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MAKING CRM MAKE SENSE

Infor CRM Enhancements **Sage Line 50 Integration**

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CONTENTS

CONTENTS	2
1.0 OVERVIEW	3
Provision.....	3
Bundle Contents	3
Impact Analysis	3
Installation.....	3
2.0 LINKING ACCOUNTS	4
3.0 VIEWING THE SAGE DATA	5
Summary & Details.....	5
Reporting.....	6
Groups.....	6
4.0 SETTING UP THE SCHEDULED UPDATE	7
Task 1 – Install & Setup the ODBC Link to Sage.....	7
Task 2 – Setup the connection to Sage.....	8
Task 3 – Setup the connection to Infor CRM.....	8
Task 4 – Install the application	8
Task 5 – Run the application	8
5.0 CHECKING THE LINK	9



1.0 OVERVIEW

Provision

- Extracts data from Sage Line 50 (v8.x to v15.x [2009]) into Infor CRM.
- Provide Summary View & Line Items
- Provide export to Excel
- Self-Contained EXE and Bundle

Bundle Contents

The following plugins are supplied or updated in this bundle.

Plugin Type	Item
Table	ACCOUNTINGINFO (Infor CRM Table) ITEM (Added by bundle to store Line Items)
Scripts, VBscript System:	EMAS_Sage_LaunchCRW
Forms System:	System:Sage Accounting Info
Toolbars System:	EMTB_SageL50Toolbar
Groups Account:	Sage L50 Customers
Reports Account:	Sage L50 Report

Updated:
(None)

Impact Analysis

None of the additions will alter the system in any way and can be easily removed without issue.

Installation

Simply install the bundle as normal – all plugins are unique and the bundle will update the scripts as necessary.

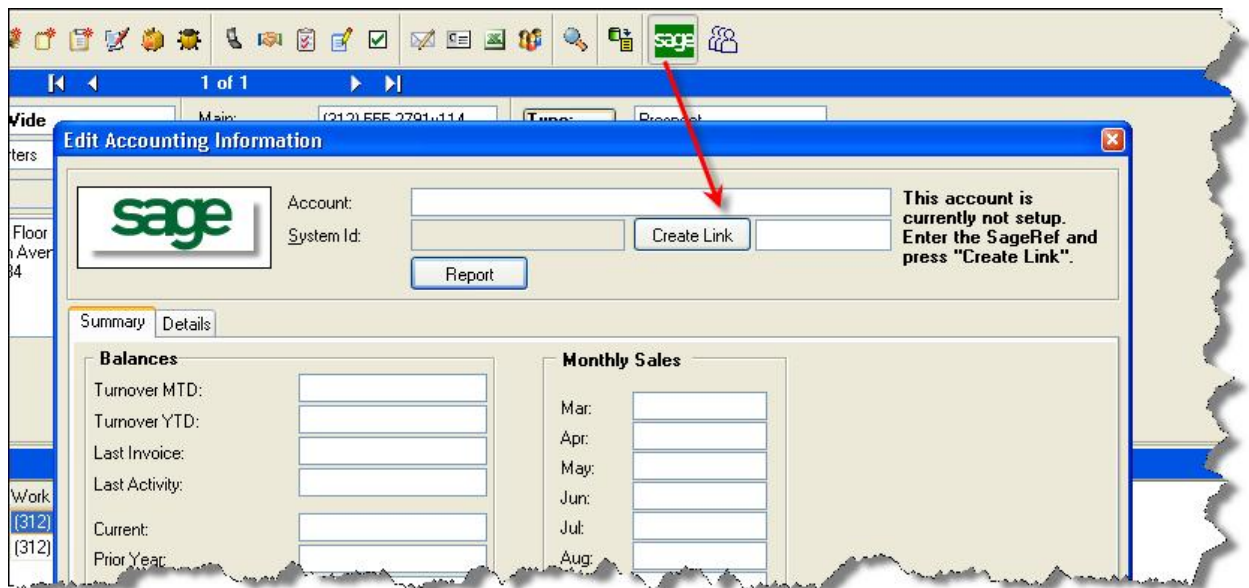


2.0 LINKING ACCOUNTS

(This task is for the accounts department)

In order to know which accounts in Infor CRM match those in Line 50 you will need to link the two via the Sage Line 50 Account Reference.

Locate each account and, from the toolbar, press the Sage Icon:



Simply enter the Sage Reference and press **"Create Link"**. The form will then re-display without these options. Continue with this linking until all accounts are setup.



3.0 VIEWING THE SAGE DATA

(This task is for the user)

There are several outputs when the link is in operation:

Summary & Details

Press the Sage toolbar button and you can then view the current summary, current year monthly breakdown and the line item details.

The screenshot shows the Sage software interface for account 'Abbott Ltd.' with System Id '123'. The 'Summary' tab is active, displaying two main sections: 'Balances' and 'Monthly Sales'.

Balances

Turnover MTD:	200.00
Turnover YTD:	500.00
Last Invoice:	16/11/2002 07:00:00
Last Activity:	
Current:	24.25
Prior Year:	444.00
Lifetime Value:	3,300.00
Limit:	5,000.00
Available:	4,800.00

Monthly Sales

Mar:	100.00
Apr:	200.00
May:	3,000.00
Jun:	
Jul:	
Aug:	
Sep:	
Oct:	
Nov:	
Dec:	
Jan:	
Feb:	

The screenshot shows the Sage software interface for account 'Abbott Ltd.' with System Id '123'. The 'Details' tab is active, displaying a table of invoice line items.

