Sage ERP Accpac 6.0A

SageCRM 7.1 | Integration Update Notice

Sage Software, Inc.
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Contents

Sage ERP Accpac Integration with SageCRM 7.1 Update Notice

This integration package contains the *SageCRM* 7.1 module, and integration components that enable SageCRM 7.1 to integrate with Sage ERP Accpac 6.0.

For system requirements, see Chapter 2 of the *SageCRM Integration Guide*.

Important

SageCRM 7.1 integrates *only* with Sage ERP Accpac 6.0. If you use Sage ERP Accpac 5.6 or earlier, you must upgrade to Sage ERP Accpac 6.0 to use the integration features.

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

Also, if you are upgrading from SageCRM 6.2 or earlier, you ***must*** upgrade to SageCRM 7.0 first.

SageCRM Solo

SageCRM Solo is ***not*** supported in the SageCRM 7.1 release. If you use SageCRM Solo, do not upgrade SageCRM until SageCRM 7.1 Service Pack 1 is available.

Package Contents

The SageCRM 7.1 Integration upgrade package includes the following items.

- The Installation program with the following selections:
  - Install SageCRM module
  - Sage ERP Accpac Accounting Integration, as follows:
    i. Integration Component for SageCRM 7.1

       Note: Depending on your license, this item may be included when you install the SageCRM 7.1 module. It is also provided as a separate install component, in case you need to reinstall it later, as explained in the section, "Adding Sage ERP Accpac Accounting Integration after SageCRM is Installed" in Chapter 3 of the *SageCRM Integration Guide*.

   ii. Integration Component for Sage ERP Accpac 6.0 (EW60A).

- Online documentation:
  - *SageCRM Integration Update Notice*
  - *SageCRM Integration Guide*

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

Before You Install

This update notice assumes that you are currently using Sage ERP Accpac version 6.0. Before you install the software included with this notice, review the system requirements described in Chapter 2 of the *SageCRM Integration Guide* for SageCRM 7.1.

For SageCRM system requirements, see the *SageCRM System Administrator Guide*.

LanPak Licenses

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

- View opportunity status details and current totals (Quote Amount, Pending Amount, Order Amount, Shipment Amount, and Invoice Amount) on the Opportunity Summary screen
- Create a new quote or order (and associated quote) from the Company 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

You ***do*** need a LanPak license to use any SageCRM feature that opens a Sage ERP Accpac form. For example, the A/R Inquiry and O/E Inquiry screens include buttons and links that open Sage ERP Accpac forms.

If you are upgrading to SageCRM 7.1, make sure that you install enough LanPak licenses to support SageCRM access to Sage ERP Accpac forms.

Installing and Activating Sage ERP Accpac Integration for SageCRM 7.1

If you are setting up SageCRM 7.1 integration with Sage ERP Accpac for the first time, skip this section and follow the detailed instructions for installing and integrating SageCRM for Sage ERP Accpac in Chapter 3 of the *SageCRM Integration Guide.*

If you are upgrading from a previous version of SageCRM for Sage ERP Accpac to SageCRM 7.1 for Sage ERP Accpac 6.0, follow the instructions in one of the following subsections:

- Upgrading from SageCRM 7.0 Integrated with Sage ERP Accpac 5.6 or 6.0 to SageCRM 7.1 for Sage ERP Accpac 6.0
- Upgrading from Sage CRM 6.2 or earlier to SageCRM 7.1

Upgrading from SageCRM 7.0 Integrated with Sage ERP Accpac 5.6 or 6.0 to SageCRM 7.1 for Sage ERP Accpac 6.0

SageCRM Solo

SageCRM Solo is ***not*** supported in the SageCRM 7.1 release. If you use SageCRM Solo, do not upgrade SageCRM until SageCRM 7.1 Service Pack 1 is available.

Before you begin installation and activation:

- Back up your data in the following Sage ERP Accpac directories: \SITE, \USER, and \COMPANY.
- Back up your SageCRM data.

