



# Sage 300

## Sage CRM 2018 Integration Upgrade Guide

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# Contents

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## Chapter 1: Introduction

## Chapter 2: Installing and Activating Sage CRM Integration

Before You Install .....	2-1
Upgrading Sage CRM for Sage 300 .....	2-2
Upgrading Sage 300 Only .....	2-2
Upgrading Sage CRM and Sage 300 .....	2-3

## Chapter 3: Changes in Sage 300 Integration with Sage CRM

Sage 300 2012 Integration with Sage CRM 7.1.....	3-1
Sage 300 6.0 Integration with Sage CRM 7.1 .....	3-2
Sage 300 6.0 Integration with Sage CRM 7.0 .....	3-2
Sage 300 5.6 Integration with Sage CRM 6.2 .....	3-8
Sage 300 5.5 Integration with Sage CRM 6.1 .....	3-10
Sage 300 5.4 Integration with Sage CRM 6.0/6.1 .....	3-17



# Chapter 1

## Introduction

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This guide provides information for upgrading from a previous version of Sage CRM for Sage 300.

If you are setting up Sage CRM integration with Sage 300 for the first time, refer instead to the *Sage CRM Integration Guide*.

You can find other Sage CRM documents in the Sage\Documentation folder of the Sage CRM folder on the installation DVD.

### Important

This version of Sage CRM integrates only with certain versions of Sage 300. For more information, see the Sage 300 Compatibility Guide.

Ensure that you have installed the latest product updates for Sage 300 System Manager and applications.

Also, before upgrading to this version of Sage CRM, you **must** upgrade to the most recent previous version of Sage CRM.

### Sage CRM Solo

Sage CRM Solo is not supported in this version of Sage CRM.

### Note re ERP product name

Sage 300 ERP has become Sage 300. All references to Sage 300 ERP (version 6.1 and 6.2), Sage ERP Accpac (version 6.0) and Sage Accpac ERP (version 5.6) have been changed to Sage 300.



# Chapter 2

## Installing and Activating Sage CRM Integration

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This chapter provides instructions for installing and setting up the Sage CRM integration component, which enables Sage CRM to integrate with Sage 300.

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**Note:** This item is a separate install component, which must be installed after Sage CRM. For more information, see “Installing Sage 300 Accounting Integration for Sage CRM” in Chapter 3 of the *Sage CRM Integration Guide*.

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### Before You Install

Before you begin installation and activation:

- Review system requirements:
  - For the Sage CRM integration component, see Chapter 2 of the *Sage CRM Integration Guide*.
  - For Sage CRM, see the *Sage CRM System Administrator Guide*.
- Back up your data:
  - In the following Sage 300 directories: \SITE, \USER, and \COMPANY.
  - Sage CRM data.
- Make sure that you install enough LanPak licenses to support Sage CRM access to Sage 300 screens.

You need a LanPak license to use any Sage CRM feature that opens a Sage 300 screen. For example, the A/R Inquiry and O/E Inquiry screens include buttons and links that open Sage 300 screens.

You do *not* need a Sage 300 LanPak license to view and use the Sage 300 integrated features that appear on Sage CRM screens. For example, you can:

- Create a new quote or order (and associated quote) from the Company Summary screen

- View opportunity status details and current totals (Quote Amount, Pending Amount, Order Amount, Shipment Amount, and Invoice Amount) on the Opportunity Summary screen
- Use the Quotes screen to create new quotes, promote quotes to orders, or view a summary of quotes for an opportunity
- Use the Orders screen to create new orders or view a summary of orders for an opportunity

## Upgrading Sage CRM for Sage 300

The procedures in this section list steps to follow if you are upgrading Sage CRM for an existing integration with Sage 300. If you are performing a new installation of Sage CRM, follow the detailed steps in Chapters 1 to 5 in the *Sage CRM Integration Guide*.

### Upgrading Sage 300 Only

Follow the steps in this section if you are upgrading to a newer version of Sage 300 without changing your version of Sage CRM.

#### To upgrade to a newer version of Sage 300:

#### Upgrade Integration for Sage CRM

1. Run the installation program for Sage CRM integration for the version of Sage 300 you use.

During the installation:

- a. Select **Sage 300 Accounting Integration for Sage CRM**.
- b. Select **Upgrade your existing Sage 300 integration**, and then click **Next**.
- c. Select a Sage 300 upgrade path (such as **2017 → 2018**).
- d. Follow the instructions on the remaining screens.



**Install E/W component**

2. During installation of Sage 300, on the Select Features screen, select **Sage CRM Integration**.

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**Note:** After installing Sage 300, you must install the Web Services synchronization component on each client workstation where you use the E/W integration component. For more information, see "Setting Up Sage 300 Workstations" in chapter 5 of the *Sage CRM Integration Guide*.

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**Setup in Sage 300**

3. Open the Sage 300 desktop and activate Sage CRM Integration (in **Administrative Services > Data Activation**).
4. On the Sage 300 desktop:
  - a. Select **Sage CRM > Sage CRM Setup**.  
The Sage CRM Setup screen appears.
  - b. Verify the settings on the screen. For more information about setup fields, press F1.
5. On each Sage 300 workstation, select **Sage CRM Workstation Setup** to run the setup utility, and then click the **Test** button to test the connection between Sage CRM and Sage 300.

**Setup in IIS**

6. Reset your Anonymous User account in Internet Information Services (IIS).

You may also need to reconfigure server access permissions. For details, refer to Chapter 4 of the *Sage CRM Integration Guide*.

**Setup in Sage CRM**

7. Open Sage CRM and perform the following steps to complete and check your integration setup (refer to Chapter 5 of the *Sage CRM Integration Guide* for details):
  - a. Click **Administration > Sage 300 Administration > Setup Integration** to check and select integration settings.
  - b. Click **Administration > Sage 300 Administration > Synchronize Tables** to re-synchronize tables.

## Upgrading Sage CRM and Sage 300

Follow the steps in this section if you are upgrading to a newer version of Sage CRM and (optionally) a newer version of Sage 300.

