SAGE MAS 500

Pre-Release Guide for Sage SalesLogix for Sage MAS 500

January 2008

software

Your business in mind.

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Product Overview

Sage SalesLogix® is the Customer Relationship Management (CRM) solution that drives sales performance in small to mid-sized businesses through Sales, Marketing, and Customer Support automation and integration to accounting and business management applications.

The combination of Sage SalesLogix CRM and Sage MAS 500 ERP provides your organization access to the most current product information, pricing, discounts, and inventory when creating quotes or taking orders. In addition, without having to leave Sage SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance so they can better service customers.

Advanced customization capabilities enable Sage SalesLogix to work in concert with your unique sales and customer interaction processes, and to accommodate growth and changing business requirements.

Through robust functionality, ease of use, and ease of customization, Sage SalesLogix provides your small to mid-sized business an affordable CRM solution with low cost of ownership, rapid time to productivity, and high return on investment.

With more than 8,000 companies using Sage SalesLogix worldwide, Sage SalesLogix is the CRM leader for small to mid-sized businesses.

Availability

Sage Saleslogix 7.2 for Sage MAS 500 is currently scheduled for be available in March, 2008.

Compatibility

Sage SalesLogix v7.2 Service Pack 1 (Windows client) or later

Sage MAS 500 Rel 7.05 Service Pack 3 & Aug 2007 MU (7.05.11) or later

Features Overview

Sage SalesLogix for Sage MAS ERP allows you to maintain your company customer information while also maintaining your customer's financial accounts. Simply knowing the customers name and address is not enough to beat the competition. You need access to all of the communications that you have had with that potential or existing customer is vitally important in maintaining a strong customer relationship for continued sales.

Sage SalesLogix for Sage MAS ERP allows you to:

- Provide Consistent Customer Records
- Create Invoices from CRM Service Contracts
- Maintain Accurate Product Information
- Generate Orders from CRM Opportunities

Consistent Customer Record

By joining Sage SalesLogix CRM with Sage MAS ERP, you finally have a single view of you customers. Back-office customer information such as invoice history, open invoices, credit rating, and more can now be viewed along with notes, activities, history, and more from your CRM system.

This consistent customer record provides additional benefits to your entire organization:

- Seamless data entry – end-users do not have to worry about entering data in separate CRM and ERP systems
- Customer information available anytime – using powerful synchronization capabilities built into Sage SalesLogix, many customer details are available to the mobile sales force
- Complete customization – using the tools provided in Sage SalesLogix, developers can customize the solution to better meet the needs of their companies

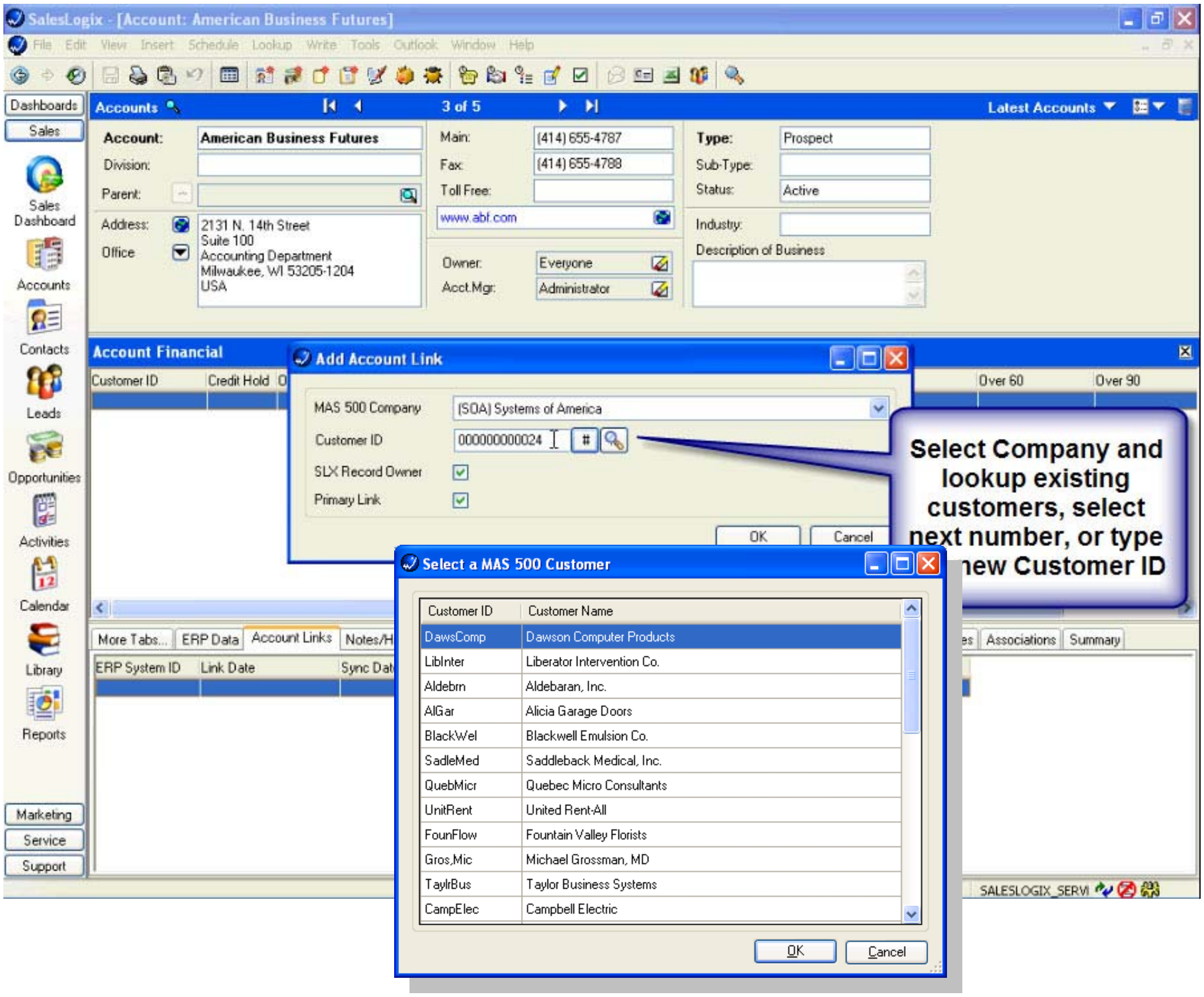
To achieve this customer record, Sage SalesLogix Accounts are seamlessly linked to Sage MAS Customers. Likewise, Contacts and Addresses are linked so that they remain consistent across systems. This linking is simple to setup, automatic to use, and requires no maintenance.

Adding ERP Customers from CRM

From Sage SalesLogix Accounts, you may lookup the matching ERP Customer record to create a link. You may also add ERP Customers directly from Sage SalesLogix if they do not exist as an ERP Customer.

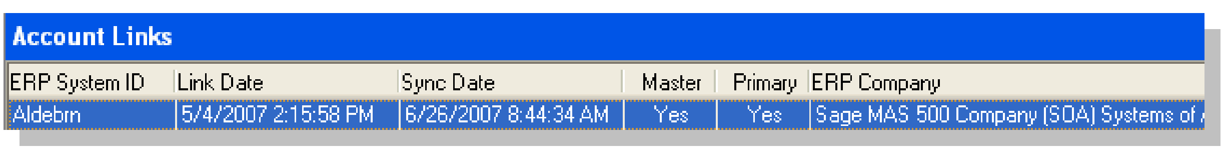
The Customer will be created using the Company Code, and Customer ID provided. The Company Code is required, and Customer ID is optional. If the Customer ID is not provided the next customer number will be selected.

The customer will be created in the selected MAS 500 Company, along with all associated addresses and contacts if selected in the setup options.



CRM Accounts to ERP Customers Link

Customer and Account relationships are many to many and are maintained in the SalesLogix ERP Account Links on the SalesLogix Account.



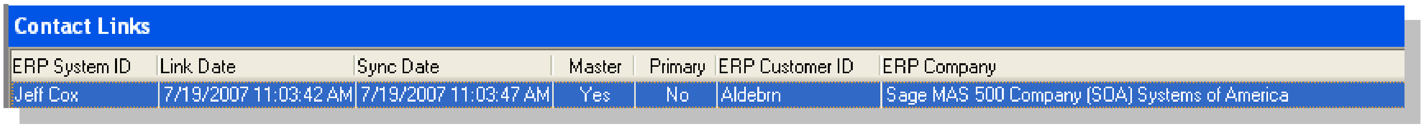
Account Links

ERP System ID	Link Date	Sync Date	Master	Primary	ERP Company
Aldebrn	5/4/2007 2:15:58 PM	6/26/2007 8:44:34 AM	Yes	Yes	Sage MAS 500 Company (SOA) Systems of A

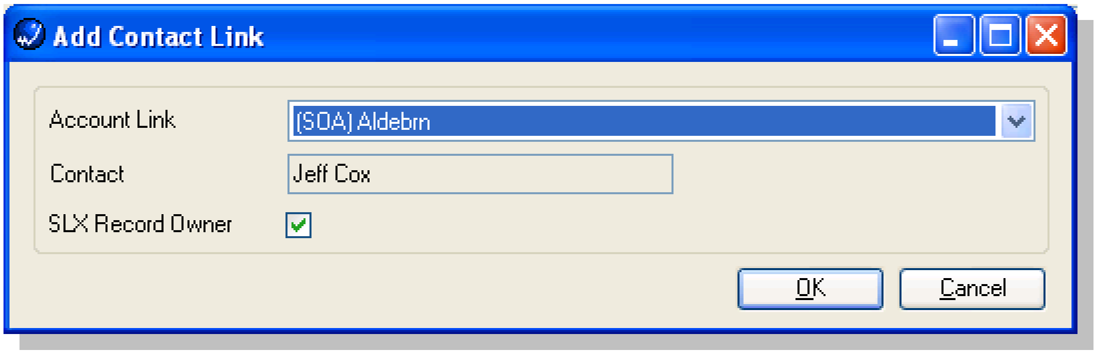
Relating CRM and ERP Contacts

In the same way you can add or link Sage SalesLogix Accounts to Sage MAS Customers, you can also add and match Contacts between the systems.

Contact to Contact relationships are many to many and are maintained in the ERP Link Contact Links on the SalesLogix Contact



Relationships can be added and edited through this view.



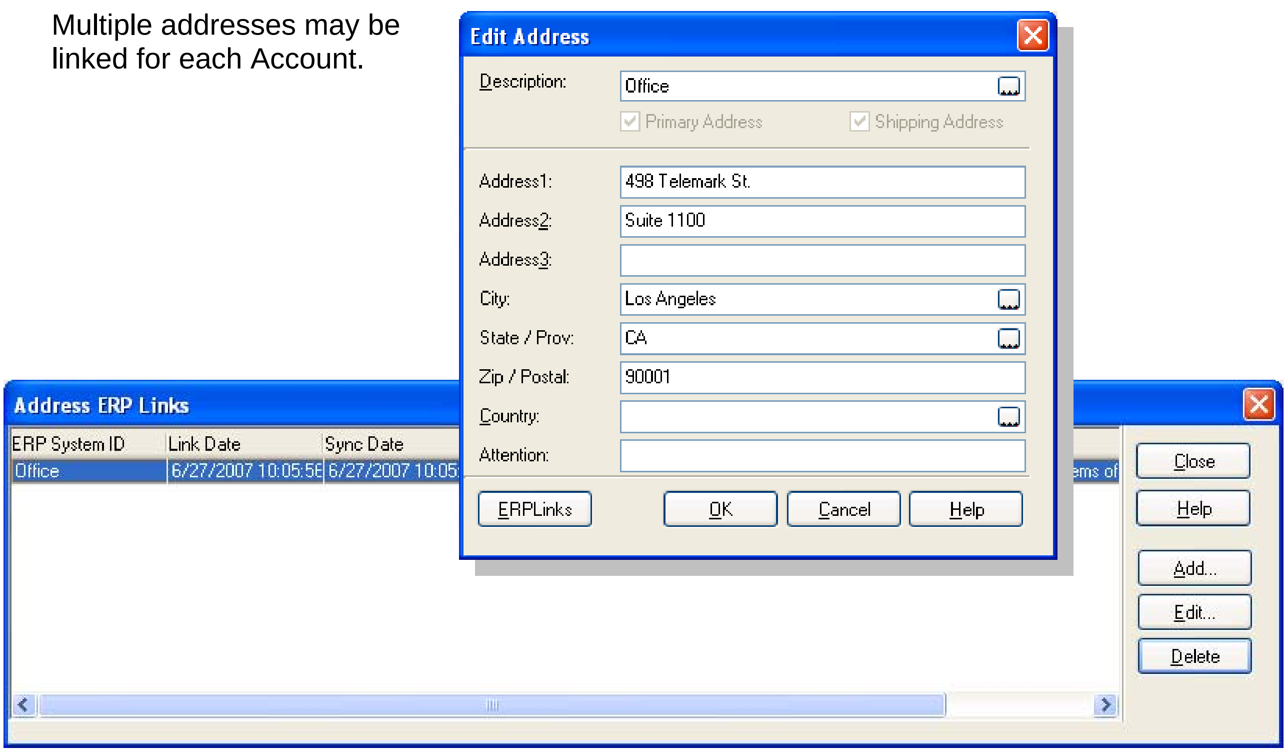
The contact will be created using the Company Code, Customer ID defined in the selected link. Contact links for Sage MAS 500 are based on the Contact Name, and cannot be changed.

Contacts may also be created in the Sage MAS 500 system automatically when the Account is refreshed, depending on the options select during setup.

Address Maintenance

You may link any address in Sage SalesLogix to an address in Sage MAS ERP from the edit address dialog, ERPLinks button. Address to Address relationships are one to one and maintained on each address record in Sage SalesLogix. Addresses may also be created in the Sage MAS ERP system automatically when the Account is refreshed, depending on the options select during setup.

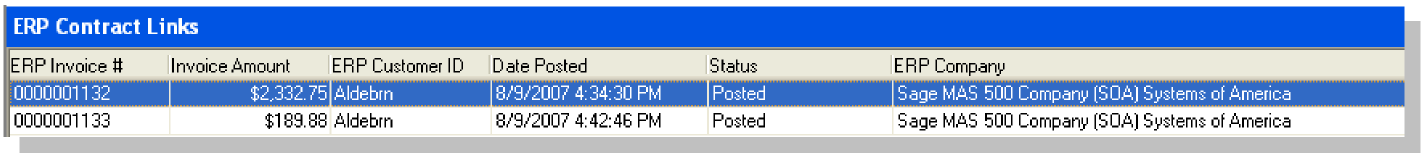
Multiple addresses may be linked for each Account.



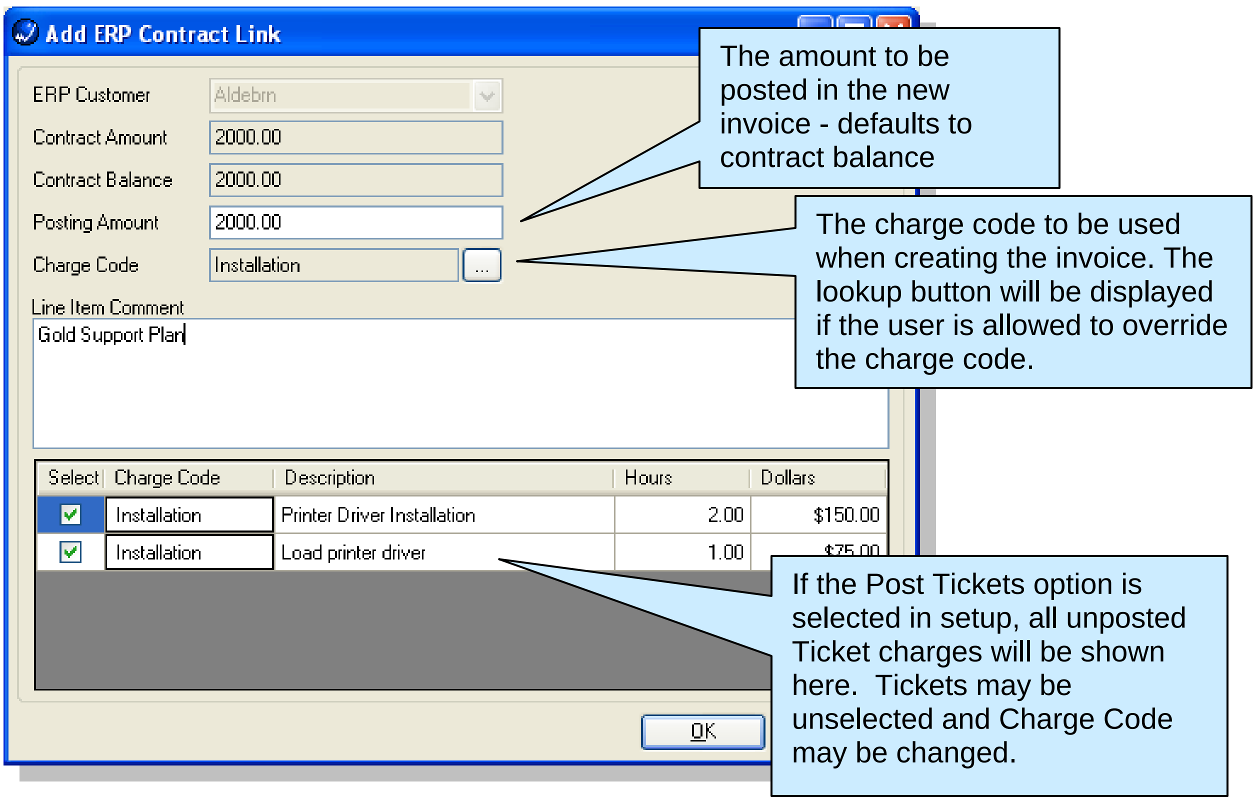
Create Invoices from CRM Service Contracts

From Sage SalesLogix, you may create a back-office invoice directly from a Service Contract. This will collect all Ticket activity related to the Contract, allow editing of details, and then submit it as an invoice. From that point, the ERP system will process as a regular invoice and a link from the Contract to the Invoice will be maintained in Sage SalesLogix.

Contract to Invoice relationships are one to many and are maintained for each Contract on the Contract view.



Right click the ERP Contract Links grid and select Add… to create a new invoice for the selected contract.

