



# **Customer Relationship Management Overview Document**

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for Sage 100 ERP

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# Table Of Contents

Introduction.....	1
Main Menu.....	2
CRM Server Options.....	2
CRM Company Options.....	3
Customer Template Maintenance.....	4
CRM Country Cross Reference Maintenance.....	5
Salesperson User Mapping.....	6
CRM Activity Log.....	7
Utilities Menu.....	8
Purge CRM Activity Log.....	8
Purge CRM Order/Quote Tracking.....	9
Rebuild CRM.....	10

# Introduction

This document includes overview information about each task in the Customer Relationship Management module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

# Main Menu

## CRM Server Options

### Navigation

Select Customer Relationship Management Main menu > CRM Server Options.

This task is available only if the Accounts Receivable and Sales Order modules are set up.

### Overview

Use CRM Server Options to create a Sage CRM instance ID for each of your Sage CRM installations. The record for each instance ID includes server access parameters for the Integration Engine and the Sage CRM SQL server. Additionally, use this task to define whether certain changes to customer information are allowed in Sage CRM and what activity is recorded in the CRM Activity Log.

When you have finished setting these options and click Accept, the Integration Engine automatically loads all data from Sage CRM into Sage 100 ERP. After options are set up and accepted, you can click Load Sage CRM Data to perform a manual synchronization of data between Sage CRM and Sage 100 ERP.

**NOTE** If you enter an instance ID that was previously deleted, you must run the Rebuild CRM utility to load the Sage CRM data.

Use the instance IDs created in this task to define additional settings for your Sage 100 ERP companies in CRM Company Options.

## CRM Company Options

### Navigation

Select Customer Relationship Management Main menu > CRM Company Options.

This task is available only if the Accounts Receivable and Sales Order modules are set up, the Salesperson Commission Reporting check box is selected in Accounts Receivable Options, and at least one Sage CRM instance has been created in CRM Server Options.

### Overview

Use CRM Company Options to define various options for the current Sage 100 ERP company and a corresponding Sage CRM installation (designated by its instance ID). Available options include whether customers can be created from Sage CRM, whether opportunities can be created on the fly, and whether Sage CRM records are automatically created when creating certain records in Sage 100 ERP.

## Customer Template Maintenance

### Navigation

Select Customer Relationship Management Main menu > Customer Template Maintenance.

### Overview

Use Customer Template Maintenance to define sets of default values to use when new Accounts Receivable customers are created from Sage CRM companies. Accounts Receivable customers can be created individually from Sage CRM, or you can create them in batches using the Customer Relationship Management Wizard.

In CRM Company Options, you can allow Sage CRM users to use only the specified default template when creating new Accounts Receivable customers, or allow them to select any template defined in this task. The Default template is a predefined set of values that can be changed but not deleted. You can maintain multiple customer templates with default values to use for new Accounts Receivable customers created from Sage CRM.

After a new customer is created, the default values can be changed for the customer in Accounts Receivable Customer Maintenance.

When new customers are created, information such as the customer name, address, and primary contact are taken from the Sage CRM company from which the customer is created.

## CRM Country Cross Reference Maintenance

### Navigation

Select Customer Relationship Management Main menu > CRM Country Cross Reference Maintenance.  
This task is available only if a record for the current company has been set up in CRM Company Options.

### Overview

Use CRM Country Cross Reference Maintenance to link Sage CRM country codes to Sage 100 ERP country codes. Country codes must be linked between Sage CRM and Sage 100 ERP for the country code to appear in addresses that are synchronized between the two systems. If country codes are not linked, synchronization of addresses results in a blank country code for the updated address, and a message is written to the CRM Activity Log.

Sage 100 ERP country codes are maintained in Country Code Maintenance.



## Salesperson User Mapping

### Navigation

Select Customer Relationship Management Main menu > Salesperson User Mapping.

This task is available only if a record for the current company has been set up in CRM Company Options.