**Important**

If you do not currently have the most recent previous version of Sage CRM, you must upgrade to this version before following the steps in this section. After upgrading, log on to Sage CRM. No action is required once Sage CRM opens. You can exit immediately, and then proceed with the steps below.

**To upgrade Sage CRM from the most recent previous version:**

**Install E/W component**

1. During installation of Sage 300, on the Select Features screen, select **Sage CRM Integration**.

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**Note:** After installing Sage 300, you must install the Web Services synchronization component on each client workstation where you use the E/W integration component. For more information, see "Setting Up Sage 300 Workstations" in chapter 5 of the *Sage CRM Integration Guide*.

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If you do not install the synchronization component now, you can install it later, using the setup screens in the Sage CRM folder of Sage 300.

By default, the E/W integration component and the synchronization component are installed into the installation folder. We recommend you install the E/W integration component into the same folder where Sage 300 is installed.

**Install Sage CRM for Sage 300**

2. From the Sage CRM DVD, select **Install Sage CRM**, and then click **Next**.

During the installation:

- a. Select **Upgrade Previous Version of CRM**, and then click **Next**.
- b. Follow the instructions on the remaining screens.

**Install Sage CRM integration component**

3. Run the installation program for Sage CRM integration for the version of Sage 300 you use.

During the installation:

- a. Select a Sage CRM install to integrate with Sage 300, and then click **Next**.
- b. Select **Upgrade your existing Sage 300 Integration**.
- c. Select a Sage 300 upgrade path (such as **2017 → 2018**).

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**Note:** If you are not changing your version of Sage 300, select **Sage 300 stays at its current version**.

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- d. Follow the instructions on the remaining screens.

**Setup in Sage 300**

4. Open the Sage 300 desktop and activate Sage CRM Integration (in **Administrative Services > Data Activation**).
5. On the Sage 300 desktop:
  - a. Select **Sage CRM > Sage CRM Setup**.  
The Sage CRM Setup screen appears.
  - b. Verify the settings on the screen. For more information about setup fields, press F1.
  - c. On each Sage 300 workstation, select **Sage CRM Workstation Setup** to run the setup utility, and then click the **Test** button to test the connection between Sage CRM and Sage 300.

**Setup in IIS**

6. Reset your Anonymous User account in Internet Information Services (IIS).

You may also need to reconfigure server access permissions. For details, refer to Chapter 4 of the *Sage CRM Integration Guide*.

**Setup in Sage CRM**

7. Open Sage CRM and perform the following steps to complete and check your integration setup (refer to Chapter 5 of the *Sage CRM Integration Guide* for details):
  - a. Click **Administration > Sage 300 Administration > Setup Integration** to check and select integration settings.
  - b. Click **Administration > Sage 300 Administration > Synchronize Tables** to re-synchronize tables.



# Chapter 3

## Changes in Sage 300 Integration with Sage CRM

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The following sections summarize changes in integration between specific versions of Sage 300 and Sage CRM. Integrations that are not listed include no major new features or enhancements.

### Sage 300 2012 Integration with Sage CRM 7.1

Sage 300 2012 integrated with Sage CRM 7.1 includes the following new features and improvements:

- **Changes to program installation.** Note the following important changes to the process of installing and integrating Sage 300 and Sage CRM:
  - Sage 300 Integration for Sage CRM (the Sage CRM-side integration component) is not part of the Sage CRM install, and must be installed separately.
  - Sage 300 Integration Component (the Sage 300-side integration component) is now part of the all-in-one Sage 300 install, so you do not need to install it separately if you select **Sage CRM Integration** when installing Sage 300.

For details and updated installation instructions, see the *Sage CRM 7.1 Integration Upgrade Guide*, and the *Sage CRM 7.1 Integration Guide*.

- **Support for multiple browsers.** You can now use Firefox, Safari, and Chrome to view and use integrated screens that appear in a browser window, including the Quotes and Orders screens.

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**Note:** If you use integrated screens that appear in a separate window, such as A/R Invoice Entry, you must use Internet Explorer.

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- **A new Sales Split panel on the integrated Quote Entry and Order Entry screens.** If you track commissions for sales staff, you can use this panel to allocate transaction totals to up to five salespersons. For more information, see "About Sales Splits" in the *Sage CRM Integration Guide*.

- **Look up Sage 300 inventory items and create quotes or orders.**  
If you use Sage 300 2012 Product Update 1 or later, you can look up Sage 300 inventory items from the Company Summary screen in Sage CRM, and then create a new quote or order for an item.

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**Note:** The **Item Inventory** button appears if **Opportunity O/E Inquiry** access permission is selected for the user and/or database.

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For more information, see “Looking Up Inventory Items” in Chapter 7 of the *Sage CRM Integration Guide*.

## Sage 300 6.0 Integration with Sage CRM 7.1

Sage 300 6.0 integrated with Sage CRM 7.1 does not include any major new features or enhancements.

If you are setting up Sage 300 and Sage CRM on separate servers, we recommend that you use .NET web deployment to connect Sage CRM to Sage 300. Also, see “Setting Up Sage 300 Workstation and Integration on the Sage CRM Server” in Chapter 4 of the *Sage CRM Integration Guide* for information about changes to settings for integrating Sage CRM with Sage 300 6.0 on separate servers.

## Sage 300 6.0 Integration with Sage CRM 7.0

Sage 300 6.0 integrated with Sage CRM 7.0 includes many enhancements and new features designed to improve usability, streamline workflow, and create seamless integration of quotes and orders with Sage 300 Order Entry.

The major changes include:

### Changes to System Requirements

A number of system requirements have changed, including:

- Sage CRM 7.0 Service Pack 1
- Sage 300 6.0 with the Sage 300 Portal installed and configured
- Internet Explorer 7 or newer
- Microsoft Internet Information Server (IIS) 6.0 or 7.0 with the latest patches.

For detailed system requirements, see the *Sage CRM Integration Guide*.

## New Integrated Entry Screens for O/E Quotes and Orders

New, integrated Quote Entry and Order Entry screens allow you to view, create, edit, and save Sage 300 O/E quotes and orders directly in Sage CRM.

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**Note:** You do not need a Lanpak license to view and use the new integrated Quote Entry and Order Entry screens.