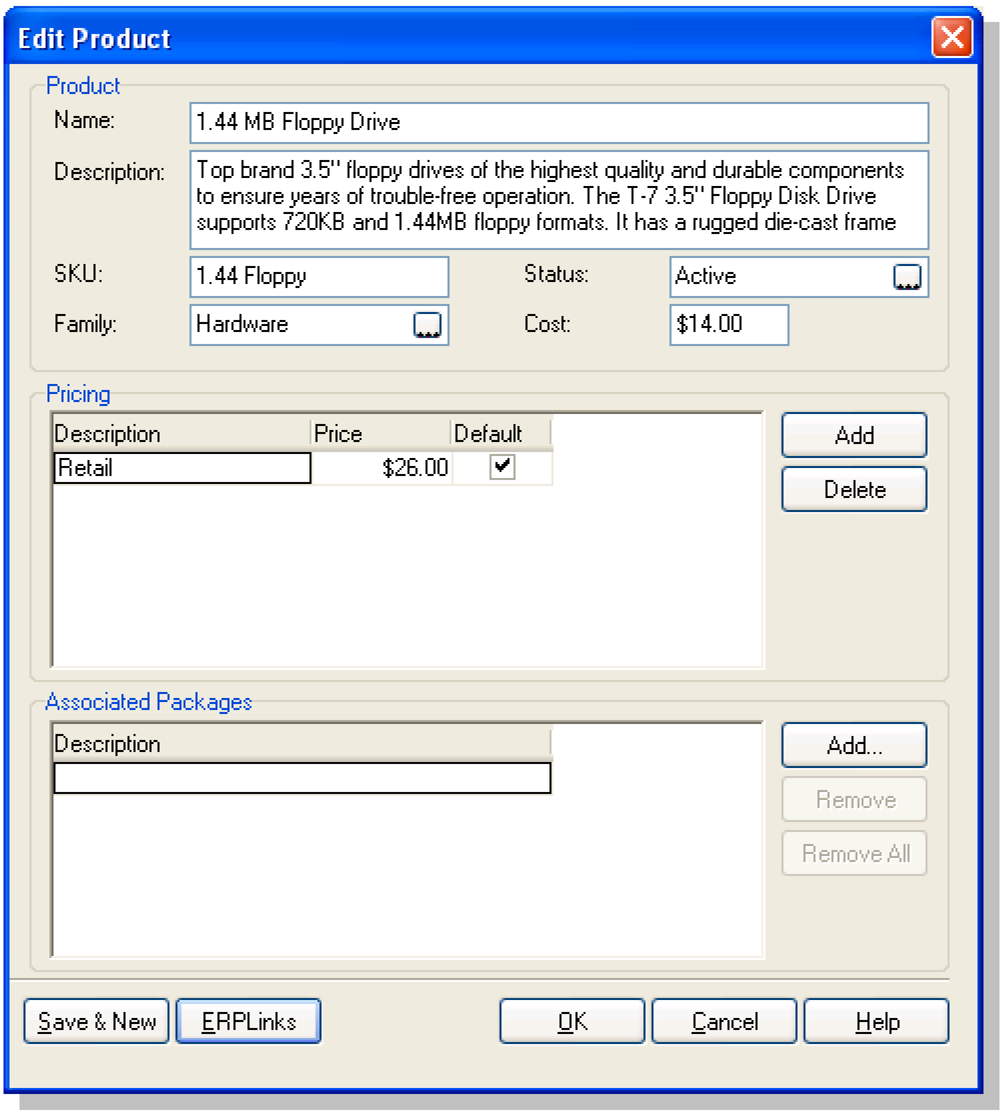


Accurate Product Information

Sage SalesLogix Products are seamlessly linked to Sage MAS Items so you can maintain accurate information on products.

Relating CRM Products to ERP Items

The Product to Item relationship is many to many and is maintained on each product record in Sage SalesLogix.



A SalesLogix Product can be associated to several MAS 500 Inventory Items across one or more MAS 500 Companies. When products are added to an opportunity the products are checked to ensure availability in the selected company and the user may be presented with a warning, or not be allowed to add the item to the opportunity, based on setup options.

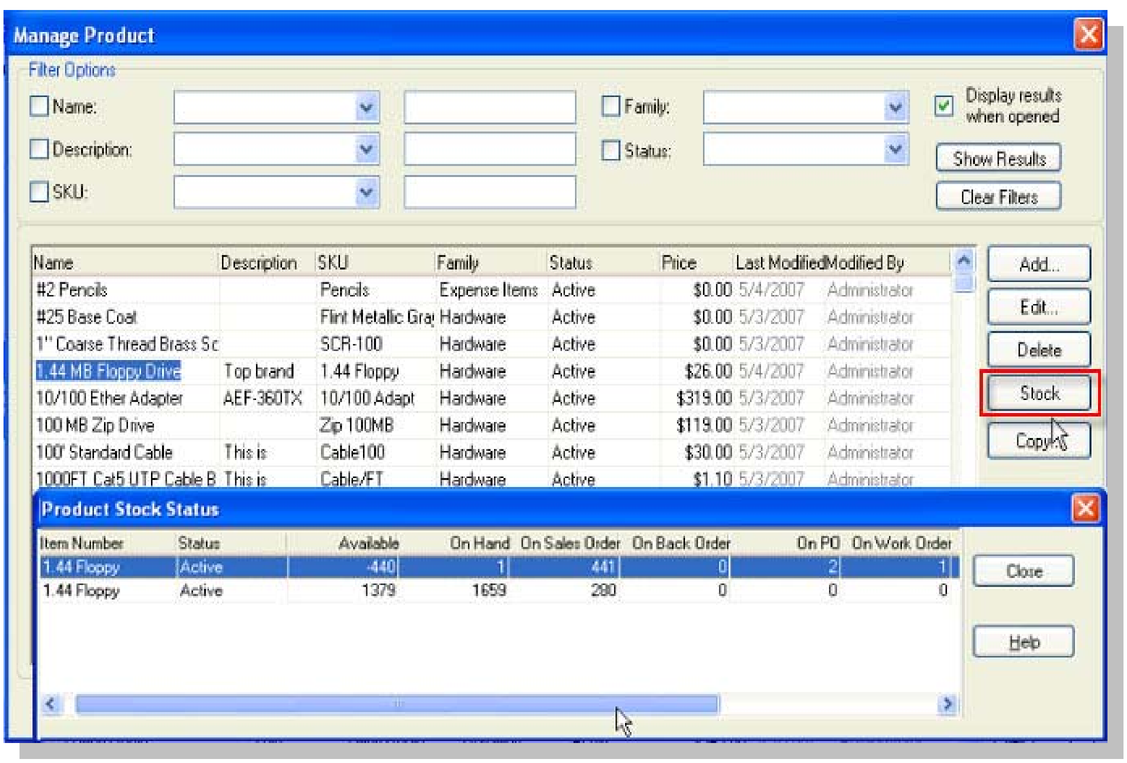
The Item to Product relationships allow for proper price checking during opportunity entry.

Adding ERP Items

Currently, adding Sage MAS ERP Inventory Items is not available from within Sage SalesLogix.

Product Inventory

View inventory status across multiple warehouses for each product.

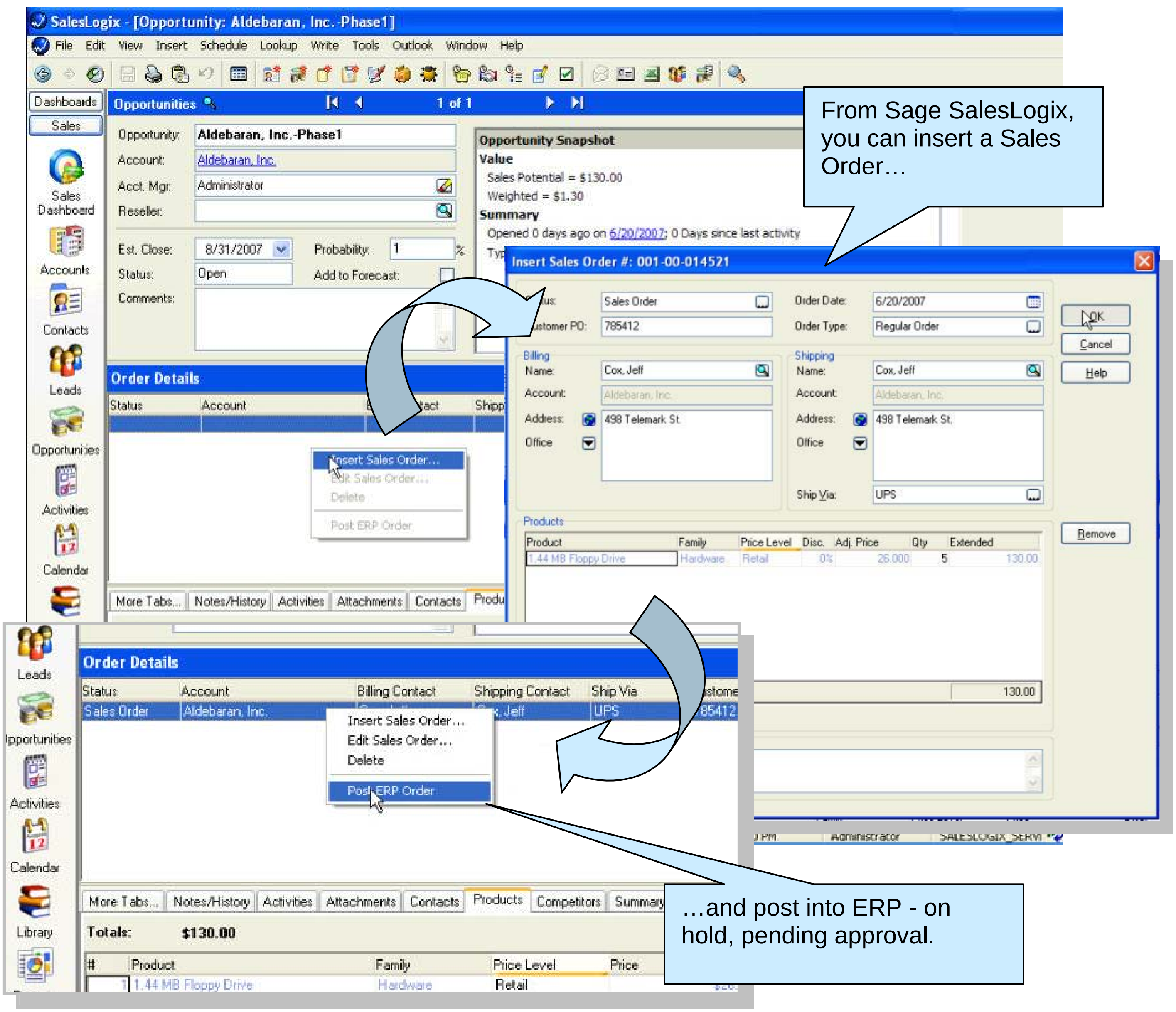


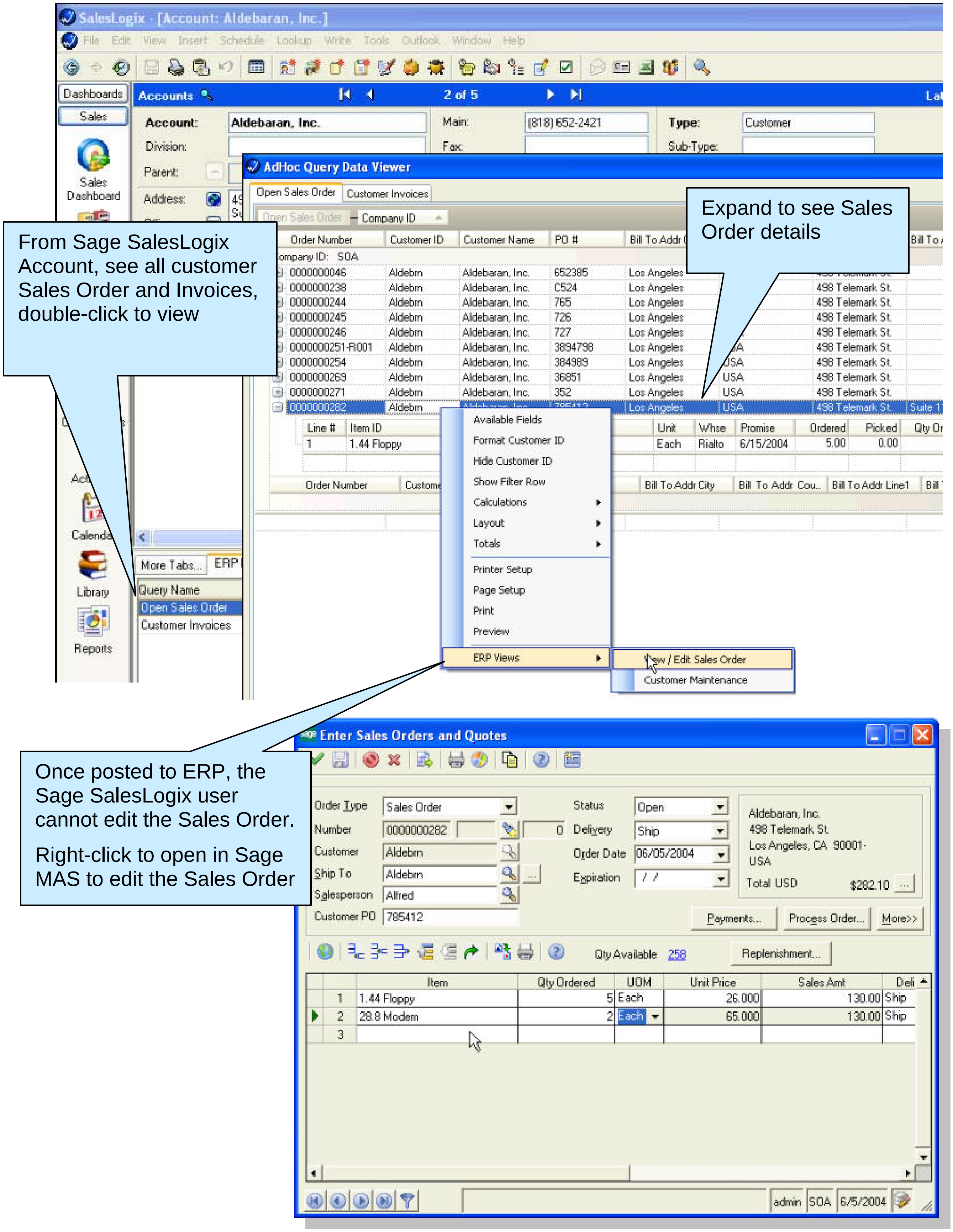
Generate Orders from CRM Opportunities

Sales Quotes While not connected to the network, remote salespeople can change account information and enter basic sales quotes. The next time they synchronize, the information is transferred into the SalesLogix database, and then into the accounting system.

Sales Orders Workgroup users have the ability to toggle between their sales management tool and MAS 90, MAS 200, or MAS 500 to create a sales order for the current SalesLogix account. This allows them to take advantage of information in MAS 90, MAS 200, or MAS 500, such as sales pricing, customer discounts, and sales tax calculation.

Inventory items If inventory items are included in the replicated data in SalesLogix, users can select their inventory items as line items on the quotes. In addition, they can look up quantities in the warehouse (site). This information is as current as the last synchronization.

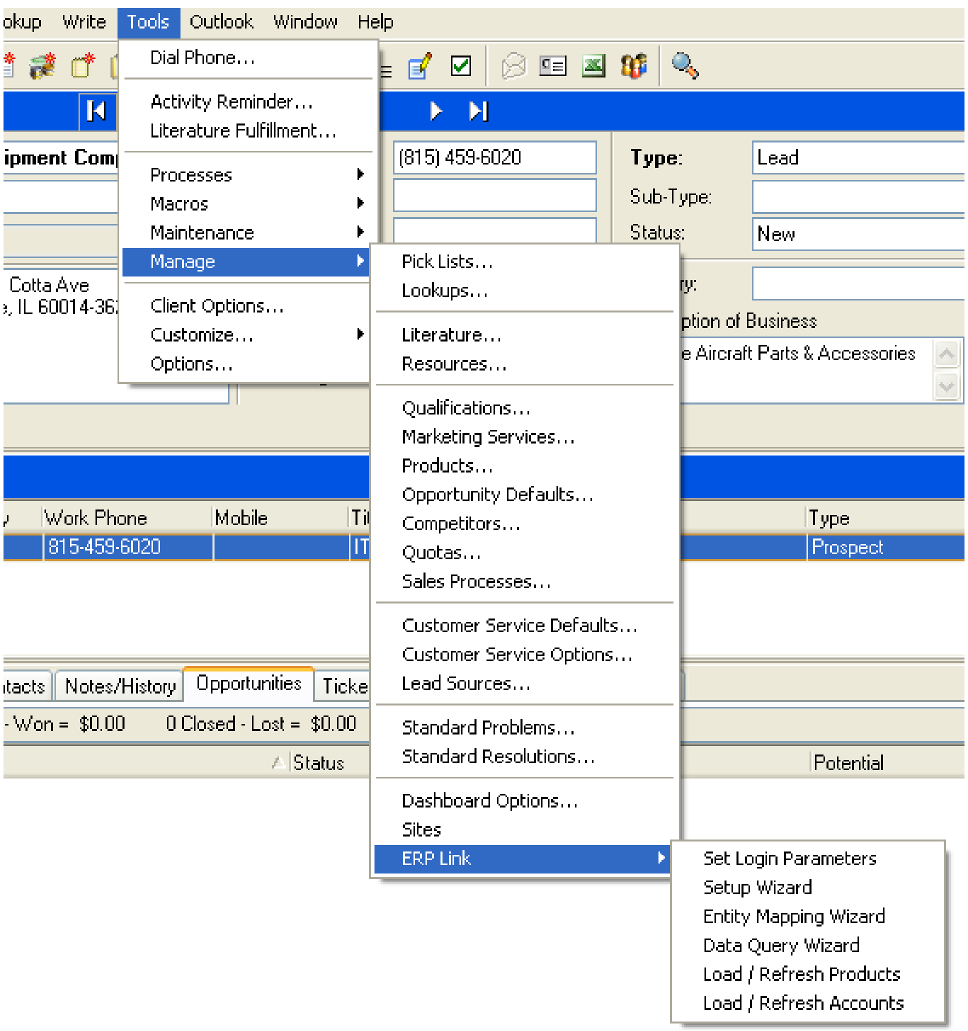



SalesLogix - [Account: Aldebaran, Inc.]
AdHoc Query Data Viewer
Expand to see Sales Order details
From Sage SalesLogix Account, see all customer Sales Order and Invoices, double-click to view
ERP Views
View / Edit Sales Order
Customer Maintenance
Enter Sales Orders and Quotes
Once posted to ERP, the Sage SalesLogix user cannot edit the Sales Order.
Right-click to open in Sage MAS to edit the Sales Order

Setup and Configuration

Once installed, you must define how the CRM and ERP interoperate. This configuration is made easier by wizards and automated where possible. From Sage SalesLogix, select the menu Tools > Manage > ERP Link to configure the following:

- Login Parameters (for Sage MAS ERP login)
- Setup Wizard
- Entity Mapping Wizard
- Data Query Wizard
- Load / Refresh Products
- Load / Refresh Accounts

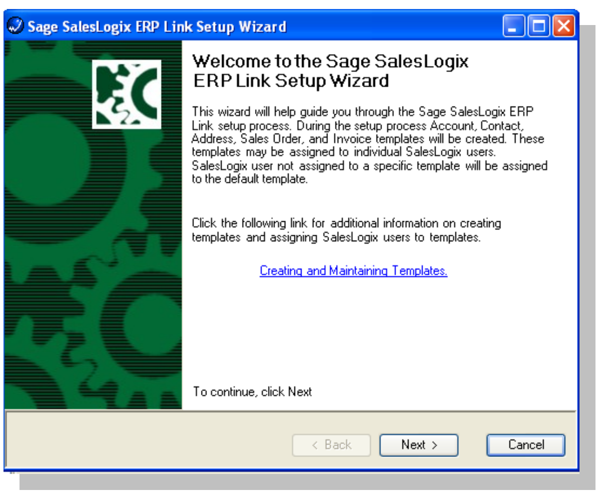


ERP Login Parameters

The Login Parameters allow the Sage SalesLogix user to enter the credentials to be used to access the Sage MAS ERP system. These credentials are stored by Sage SalesLogix user, and each Sage SalesLogix user that will be accessing Sage MAS ERP will be required to set these credentials.