Perform the following steps only if you are upgrading your SageCRM to 7.1. If you are performing a new installation of SageCRM, follow the detailed steps in Chapters 1 to 5 in the *SageCRM Integration Guide.*

To upgrade from SageCRM 7.0 integrated with Sage ERP Accpac 5.6 or 6.0 to SageCRM 7.1 for Sage ERP Accpac 6.0:

Install SageCRM 7.0 for Sage ERP Accpac

1. Insert the SageCRM DVD, select **Install SageCRM**, and then click **Next**.

   During the installation:

   a. Select **Upgrade Previous Version of CRM**, and then click **Next**.

   b. Select **Upgrade your existing Sage Accpac ERP integration**, and then click **Next**.

   c. Select an upgrade path option:

- If you are upgrading from SageCRM 7.0 integrated with Sage ERP Accpac 5.6 to SageCRM integrated with Sage ERP Accpac 6.0, select the **5.6 → 6.0** option.
- If your installed version of Sage ERP Accpac is 6.0, select **Sage ERP Accpac stays at its current version**, and then click **Next**.

  On the following screen, select **6.0** as the version of Sage ERP Accpac you currently have installed, and click **Next**.

d. Follow the instructions on the remaining screens.

Uninstall E/W component and SageCRM synchronization component

2. On all workstations where Sage ERP Accpac is installed, uninstall the Sage ERP Accpac 6.0 E/W integration component and SageCRM synchronization component.

Note: You must perform this step when upgrading to SageCRM 7.1. The new E/W integration component included with SageCRM 7.1 includes changes that are required to support integration with the new version.

If you have installed Sage ERP Accpac on a server and are using Sage ERP Accpac workstation setup, you only need to uninstall the SageCRM synchronization component from the workstations. (The E/W integration component is not installed on workstations that use workstation setup to access Sage ERP Accpac programs on a server.

Install E/W component

3. Install the Sage ERP Accpac 6.0 E/W integration component.

To install the E/W integration component:

a. Insert the SageCRM DVD, open Setup.exe, and then select **Install Sage Accpac Accounting Integration**.

b. On the next screen, select **Install Integration Component for Sage ERP Accpac 6.0.**

(For more details, refer to the section on installing the E/W integration component in Chapter 5 of the *SageCRM Integration Guide.*

Synchronization component

During the E/W integration component installation, you will be prompted to install the SageCRM synchronization component if it has not been installed. You must install this component to create the Web Services connection between Sage ERP Accpac and SageCRM.

Note: When you are prompted to select the installation folder for the synchronization component, select the **Everyone** option to install it for anyone who uses this computer.

If you do not install the synchronization component now, you can install it later, using the setup forms in the SageCRM folder of Sage ERP Accpac.

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

Setup in Sage ERP Accpac

4. Open the Sage ERP Accpac desktop and activate SageCRM Integration (in **Administrative Services** > **Data Activation**).

5. On the Sage ERP Accpac desktop:

    a. Select **SageCRM** > **SageCRM Setup**.

       The SageCRM Setup form appears.

    b. Verify the settings on the form. For more information about setup fields, press F1.

    Note: The COM/DCOM connection method is not supported for the E/W integration component in Sage ERP Accpac 6.0, and is no longer available as an option on the SageCRM Setup form.

    If you are upgrading from a previous version of Sage ERP Accpac and you were using COM/DCOM, you must specify settings for a Web Services connection on the SageCRM Setup form.

6. On each Sage ERP Accpac workstation, select **SageCRM Workstation Setup** to run the setup utility, and then click the **Test** button to test the connection between SageCRM and Sage ERP Accpac.

Setup in IIS

7. 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 *SageCRM Integration Guide.*

   Note: If you have installed SageCRM and Sage ERP Accpac on separate servers, see "Setting Up the SageCRM Rewriter and Virtual Directories" in Chapter 4 of the *SageCRM Integration Guide* for information about changes to settings for integrating SageCRM 7.1 with Sage ERP Accpac 6.0 on separate servers.

Setup in SageCRM

8. Open SageCRM 7.1 and perform the following steps to complete and check your integration setup (refer to Chapter 5 of the *SageCRM Integration Guide* for details):

   a. Click **Administration** > **Sage Accpac Administration** > **Setup Integration** to check and select integration settings.

   b. Click **Administration** > **Sage Accpac Administration** > **Synchronize Tables** to re-synchronize tables.

   c. If you are integrating SageCRM with Sage ERP Accpac Order Entry and you are upgrading from SageCRM integrated with Sage ERP Accpac 5.6 or earlier, click **Convert OE Quotes and Orders** to convert existing Sage ERP Accpac O/E quotes and orders that were linked to SageCRM opportunities and make them compatible with SageCRM 7.1 integration.

      For details about how documents and tables are modified during conversion, refer to Chapter 5 of the *SageCRM Integration Guide*.