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To open the new screens from the Opportunity Summary screen:

1. Click the Quotes tab or Orders tab.

The Quote Summary or Order Summary screen appears.

2. Click **New Quote** or **New Order** to create a new quote or order, or click a link to open an existing document.

To open the new screens from the Company Summary screen, click the **New Quote** button or **New Order** button. Sage CRM automatically creates a new opportunity for the company, and then opens a new quote or order linked to the opportunity.

These screens have been redesigned to work seamlessly in Sage CRM. We've also made some improvements to enhance usability, such as:

- **Easy-to-customize grid.** A new View menu above the grid allows you to customize the grid by showing, hiding, and arranging columns.
- **Improved comments and instructions.** Comments and instructions for line items now appear in separate columns, making it easier to add instructions for staff or comments for customers.
- **Integrated Custom Fields.** If you use Transaction Analysis and Optional Field Creator, the Optional Fields tab on entry forms has been replaced with an expandable Custom Fields panel that displays required and optional header-level fields. If the Custom Fields panel contains required fields, it is expanded by default.

Detail-level fields now appear as columns in the grid, with required and auto-insert detail-level fields displayed by default. To show optional fields as columns, use the View menu to add them to the grid.

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**Note:** Changes you make to any detail for a quote or order are **not** reflected in the Totals area until you click the **Refresh** button (beside the Quote Total or Order Total) or save the quote or order.

If you change a quote or an order, you **must** click this button to see accurate subtotals, order discounts, tax amounts, and totals.

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## New Integrated Summary Screens for O/E Quotes and Orders

Two new summary screens replace the Opportunity Items screen: Quote Summary and Order Summary. You can use these screens to view and manage quotes and orders for an opportunity, or to select one or more quotes to promote to an order.

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**Note:** You do not need a LanPak license to view and use the integrated Quote Summary and Order Summary screens.

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To view these screens, select an opportunity, and then click the Quotes tab or Orders tab. On these screens, you can:

- Click the link in the **Document Number** column to view or edit an existing quote or order in the Quote Entry or Order Entry screen.
- Click the **New Quote** button or **New Order** button to create a new quote or order. Note that these buttons are unavailable if the opportunity is closed or the customer is inactive.
- On the Quote Summary screen, promote one or more quotes to an ERP O/E order, as described in the following section.

## Promote Multiple Quotes to a Single Order

On the new Quotes Summary screen, you can select quotes for an opportunity, and then click Promote to Order to promote the selected quote(s) to an ERP order. You cannot select expired quotes, quotes that have already been promoted, or quotes for a closed opportunity.

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**Note:** If you are promoting multiple quotes for a company that is not linked to the ERP system, the first quote's account set is used as the default for the resulting order.

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After you create the order, a message asks, "Does this complete the opportunity?" If you click Yes, Sage CRM sets the opportunity's status to Won, preventing all users from adding new quotes to the opportunity. If quotes exist for the opportunity that have not been promoted to an order, those quotes are no longer included in opportunity totals.

## Link Quotes and Orders to an Opportunity

If you click **New Quote** on the Quote Summary screen, or **New Order** on the Order Entry screen, Sage CRM automatically links the new quote or order to the current opportunity.

If you click **New Quote** or **New Order** on the Company Summary screen, Sage CRM automatically creates a new opportunity for the company, and then opens a new quote or order linked to the opportunity.



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**Note:** You can still use the existing O/E Inquiry tab to enter an order or a quote that is not linked to an opportunity, but you can no longer manually link a quote entered here to an opportunity. This means that no reports or statistical information are available in Sage CRM for quotes or orders entered on the O/E Inquiry tab.

If you do not want users to use the O/E Inquiry screen to enter orders and quotes, you can remove authorization to use the Order Entry form for specific security groups in Administrative Services.

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### Create Quotes and Orders from Company Summary Screen

**New Quote** and **New Order** buttons have been added to the Company Summary screen. When you click either of these buttons, Sage CRM automatically creates a new opportunity for the company, and then opens a new quote or order linked to the opportunity.

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**Note:** If you click **New Quote** or **New Order** for a company that is not linked to the ERP system, the Customer Number for the new quote or order is CRM999999999. If you promote the company to ERP Order Entry, the Customer Number is updated.

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### Improved Updating of Opportunity Status

As an opportunity progresses through the sales cycle, its status is automatically updated at key points by both the CRM and ERP systems.

- If you click the **New Quote** button on the Company Summary screen, Sage CRM automatically creates a new opportunity and sets its status to In Progress.
- If you promote one or more quotes to an order and save the order, a message asks "Does this complete the opportunity?" You can click **No** to keep opportunity status set to In Progress, or click **Yes** to complete the opportunity and set its status to Won.

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**Note:** If you promote a quote to order in the ERP system, its status will remain set to In Progress.

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### Select Quotes to Include in Opportunity Totals

On the Quote Entry and Quote Summary screens, the **Include in Opportunity Totals** option lets you specify whether to include a quote's amount in opportunity totals. For example, if you are creating multiple versions of a quote, you may want to select only one version to include in opportunity totals.

## Improved Forecasting

On the Opportunity Summary screen, the Forecast field has been enhanced to show accurate, up-to-date information about the current value of an opportunity as it progresses from quote(s) to invoiced order(s).

You can use this field and the amounts on the Opportunity Totals tab to view and report on current sales information without opening Order Entry.

Here's how the Forecast field is updated at each stage as an opportunity progresses through the sales process:

- **Create quote(s).** If you have created one or more quotes for an opportunity but have not promoted any quotes to an order, the Forecast field shows total quote value. Quotes are only included here if you have selected them (see the following section "Improved Reporting of Opportunity Totals"), so if you have created multiple variations of a quote, only the ones you select will be included in the forecast.
- **Promote quote(s) to an order.** If you have promoted one or more quotes to an order and the opportunity's status is In Progress, the **Forecast** field shows total order value plus the value of included quotes not yet promoted to an order.
- **Complete the opportunity.** If you have promoted one or more quotes to an order and the opportunity's status is Won (meaning you have completed the opportunity), the Forecast field shows total order value.

If any quotes that were included in the opportunity were not promoted to an order, the "Include in Opportunity Totals" option is cleared for those quotes so they are no longer reflected in the Forecast field.

