Sage ERP Accpac



How can we help you?

Use the links below to find instructions, software training, oneon-one support, technical specifications, or other resources to get Sage ERP Accpac working smoothly for your business! Your Sage Business Partner is also an excellent resource to consult when you have questions about Sage ERP Accpac.

- L'm setting up Sage ERP Accpac and need information or assistance
- L'm looking for instructions to complete a task within Sage ERP Accpac
- L think something is broken, or I'm getting error messages
- Lim looking for downloads, updates, or technical specifications
- Lwant to become a more skilled user of Sage ERP Accpac
- Lwant to share knowledge with other Sage ERP Accpac users
- L want to contact a Sage ERP Accpac representative



SageCRM Integration

The Sage ERP Accpac Integration Component establishes a seamless link between your Sage ERP Accpac accounting system and SageCRM.

To set up this component, follow these steps.

- 1. Install the integration component on the server where Sage ERP Accpac is installed, and also on any workstations which have Sage ERP Accpac accounting programs installed.
- 2. Activate the Sage ERP Accepac integration component. This will enable the following icons under the SageCRM folder on the Sage Accepac company desktop:
 - SageCRM Setup
 - Workstation Setup
 - Error Log
- 3. Open the SageCRM Setup form and choose the integration and notification options for your system.
- 4. Run the Workstation Setup utility on any Sage ERP Accpac desktop workstation (whether Sage ERP Accpac programs are installed locally or running from the server) that you wish to integrate with SageCRM. You do not need to run the Workstation Setup utility on the client if you are running a browser client only.

Once you have chosen the appropriate options and completed these setup steps, changes made to customers, customer shipto addresses, vendors, and vendor remit-to addresses, are reflected automatically in SageCRM.

SageCRM Integration Activation

After you install the Sage ERP Accpac Integration Component, you must activate it.

You use the Data Activation dialog box to activate services and applications in Sage ERP Accpac.

To activate the Sage ERP Accpac Integration Component:

- 1. Start Sage ERP Accpac from your workstation.
- 2. Log on as the ADMIN user in your company database. If security is activated in Sage ERP Accpac, you need to enter the password for the ADMIN user.
- 3. In System Manager's Administrative Services folder, click Data Activation.
- 4. From the Applications list, select the appropriate version of SageCRM Integration, and choose Activate. This opens the SageCRM Integration Activation dialog box.
- 5. In the SageCRM Installation Name field, enter the name of your SageCRM installation.
- 6. Click Proceed to complete the activation. To cancel the activation, click Close on the Activation window.

Once activation is finished, and you close the Data Activation window, the SageCRM folder is displayed on the Sage ERP Accpac desktop.

SageCRM Setup

This form lets you choose several options for running SageCRM with Sage ERP Accpac. You must use this form to choose setup options when you first set up SageCRM.

Once you have set up SageCRM Integration, use this form when you want to change your selections.

To use the SageCRM Setup form

Select the SageCRM folder and click the SageCRM Setup icon.

The E/W SageCRM Setup form appears.

2. Review and select the following connection options on the Setup form:

Suspend All Integration to SageCRM. Select this option if you do *not* want any changes in Sage ERP Accpac to be reflected automatically in SageCRM.

Suspend A/R Integration to SageCRM. Select this option if you do *not* want changes in Accounts Receivable to be reflected automatically in SageCRM.

Suspend A/P Integration to SageCRM. Select this option if you do *not* want changes in Accounts Payable to be reflected automatically in SageCRM.

Suspend O/E Integration to SageCRM. Select this option if you do *not* want changes in Order Entry to be reflected automatically in SageCRM.

Note: If you suspend O/E integration to SageCRM, the totals and forecasting information on the Opportunity Summary, Quote Summary, and Order Summary screens will not be updated with information from Sage ERP Accpac.

You can also transfer customer or vendor information manually to SageCRM using the SageCRM import functions.