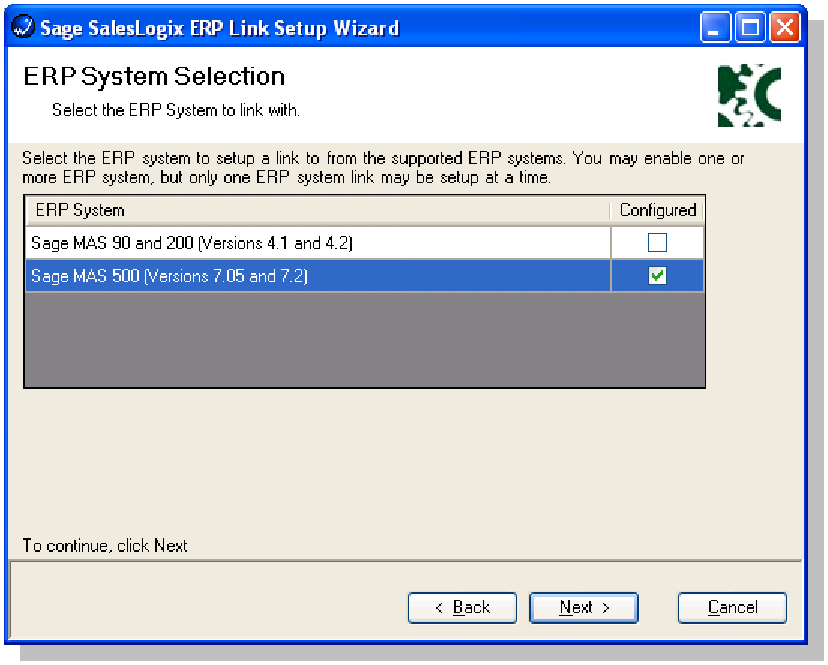
Setup Wizard

The Setup Wizard allows the Sage SalesLogix Administrator to set options which will define how the two systems will operate. The following are the options currently available.



Setup ERP Selection

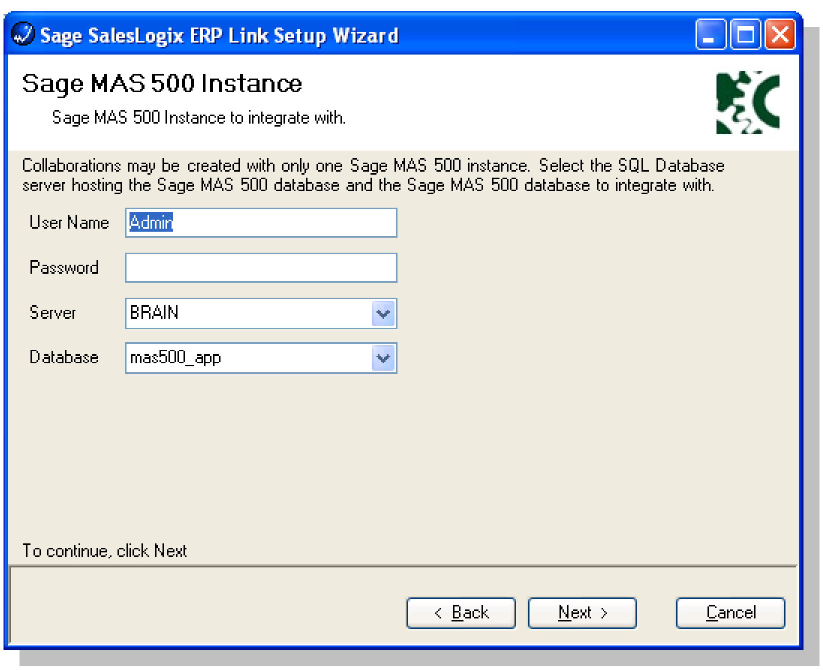
ERP System Selection allows the user to select the ERP application that will be configured for integration with SalesLogix. The ERP System(s) available depend on the installed plugins.



Select ERP Instance

You must define the specific instance of the back-office to connect to Sage SalesLogix. A valid ERP user name and password is required to connect to each specific server and database.

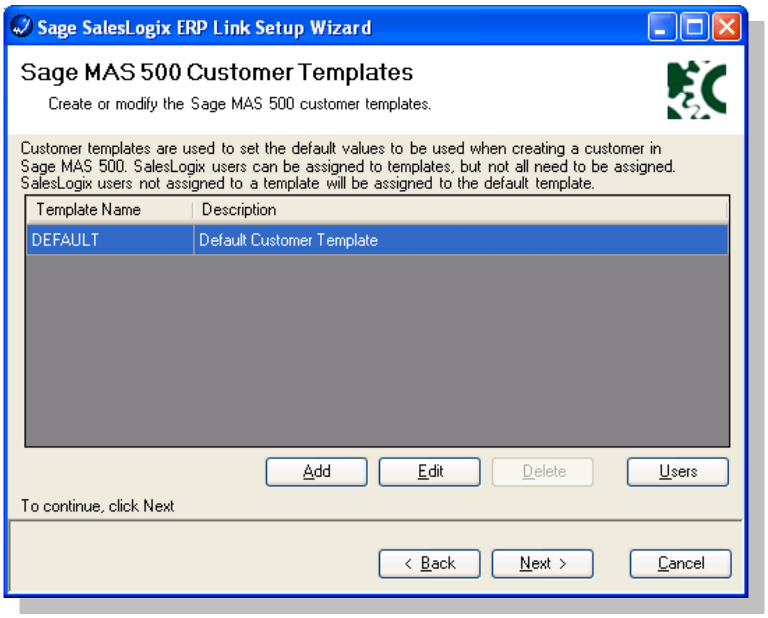
Please note: for proper configuration, this must be a Sage MAS 500 User Account that does not use Application Roles.



Default Values for ERP Customers – Customer Templates

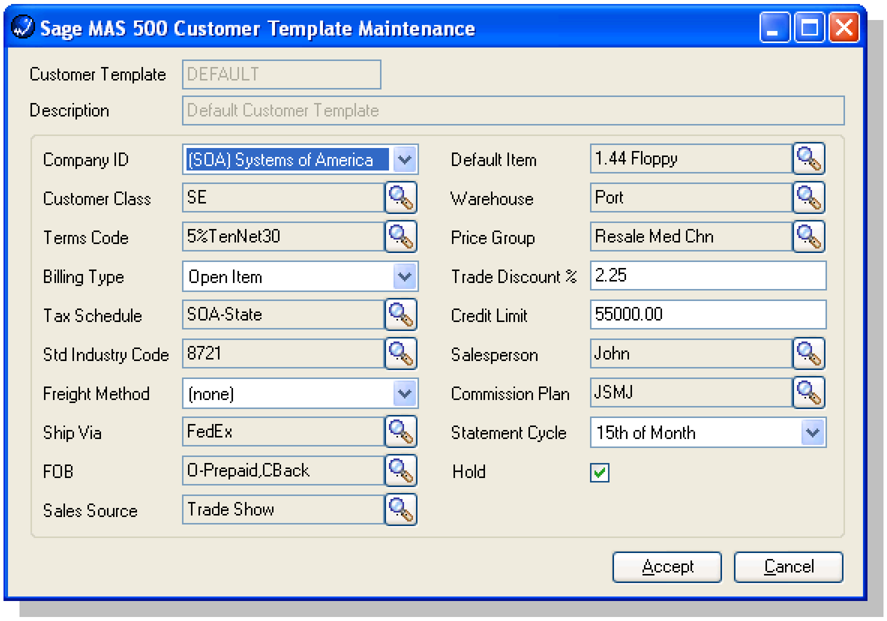
Customer templates are used to define the default values when new customers are created in the back-office system by Sage SalesLogix. You may assign different templates to different Sage SalesLogix users depending on rights and values to be entered for a new customer record.

Customer templates can be assigned to users. If a Sage SalesLogix user does not have a template assigned, the DEFAULT template will be applied.



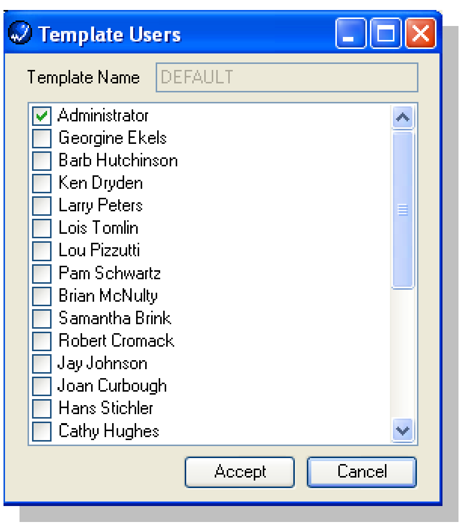
ERP Customer Template Maintenance

ERP Customer Template Maintenance defines several items required when creating a new ERP customer from CRM. This configuration is specific to your ERP system – refer to ERP documentation for information on the options.



Assign CRM Users to a ERP Customer Template

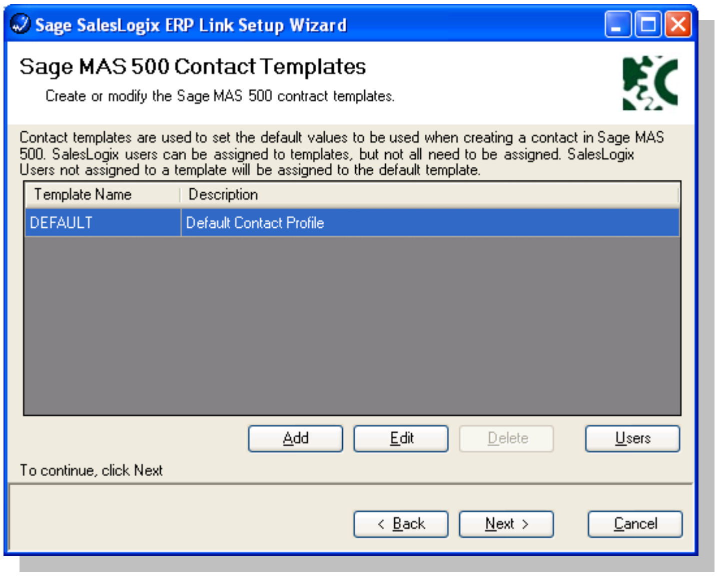
Template users are assigned by selecting the template and clicking the Users button. To assign a user to a template place a check by the name of the user. This list will contain all CRM users.



Default Values for ERP Contacts – Contact Templates

Similar to Customer templates, Contact templates are used to define the default values when new contacts are created in the back-office system by Sage SalesLogix. You may assign different templates to different Sage SalesLogix users depending on rights and values to be entered for a new customer record.

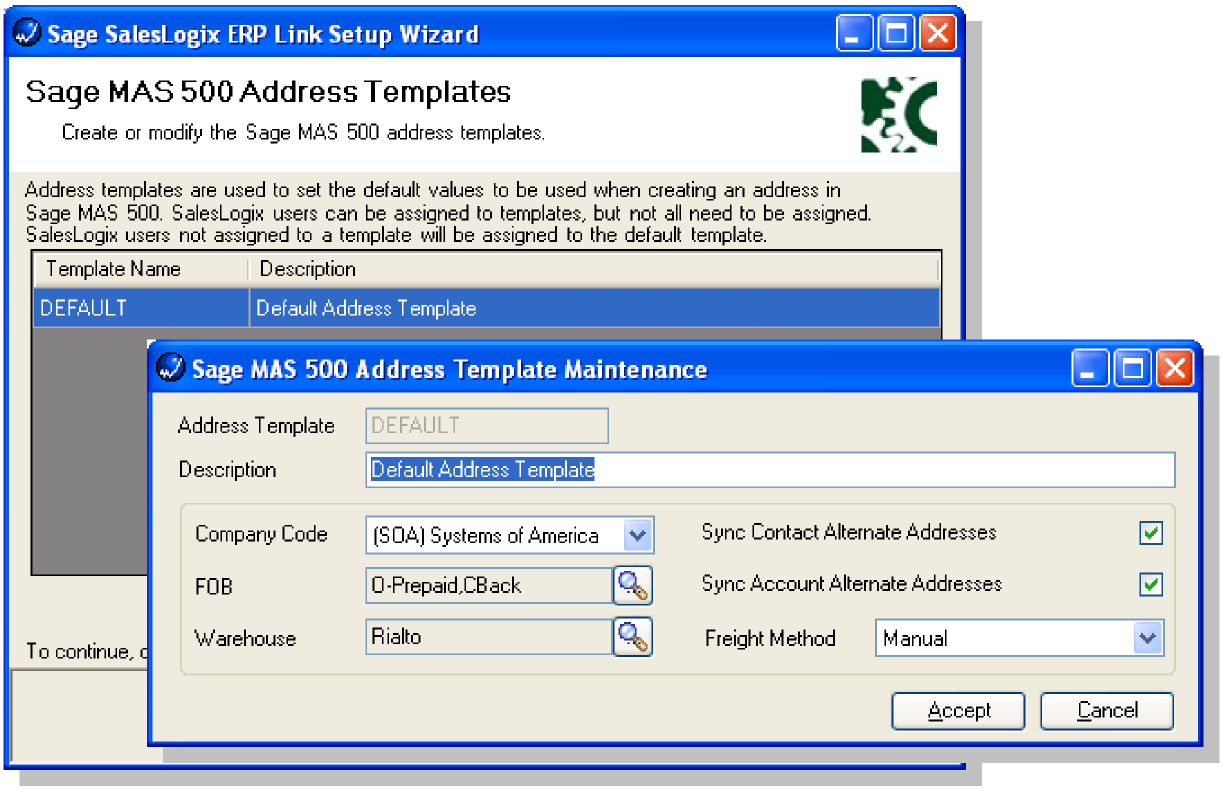
Contact templates can be assigned to users. If a Sage SalesLogix user does not have a template assigned, the DEFAULT template will be applied.


Sage SalesLogix ERP Link Setup Wizard
Sage MAS 500 Contact Templates
Create or modify the Sage MAS 500 contract templates.
Contact templates are used to set the default values to be used when creating a contact in Sage MAS 500. SalesLogix users can be assigned to templates, but not all need to be assigned. SalesLogix Users not assigned to a template will be assigned to the default template.
Template Name
Description
DEFAULT
Default Contact Profile
Add
Edit
Delete
Users
To continue, click Next
< Back
Next >
Cancel

Default Values for ERP Address – Address Templates

Similar to Customer templates, Address templates are used to define the default values when new addresses are created in the back-office system by Sage SalesLogix. You may assign different templates to different Sage SalesLogix users depending on rights and values to be entered for a new customer record.

Address templates can be assigned to users. If a Sage SalesLogix user does not have a template assigned, the DEFAULT template will be applied.



Sync Contact Alternate Addresses defines how ERP will handle contact alternate addresses from Sage SalesLogix. When enabled all contact alternate addresses, for linked contacts, will be created in Sage MAS ERP.