If you ship or invoice any part of the order, the shipment or invoice amount belonging to the current opportunity is included in the Forecast amount.

## Improved Reporting of Opportunity Totals

On the Opportunity summary screen, the following fields show sales information to help you track an opportunity as it progresses through the sales process:

- **Quote Amount.** The sum of all quotes included in the opportunity.
- **Pending Amount.** The sum of all quotes included in the opportunity but not yet promoted to an order.
- **Order Amount.** The sum of all orders for this opportunity that have not been shipped.

- **Shipment Amount.** The sum of all shipments for this opportunity that have not been invoiced.
- **Invoice Amount.** The sum of all invoiced shipments for this opportunity.

### New Conversion Process for Existing O/E Quotes and Orders

If you are upgrading to Sage CRM 7.0 integrated with Sage 300 6.0, you must convert existing Order Entry quotes and orders to make them compatible with the new integration.

After successful conversion, Sage CRM will display information from converted documents in Opportunity Totals and Forecast amounts on all summary screens for an opportunity.

See the section "Convert Existing Sage 300 O/E Quotes and Orders" in Chapter 5 of the Sage CRM Integration Guide for information on how to prepare and convert existing documents.

### Improved Promotion to Customer

When you promote a company to a Sage 300 customer, Sage CRM automatically updates all opportunity-linked Order Entry quotes, orders, shipments, and invoices with the new Sage 300 customer number.

### Suspend O/E Integration to Sage CRM

On the Sage CRM Setup form in Sage 300, a new option allows you to specify whether you want changes in Order Entry to be reflected automatically in Sage CRM.

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**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 when you enter information in Sage CRM or Sage 300.

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### Clear Expired Quotes in Sage 300 Order Entry

On the Processing tab of the O/E Options form in Sage 300, a new option allows you to specify a number of days after which expired quotes will be deleted from the system. Order Entry deletes expired quotes from the system when you run Day End Processing.

If you do not select this option, expired quotes will not be deleted.

### COM/DCOM Support Discontinued for E/W Integration Component

The COM/DCOM connection method is not supported for the E/W integration component in Sage 300 6.0.

If you are installing the E/W component, you must use the Web Services connection method and install the Sage CRM synchronization component.

## Sage 300 5.6 Integration with Sage CRM 6.2

The major changes made to Sage 300 5.6 with Sage CRM 6.2 include:

- Integration with Sage CRM Solo

You can now view ERP customers and vendors using the Solo client. Note that ERP-related data cannot be modified or added.

If an ERP company doesn't have a contact, the company will not appear in the Solo client after synching. When you upgrade from a previous version of CRM which uses Solo, you will need to follow the instructions for upgrading in "Option 2" of the Sage CRM Solo Guide. This involves uninstalling the old Solo client and installing the new one. If you have to reinstall the ERP integration for any reason, you will need to:

- Reinstall the integration.
- Uninstall the Solo client (follow the steps in the *Sage CRM Solo Guide*) and reboot the Solo client machine.
- Recreate the snapshot on the server.
- Reinstall the Solo client on the client machine.
- Re-synch the data on the Solo client.

- Addition of serial/lot number information in Order Entry and Purchase Order Inquiry

New menu options (Serial/Lot Number, Sales/Purchase History) have been added to the OE Inquiry and PO Inquiry menus. From here you can view details of OE and PO transactions which include serials or lots. Note that you must run day end processing before serial and lot sales history will appear.

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**Note:** Invoices upgraded from version 5.5 will not have any serial or lot information included. As well, PO History will not display any serial or lot numbers for PO transactions upgraded from 55 or earlier.

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- Additional screens for Customer Price List, Vendor Contract Costs, All Shipments and All Receipts

You can now display item prices in the Customer Price List menu and item costs in the Vendor Contract Costs menu from OE and PO Inquiry, respectively.

A new menu choice has been added to OE Inquiry to display All Shipments. Note that you can display stand-alone shipments by leaving the From and To Order Number fields blank.

A new menu choice has been added to PO Inquiry to display All Receipts. Note that you can display stand-alone receipts by leaving the From and To Purchase Order fields blank.

- Ability to maintain Customer National Account relationships from ERP to CRM.

National Account Integration is initially turned off in Sage CRM setup. You can use Sage 300 Administration to import national account relationships, which must be maintained within the ERP system, as synchronization is one-way from ERP to CRM. After you import National Account relationship information, the information appears on the customer's Relationships tab.

If the National Account integration is turned on, and you make an edit to a customer's National Account membership (e.g. change the National Account field in AR Customers), this change will be synchronized back to the Relationship tab in Sage CRM.

- Added order information to the Sage 300 Quote tab for Opportunities.

Order information can now be displayed for opportunities whose Sage 300 Quote have been promoted to an order.

- Salesperson Enhancements

You can now set the Salesperson Codes on companies promoted to your ERP system from Sage CRM. As well, salesperson information has been added to the Customer Statistics tab

- Support for Customer/Vendor Number Changer

You can now change and copy customer and vendor numbers in Sage CRM using the number changer feature in Sage 300.

- New way to identify current version of Sage CRM Integration

The About Sage CRM Integration menu option will help Technical Support identify whether Sage CRM is integrated correctly with Sage 300.

- Availability of Customer/Vendor Comments and Tax Information

Customer comments can be displayed using the Customer Statistics tab or the AR Inquiry tab. Likewise, Vendor comments can be displayed using the Vendor Statistics tab or the AP Inquiry tab.

Transaction drill-downs now display hyperlinked total tax amounts which, when clicked, provide a breakdown of the tax-by-tax authority.

## Sage 300 5.5 Integration with Sage CRM 6.1

The following subsections summarize the major changes made to Sage 300 5.5 integrated with Sage CRM 6.1.

### User-Level Security and Database-Level Security

On the Sage 300 Administration menu, you can now configure two levels of security — the user level and the database level.