Upgrading from Sage CRM 6.2 or Earlier to SageCRM 7.1

If you are using Sage ERP Accpac CRM 6.2 or earlier, you must first upgrade to SageCRM 7.0 before you can upgrade to SageCRM 7.1.

Upgrade to SageCRM 7.0 for Sage ERP Accpac

1. Obtain the software for the SageCRM 7.0 for Sage ERP Accpac integration. (Refer to the *SageCRM Integration 7.0 Update Notice* that accompanies the software for more details of the steps to follow in this section.)

2. On the main installation screen, select the option to install version 7.0 of SageCRM (100 or 200) for Sage ERP Accpac, depending on the version you are currently using.

   Click **Next** to proceed to the next screen.

3. When you are prompted to select your installed copy of SageCRM, select **Upgrade Previous Version of CRM**, and then click **Next**.

4. Select **Upgrade your existing Sage ERP Accpac Integration**, and then click **Next**.

   For your Sage ERP Accpac upgrade path, select **Sage ERP Accpac stays at its current version**, and click **Next**.

5. Select **5.6** as your installed version of Sage ERP Accpac (or the version of Sage ERP Accpac that is currently *integrated* with SageCRM 6.2 or earlier), and then click **Next**.

6. Continue with the remaining screens.
7. On the final screen, click **Finish**.
8. Log on to SageCRM. No action is required once SageCRM opens. You can exit immediately.
9. You can now upgrade to SageCRM 7.1 for Sage ERP Accpac.

Upgrade to SageCRM 7.1 for Sage ERP Accpac

You can now install SageCRM 7.1.

When you begin installation, select your Sage ERP Accpac upgrade path, and then follow the instructions in “Upgrading from SageCRM 7.0 Integrated with Sage ERP Accpac 5.6 or 6.0 to SageCRM 7.1 for Sage ERP Accpac 6.0” to upgrade your integration components.

Changes in Sage ERP Accpac 6.0 Integration with SageCRM 7.1

Sage ERP Accpac 6.0 integrated with SageCRM 7.1 does not include any major new features or enhancements.

If you are setting up Sage ERP Accpac and SageCRM on separate servers, we recommend that you use .NET web deployment to connect SageCRM to Sage ERP Accpac. Also, see “Setting Up the SageCRM Rewriter and Virtual Directories” in Chapter 4 of the *SageCRM Integration Guide* for information about changes to settings for integrating SageCRM 7.1 with Sage ERP Accpac 6.0 on separate servers.

Changes in Sage ERP Accpac 6.0 Integration with SageCRM 7.0

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

The major changes made to Sage ERP Accpac 6.0 with SageCRM 7.0 include:

Changes to System Requirements

A number of system requirements have changed for Sage ERP Accpac 6.0 integrated with SageCRM 7.0, including:

- SageCRM 7.0 Service Pack 1
- Sage ERP Accpac 6.0 with the Sage ERP Accpac 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 *SageCRM 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 ERP Accpac O/E quotes and orders directly in SageCRM.

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

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. SageCRM 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 SageCRM. 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.

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 (to the right of the Quote Total or Order Total) or save the quote or order.

You ***must*** click this button to see accurate subtotals, order discounts, tax amounts, and totals after you make any change to a quote or order.

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.

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

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 a Sage ERP Accpac 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 one or more quotes for an opportunity, and then click Promote to Order to promote the selected quote(s) to a Sage ERP Accpac order. Note that you cannot select expired quotes, quotes that have already been promoted, or quotes that belong to a closed opportunity.

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

After you create the order, a message asks, "Does this complete the opportunity?" If you click Yes, SageCRM 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, SageCRM automatically links the new quote or order to the current opportunity.

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

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 will be available in SageCRM for quotes or orders entered through 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.

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, SageCRM automatically creates a new opportunity for the company, and then opens a new quote or order linked to the opportunity.

Note: If you click **New Quote** or **New Order** for a company that is not linked to Sage ERP Accpac, the Customer Number for the new quote or order is set to CRM999999999. If you promote the company to Sage ERP Accpac Order Entry, the entry will be changed to reflect the newly assigned Customer Number.

Improved Updating of Opportunity Status

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

- If you click the **New Quote** button on the Company Summary screen, SageCRM 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.

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

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 SageCRM 7.0 integrated with Sage ERP Accpac 6.0, you must convert existing Order Entry quotes and orders to make them compatible with the new integration.