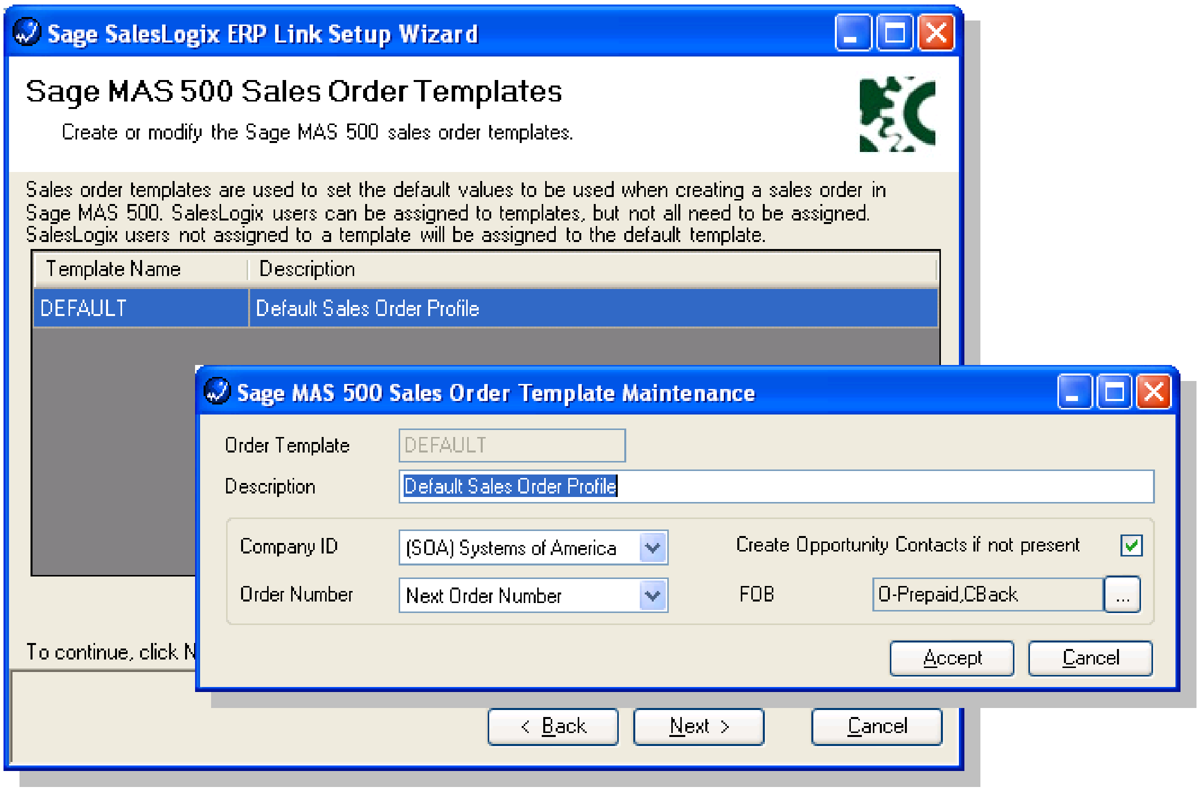
Sync Account Alternate Addresses defines how ERP will handle account alternate addresses from Sage SalesLogix. When enabled all account alternate addresses, for linked accounts, will be created in Sage MAS ERP.

Refer to Sage MAS ERP documentation for a detailed description of FOB, Warehouse and Freight Method.

Default Values for ERP Sales Orders – Sales Order Templates

Similar to Customer templates, Sales Order templates are used to define the default values when new sales orders are created in the back-office system by Sage SalesLogix. You may assign different templates to different Sage SalesLogix users depending on rights and values to be entered for a new customer record.

Sales Order templates can be assigned to users. If a Sage SalesLogix user does not have a template assigned, the DEFAULT template will be applied.



Order Number defines the method used to select the next sales order number to be used. The options are:

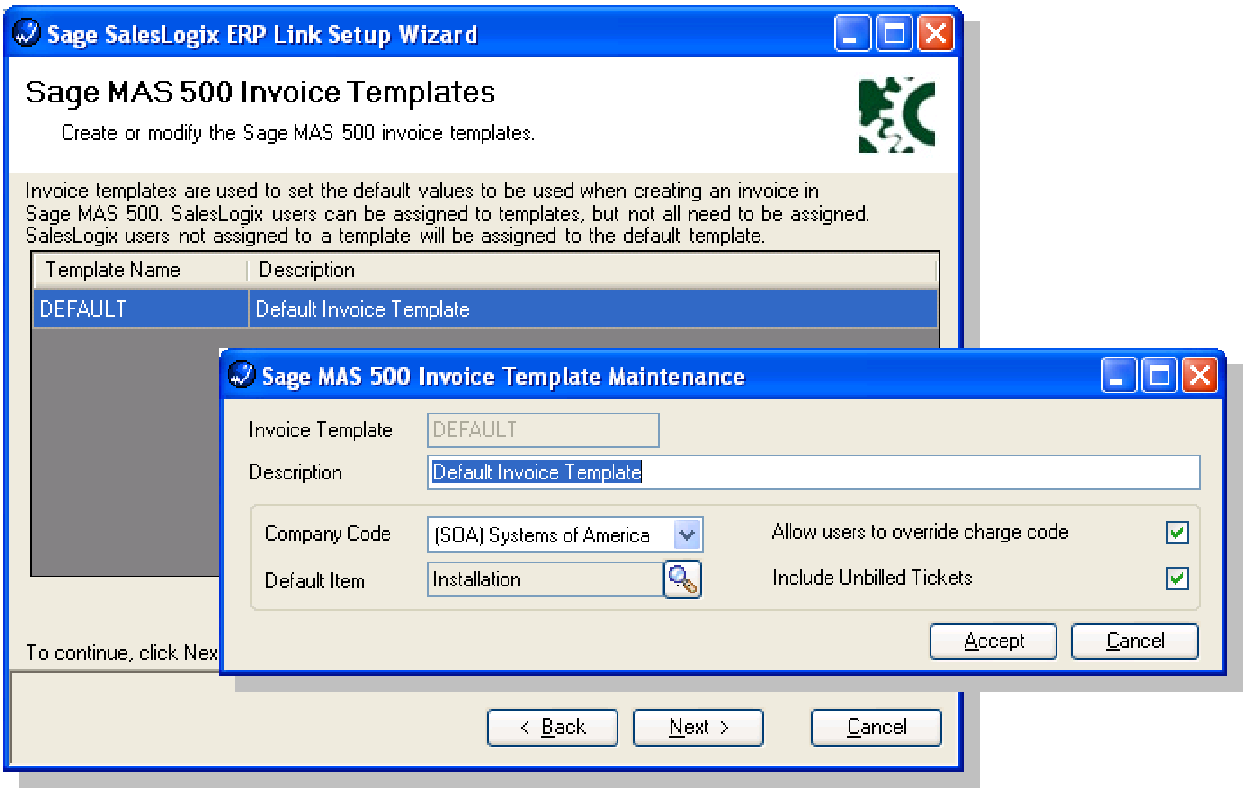
- Next Order Number
- Sales Order ID

Create Opportunity Contact if not present will automatically create an ERP Contact if the Contact does not exist in the Sage MAS ERP system.

Default Values for ERP Invoices – Invoice Templates

Similar to Customer templates, Invoice templates are used to define the default values when new invoices are created in the back-office system by Sage SalesLogix. You may assign different templates to different Sage SalesLogix users depending on rights and values to be entered for a new customer record.

Invoice templates can be assigned to users. If a Sage SalesLogix user does not have a template assigned, the DEFAULT template will be applied.



Default Item defines the default charge code to be used when creating the invoice.

Allow users to override charge code allows the user select a different charge code when creating the invoice in Sage MAS ERP.

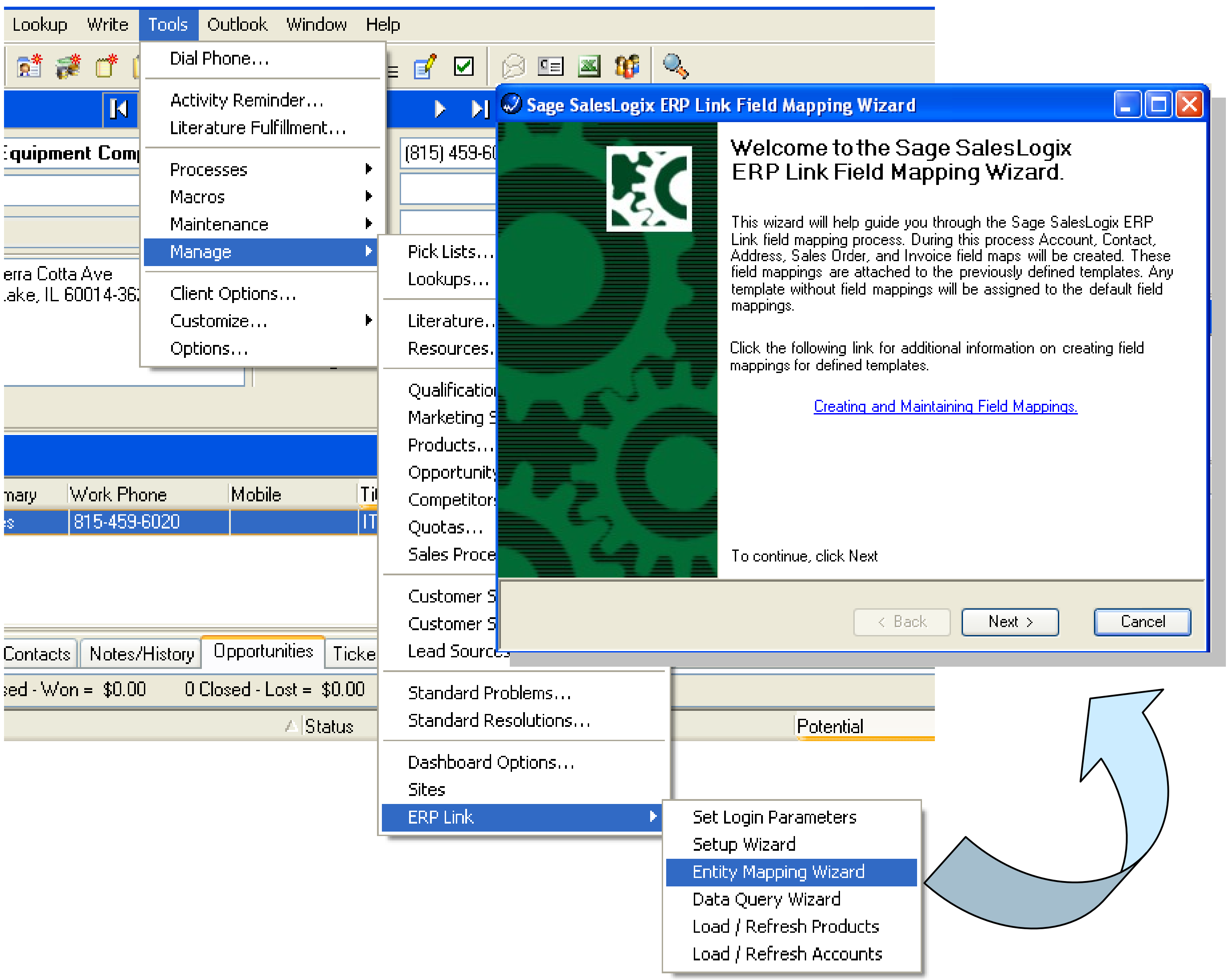
Include Unbilled Tickets allows the user to include unbilled ticket items on the invoice that is created in Sage MAS ERP.

CRM to ERP Field Mapping

You may define how CRM and ERP data moves between systems. This field mapping can include functions to convert data formats and conditionally move data between CRM and ERP. This configuration is made easier by wizards and automated where possible.

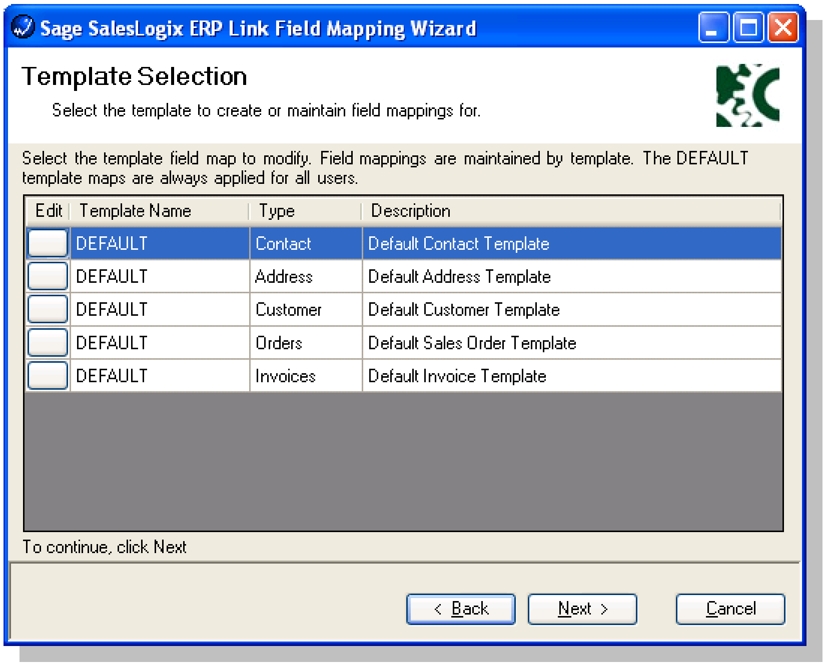
Each Template (see previous section) can have different field mappings associated depending on the complexity and needs of individual customers. This section will give an overview of field mapping.

From Sage SalesLogix, select the menu Tools > Manage > ERP Link > Entity Mapping Wizard to configure Account, Contact, Address, Sales Order, and Invoice field maps.



Selecting a Template

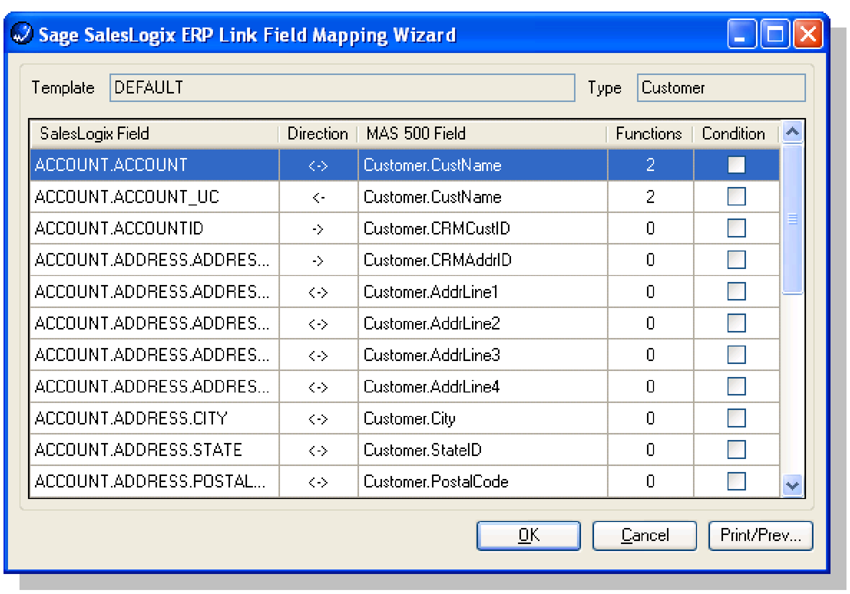
The first step of the Wizard is to select which Template to configure field mappings. Default templates are shown, but any template may have a different field map.



Defining the Field Mapping

We will use the Customer Template as an example for field mapping. Contact, Address, Sales Order, and Invoice templates are mapped in the same fashion.

Note: Invoice mappings have restrictions. The A/R Invoice has header and line items, but only header items can be mapped. Line entries are strictly controlled to prevent incorrect or invalid data.



Some notes about this setup. First, the Direction indicates how the data flows:

- <– Indicates the data flow from Sage MAS ERP into Sage SalesLogix CRM
- -> Indicates the data flows from Sage SalesLogix CRM into Sage MAS ERP
- <-> indicates the record ownership will determine the direction of data flow

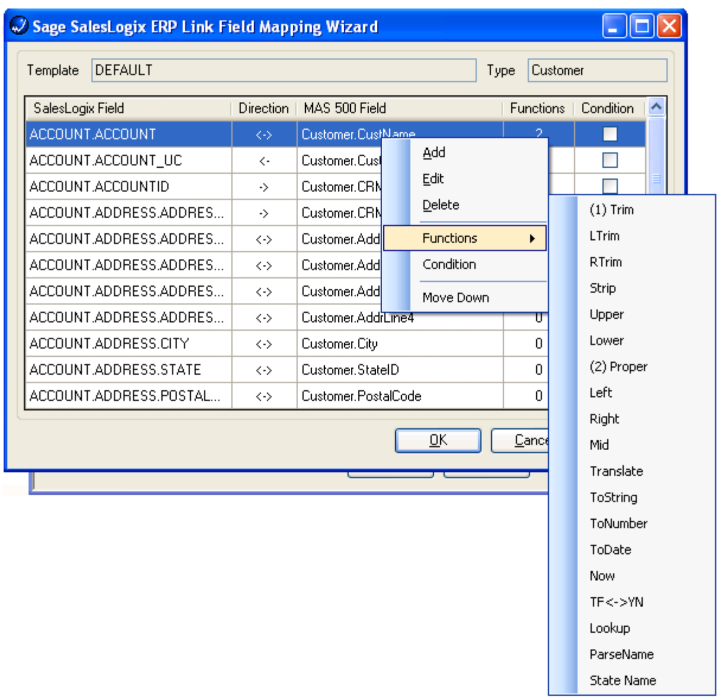
Additionally, each field link can have functions applied and/or conditions enforced before the data is moved.

Field Mapping Functions

Using the Customer Name ERP field as an example, before we move the data from ERP to CRM, we want to trim it of extra spaces (due to way data is stored) and convert to Proper case. You can see from previous screen shot that there are two fuinctions assigned.

These two functions can be accessed by right-clicking on the field, choosing Functions, then choosing from available functions. The execution of functions occur in the numerical order shown below (Trim occurs first followed by Proper).

Several functions can be combined for complex data transformation.