- **User Level.** The Grant Access function has been renamed to Accpac (Sage 300) User-Level Security. You use User-Level Security to define a user's access rights to the integrated screens, such A/R Inquiry. These rights apply to all Sage 300 integrated databases *except* the databases specified in the new Database-Level Security function, described next.
- **Database Level.** A new security feature, Accpac (Sage 300) Database-Level Security, enables you to define a user's access rights to the integrated screens, such A/R Inquiry, where the rights apply only to the Sage 300 integrated database that you choose.

### Synchronization of A/R Ship-To Address and A/P Remit-To Address

You can now synchronize:

- The ship-to address in Sage 300 Accounts Receivable with the A/R ship-to address in Sage CRM.
- The remit-to address in Sage 300 Accounts Payable with the A/P remit-to address in Sage CRM.

Read the next three subsections for details.

### Sage CRM Setup

On the Sage CRM Setup form in Sage 300, there are two new options:

- **Suspend A/R Ship-To Addresses.** If you *clear* this option, customer ship-to addresses and contact information is automatically synchronized between Sage 300 Accounts Receivable and Sage CRM.

- **Suspend A/P Remit-To Addresses.** If you *clear* this option, vendor remit-to addresses and contact information is automatically synchronized between Sage 300 Accounts Payable and Sage CRM.

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**Note:** To synchronize ship-to or remit-to addresses, be sure to **clear** the options.

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### Import Customers or Vendors

When you use Import Customers on the Sage 300 Administration menu, you can now choose to import customer records, or ship-to address records, or both. Similarly, when you use Import Vendors, you can choose to import vendor records, or remit-to address records, or both.

### Sage CRM Addresses and People





- When you edit addresses on the Sage CRM Address edit screen, you can now specify whether the address entered is an A/P Remit-To Address or an A/R Ship-To Address.
- When you edit contacts on the Sage CRM Person edit screen, you can now specify whether the contact entered is an A/P Remit-To Contact or an A/R Ship-To Contact.

Note that changes you make to ship-to (or remit-to) addresses or contacts in Sage CRM are automatically reflected in Sage 300. However, any ship-to (or remit-to) addresses or contacts that you create in Sage CRM will not be automatically created in Sage 300.




### Changes to the A/R and A/P Inquiry Menus

The choices on the A/R Inquiry and A/P Inquiry menus have changed. In the previous version, the menu choices were Posted Transactions and Unposted Transactions. (The Unposted Transactions option in both A/R and A/P Inquiry menus displayed invoices, debit/credit notes, and interest.) Now, Unposted Transactions is called Unposted Invoices. You also have the following new menu choices:

- Unposted Receipts and Unposted Refunds (A/R Inquiry menu)

A/R Inquiry Menu	
Menu Selection	Description
 Posted Transactions	List all Posted A/R Transactions.
 Unposted Invoices	List all Unposted A/R Invoices.
 Unposted Receipts	List all Unposted A/R Receipts.
 Unposted Refunds	List all Unposted A/R Refunds.

- Unposted Payments (A/P Inquiry menu)

A/P Inquiry Menu	
Menu Selection	Description
 Posted Transactions	List all Posted A/P Transactions.
 Unposted Invoices	List all Unposted A/P Invoices.
 Unposted Payments	List all Unposted A/P Payments.

The next two sections describe the new menu choices.

### Ability to View, Edit or Create A/R Receipts and Refunds

You can now display posted or unposted receipts (which include unapplied cash and prepayments), and refunds.

- To display posted receipts or refunds, select Posted Transactions from the A/R Inquiry menu to open the list screen, which displays all document types by default. To display only posted receipts or refunds, choose these options from the Document Type field of the list screen.
- To display unposted receipts or refunds, select the new options, Unposted Receipts and Unposted Refunds, from the A/R Inquiry menu.

From the list screen that opens, you can create or edit a receipt or refund.

### Ability to View, Edit or Create A/P Payments

You can now display posted or unposted payments (which include prepayments).

- To display posted payments, select Posted Transactions from the A/P Inquiry menu to open the list screen, which displays all document types by default. To display only posted payments or prepayments, choose these options from the Document Type field of the list screen.
- To display unposted payments, select the new option, Unposted Payments, from the A/P Inquiry menu.

From the list screen that opens, you can create or edit a payment.

### Display Pending Shipments

The options on the O/E Inquiry menu for customers have changed.






O/E Inquiry Menu	
Menu Selection	Description
 All Orders	List all Orders.
 New Order	Create a New Order.
 Credit/Debit Notes	List all Credit/Debit Notes.
 Pending Shipments	List all Pending Shipments.
 Sales History	List Item Sales History.



- A new menu option, Pending O/E Shipments, lets you display a list of pending shipments. You can drill down a document in the list, or click its hyperlink to view the document in the Sage 300 Order Entry form.
- Options to display quotes, or active/standing/future orders, have been removed from the menu, and have become options in the new Order Type field on the list screen that opens when you select All Orders from the menu.

## Display Pending Receipts

The options on the P/O Inquiry menu for vendors have changed.

P/O Inquiry Menu	
Menu Selection	Description
 All Purchase Orders	List all Purchase Orders.
 New Purchase Order	Create a New Purchase Order.
 Requisitions	List all Requisitions.
 Returns	List all Returns.
 Credit/Debit Notes	List all Credit/Debit Notes.
 Pending Receipts	List all Pending Receipts.
 Purchase History	List Item Purchase History.

- New menu options let you display a list of:
  - Pending P/O Receipts
  - Requisitions
  - Returns

You can drill down a document in the list, or click its hyperlink to view the document in the Sage 300 form.

- Options to display active, standing, future, or blanket purchase orders have been removed from the menu, and have become options in the new Order Type field on the list screen that opens when you select All Purchase Orders from the menu.

## Enhanced Integration between Sage 300 and Sage CRM

Sage 300 and Sage CRM integration has been enhanced in several ways so that you can quickly gain access to Sage 300 forms to create new documents or edit existing ones.

## More Accessibility to a Transaction's Details and Source Documents

When viewing Sage 300 transactions while working in Sage CRM (that is, Accounts Receivable, Accounts Payable, Purchase Orders, Order Entry, Project and Job Costing, and Return Material Authorization transactions),

you will find more hyperlinks throughout the screens, that enable you to view (or edit) a selected transaction's original source documents. You will also find more drill down icons that let you view document details.