Suspend A/R Ship-To Addresses Integration to SageCRM or Suspend A/P Remit-To Addresses Integration to SageCRM. Select this option if you do *not* want changes to these addresses in Accounts Receivable or

Accounts Payable to be reflected automatically in SageCRM. (Note that after an installation, these two options are *selected*, by default.)

You can also transfer customer ship-to (or vendor remit-to) address information manually to SageCRM using the SageCRM import functions.

SageCRM Installation Name. Ensure that the SageCRM installation name is correct (the default is CRM).

If you change this field, click the **SageCRM Web Services URL** the Web Services URL field.

Logon User. The default is "r;CRM". The CRM user account is created automatically within SageCRM to allow Sage ERP Accpac to connect to it.

Password. To add security to this connection, enter a password.

Note: If you change the password for the Logon user, you also need to change the password for this user within SageCRM. This also applies if you use a different Logon user name than the default&emdash;CRM.

SageCRM Server name. The default value for this field is the name of your computer. If SageCRM and Sage ERP Accpac are installed on separate servers, enter the name of the SageCRM server.

If you change this field, click the **SageCRM Web Services URL** the Web Services URL field.

Web Services URL. The Web Services URL field consists of the SageCRM Server Name field, the SageCRM Installation Name field, and program defaults. For example: http://605DEV05/CRM09/eware.dll/webservices/soap where 605DEV05 is the server name, and CRM09 is the installation

name.

If you make changes to the SageCRM Server Name field or the SageCRM Installation Name field, click the **SageCRM Web Services URL** button to automatically update the corresponding portions of the URL field.

Alternatively, you can simply type over the existing value in the URL field. The server name and installation name used in the URL must be the same as the value in the SageCRM Server Name field and the SageCRM Installation Name field.

3. Review the notification options at the bottom of the Setup window.

Acknowledge operations. By default, whenever a customer or vendor record is edited and saved in Sage ERP Accpac, a notification window is displayed to inform the user that the update to SageCRM was successful. Uncheck this option if you do not want to receive notification messages.

Display errors. By default, the integration component alerts the user to any problems that occur when the program tries to update a customer or vendor in SageCRM. You can turn this option off and view the error log to review any problems.

Log errors. This option allows the administrator to turn on or off the logging of errors received by the integration component.

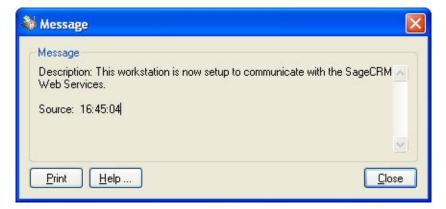
4. Click Save to complete the setup process, and then click Close to exit.

Workstation Setup

You need to run the Workstation Setup utility on any Sage ERP Accpac desktop workstation (whether Sage ERP Accpac programs are installed locally or running from the server) that you wish to integrate with SageCRM. You do not need to run the Workstation Setup utility on the client if you are running a browser client only.

To run workstation setup:

- 1. Start Sage ERP Accpac on the workstation that you want to set up.
- 2. In the SageCRM folder, select **Workstation Setup**.
- 3. If the SageCRM synchronization component has not yet been installed, a message will ask if you want to install it.
 - Click **Yes** and follow the instructions to install the SageCRM synchronization component. For detailed instructions, refer to the "Installing the E/W Component" section in Chapter 5 of the SageCRM Integration Guide.
- 4. The program also displays a message that informs you if the workstation is currently set up to communicate with SageCRM:



This does not necessarily mean that the communication

connection between SageCRM and Sage ERP Accpac is successful. You can test the connection, as instructed in a later step.

- 5. Click the **Close** button on the message box.
- 6. A window then appears displaying the CRM installation name, the name of the CRM server, and the Web Services URL.
- 7. To test the connection, click the **Test** button.
- 8. Click Close to exit.

Note: If you move SageCRM to another installation location or to a different server, you must rerun the SageCRM Setup program and the SageCRM Workstation Setup utility.