Available Functions include:

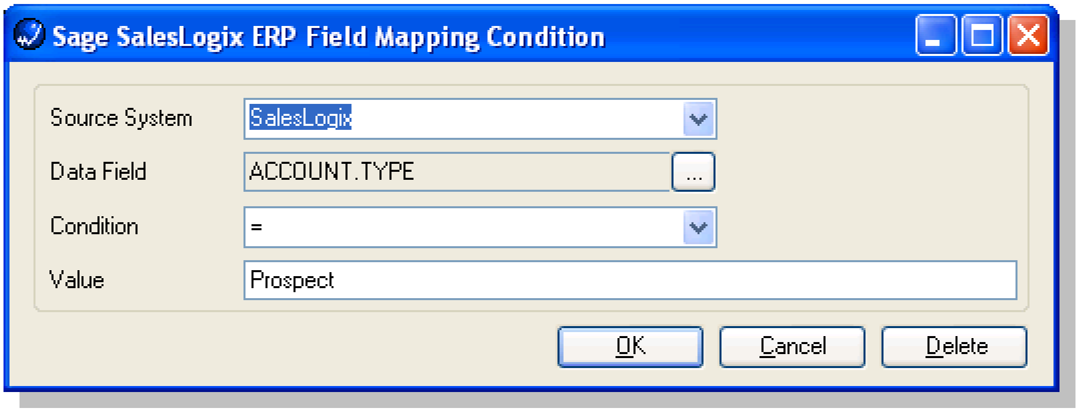
- Trim – Trims leading and trailing blanks spaces
- LTrim – Trims leading blanks spaces
- RTrim – Trims trailing blank spaces
- Upper – Convert string to upper case
- Lower – Convert string to lower case

- Proper – Convert string to proper case, based on windows settings.
- Left – Returns left(x) characters from a string, where x is the number of characters.
    - Parameters: Length
- Right – Returns right(x) characters from a string, where x is the number of characters.
- Parameters: Length
- Mid – Returns a portion of a string, based on a supplied starting position and number of characters
    - Parameters: Starting Position, Length
- Translate – Used to convert one string value to another (for example used to convert string “IN” to “Invoice”)
- Parameters: Search String, Replacement String; Comma separated strings (for example: “INCMDM”, “Invoice,Credit Memo,Debit Memo”)
- ToString – Converts a value to a string
- ToNumber – Converts a value to a number
- ToDate – Converts a value to a date
- Now – Return the current system date and time
- TF<->YN – Converts TF to YN respectively
- LookUp – Used to retrieve a value from the SalesLogix database, based on a value from the ERP System
    - Parameters: Lookup Table, Lookup Key, Return Field
- ParseName – Used to parse a single name field, into First, Last, Middle, Prefix, and Suffix
    - Parameters: Name Part, 0=First, 1=Last, 2=Middle, 3=Prefix, 4=Suffix
- State Name – Returns the complete State Name from an abbreviation

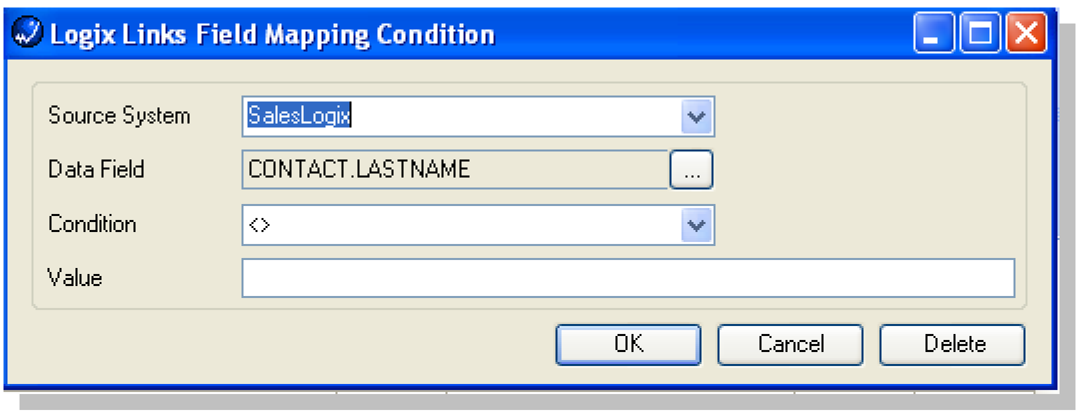
Field Mapping Conditions

In some cases data should not be moved unless certain conditions apply. In such cases you can apply Conditions to specify when the data should move. Change Conditions by right-clicking on the field and choosing Conditions.

In the example below, the Sage SalesLogix Data Field ACCOUNT.TYPE must contain a value equal to “Prospect” before the data is moved.

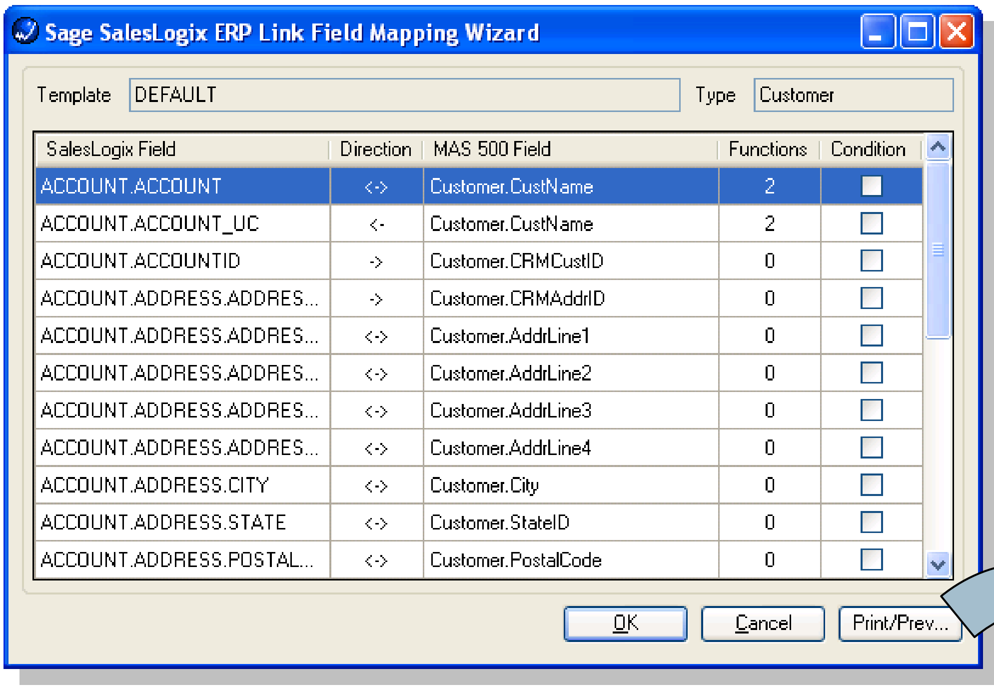


In this example, the Sage MAS ERP CONTACT.LASTNAME field cannot be blank.

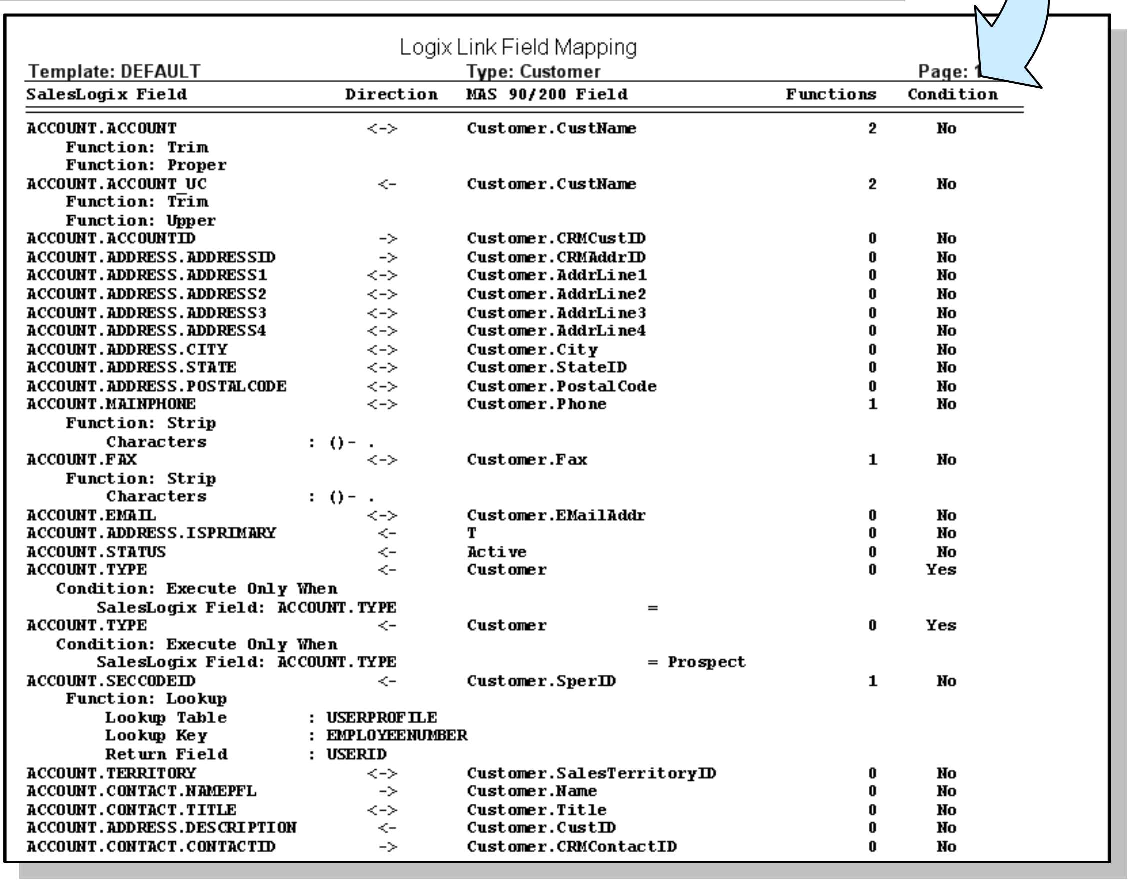


Reviewing Field Mapping

When you have completed mapping of all fields and applied the appropriate functions and conditions, you may preview the entire map and print a report of the map for future reference by using the Print/Prev button.



SalesLogix Field	Direction	MAS 500 Field	Functions	Condition
ACCOUNT.ACCOUNT	<->	Customer.CustName	2	
ACCOUNT.ACCOUNT_UC	<-	Customer.CustName	2	
ACCOUNT.ACCOUNTID	->	Customer.CRMCustID	0	
ACCOUNT.ADDRESS.ADDRES...	->	Customer.CRMAddrID	0	
ACCOUNT.ADDRESS.ADDRES...	<->	Customer.AddrLine1	0	
ACCOUNT.ADDRESS.ADDRES...	<->	Customer.AddrLine2	0	
ACCOUNT.ADDRESS.ADDRES...	<->	Customer.AddrLine3	0	
ACCOUNT.ADDRESS.ADDRES...	<->	Customer.AddrLine4	0	
ACCOUNT.ADDRESS.CITY	<->	Customer.City	0	
ACCOUNT.ADDRESS.STATE	<->	Customer.StateID	0	
ACCOUNT.ADDRESS.POSTAL...	<->	Customer.PostalCode	0	



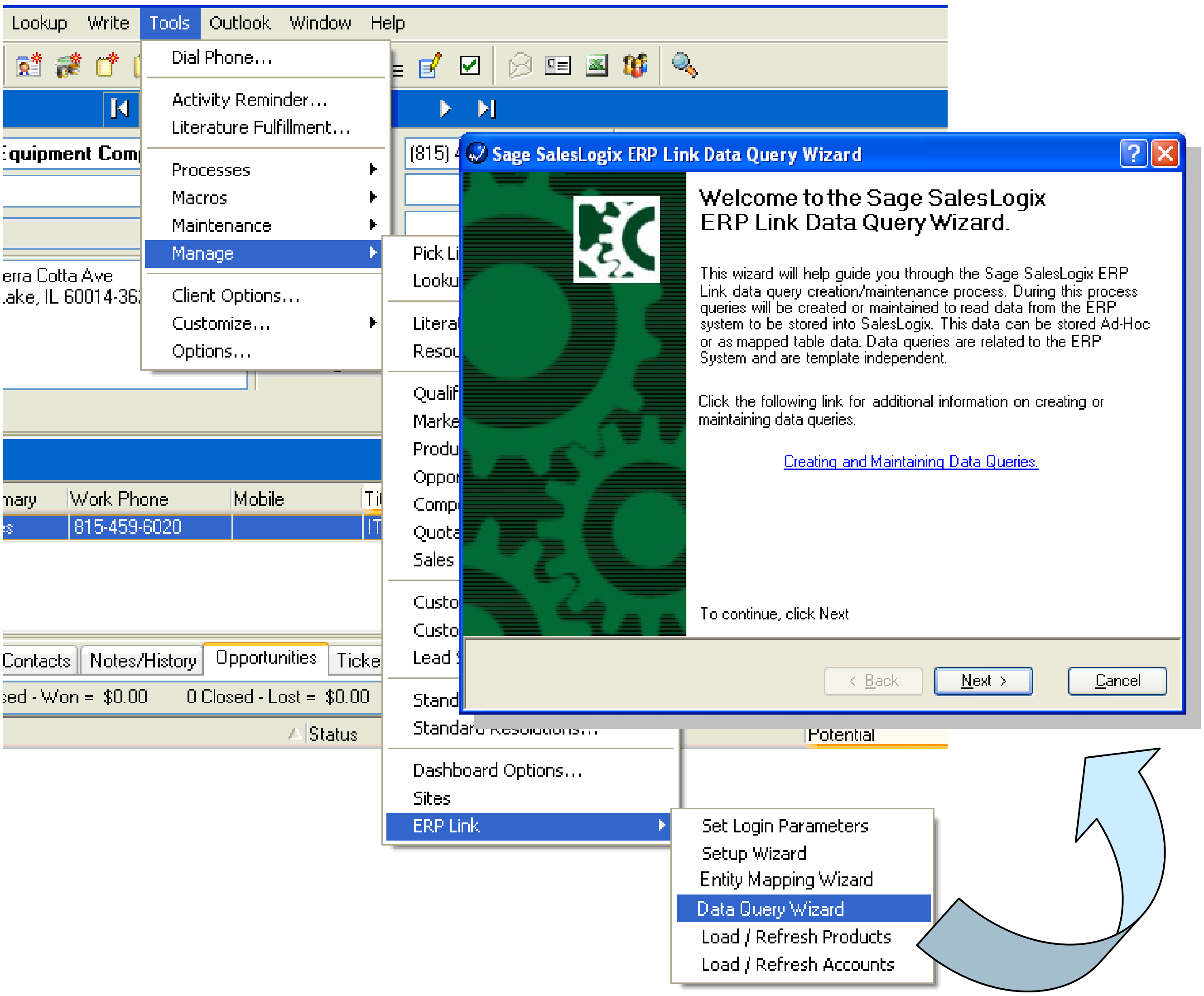
```
Logix Link Field Mapping
Template: DEFAULT                          Type: Customer                              Page: 1
SalesLogix Field              Direction    MAS 90/200 Field            Functions  Condition

ACCOUNT.ACCOUNT                  <->       Customer.CustName                  2       No
    Function: Trim
    Function: Proper
ACCOUNT.ACCOUNT_UC                <-       Customer.CustName                  2       No
    Function: Trim
    Function: Upper
ACCOUNT.ACCOUNTID                 ->       Customer.CRMCustID                 0       No
ACCOUNT.ADDRESS.ADDRESSID         ->       Customer.CRMAddrID                 0       No
ACCOUNT.ADDRESS.ADDRESS1         <->       Customer.AddrLine1                 0       No
ACCOUNT.ADDRESS.ADDRESS2         <->       Customer.AddrLine2                 0       No
ACCOUNT.ADDRESS.ADDRESS3         <->       Customer.AddrLine3                 0       No
ACCOUNT.ADDRESS.ADDRESS4         <->       Customer.AddrLine4                 0       No
ACCOUNT.ADDRESS.CITY             <->       Customer.City                      0       No
ACCOUNT.ADDRESS.STATE            <->       Customer.StateID                   0       No
ACCOUNT.ADDRESS.POSTALCODE       <->       Customer.PostalCode                0       No
ACCOUNT.MAINPHONE                <->       Customer.Phone                     1       No
    Function: Strip
        Characters          : ()- .
ACCOUNT.FAX                      <->       Customer.Fax                       1       No
    Function: Strip
        Characters          : ()- .
ACCOUNT.EMAIL                    <->       Customer.EMailAddr                 0       No
ACCOUNT.ADDRESS.ISPRIMARY         <-       T                                  0       No
ACCOUNT.STATUS                    <-       Active                             0       No
ACCOUNT.TYPE                      <-       Customer                           0       Yes
   Condition: Execute Only When
       SalesLogix Field: ACCOUNT.TYPE                  =
ACCOUNT.TYPE                      <-       Customer                           0       Yes
   Condition: Execute Only When
       SalesLogix Field: ACCOUNT.TYPE                  = Prospect
ACCOUNT.SECCODEID                 <-       Customer.SperID                    1       No
    Function: Lookup
        Lookup Table        : USERPROFILE
        Lookup Key          : EMPLOYEENUMBER
        Return Field        : USERID
ACCOUNT.TERRITORY                <->       Customer.SalesTerritoryID          0       No
ACCOUNT.CONTACT.NAMEPFL           ->       Customer.Name                      0       No
ACCOUNT.CONTACT.TITLE            <->       Customer.Title                     0       No
ACCOUNT.ADDRESS.DESCRIPTION       <-       Customer.CustID                    0       No
ACCOUNT.CONTACT.CONTACTID         ->       Customer.CRMContactID              0       No
```

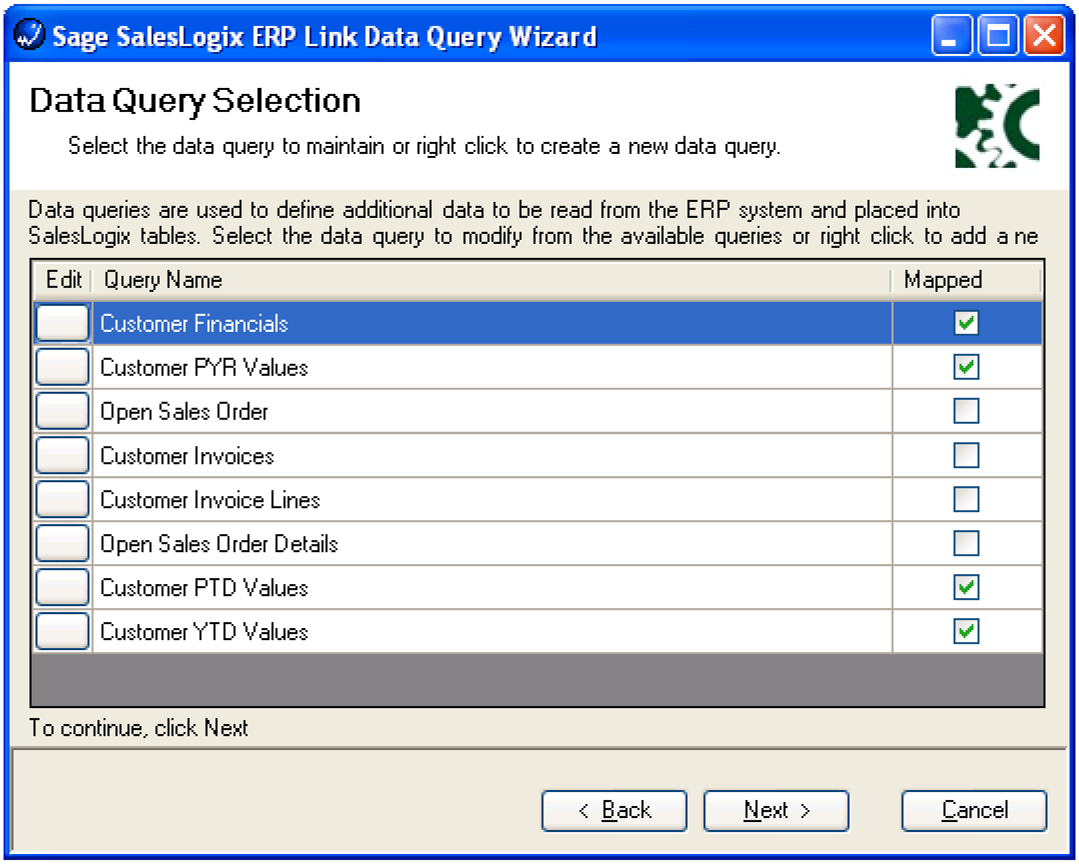
ERP Data Query Wizard

A data query is the definition of how Sage SalesLogix requests information from the ERP system. Data Queries are specific to the ERP system but are template independent. You can store this data in an ad-hoc fashion (for a “view” of data) or as mapped table data (relational fields/tables in the Sage SalesLogix database).