For example:

- On the A/R (or A/P) Inquiry menu: When you select Posted Transactions and drill down a selected document in the displayed list, you can click the new Document Number hyperlink to view or edit the document in the Sage 300 form.
- On the O/E Inquiry menu: When you select All Orders and drill down an order from the displayed list, the order detail screen that opens may have a Shipments section, where you can click the Shipment Number hyperlink that now opens the Sage 300 O/E Shipment Entry form. You can also click the new Drill Down icon, which opens the shipment detail screen. From there, you can further drill down any invoice listed, or you can click the new Invoice Number hyperlink to view the document on the Sage 300 O/E Invoice Entry form.

For purchase orders listed from the P/O Inquiry menu, you follow a similar procedure when viewing the purchase order's Receipt section.

### Easier Creation of Sage 300 Documents

A "New" button has been added to some screens, enabling you to quickly and easily create Sage 300 documents while working in Sage CRM.

You can create new documents from most of the list screens that open when you select an option from an Inquiry menu (A/R Inquiry, O/E Inquiry, and so on), and from some drilldown screens. For instance, you can now create:

- A/R receipts and refunds.
- A/P payments.
- O/E shipments, invoices, and credit/debit notes.
- P/O receipts, invoices, credit/debit notes, returns, requisitions.

### Accessibility to A/R Customer and A/P Vendor Information

When displaying a customer, you now have quick access to the Sage 300 A/R Customer form, by clicking the Accpac (Sage 300) Customer Number hyperlink located at the top right of the Sage CRM screen:



Similarly, the Vendor Number hyperlink is available when you are viewing a vendor.

You can also click the customer hyperlink:

- When you drill down to view an O/E or P/O document (such as a P/O requisition, order, return, credit/debit note, and so on).
- In the Credit Information section of the Customer Statistics tab (or the Vendor Statistics tab).

### **Accessibility to A/R Customer Activity and A/P Vendor Activity**

On the Customer Statistics tab, a new Customer Activity icon has been added to the right side of the screen, to enable quick access to the Sage 300 A/R Customer Activity form. Similarly, for a vendor, the Vendor Statistics tab has a new Vendor Activity icon to enable quick access to the Sage 300 A/P Vendor Activity form.

### **Easier Data Entry on Sage 300 Forms**

When you create a new Sage 300 document from Sage CRM, many of the details from the associated document is automatically entered on the Sage 300 form. This facilitates your entry of data on the Sage 300 form.

For example, when you drill down an order from the All Orders list (from the O/E Inquiry menu), and choose to create a new shipment, then the details (such as customer number, order number, item lines) automatically display in the Sage 300 O/E Shipment Entry form that opens.

### **More Sage 300 Information in Sage CRM**

More information from Sage 300 is now displayed on the document inquiry screens. For instance:

- Job-Related Information — if you drill down a job-related A/R, A/P, O/E or P/O document, the details screen shows job information.
- Advanced Credit Information — appears on an unposted A/R receipt with advanced credit information.
- Retainage Information — appears if the company has elected to use Retainage Accounting in A/R or A/P setup options.
- On the Item Information screen (which opens when you click on a hyperlink for an item), an asterisk (\*) indicates the location (or bill of materials or kit) associated with the item.

### More Statistical Information

The Aging and Statistics tab is now called Customer (or Vendor) Statistics tab.

You will now find more statistical information for a customer or vendor:

- The Customer Statistics tab now displays national account information for a customer who is set up with a national account.
- The Vendor Statistics tab now displays more complete vendor statistical information.

### Enhanced Filters for Selecting Transactions

On the list screens (that open when you select a “list” option from an Inquiry menu), enhanced filters are now available to let you specify the transactions to be displayed. For example:

- When you select All Orders on the O/E Inquiry menu, you can now select to display only the orders that fall within the range of order dates or expected shipment dates that you specify. You can also choose the type of orders to display.
- When you select Posted Transactions on the A/R Inquiry menu, you can select to display only the documents that fall within the range of dates that you specify. You can also choose the type of documents to display.

### Integration with Sage 300 Warehouse Management System (WMS)

Sage CRM now integrates with Sage 300 Warehouse Management System (WMS). If you use Sage 300 WMS, you can now send and receive transaction information, as follows.

#### **Purchase Orders:**

When you create (post) a new purchase order in Sage CRM, the purchase order is sent automatically to Sage 300 WMS. (To create a purchase order, use the P/O Inquiry menu.)

After you receive the purchase order items and record the receipt in WMS, you can create (post) the receipt document while in Sage CRM.

To post the receipt in Sage CRM:

1. Select the P/O Inquiry menu, click All Purchase Orders.
2. Drill down the selected purchase order.
3. On the detail screen that opens, click the “New Receipt” button. This opens the P/O Receipt Entry form, with receipt information from

Sage 300 WMS (such as quantity received) automatically entered on the form.

**Sales Orders:**

When you create (post) a new sales order in Sage CRM, the sales order is sent automatically to Sage 300 WMS. (To create a sales order, use the O/E Inquiry menu.)

After you ship the sales order items and record the shipment in WMS, you can create (post) the shipment document while in Sage CRM.

To post the shipment in Sage CRM:

1. Select the O/E Inquiry menu, click All Orders.
2. Drill down the selected sales order.
3. On the detail screen that opens, click the "New Shipment" button. This opens the O/E Shipment Entry form, with shipment information from Sage 300 WMS (such as quantity shipped) automatically entered on the form.

**Customize the Number of Rows in a Grid**

You can specify the number of rows displayed in the grid of the Sage 300 integrated screens; for example, the number of rows displayed on a page of A/R unposted invoices. On the Sage CRM Main Menu, choose My CRM, then the Preferences tab. In the Grid Size field, choose the number of rows to be displayed. (To access My CRM, your User ID must be set up in the Users function to access My CRM Lists.)

## Sage 300 5.4 Integration with Sage CRM 6.0/6.1

The following subsections summarize the major changes made to Sage 300 5.5 integrated with Sage CRM for Sage 300 6.0 and 6.1. For more details of the features, refer to the *Sage 300 Integration Guide for Sage CRM* that was shipped with that version.