Printing the Error Log

The error log lists any problems that occur when the program tries to update a customer or vendor in SageCRM.

You can turn error logging on or off on the SageCRM Setup form.

To print the Error Log

 Open the Error Log form in the SageCRM folder, and click the Print button.

For each error encountered with updating SageCRM contacts, the error log displays the:

- Date
- Time
- User
- Operation
- Error message
- Module
- Contact type
- Contact ID
- Contact name

Using Help

Welcome to Sage ERP Accpac online Help! Context-sensitive Help is available when you use Sage ERP Accpac on your desktop or from a Web browser.

Obtaining Online Help

- Press F1 at the Sage Desktop to get help for the System Manager.
- To get help for a specific module, open a form for the module, and then click Contents on the Help menu.
- When help is open:
 - Click the Contents tab to view the table of contents for this help system.
 - Click the Index tab or the Search tab to find help topics using keywords.
 - Click the Glossary tab to look up definitions for Sage ERP Accpac terms.

Glossary

1099 Form A/R Invoice Type

Account Description

Account Description
Account Groups
Account Number Segment Overrides
Account Number Segments
Account Segment
Account Segment
Account Segment
Account Set
Account Set
Account Set
Account Set
Account Types
Accounting Equation
Accounting Method
Accounting Period
Accounts Payable
Accrual
Accrual
Accrual Carry-Over Date
Accrual Method
Accrual-Basis accounting method

Accrual-Basis accounting method Accrued Expenses Activating taxes

Activating taxes
Activation
Active Order
Actual Fiscal Sets
Adjustment Period
Adjustments
Advance
All Users
Allocated Tips
Allocation Account
Allow Posting to Previous Years
Allow Provisional Posting
Annual Maximum

Annual Maximum Annualization

Annualization
Assets
Assign UI Profile IDs
Audit Trail
Authentication Method
Automatic Reversal
Backdated document

Bad Debts
Balance Sheet

Base Account
Base Deductions

Base Earnings Base Hours

Base Taxes
Base Wage Multiplier
Basic Account Information
Basic Project style

Batches Benefit

Billing Type

Billings And Costs accounting method Budget Fiscal Sets Calculation Base Calculation Methods Calculator

Carrying Over Vacation, Sick, and Compensatory Time Accruals Carry-Over Cash Advance

Cash Benefit

Cash Flow Statement Cash Method

Category
Category Percentage Complete accounting method

Ceiling
Chart of Accounts

Chart of Accounts
Class Codes
Classified Statements
Clearing Exchange Gain or Loss
Close to Segment / Account
Closing Account
Closing Period
Closing the Books