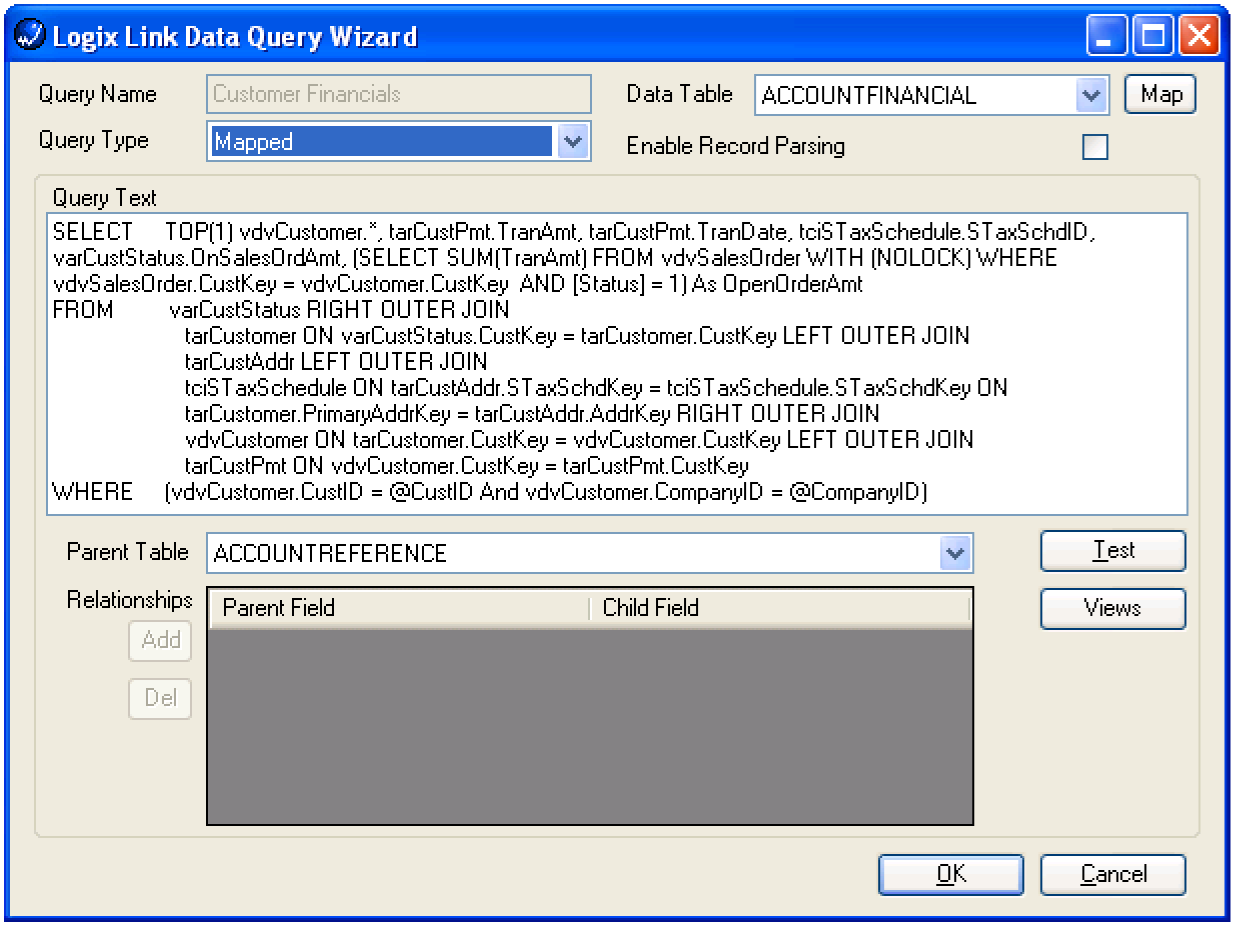
From Sage SalesLogix, select the menu Tools > Manage > ERP Link > Data Query Wizard to configure how data is requested from the ERP system.

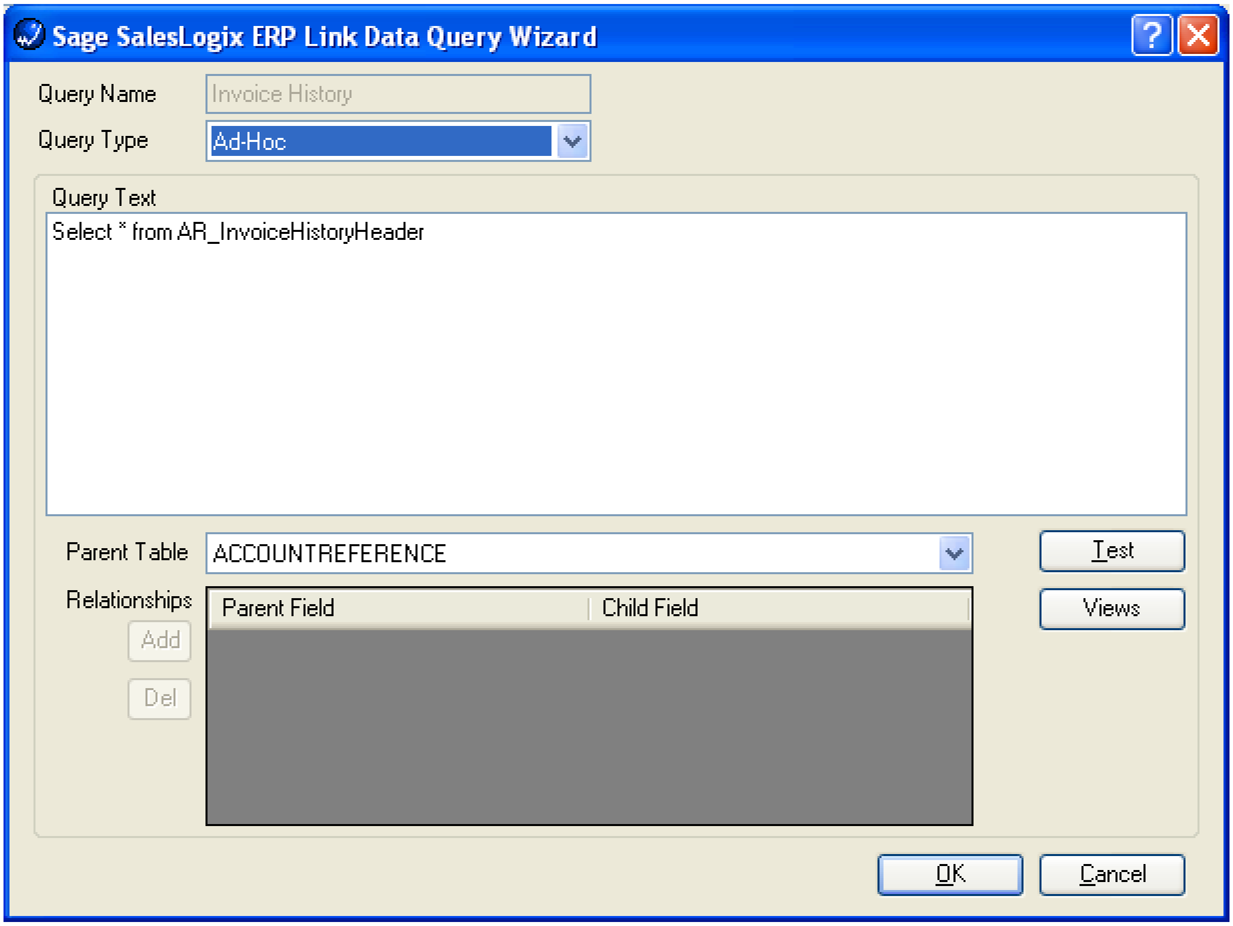


The Data Query Wizard allows the user to create and maintain data queries that will read information from the ERP system, and then populate that data into SalesLogix.



Data queries may be added, edited, or deleted, from the right click menu, or edited from the Edit button in the display grid.


Logix Link Data Query Wizard
Query Name
Customer Financials
Data Table
ACCOUNTFINANCIAL
Map
Query Type
Mapped
Enable Record Parsing
Query Text
SELECT TOP(1) vdvCustomer.*, tarCustPmt.TranAmt, tarCustPmt.TranDate, tciSTaxSchedule.STaxSchdID, varCustStatus.OnSalesOrdAmt, (SELECT SUM(TranAmt) FROM vdvSalesOrder WITH (NOLOCK) WHERE vdvSalesOrder.CustKey = vdvCustomer.CustKey AND [Status] = 1) As OpenOrderAmt
FROM varCustStatus RIGHT OUTER JOIN
tarCustomer ON varCustStatus.CustKey = tarCustomer.CustKey LEFT OUTER JOIN
tarCustAddr LEFT OUTER JOIN
tciSTaxSchedule ON tarCustAddr.STaxSchdKey = tciSTaxSchedule.STaxSchdKey ON
tarCustomer.PrimaryAddrKey = tarCustAddr.AddrKey RIGHT OUTER JOIN
vdvCustomer ON tarCustomer.CustKey = vdvCustomer.CustKey LEFT OUTER JOIN
tarCustPmt ON vdvCustomer.CustKey = tarCustPmt.CustKey
WHERE (vdvCustomer.CustID = @CustID And vdvCustomer.CompanyID = @CompanyID)
Parent Table
ACCOUNTREFERENCE
Test
Relationships
Parent Field
Child Field
Views
Add
Del
OK
Cancel



When adding a new data query the following options are available.

Query Name – Identifies the query and will be displayed in the ERP Data view inside the SalesLogix Client.

Query Type – The data query must be a Mapped or Ad Hoc data query

Mapped data queries require the data to be mapped to a physical table in SalesLogix.

Ad Hoc data queries collect and store the information in an XML format in SalesLogix.

Data Table – This option is only available for mapped queries, and defines the table the data will be

mapped to.

Enable Record Parsing – The option is only available for mapped queries, and defines that records created

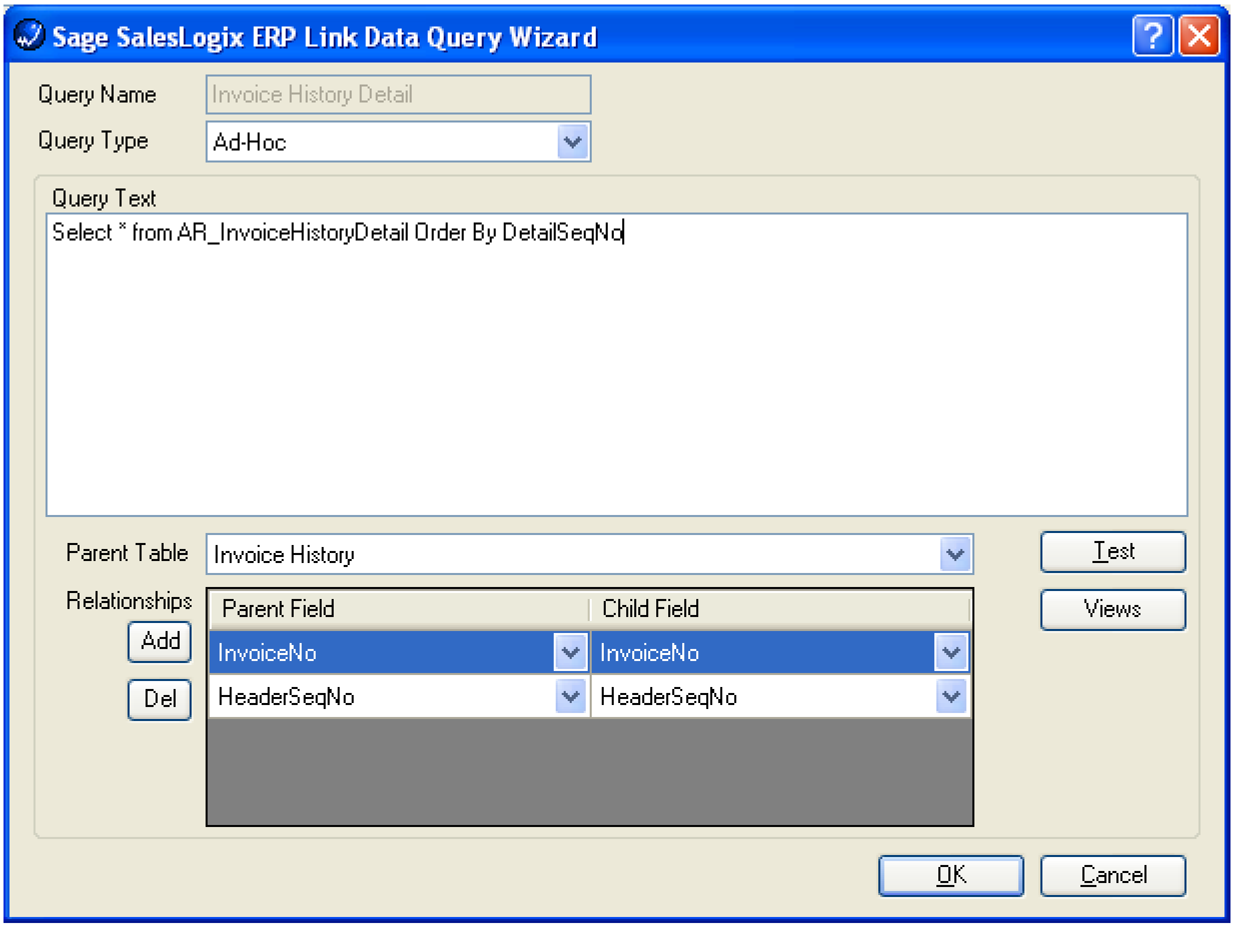
In the mapped table will be removed when they are removed from the ERP System.

Query Text – Used to define the text of the query to execute.

Parent Table – Defines the parent table the data is related to. The items available depend upon the type of query selected.

For mapped queries only ACCOUNTREFERENCE and blank are available.

The Parent Table for Ad Hoc queries may be ACCOUNTREFERENCE or any of the previously defined data queries. When the parent table is a previously defined data query the results of the current query will be displayed as a child table in the data viewer. If the parent table selected is another data query the parent/child relationship must be created. The parent child relations define how the parent table is related to the current query.



Relationships – This grid defines the parent and child fields that create the relationship between the Parent

Table and the current query. The Add button allows the user to add a new row to the grid, and the

Del button deletes the currently selected row from the grid.

Test – Allows the user to test the query.

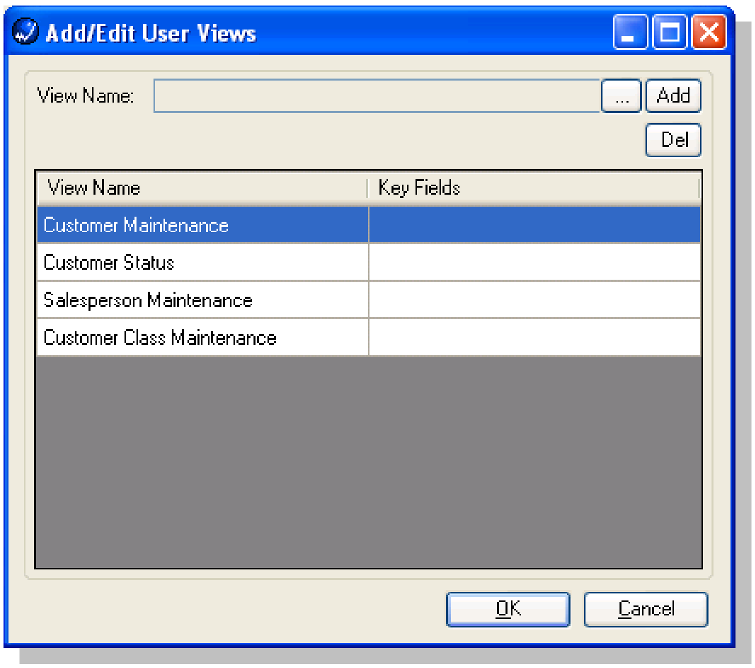
Views – Allows the user to add ERP System views to the selected query data. ERP System views are

described in the next section.