**Integration with Sage 300 Purchase Orders**

If you use Sage 300 Purchase Orders 5.4, Sage CRM now provides a new P/O Inquiry tab that enables CRM integration with Purchase Orders.

P/O Inquiry Menu	
Menu Selection	Description
 Active Purchase Orders	List all Active Purchase Orders.
 Standing Purchase Orders	List all Standing Purchase Orders.
 Future Purchase Orders	List all Future Purchase Orders.
 Blanket Purchase Orders	List all Blanket Purchase Orders.
 All Purchase Orders	List all Purchase Orders.
 New Purchase Order	Create a New Purchase Order.
 Returns	List all Returns.
 Credit/Debit Notes	List all Credit/Debit Notes.
 Purchase History	List Item Purchase History.






Similar to the O/E Inquiry tab, the new P/O Inquiry tab allows you to:

- Look up vendor purchase orders, returns, credit/debit notes, and a history of items purchased. You can select a purchase order, and open it in the Sage 300 Purchase Orders form, for viewing or editing.
- Create a new purchase order, using the Sage 300 Purchase Orders entry form.

### Integration with Sage 300 Project and Job Costing

If you use Sage 300 Project and Job Costing 5.4, Sage CRM now provides a new P/M Inquiry tab that enables CRM integration with Project and Job Costing.

- For a customer, the P/M Inquiry tab provides a menu (shown as follows) that lets you list contracts of varying statuses (open, inactive, completed, and so on), contract estimates, and contract transaction history. You can also create a contract.

P/M Inquiry Menu	
Menu Selection	Description
 Contract Estimates	List all Contract Estimates.
 Approved Contracts	List all Approved Contracts.
 Open Contracts	List all Open Contracts.
 Contracts On Hold	List all Contracts On Hold.
 Inactive Contracts	List all Inactive Contracts.
 Completed Contracts	List all Completed Contracts.
 Closed Contracts	List all Closed Contracts.
 All Contracts	List all Contracts.
 New Contract	Create a New Contract.
 Transaction History	List all Transactions.

When you list contracts for a customer, you can select one of the listed contracts and open its Sage 300 Project and Job Costing form, for viewing or editing.

- For a vendor, the P/M Inquiry menu provides only the Transaction History option.

### Integration with Sage 300 Return Material Authorization (RMA)

If you use Sage 300 RMA 5.4A, Sage CRM now provides a new R/A Inquiry tab that enables CRM integration with Sage 300 RMA.

- For a customer, the R/A Inquiry tab provides a menu (shown as follows) that lets you list active, completed, or all return authorizations. You can also create a return authorization.

R/A Inquiry Menu	
Menu Selection	Description
 Active Return Authorizations	List all Active Return Authorizations.
 Completed Return Authorizations	List all Completed Return Authorizations.
 All Return Authorizations	List all Return Authorizations.
 New Return Authorization	Create a New Return Authorization.

When you list return authorizations for a customer, you can select one of the listed return authorizations and opens its Sage 300 RMA form, for viewing or editing.

- For a vendor, the R/A Inquiry menu is similar, but does not provide the option to create a new return authorization.

## Integration with Optional Fields

If you have set up optional fields for customers in Sage 300 Accounts Receivable 5.4 (or for vendors in Sage 300 Accounts Payable 5.4), you can now view or edit optional fields in several areas of Sage CRM:

- A new Optional Fields tab displays the optional fields for a customer or vendor. You can edit the field values, and add (or remove) optional fields to the customer or vendor.
- On the Promote to Accpac (Sage 300) tab, you can assign optional fields to the customer/vendor when you promote the customer or vendor.
- You can display optional fields associated with each transaction or each transaction detail. Click on any Optional Fields "Yes" hyperlink in documents shown on the Sage 300 tabs (such as the Aging and Statistics tab, O/E Inquiry tab, P/O Inquiry tab, and so on).

The screenshot displays the Sage CRM interface for an order. The 'Order Information' section shows details for Order Number ORD000000000061, Customer Number 1105, and Order Type Active. The 'Optional Fields' link is circled in red. Below this is a table with columns: Item, Description, Location, Expected Shipment Date, Original Quantity Ordered, Quantity Shipped to-date, Quantity Backordered, Order Unit of Measure, Order Unit Price, Extended Amount, Order Discount Amount, Extended Discounts, and Optional Fields. Two rows are visible, both with 'Yes' in the Optional Fields column, which is circled in red. The 'Shipments' section below shows a table with columns: Shipment Number, Expected Ship Date, Shipment Date, Ship-Via Code, Number of Lines on Shipment, Shipment Subtotal Amount, Shipment Discount Amount, Total Tax Amount, and Shipment Total. The 'Optional Fields' column in the Shipments table is also circled in red.

This opens another form that displays the optional fields for that transaction or detail line. You cannot edit the optional fields in that form.

## New Credit/Debit Notes Lookup in the O/E Inquiry Tab

For Sage 300 5.4 integration, the O/E Inquiry Menu now provides a Credit/Debit Notes choice, allowing you to look up a customer's history of credit or debit notes.



O/E Inquiry Menu	
Menu Selection	Description
Active Orders	List all Active Orders.
Quotes	List all Quotes.
Future Orders	List all Future Orders.
Standing Orders	List all Standing Orders.
All Orders	List all Orders.
New Order	Create a New Order.
<b>Credit/Debit Notes</b>	List all Credit/Debit Notes.
Sales History	List Item Sales History.

