following example, the view name is **v_ERPFail**.
5. Enter the following **View Script**:

```
CREATE VIEW v_ERPFail
AS
SELECT *
FROM ERPIntegrations left join escalations on escl_
recordid= ERPI_IntegrationID and escl_tableID = (select
Bord_TableId from Custom_Tables where Bord_Name =
'ERPIntegrations')
```

Create a view for the Notification Service

1. Add a new view.
2. Enter the following View Name: **vNotificationERPIntegrations**.
3. Enter the following View Script:

```
CREATE VIEW vNotificationERPIntegrations
AS
SELECT *
FROM ERPIntegrations left join escalat ions on escl_
recordid= ERPI_IntegrationID and escl_tableID = (select
Bord_TableId from Custom_Tables where Bord_Name =
'ERPIntegrations')
```

Add a field to the Custom_Tables table

To allow rules to be created against **ERPIntegrations**, you need to populate a field in the **Custom_Tables** table.

1. Run the following SQL script:

```
update Custom_tables set Bord_WorkflowIdField = 'ERPI_
workflowid'
where Bord_Name = 'ERPIntegrations'
```

2. Run a metadata refresh in CRM.

Create an escalation rule



Open: Administration > Advanced Customisation > Escalation.

1. Add a new rule for a **View**.
2. Enter the following **View** details: V_ERPFail for table: **ERPIntegrations**.

3. Enter the following SQL Trigger Clause:

```
(1 = #U AND lower(v_ERPFail.ERPI_SyncStatus) = 'Fail') AND
((Escl_EscalationId is NULL ) OR (Escl_WorkflowRuleId <>
10149) OR ((Escl_WorkFlowRuleId = 10149) AND Escl_Datetime
< #T AND Escl_UserId = #U))
```

You must use the correct Escl_WorkFlowRuleId. In the SQL script above, this is **10149**.

The SQL script used above will notify the System Administrator user **1=#U**. To notify other users, add the relevant user ID. To check you user IDs, use the following SQL script:

```
select User_UserId, User_Logon, User_FirstName, User_
LastName
from Users
```

Workflow Rule

Clone an existing rule, giving it a new name and press save, or fill in the various boxes below

Clone an existing rule:

Clone the actions associated with the Rule:

Table or view:

☐ Table:

☒ View: Table:

Rule Name:

Type:

Alternative Image for Rule:

Custom File Name:

☐ .Net

Available for Cloning: ☐

Rule Enabled: ☒

Restricted to Team:

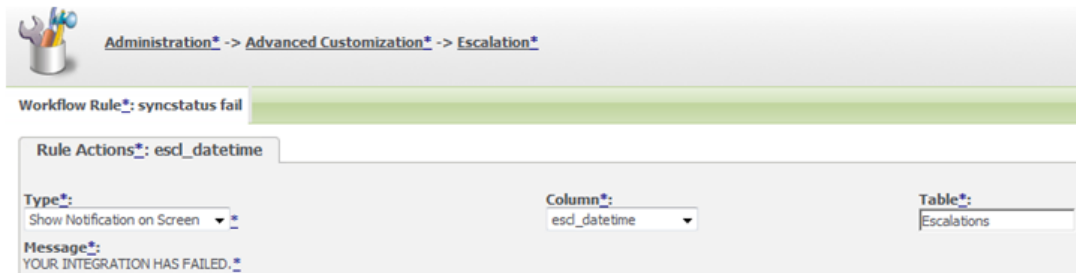
Order:

Trigger SQL Clause:

```
(1 = #U AND lower(v_ERPFail.ERPI_SyncStatus) = 'Fail') AND
((Escl_EscalationId is NULL ) OR (Escl_WorkflowRuleId <>
10149) OR ((Escl_WorkFlowRuleId = 10149) AND Escl_Datetime
< #T AND Escl_UserId = #U))
```

4. Now you can create an action for the rule, such as an on screen notification or an email message.

5. For example, to add an on screen notification
 - a. Add new workflow action.
 - b. Select **Show Notification on Screen** from the **Type** drop-down list.
 - c. Select **ESCL_datetime** from the **Column** drop-down list.
 - d. Enter Escalations as the **Table**.
 - e. Enter your required on screen **Message**.



The screenshot shows the Sage CRM Administration interface. The breadcrumb navigation at the top reads: **Administration** -> **Advanced Customization** -> **Escalation**. Below this, a green bar indicates the current workflow rule: **Workflow Rule*: syncstatus fail**. The main section is titled **Rule Actions*: escl_datetime**. It contains three fields: **Type*** with a dropdown menu set to "Show Notification on Screen", **Column*** with a dropdown menu set to "escl_datetime", and **Table*** with a text input field containing "Escalations". At the bottom, the **Message*** field contains the text "YOUR INTEGRATION HAS FAILED."

6. If you want to send email notifications you must make sure that you have configured CRM to allow emails to be sent. For more information about Escalation Rules see the Sage CRM Partner Community website: http://community.sagecrm.com/partner_community/default.aspx