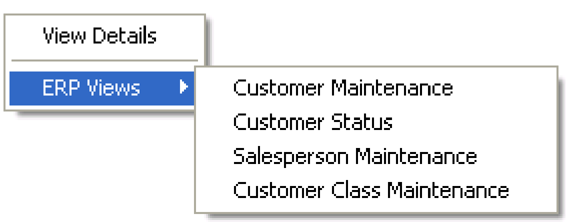
ERP System Views

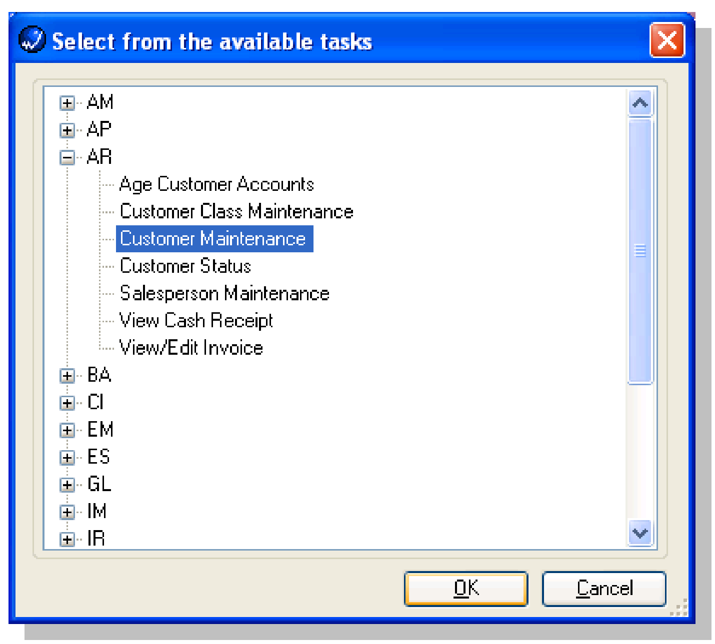
ERP System Views allow the user to launch into ERP system application and, if available, select the related record automatically. ERP System Views may be added to any query, Mapped or Ad Hoc, but only Ad Hoc views will automatically display the options. Additional Mapped queries require a view to display the data and will also need the code to display and launch the ERP System Views added to them.

To add a new ERP System View to a data query click the ellipse "…" button beside the View Name field.



The available ERP system views are displayed in a tree view window, grouped by module code. Select from the available view to add. After the view has been selected, click OK to add the view to the available list.

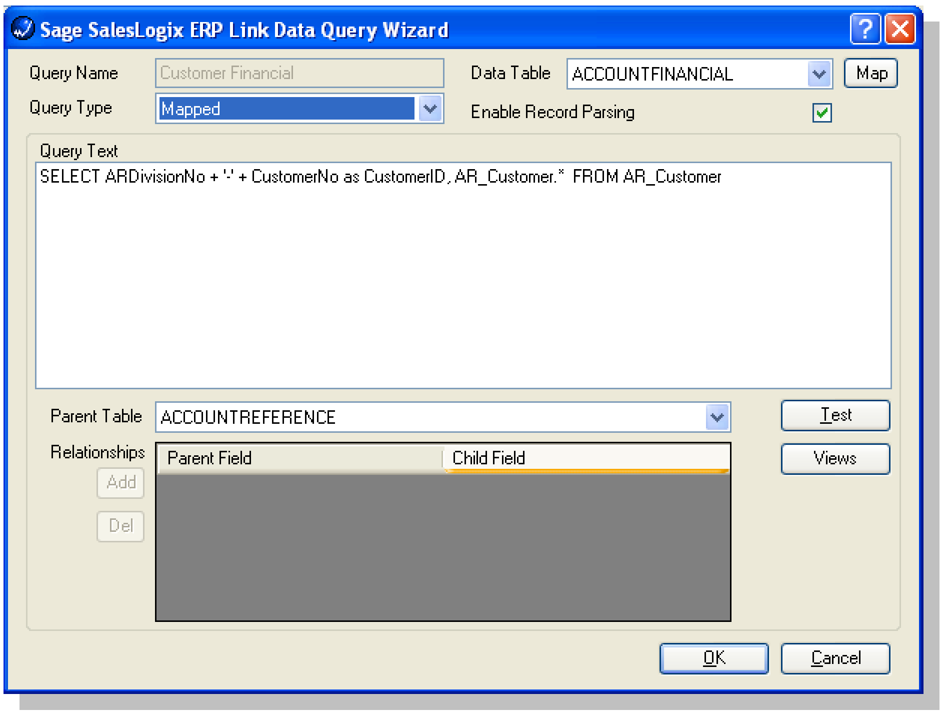




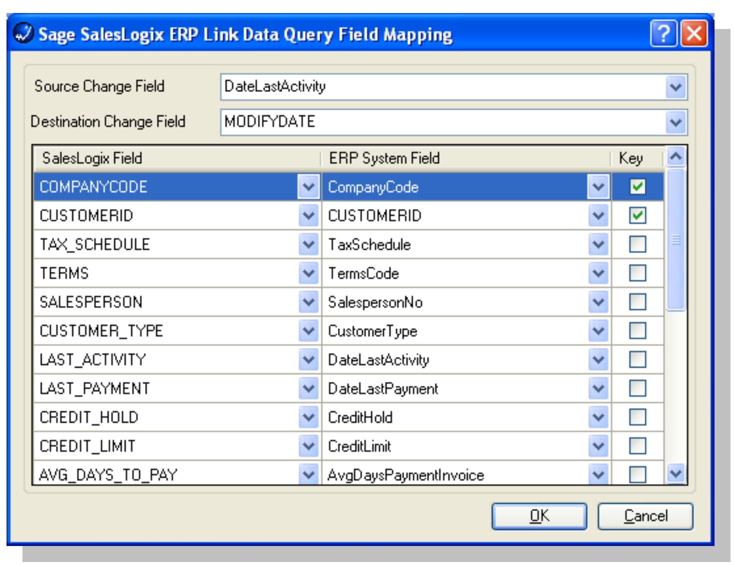
Mapped Queries

Mapped queries are used to import data from the ERP system into Sage SalesLogix tables. Mapped queries can be related or unrelated queries, to the Sage SalesLogix Account. Related queries are used to define data that is related to the Account through the Account Reference.

Unrelated queries are used to import general data from the ERP System into Sage SalesLogix that is not related to the Account, i.e. defined available payment terms. The data table must be selected from the list of available tables. After the data query and the data table have been selected the Map button can then be used to define the field mappings of the data from the data query.

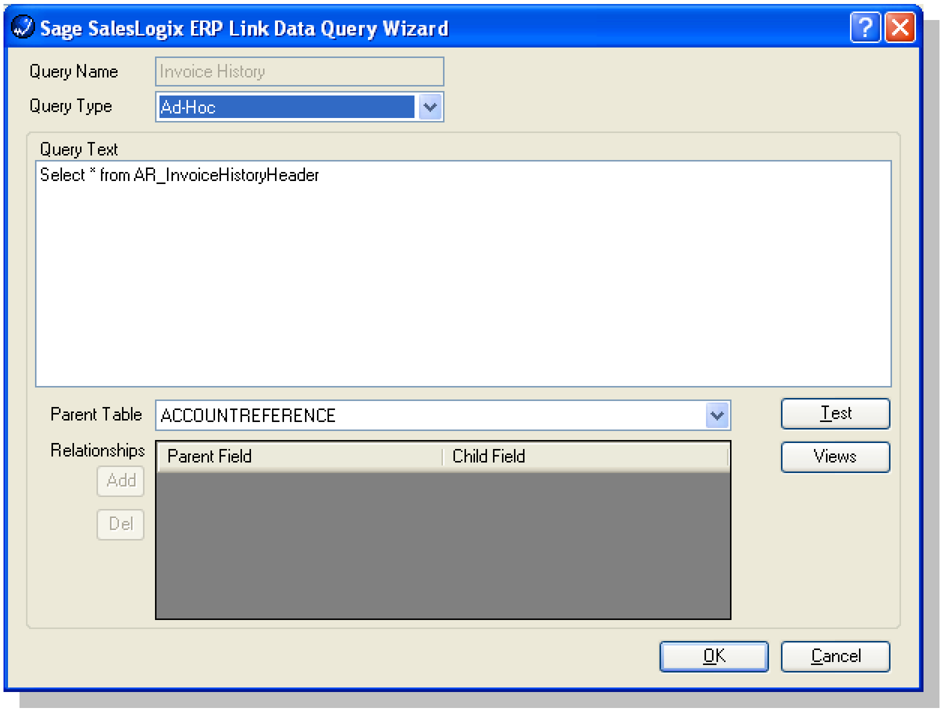


The field mapping grid allows the user to define the field mapping of the data selected from the query. The user can also define the key fields which will be used to locate existing records for updating. The Source Change Field and Destination Change Field are used to define fields from SalesLogix and the ERP System to check for change from the previous execution. If the value of both fields has not changed, the data mapping will not take place, which can increase data query performance.



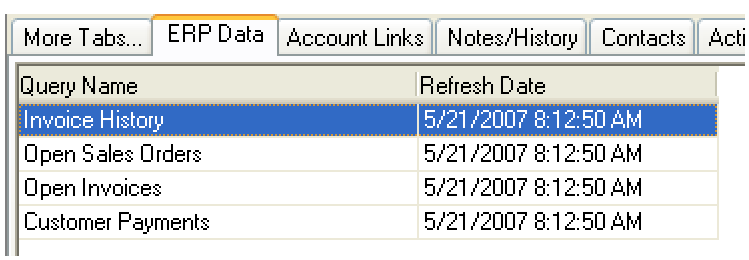
Ad Hoc Queries

Ad Hoc queries allow the user to define fast, simple queries that may also have a parent/child relationship with other queries. The resulting data from Ad Hoc queries is stored in the SalesLogix database, but in an XML format. This prevents the data from being used to create SalesLogix groups, or other SalesLogix functions that require the data to reside in individual fields. The data from Ad Hoc queries is viewed view the Query Data Viewer described in the next section.



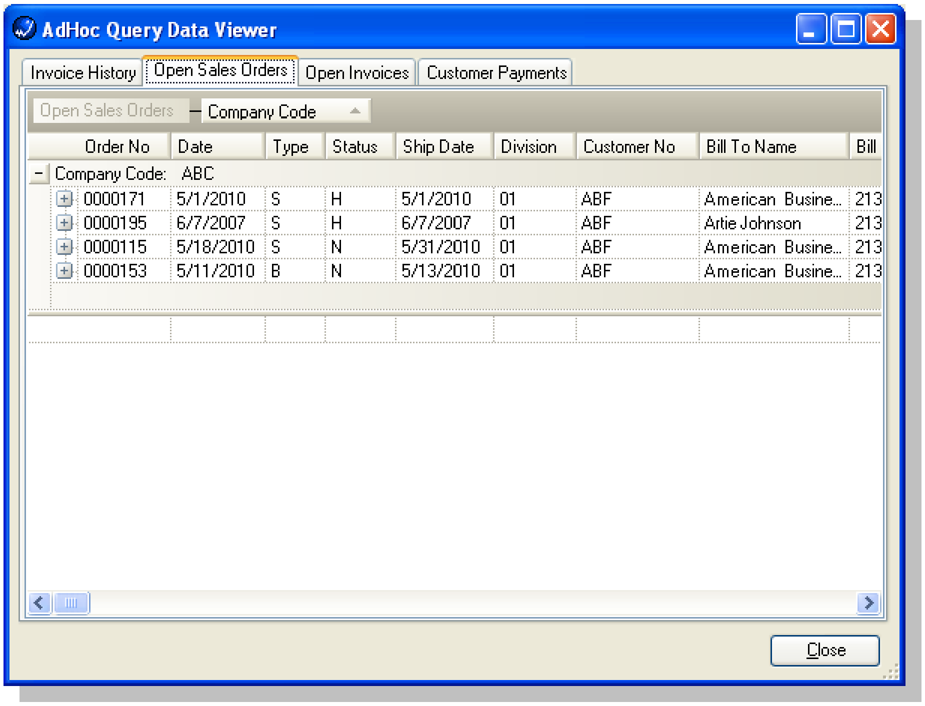
Ad Hoc Query Data Viewer

The results of the Ad Hoc queries are stored in the SalesLogix database in an XML format, and the Ad Hoc queries with the Account Reference parent are displayed in the ERP Data tab.

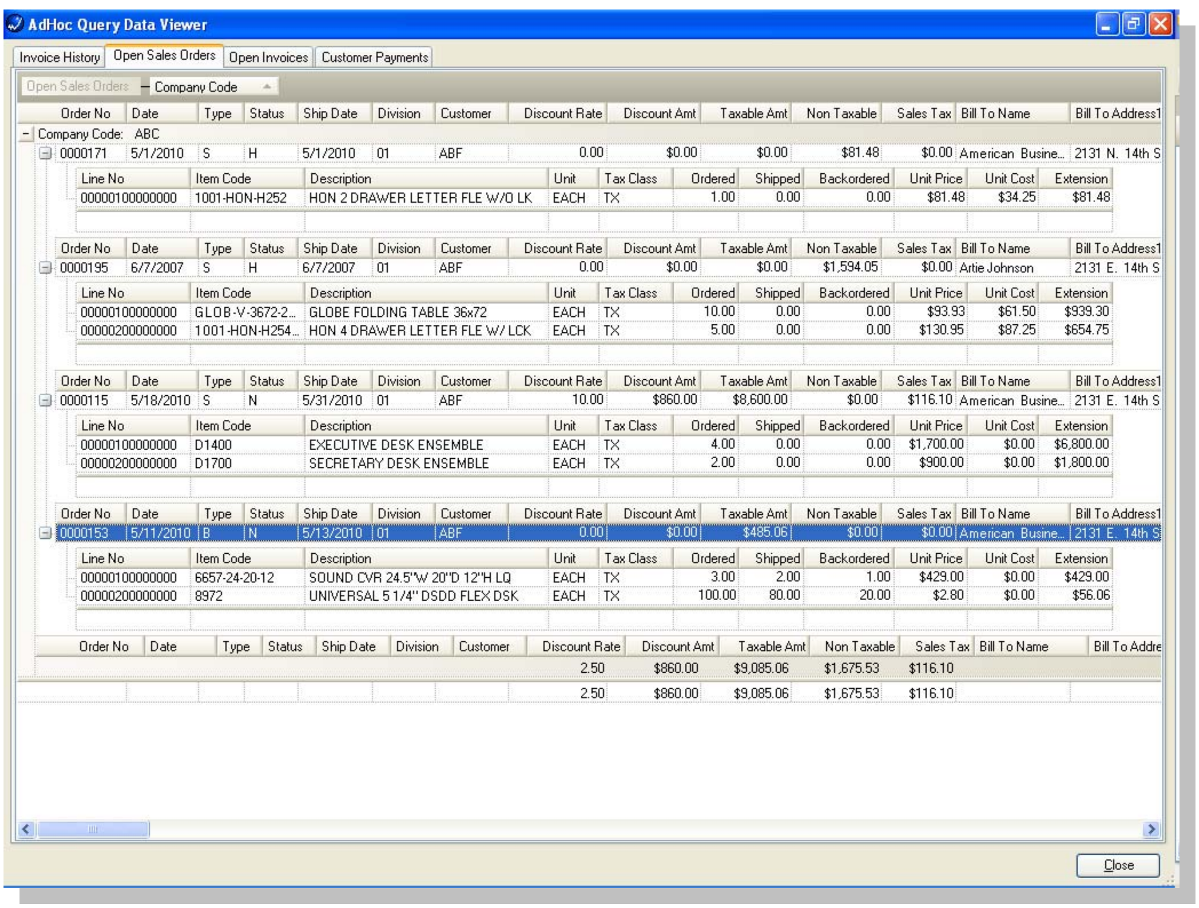


To view the data stored by these queries the user can double click on any one of the items listed and the Ad Hoc Query Data Viewer will open.

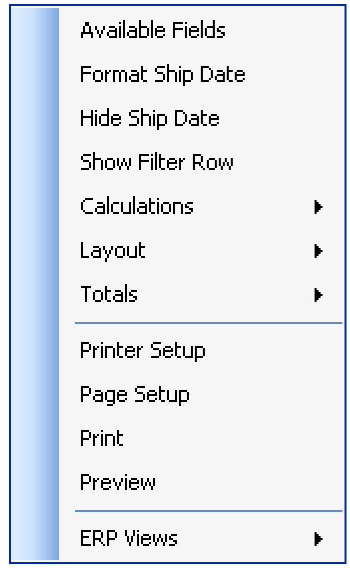
The Ad Hoc Query Data Viewer displays all of the available XML data for the selected account. The root queries are displayed on individual tabs in the viewer. Parent/Child data is displayed in the Query Data Viewer in a hierarchical view.



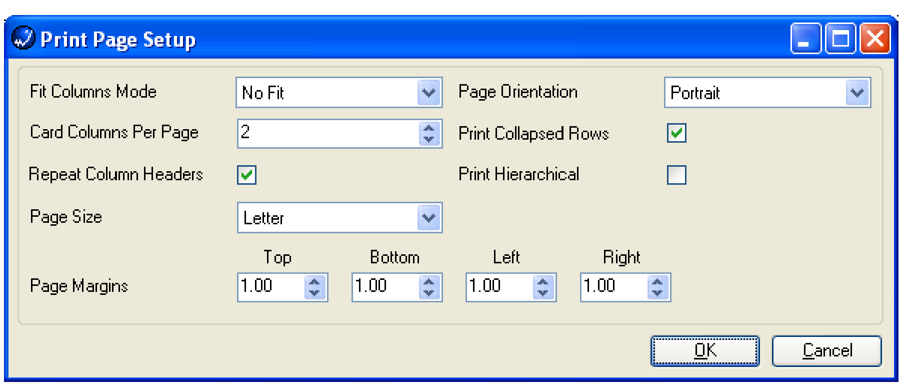
The data displayed in the Query Data Viewer can be grouped, sorted, and filtered by the user.