Select the new Credit/Debit Notes option. This displays a list of credit/debit notes. You can select a note and display its header and detail information:

Credit/Debit Note Information										
Credit/Debit Note Number CN00000000000003	Customer Number 1200	Type Credit Note	Credit/Debit Note Date Mar 1, 2007	Description	Reference RMA000000000002					
Order Number	Invoice Number	Invoice Date	Purchase Order Number	Return Date Mar 1, 2007	Optional Fields Yes					
Credit/Debit Note Subtotal Amount \$ 31.95	Credit/Debit Note Excluded Tax T \$ 2.64	Credit/Debit Note Included Tax T \$ 0.00	Total Tax Amount \$ 2.64	Credit/Debit Note Discount Amount \$ 0.00	Credit/Debit Note Total \$ 34.59					
Item	Description	Return Type	Location Description	Quantity Returned	Order Unit	Pricing Unit Price	Extended Amount/Misc. Charge	Credit Note Discount Amount	Extended Discounted Price	Optional Fields
A1-320/0	50W/12V Halogen Bulb	Items Returned to Inventory	Central warehouse - Seattle		5 Ea.	\$ 6.39	\$ 31.95	\$ 0.00	\$ 31.95	No
Total							\$ 31.95	\$ 0.00	\$ 31.95	

### Mass Update Feature in Sage CRM 6.0

The “Mass Update” feature enables you to select and update fields for a group of customers or vendors.

This feature updates the fields that are stored in Sage CRM but does **not** update the same fields stored in Sage 300.

For example, if a group consisted of Sage 300 Customer A and Sage CRM Customer B, and you used Mass Update to update the Tax Group field for the entire group, the Tax Group for both customers would be updated in Sage CRM records, but not in Sage 300, for Customer A.

**We recommend that you do NOT use the Mass Update feature with any Sage 300 fields, such as:**

Address: Address fields (Address 1 to Address 4)

Address: Country  
Address: City  
Address: State  
Address: ZIP  
Company: Credit Limit  
Company: Tax Group  
Company: Terms Code  
Company: Accpac (Sage 300) Database ID  
Company: Business Email  
Company: Accpac (Sage 300) Customer Number  
Company: Accpac (Sage 300) Vendor Number  
Company: Company Name  
Company: Phone  
Company: Website  
Person: Fax Number  
Person: First Name  
Person: Last Name  
Person: Phone  
Person: Email

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**Note:** As an alternative to “mass updating” these fields for Sage 300 customers or vendors, you can export these fields from your Sage CRM group to a spreadsheet (see the *Sage CRM User Guide* and *System Administrator Guide* for details), update the fields you need, then import them into Sage 300.

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### Changes in the Sage 300 Integration (E/W) Forms

In Sage 300 5.4, the following changes have been made to the forms in the Sage CRM folder. Details are also provided in the next section, “Connection Method Changes.”

#### **E/W Sage CRM Setup form:**

- The Remote Server Name field has been renamed to Sage CRM Server Name.

- In the new Sage CRM Synchronization Method field, you can choose the new option, **Web Services**, or leave it as **COM/DCOM** (the default method of past versions).

### E/W Sage CRM Workstation Setup form:

- A new Test button enables you to test your connection after a workstation has been set up.

## Connection Method Changes

In versions earlier than 6.0, you use the COM/DCOM connection to send updates from Sage 300 to Sage CRM and from Sage CRM to Sage 300. If you use Sage 300 5.4, you can now set up the connections in another way.

## From Sage 300 to Sage CRM

If you use Sage 300 5.4, you now have the option of using Web Services instead of COM/DCOM. To do so, follow these steps. For more detailed steps, see Chapter 5 of the latest *Sage 300 Integration Guide for Sage CRM*.

1. Install version 5.4B of the Sage 300 integration component, including the CRM synchronization component. (The Web Services option requires the synchronization component.)

If you did not install the synchronization component, you can install it later in workstation setup (step 5 to follow).

### Sage CRM Setup form

2. From the Sage CRM folder, choose Sage CRM Setup to open the E/W Sage CRM Setup form.

3. In the Sage CRM Synchronization Method field, select Web Services.

This choice enables the Sage CRM Web Services URL field, which consists of the Sage CRM Server Name, Sage CRM Installation Name, and program defaults. 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.

4. Click the Sage CRM Web Services URL button, and if necessary, enter the correct Sage CRM Web Services URL in the adjacent field.

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**Note:** The Sage CRM Web Services URL button updates the Server Name and Installation Name portions of the URL. If you make changes to the Sage CRM Server Name field or Sage CRM Installation Name field, you should click the Sage CRM Web Services URL button to automatically update the corresponding portions of the URL field.

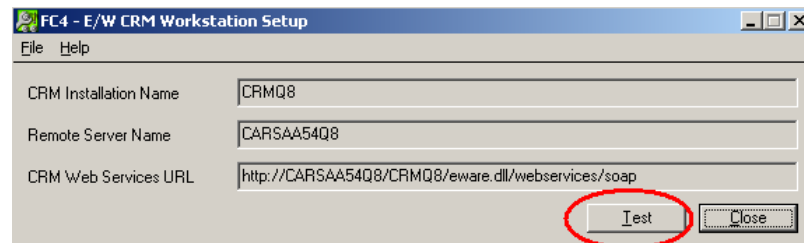
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### Workstation Setup form

5. From the Sage CRM folder, choose Workstation Setup to open the E/W CRM Workstation Setup form.

If you have not yet installed the CRM synchronization component (and you had selected Web Services in the E/W Sage CRM Setup form, as instructed in step 3), a dialog box will appear, to enable you to install it now.

6. To test your connection, click the new Test button on the Workstation Setup form, shown below.



### From Sage CRM to Sage 300

If you use Sage 300 5.4, and are using Sage 300 .NET Web Deployment, you now have the option to use .NET remoting (instead of COM/DCOM) to send information from Sage CRM to Sage 300 and to open the Sage 300 screens (such as Order Entry) from within Sage CRM. To do so, follow these steps.

1. In Sage CRM, choose the Administration menu, Sage 300 Administration, Setup Integration.
2. For each company record, set the Accpac (Sage 300) Server Name in CRM to use .NET notation, in the form of "**net://<machinename>:9000**" (where **9000** is the port used by .NET remoting).

Administration -> Sage Accpac Administration

To change the information about the company database:

1. Click the Change button to enable the fields.
2. Make your changes and then click Save at the right side of the screen.
3. Click Continue.

**Sage Accpac Integration Configuration**

Accpac Database ID:	Accpac Company Name:	Accpac Server Name:
FC4	FC4 company	net://carsas54q8:9000

Default Company

3. Download the Sage 300 .NET Libraries to the CRM machine. To do this: On the CRM machine, open Sage 300 in browser mode (using .NET Web Deployment) and sign on to a company.