After successful conversion, SageCRM 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 ERP Accpac O/E Quotes and Orders" in Chapter 5 of the SageCRM Integration Guide for information on how to prepare and convert existing documents.

Improved Promotion to Customer

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

Suspend O/E Integration to SageCRM

On the SageCRM Setup form in Sage ERP Accpac, a new option allows you to specify whether you 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 when you enter information in SageCRM or Sage ERP Accpac.

Clear Expired Quotes in Sage ERP Accpac Order Entry

On the Processing tab of the O/E Options form in Sage ERP Accpac, 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 ERP Accpac 6.0.

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

Changes in Previous Versions of Sage ERP Accpac and SageCRM

The following sections summarize changes in integration between previous versions of Sage ERP Accpac and SageCRM.

Changes in Sage ERP Accpac 5.6 Integration with SageCRM 7.0

There are no major changes in the integration of Sage ERP Accpac 5.6 with SageCRM 7.0.

Changes in Sage ERP Accpac 5.6 Integration with SageCRM 6.2

The major changes made to Sage ERP Accpac 5.6 with SageCRM 6.2 include:

- Integration with SageCRM Solo

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

  If an Accpac 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 SageCRM Solo Guide. This involves uninstalling the old Solo client and installing the new one. If you have to reinstall the Accpac integration for any reason, you will need to:

  – Reinstall the integration.

  – Uninstall the Solo client (follow the steps in the *SageCRM 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.

  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.

- 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 Accpac to CRM

  National Account Integration is initially turned off in SageCRM setup. You can use Sage ERP Accpac Administration to import national account relationships, which must be maintained within Accpac, as synchronization is one-way from Accpac 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 SageCRM.

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

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

- Salesperson Enhancements

  You can now set the Salesperson Codes on companies promoted to Accpac from SageCRM. 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 SageCRM using the number changer feature in Accpac.

- New way to identify current version of SageCRM Integration

  The About SageCRM Integration menu option will help Technical Support identify whether SageCRM is integrated correctly with Sage ERP Accpac.

- 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.

Changes in Sage ERP Accpac 5.5 Integration with SageCRM 6.2

There are no major changes in the integration of Sage ERP Accpac 5.5 with SageCRM 6.2. For changes in Sage ERP Accpac 5.5 integration with version 6.1 of SageCRM, please see the following section.

Changes in Sage ERP Accpac 5.5 Integration with SageCRM 6.1

The following subsections summarize the features that were available in the CRM-integrated version 5.5 of Sage ERP Accpac. For more details, refer to the latest *SageCRM for Sage ERP Accpac Integration Guide*.

User-Level Security and Database-Level Security

On the Sage ERP Accpac 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 User-Level Security. You use Accpac User-Level Security to define a user’s access rights to the integrated screens, such A/R Inquiry. These rights apply to all Sage ERP Accpac integrated databases *except* the databases specified in the new Accpac Database-Level Security function, described next.
- Database Level. A new security feature, Accpac 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 ERP Accpac 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 ERP Accpac Accounts Receivable with the A/R ship-to address in SageCRM.
- The remit-to address in Sage ERP Accpac Accounts Payable with the A/P remit-to address in SageCRM.

Read the next three subsections for details.

SageCRM Setup

On the SageCRM Setup form in Sage ERP Accpac, there are two new options:

Suspend A/R Ship-To Addresses. If you *clear* this option, then any changes you make to a Sage ERP Accpac customer's ship-to address and contact in Sage ERP Accpac Accounts Receivable will be automatically reflected in SageCRM as well. Similarly, ship-to address changes you make in SageCRM will be reflected in Sage ERP Accpac.

Suspend A/P Remit-To Addresses. If you *clear* this option, then any changes you make to a Sage ERP Accpac vendor's remit-to address and contact in Sage ERP Accpac Accounts Payable will be automatically reflected in SageCRM as well. Similarly, remit-to address changes you make in SageCRM will be reflected in Sage ERP Accpac.

Note: Please check your options carefully on the SageCRM Setup form in Sage ERP Accpac. If you want synchronized updating of the ship-to or remit-to addresses, be sure to ***clear*** the options.

Import Customers or Vendors

When you use Import Customers on the Sage ERP Accpac 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.

