Sage CRM Integration Help

Use the links below to find instructions, software training, one-on-one support, technical specifications, or other resources to get Sage 300 ERP working smoothly for your business.

Your Sage Business Partner is also an excellent resource to consult when you have questions about Sage 300 ERP.

How can we help you?

- I'm setting up Sage 300 ERP and need information or assistance
- I'm looking for instructions to complete a task in Sage 300 ERP
- I think something is broken, or I'm getting error messages
- I'm looking for downloads, updates, or technical specifications
- I want to become a more skilled user of Sage 300 ERP
- I want to share knowledge with other Sage 300 ERP users
- I want to contact a Sage 300 ERP representative

Sage CRM Integration

Sage 300 ERP Integration for Sage CRM establishes a seamless link between your Sage 300 ERP accounting system and Sage CRM.

To set up this component, follow these steps.

- 1. Install Sage 300 ERP Integration for Sage CRM on the server where Sage 300 ERP is installed.
- 2. <u>Activate Sage 300 ERP Integration for Sage CRM</u>. This will enable the following icons under the Sage CRM folder on the Sage 300 ERP company desktop:
 - Sage CRM Setup
 - Workstation Setup
 - Error Log
- 3. Open the Sage CRM Setup form and choose the integration and notification options for your system.
- 4. Run the Workstation Setup utility on any Sage 300 ERP desktop workstation that you wish to integrate with Sage CRM (whether Sage 300 ERP is installed locally or running on the server). You do not need to run the Workstation Setup utility on the client if you are running a browser client only.

After you select the appropriate options and complete these setup steps, changes made to customers, customer ship-to addresses, vendors, and vendor remit-to addresses are reflected automatically in Sage CRM.

Sage CRM Integration Activation

After you install Sage 300 ERP Integration for Sage CRM, you must activate it.

You use the Data Activation dialog box to activate services and applications in Sage 300 ERP.

To activate Sage 300 ERP Integration for Sage CRM:

- 1. Start Sage 300 ERP from your workstation.
- 2. Log on as the ADMIN user in your company database. If security is activated in Sage 300 ERP, 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 Sage 300 ERP Integration for Sage CRM, and choose Activate. This opens the Sage CRM Integration Activation dialog box.
 - a. In the Sage CRM Installation Name field, enter the name of your Sage CRM installation.
 - b. 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 Sage CRM folder appears on the Sage 300 ERP desktop.

Sage CRM Setup

This form lets you choose several options for Sage 300 ERP Integration for Sage CRM. You must use this form to choose setup options when you first set up Sage CRM.

Once you have set up Sage 300 ERP Integration for Sage CRM, use this form when you want to change your selections.

To use the Sage CRM Setup form

- Select the Sage CRM folder and click the Sage CRM Setup icon.
 The E/W Sage CRM Setup form appears.
- 2. Review and select the following connection options on the Setup form:
 - Suspend All Integration to Sage CRM. Select this option if you do not want any changes in Sage 300 ERP to be reflected automatically in Sage CRM.
 - Suspend A/R Integration to Sage CRM. Select this option if you
 do not want changes in Accounts Receivable to be reflected
 automatically in Sage CRM.
 - Suspend A/P Integration to Sage CRM. Select this option if you
 do not want changes in Accounts Payable to be reflected
 automatically in Sage CRM.
 - Suspend O/E Integration to Sage CRM. Select this option if you
 do not want changes in Order Entry to be reflected automatically in
 Sage CRM.

Note: If you suspend O/E integration to Sage CRM, the totals and forecasting information on the Opportunity Summary, Quote Summary, and Order Summary screens will *not* be updated with information from Sage 300 ERP.

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

 Suspend A/R Ship-To Addresses Integration to Sage CRM or Suspend A/P Remit-To Addresses Integration to Sage CRM.
 Select this option if you do not want changes to these addresses in Accounts Receivable or Accounts Payable to be reflected automatically in Sage CRM. (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 Sage CRM using the Sage CRM import

functions.

- Sage CRM Installation Name. Ensure that the Sage CRM installation name is correct (the default is CRM).
 - If you change this field, click the **Sage CRM Web Services URL** the Web Services URL field.
- Logon User. The default is "CRM". The CRM user account is created automatically within Sage CRM to allow Sage 300 ERP 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 Sage CRM. This also applies if you use a different Logon user name than the default&emdash;CRM.

 Sage CRM Server name. The default value for this field is the name of your computer. If Sage CRM and Sage 300 ERP are installed on separate servers, enter the name of the Sage CRM server.

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

 Web Services URL. The Web Services URL field consists of the Sage CRM Server Name field, the Sage CRM 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 Sage CRM Server Name field or the Sage CRM Installation Name field, click the **Sage CRM 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 Sage CRM Server Name field and the Sage CRM Installation Name field.

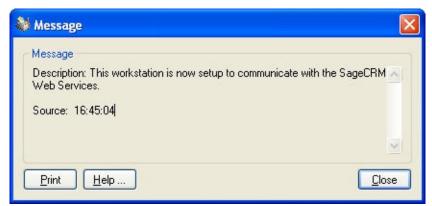
- 3. Review the notification options at the bottom of the Setup window.
 - Acknowledge operations. By default, whenever a customer or vendor record is edited and saved in Sage 300 ERP, a notification window is displayed to inform the user that the update to Sage CRM was successful. Uncheck this option 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 Sage CRM. 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 300 ERP desktop workstation (whether Sage 300 ERP programs are installed locally or running from the server) that you wish to integrate with Sage CRM. 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 300 ERP on the workstation that you want to set up.
- 2. In the Sage CRM folder, select **Workstation Setup**.
- 3. If the Sage CRM 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 Sage CRM synchronization component. For detailed instructions, refer to the "Installing the E/W Component" section in Chapter 5 of the Sage CRM Integration Guide.
- 4. The program also displays a message that informs you if the workstation is currently set up to communicate with Sage CRM:



This does not necessarily mean that the communication connection between Sage CRM and Sage 300 ERP 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 Sage CRM to another installation location or to a different server, you must rerun the Sage CRM Setup program and the Sage CRM 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 Sage CRM.

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

To print the Error Log

• Open the Error Log form in the Sage CRM folder, and click the Print button.

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

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

Using Help

Welcome to Sage 300 ERP online Help! Context-sensitive Help is available when you use Sage 300 ERP 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.