Closing the Books Common Stock

Company Database

Company Desktop

Company Profile

Compensatory Time

Completed Project accounting method

Consolidated Batch

Control Account

Control Account for Subledgers

Conversion Rate

Corporation

Cost Accounting

Cost Center Overrides

Cost Center Segments

Cost of Goods Manufactured

Cost of Goods Sold

Cost Plus project

CPRS

Credit

Currencies

Currency Rate Type

Currency Rates

Currency Table

Current Assets

Current Liabilities

Custom (and Local) Taxes

Customization Directory

Customize User Interface

Database

Database ID

Date Matching

Debit

Decimal Places for Quantity

Deduction

Default Closing Account

Default Currency

Default Hours

Default Rate Type

Default Source Code

Defining a Source Journal

Defining Meaningful Account Number Segments

Delimiter Character

Depreciation

Detail and Consolidated Posting Options

Detailed Batch

Details

Direct Labor Costs
Distribution Accounts

Distribution Code

Distribution Set

Dividend

Drilldown

Earning/Deduction

Earning/Deduction Frequencies

Earnings

Edit Imported Entries

Effective Date

Employee History

Employee Level Security

Employee Selection List

EMU

Equity

Euro Conversion Rates

Euro Currency

Euro Option

Exchange Gain or Loss

Exchange Rate

Expense Reimbursement

Expenses

Exporting

Factory Overhead

Federal and State Taxes

Field

Financial Statements

Financi Finder

Fiscal Calendar

Fiscal Periods

Fiscal Sets

Fiscal Year

Fixed Assets

Fixed Price project

FOB Point

Force Listing of Batches

Foreign-currency Bank

Functional Currency

Functional Currency Code

Functional-Currency Equivalent

Future Order

G/L Batch

G/L Options -- Account tab

G/L Options -- Company tab

General Ledger Account

Gross Pay Gross Profit on Sales

History

Imported Account Data

Imported Batches

Importing

Income

Income Statement

Information in G/L Accounts

Integration Access Pack

Integrity Check

Inventory

Invoice Type

Journal

Journal Entry

Labor Hours Percentage Complete accounting method

LanPak

Last Run Date

Last Year Information

Ledger

Level

Liabilities

Local and Other Custom Taxes

Lock Budget Sets (1-5)

Long-Term Liabilities

Lookup Table

Macro

Maintain Quantities Options

Manual Check

Matching Concept

Menu Bar

Miscellaneous Charge

Multicurrency Accounting

Multicurrency Bank

Multicurrency Fiscal Sets

Multicurrency G/L Accounts

Multicurrency G/L Option

Net Pay

No Users

Normal (Account) Balance

Number of Fiscal Periods

Optional Fields

Original Invoice

Override Segments

Overtime Rate Multiplier

Overtime Schedule

Owner Equity

Partnership Pay Factors

Payroll Class Codes

Payroll Distribution Accounts

Period Minimum and Period Maximum

Periods Per Year

Picking Slip

Post in Specified/All Currencies

Posting Statistics

Posting tab in G/L Options

Preferred Stock

Prepaid Expenses

Price List

Printing Scheduled Reports

Printing Source Journal Definitions

Profile ID

Profit

Profit and Loss Statement

Profit Center

Programs (Applications)

Project Percentage Complete accounting method

Project Type

Provisional Fiscal Sets

Provisional Posting

Provisional Posting Journal

Quantities in G/L Accounts

Quantity Fiscal Sets Quarter With 4 Periods

Quote

Rate Operation

Rate Type

Rates

Realization

Realized Exchange Gain or Loss

Reallocation Account

Recognized Exchange Gain or Loss

Reconcile (Bank)

Record

Record of Employment

Recurring Transaction

Remit-to Location

Repayment Deduction

Reported Tips

Reporting Currency

Restart Record

Retainage Accounting

Retainage Invoice

Retained Earnings

Revaluation

Revaluation Codes

Revenues

Reversed Unrealized Exchange Gain or Loss

Salary and Wages

Salary and Wages Payable Account

Sales

Sales Table

Sample Account Segments

Schedule Code

Schedule Reports

Schedule Transactions

Script

Security Group

Segment Codes Validation

Selection List

Service Years

Services

Session Date

Settlement Rate **Settling Transactions**

Shareholders

Shareholders' Equity

Shift Differential Rate Shift Differential Schedule

Ship-Via Code

Sick Time

Sole Trader

Source Codes Source Currency

Source Document

Source Journal Profiles

Source Journals and Consolidated Transactions

Specific User

Spread

Standard Project style

Standing Order

Statement of Retained Earnings

Status

Stock Subsidiary Ledger

Surtax Multiplier

Suspense Account System Database

Tax Authorities

Tax Classes

Tax Groups

Tax Tables

Template (employee setup)

Time And Materials projects

Timecards

Tip Disbursement

Total Cost Percentage Complete accounting method

Transaction Rate Type

Trial Balance

Type UI Profile ID

UI Profile Maintenance
Unrealized Exchange Gain or Loss
User Authorization
User Record
Vacation Time
Wage Bracket Table
Wage Garnishment
Web Desktop
Withdrawal
Workers' Compensation Code
Worksheet
Years of Fiscal Sets
Years of Transaction Detail