SageCRM Addresses and People

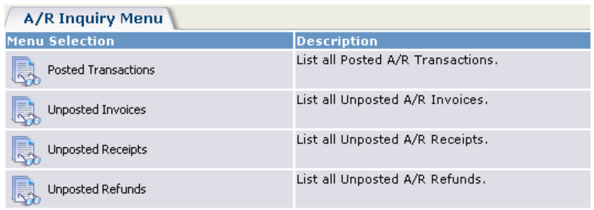
- When you edit addresses on the SageCRM Address edit screen, you can now specify whether the address entered is an A/P Remit-To Address or an A/R Ship-To Address.
- When you edit contacts on the SageCRM Person edit screen, you can now specify whether the contact entered is an A/P Remit-To Contact or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

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

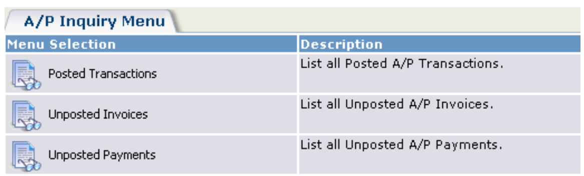
Changes to the A/R and A/P Inquiry Menus

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)



- Unposted Payments (A/P Inquiry menu)



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. By default, the list screen displays all document types. 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. By default, the list screen displays all document types. 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.

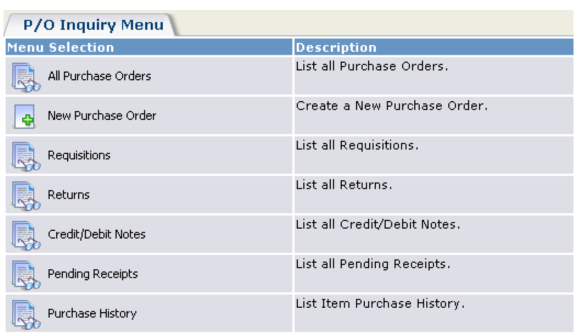

O/E Inquiry Menu

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 ERP Accpac 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 ERP Accpac 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 ERP Accpac and SageCRM

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

More Accessibility to a Transaction’s Details and Source Documents

When viewing Sage ERP Accpac transactions while working in SageCRM (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 ERP Accpac 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 ERP Accpac 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 ERP Accpac 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 ERP Accpac Documents

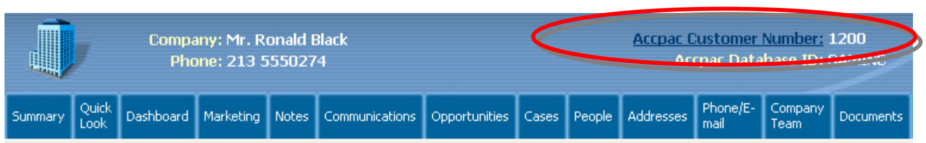
The “New” button has been added to several screens, enabling you to quickly and easily create more types of Sage ERP Accpac documents while working in SageCRM.

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 ERP Accpac A/R Customer form, by clicking the Accpac Customer Number hyperlink located at the top right of the SageCRM screen:



Similarly, the Accpac 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 ERP Accpac 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 ERP Accpac A/P Vendor Activity form.

Easier Data Entry on Sage ERP Accpac Forms

When you create a new Sage ERP Accpac document from SageCRM, many of the details from the associated document is automatically entered on the Sage ERP Accpac form. This facilitates your entry of data on the Sage ERP Accpac 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 ERP Accpac O/E Shipment Entry form that opens.

More Sage ERP Accpac Information in SageCRM

More information from Sage ERP Accpac 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 ERP Accpac Warehouse Management System (WMS)

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

Purchase Orders:

When you create (post) a new purchase order in SageCRM, the purchase order is sent automatically to Sage ERP Accpac 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 SageCRM.

To post the receipt in SageCRM:

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 ERP Accpac WMS (such as quantity received) automatically entered on the form.

Sales Orders:

When you create (post) a new sales order in SageCRM, the sales order is sent automatically to Sage ERP Accpac 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 SageCRM.

To post the shipment in SageCRM:

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 ERP Accpac 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 ERP Accpac integrated screens; for example, the number of rows displayed on a page of A/R unposted invoices. On the SageCRM Main Menu, choose My CRM, then the Preferences tab. In the Grid Size field, choose the number of rows to be displayed. (Note that to have access to My CRM, your User ID must be set up in the Users function to access My CRM Lists.)