### Overview

Use Salesperson User Mapping to assign salespeople to a Sage 100 ERP and Sage CRM user logon combination.

Sage CRM links to Sage 100 ERP using a salesperson, who is then mapped to a Sage 100 ERP user. Salespersons from each division can be linked to one user logon combination. A one-to-one mapping is used between the Sage 100 ERP user logon and the Sage CRM user logon.

## CRM Activity Log

### Navigation

Select Customer Relationship Management Main menu > CRM Activity Log.

### Overview

Use CRM Activity Log to print a record of significant operating events from the Sage CRM integration with Sage 100 ERP. The log prints the activity date, time, activity type, Sage 100 ERP user logon, Sage CRM user logon, Sage 100 ERP company code, Sage CRM instance ID, and a description of the activity.

The log can be sorted by activity date, activity type, Sage 100 ERP user logon, Sage CRM user name, Sage 100 ERP company code, or Sage CRM Instance ID. You can filter the information that prints on the report by entering a range of activity dates, Sage 100 ERP user logons, Sage CRM user names, Sage 100 ERP company codes and Sage CRM Instance IDs.

The types of activity recorded in the CRM Activity Log depend on the selections in CRM Server Options, and can include Sage CRM record creation, Accounts Receivable record creation, Sage CRM note creation, and synchronization events. The CRM Activity Log also automatically records errors and warnings that occur when data is transferred between the Sage CRM system and Sage 100 ERP. You can print any or all types of recorded activity in the log.

Data is available for printing until you purge it in Purge CRM Activity Log.

## Utilities Menu

### Purge CRM Activity Log

#### Navigation

Select Customer Relationship Management Utilities menu > Purge CRM Activity Log.

#### Overview

Use Purge CRM Activity Log to remove Customer Relationship Management activity records with dates on or before the date entered. You can purge data for specified Sage 100 ERP companies and Sage CRM instance IDs or for all companies and instance IDs.

After the purge is complete, the System Activity Log is updated with the date, time, company code, user logon, purge description, and purge date.

## Purge CRM Order/Quote Tracking

### Navigation

Select Customer Relationship Management Utilities menu > Purge CRM Order/Quote Tracking.

### Overview

The CRM order/quote tracking file is a list of sales orders and quotes generated for opportunities in the Sage CRM system. Entries are added when sales orders and quotes are created from the Sage CRM system using Sales Order Entry, but they are not deleted automatically when quotes are converted to orders or when orders are completed. Tracking history remains in the order/quote tracking file until it is purged.

Use Purge CRM Order/Quote Tracking to remove CRM order and quote tracking entries with dates that are on or before the date entered. You can purge orders and quotes for specified Sage 100 ERP companies and Sage CRM instance IDs or for all companies and instance IDs.

When you purge CRM order and quote tracking entries, only entries that have no related entries in other files are purged. If an order or quote is still active, or if the Retain Sales Orders/Quote History check box is selected in Sales Order Options and records exist in history that match the order or quote tracking entry, the entry is not purged, even if it has a date that is before the purge date.

**WARNING** Purging CRM order and quote history also permanently removes the associated order and quote records in the Sage CRM system.

After the purge is complete, the System Activity Log is updated with the date, time, company code, user logon, purge description, and purge date.

## Rebuild CRM

### Navigation

Select Customer Relationship Management Utilities menu > Rebuild CRM.

### Overview

Use Rebuild CRM to rebuild and repopulate the mirror tables residing in the Sage 100 ERP accounting system with Sage CRM data. Rebuilding the mirror tables may correct data corruption issues.

**NOTE** The Integration Engine must be stopped before you can rebuild the mirror tables using this task.

Running this utility will affect all Sage CRM Instance IDs and Sage 100 ERP companies that are integrated with Sage CRM. After the mirror tables are repopulated, the CRM Activity Log is purged.

**WARNING** This utility should be used only under the direction of a qualified Sage Customer Support Representative. Using this utility improperly may result in data corruption.