Right clicking on a record displays a popup menu from which the user can select several different options.:



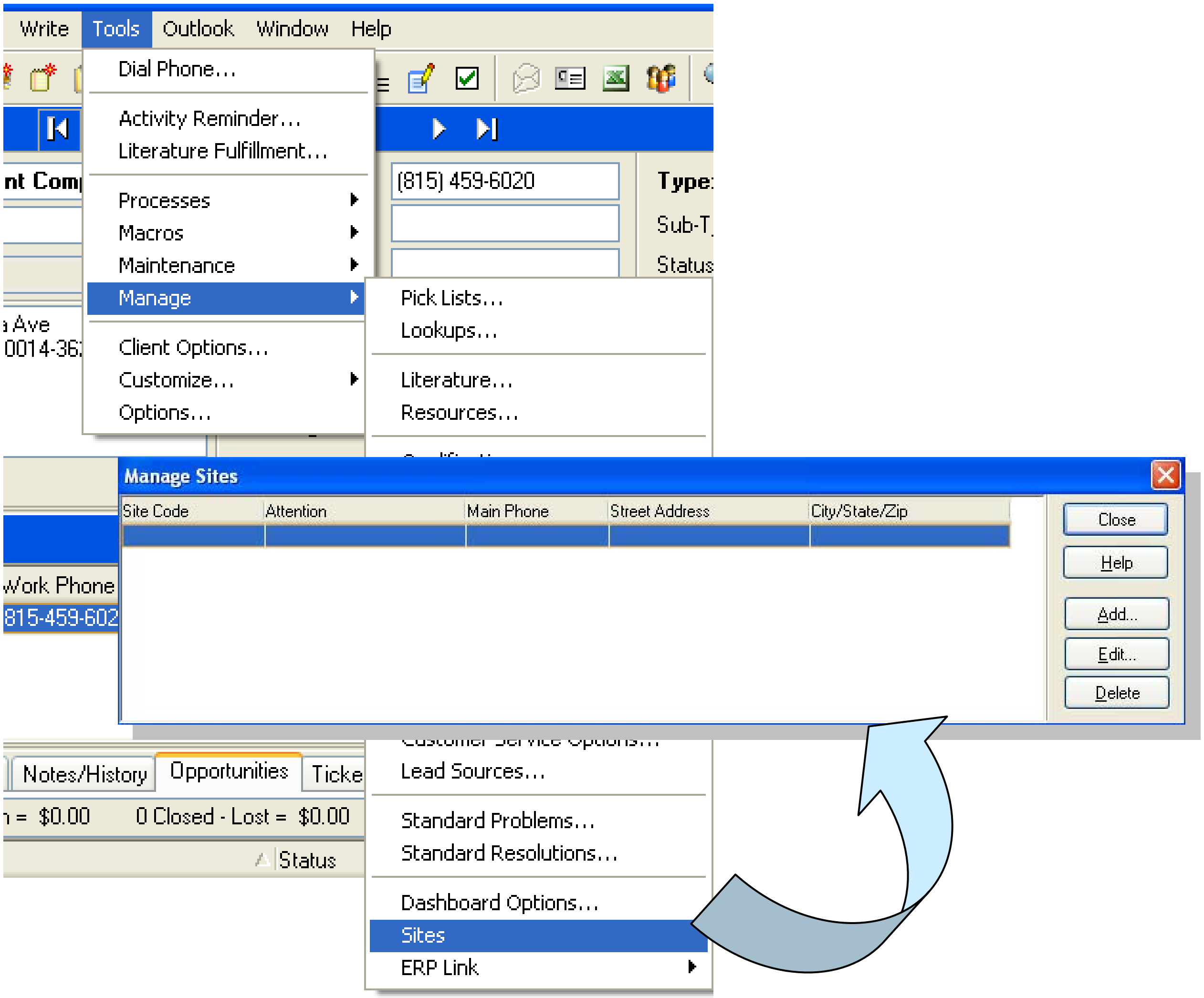
- Available Fields – Displays a popup window containing a list of available fields which can be added to the selected grid row.
- Format “Field Name” – Displayed only when a current grid field is selected. Allows the user to format the current column.
- Hide “Field Name” – Displayed only when a current grid field is selected. Allows the user to hide the selected column.
- Show/Hide Filter Row – Allows the user to show or hide the filter row.
- Calculations – Allows the user to select Sum, Average, Count, Min., Max., STD Deviation, Value Count, and None. Calculations are shown in the Group Totals, or Totals row.
- Layout – Allows the user to select List View or Card View, along with Load, Save and Reset Layout, and Table Captions.
- List View is the default grid view, which lists the records.
- Card View displays each record on a card in the grid.
- Load Layout allows the user to load an existing grid layout from file.
- Save Layout allows the user to save the current grid layout to file.
- Reset Layout will reset the grid layout to the table schema of the displayed data.
- Table Captions allows the user to set the table name to be displayed in the group window.
- Totals – Allows the user to turn Group, and Grand total row on or off.
- Printer Setup – Allows the user to select the printer to be used when the grid data is printed.
- Page Setup – Allows the user to select page properties options to be used when the grid data is printed.



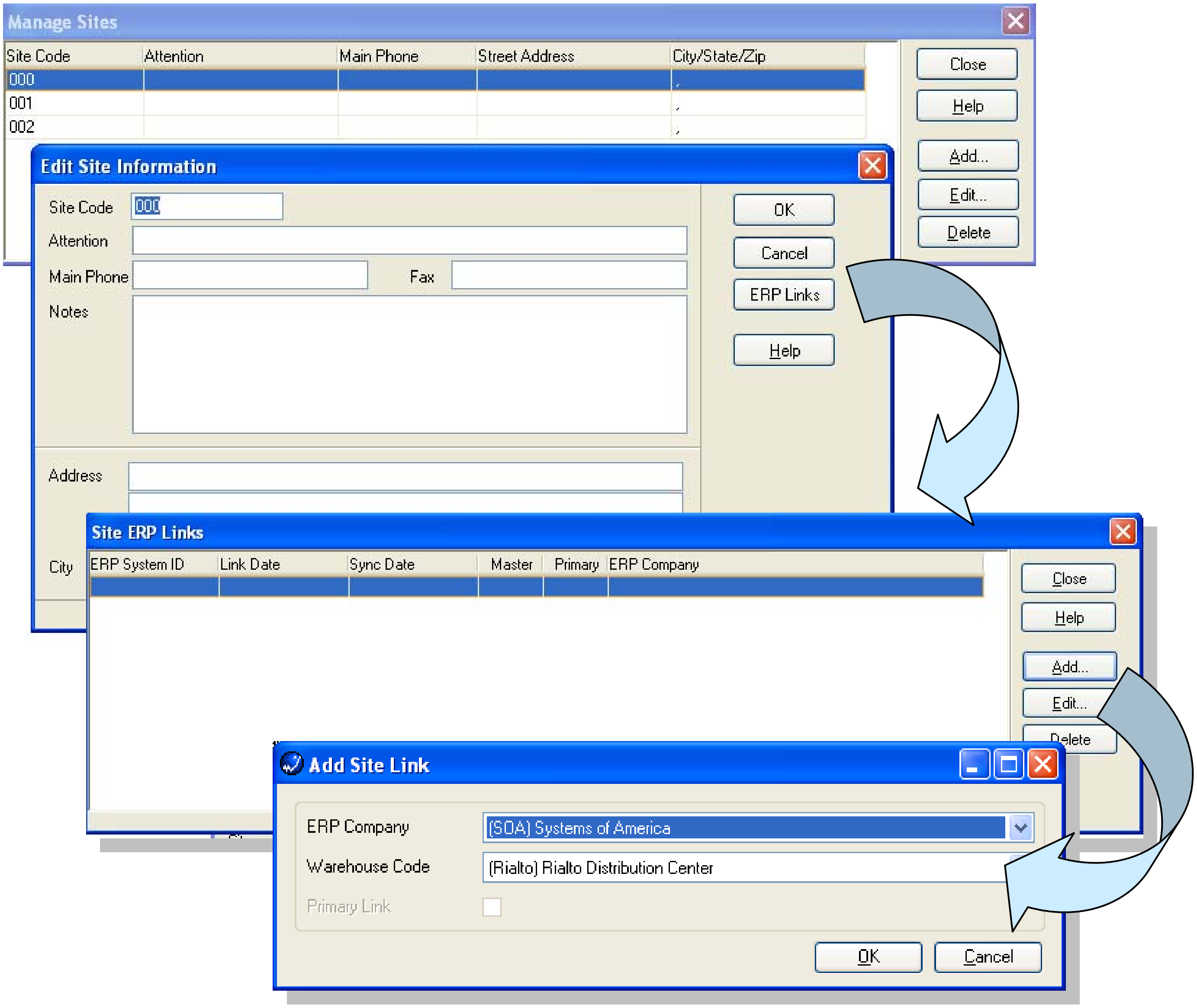
    - Fit Columns Mode – Determines how the columns should be sized to fit in a page.
        - No Fit - Specifies that columns should be printed as they are seen in the screen.
        - Zooming - Specifies that the print document will be scaled to fit all the columns in one page.
        - Sizing Columns - Specifies that columns should be resized to fit all the columns in one page.
    - Card Columns Per Page - Specifies the number of card columns to print in a page.
    - Repeat Column Headers - Determines whether column headers should be printed on any page or only in the first page.
    - Page Size – Specifies the page size to be used when printing or previewing. Available items are dependent on available page sizes of the current selected printer.
    - Page Orientation – Used to specify Portrait or Landscape printing.
    - Print Collapsed Rows - Determines whether collapsed rows should be printed.
    - Print Hierarchical - Determines whether the grid should print its hierarchical structure or as a single table.
    - Page Margins – Specifies the margin spaces of the printed page.
- Print – Prints the selected grid contents to the selected printer.
- Preview – Previews the selected grid contents.
- ERP Views – Displays a sub menu of ERP System views the user may launch into, depending on ERP System security.

Sites / Warehouses

You may define Sites within Sage SalesLogix for product inventory. Sites can be created to link to the ERP Warehouses for stock status. Choose Tools > Manage > Sites from the Sage SalesLogix menu.



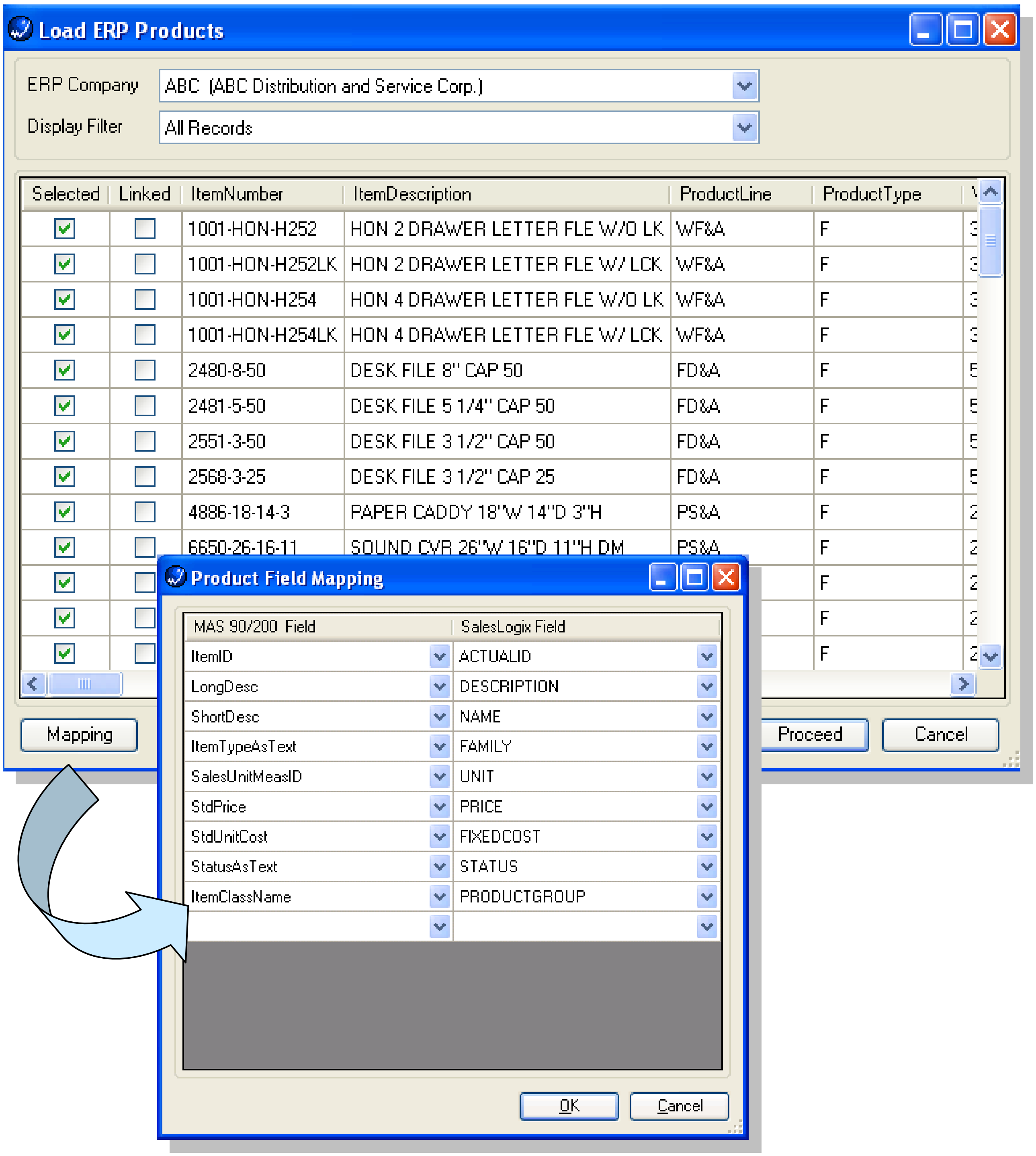
Once the Site is created in Sage SalesLogix, it may be associated to a Warehouse in the ERP system.



Products / Items

You may link ERP items to Sage SalesLogix Products to allow for accurate quotes and orders. Choose Tools > Manage > ERP Link > Load / Refresh Products from the Sage SalesLogix menu to define this process.

Select the Products to link. If more than one back office company is configured, they will appear in the ERP Company drop down list. You may also change how the product fields are mapped from this screen.



Features and Comparison to Sage DynaLink

NEW ERP Contract

- Pulls posting amounts, notes and tickets over from MAS
    - Can select a different charge code from MAS 500
    - Posting in SLX means that it is pending in MAS until completed in MAS

Improved User Experience

- On Demand, per record linking and synchronization of records
- Phoenix introduces more seamless integration functionality e.g.
- When a user selects a product to add to an opportunity in SLX the unit price for the quantity selected is calculated in real time by the ERP system and seamlessly populated into SLX. The user sees the back office price for that product without needing to engage a ERP sync.
- ERP Data presented in a more user friendly drill-able data grid in Sage SalesLogix
- ERP has a simple button that pushes a CRM account into ERP in one easy step - not dependent upon a sales order

Look-ups

- Can be done by class values – pre-set templates for:
    - Contact
    - Address
    - Sales Order
    - Customer
    - Invoice
- No typing in value, can choose from drop-down menu
- Can assign specific users for the templates

Sites (Warehouse)

- Sites returned to Sage SalesLogix to manage stock quantities for individual products at individual warehouses

Synchronization

- Improved Data Synchronization performance
- With the ERP integration, now can do batching and users can force a sync (on demand). Can also be scheduled as well as an immediate refresh
- DynaLink synchronized only in batch mode, and a CRM user couldn’t force (push) out a sync

Architecture Improvements

- No longer need a separate server

- Entirely Customizable via SalesLogix and .Net Extensions
- Improved Installation experience (SLX Bundle) instead of separate install routine

Staging Tables

- Specify SLX field that matches (maps) with MAS 500 field
    - Select conditions and values
    - Map data to primary (parent), but cannot map data to child
        - *Parent/child feature, nor drill down capability to any level does not exist in Dynalink*
    - Preview mapping detail profile to view conditions / function
    - Mapping fields are set as:

SLX Field	MAS 500 Field
Account	Customer
Contacts	Contacts
Addresses	Addresses
Orders	Quotes
Invoices	Invoices
Sites	Warehouses

    - Customized SLX fields / MAS fields are available
    - Have 4 – 6 user open fields to help map one customized field to another

Queries

- Can placed view into data query to see query executed and data returned
- Map query
    - SLX field goes out to MAS 500 to gather data and then maps back to SLX
- Ad hoc query
    - XML data placed into specific fields in database
    - *Ad hoc query does not exist in Dynalink*

Load ERP Products

- Choose ERP component
- Display filter with all records
- Loads all MAS 500 pieces into SLX (in real-time)
    - Green = OK
    - Red = Problem with record (i.e. Map field too long to fit into destination)
- Show status values for each item: backorder, shipped, etc.
- Click on specific item and retrieve details

Accounts

- Query back-office system for full listing => populates listing from MAS 500
  - Will designate if duplicate accounts exist in SLX
  - Auto Link test for same / similar values in ERP also in CRM (like a de-dupe)
  - Tighter validation
- Difference results number represents how far off the similar accounts are from each other (like a Google results search)
  - Can set decreasingly less stringent matches
- Dynalink did not have the efficiency of this capability except to manually sort through and review records
- ERP data tab at bottom of Account Record illustrates the ad hoc query details that come over
  - Can double click ad hoc listing and see details of sales records / invoice records
  - Can drag and drop fields around
  - Can create groups and subgroups
  - Preview data will show parent record with associated children
- Click on sales order in SLX and it will launch MAS 500 to show details of the sales order record
- In Dynalink, the user did not have the ability to specify views
- Account Details maps over directly
  - Right click into customer maintenance because “sitting” within MAS 500

Opportunity Product

- While adding opportunity products, will pull ERP item pricing, including specials

Not Available

- Vendor linking is not available in this release of Phoenix out of box (available through customization)

Frequently Asked Questions

Is Sage MAS 500 Visual Integrator required?

No. This integration does not require the use of MAS Visual Integrator as previous integrations required.

How do I install?

Installed as a Bundle in Sage SalesLogix. No separate “server” to install or maintain.

What is the price and licensing restrictions?

The integration is free for Sage MAS ERP customers who are current on maintenance and support.

How does this integration work with Sage SalesLogix v7.2 Web Client?

Any of the SalesLogix entities edited through the Web Client that are mapped using the synchronization and scheduled to run (Accounts, Products, Contact) will work the same as the Windows Client with the exception that you the Windows Client allows you to induce a sync run for the individual record without scheduling, the Web Client doesn't have this UI out of the box.

All of the integration with custom forms - i.e. ERP views, and any out of box views that are modified to consume ERP data (like the Opp_Product pricing) will only work in the Windows Client out of the box (there is no equivalent Web Client UI delivered as part of this current integration.

The current Web Client cannot create a Sales Order and that functionality is not available with this integration out-of-box. It is possible to customize the Web Client to accomplish nearly all of the functionality available in this integration. The only functional items that may be difficult to replicate is the direct integration to the ERP application including the adhoc query.

We do plan to extend this integration to the Web Client in the future.

Your business in mind.

SAGE MAS 500

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