Changes in Sage ERP Accpac 5.4 Integration with SageCRM 6.0/6.1

Sage ERP Accpac CRM has been renamed to SageCRM for Sage ERP Accpac.

The following subsections summarize the new features that were available as of version 5.4 of Sage ERP Accpac integrated with SageCRM for Sage ERP Accpac 6.0/6.1. For more details of the features, refer to the *Sage ERP Accpac Integration Guide for SageCRM* that was shipped with that version.

Integration with Sage ERP Accpac Purchase Orders

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

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 ERP Accpac Purchase Orders form, for viewing or editing.
- Create a new purchase order, using the Sage ERP Accpac Purchase Orders entry form.


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.

Integration with Sage ERP Accpac Project and Job Costing

If you use Sage ERP Accpac Project and Job Costing 5.4, SageCRM 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 ERP Accpac 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 ERP Accpac Return Material Authorization (RMA)

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

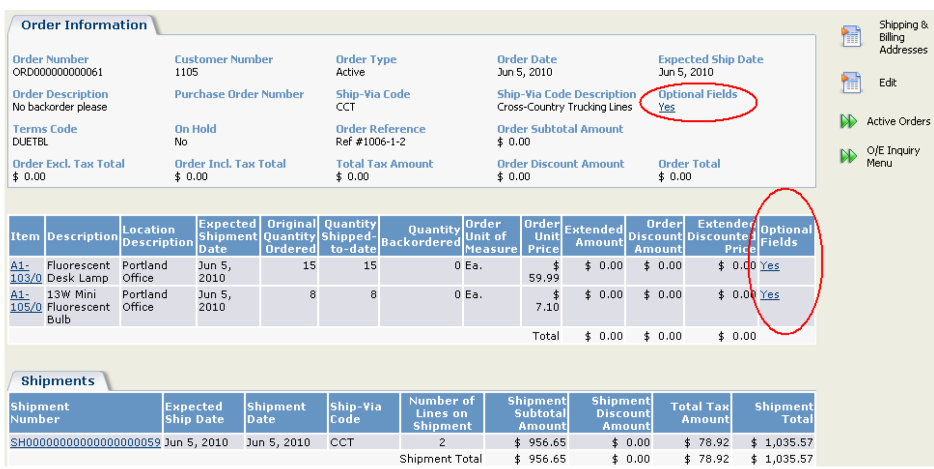
When you list return authorizations for a customer, you can select one of the listed return authorizations and opens its Sage ERP Accpac RMA form, for viewing or editing.

- 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 ERP Accpac Accounts Receivable 5.4 (or for vendors in Sage ERP Accpac Accounts Payable 5.4), you can now view or edit optional fields in several areas of SageCRM:

- 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 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 ERP Accpac tabs (such as the Aging and Statistics tab, O/E Inquiry tab, P/O Inquiry tab, and so on).



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 ERP Accpac 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.
Credit/Debit Notes	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	Customer Number	Type	Credit/Debit Note Date	Description	Reference
CN0000000000003	1200	Credit Note	Mar 1, 2007		RMA000000000002

Order Number	Invoice Number	Invoice Date	Purchase Order Number	Return Date	Optional Fields
				Mar 1, 2007	Yes

Credit/Debit Note Subtotal Amoun	Credit/Debit Note Excluded Tax T	Credit/Debit Note Included Tax T	Total Tax Amount	Credit/Debit Note Discount Amoun	Credit/Debit Note Total
$ 31.95	$ 2.64	$ 0.00	$ 2.64	$ 0.00	$ 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 SageCRM 6.0

The "Mass Update" feature, described in the *SageCRM 6.0 User Guide*, enables you to select and update fields for a group of customers or vendors.

This feature updates the fields that are stored in SageCRM but does **not** update the same fields stored in Sage ERP Accpac.

For example, if a group consisted of Sage ERP Accpac Customer A and SageCRM 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 SageCRM records, but not in Sage ERP Accpac, for Customer A.

We recommend that you do NOT use the Mass Update feature with any Sage ERP Accpac 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 Database ID

Company: Business Email

Company: Accpac Customer Number

Company: Accpac Vendor Number

Company: Company Name

Company: Phone

Company: Website

Person: Fax Number

Person: First Name

Person: Last Name

Person: Phone

Person: Email

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

Changes in the Sage ERP Accpac Integration (E/W) Forms

In Sage ERP Accpac 5.4, the following changes have been made to the forms in the SageCRM folder. Details are also provided in the next section, "Connection Method Changes."

E/W SageCRM Setup form:

- The Remote Server Name field has been renamed to SageCRM Server Name.
- In the new SageCRM 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 SageCRM 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 ERP Accpac to SageCRM and from SageCRM to Sage ERP Accpac. If you use Sage ERP Accpac 5.4, you can now set up the connections in another way.

From Sage ERP Accpac to SageCRM

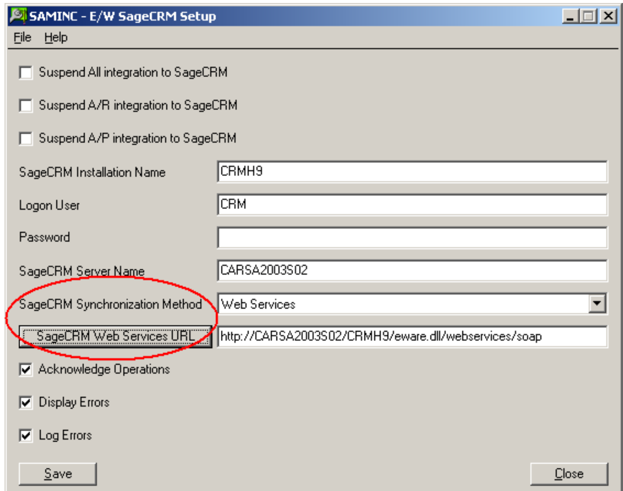
If you use Sage ERP Accpac 5.4, you now have the option of using Web Services instead of COM/DCOM. To do so, follow these steps. For more detailed steps, see Chapter 5 of the latest *Sage ERP Accpac Integration Guide for SageCRM*.

1. You must have installed the new version of the Sage ERP Accpac Integration (E/W) component 5.4B. During that installation, choose to install the CRM synchronization component (see "Installing and Activating Sage ERP Accpac Integration for SageCRM ").

   If you did not install the synchronization component at that time, you can install it later in workstation setup (step 5 to follow). The Web Services option requires the synchronization component.

SageCRM Setup form

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



3. In the SageCRM Synchronization Method field, select Web Services.

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

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

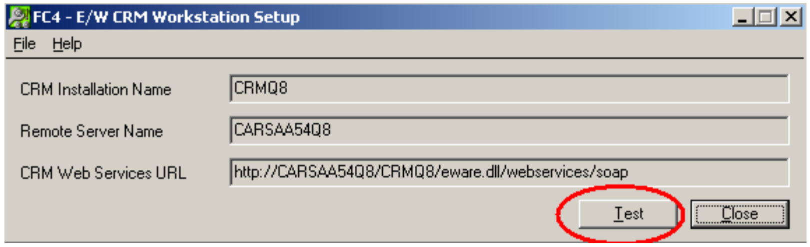
Note: The SageCRM Web Services URL button updates the Server Name and Installation Name portions of the URL. If you make changes to the SageCRM Server Name field or SageCRM Installation Name field, you should click the SageCRM Web Services URL button to automatically update the corresponding portions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

Workstation Setup form

5. From the SageCRM 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 SageCRM 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.

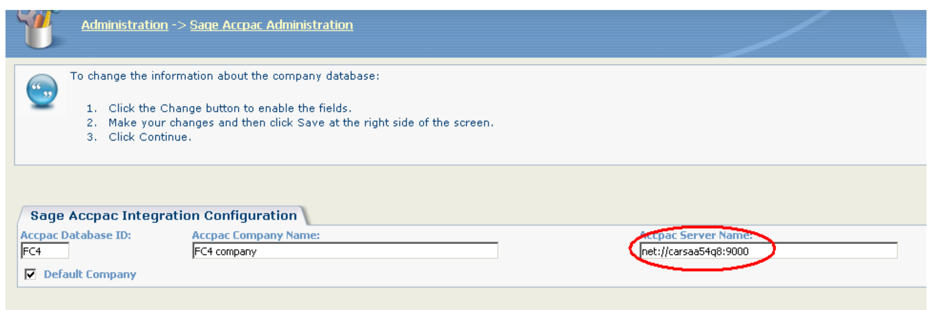


From SageCRM to Sage ERP Accpac

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

1. In SageCRM, choose the Administration menu, Sage ERP Accpac Administration, Setup Integration.

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



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