TaxDate	Ref	Type	Net	VAT	Total	Posted	Printed
11/07/2008	222	Invoice		200.00	35.00	235.00	Yes
11/07/2006	111	Invoice		100.00	17.50	117.50	Yes

You can also export the line items to Excel for further analysis.




Reporting

Pressing the Report button will generate a "cross-tab" report that shows the summary of all transactions by year and period:

30/11/2008 19:15:25
Page 1 of 1

Sage L50 v8.x Sales Report



Abbott Ltd.

Sage Ref	Currency	Status	Turnover MTD	Current	Lifetime Value
123			200	24	3,300

	2006	2008	Total
Jul/06	100	0	100
Jul/08	0	200	200
Total	100	200	300

Groups

A group is provided called "Sage L50 Customers" – this displays all current customers and their values.

Accounts 12 of 87										
Lookup Results	Latest Accounts	Active Campaigns	All Accounts	Customers	My Accounts	My History	My Leads	My Prospects	Partners	Sage L50 Customers
Account	City	Mainphone	Sage Ref	Turnover YTD	Prior Year	LifeTime Value				
Abbott Ltd.	Chicago	3125557854	123	£500.00	£444.00	£3,300.00				
Indiana Tool and Lathe	Indianapolis	3175550505	12121							
Clayco Manufacturing	Milwaukee	2145552220								
International Motor Supply	Indianapolis	3175556547	xxx							
Heartland Products	Kansas City	8165550171								
Chicago Auto Products	Chicago	3125557575								
Irwin Industries	Houston	7135556545								
Zenith Robotics Corp.	Oak Park	7085559878								
Davidson Drills	Milwaukee	4145559878								
Koll Trucks	Tempe	314555654								
Spinnaker Mechanical Contractors	Vancouver	6045559669								
Three-D Systems	Rockford	8004551818								
Mountain Ranch	Burleson	8175558333								
ATEL Tech Investment	San Antonio	2105550900								



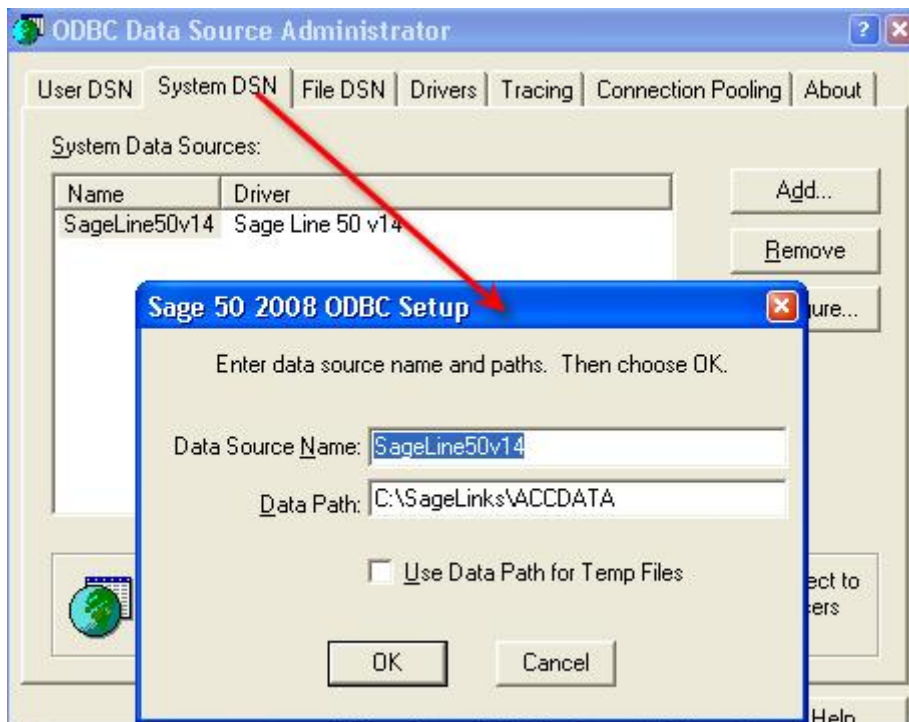
4.0 SETTING UP THE SCHEDULED UPDATE

(This task is for the system administrator)

In order for the data to automatically flow into Infor CRM there are several tasks that need to be accomplished. Once setup, we suggest you add a scheduled task to automatically run the executable on a basis to suit your site – most likely daily, overnight.

Task 1 – Install & Setup the ODBC Link to Sage

Sage provide the ODBC drivers to link to Sage, simply run the setup.exe on the nominated server. You will then find a new System DSN in Control Panel | Administrative Tools | Data Sources (ODBC)



Adjust the Data Path to point to your ACCDATA folder. Note: If you are planning to run a scheduled task, ensure you use a UNC path and **not** a local filepath, as the scheduler does not have access to local resources.



Task 2 – Setup the connection to Sage

Create a file in `c:\program files\Infor CRM` named `"em_settings_SageLine50.txt"` and edit the file with the following contents:

```
Connection:User ID=system;Password="manager";Data Source=SageLine50v14;Extended Properties="Type=ODBC"
```

Modify the text in **red** to exactly match the ODBC name.

Task 3 – Setup the connection to Infor CRM

Create a file in `c:\program files\Infor CRM` named `"em_settings_sql.txt"` and edit the file with the following contents:

```
Connection:Provider=SQLNCLI.1;Password=masterkey;Persist Security Info=True;User ID=sysdba;Initial Catalog=Infor CRM;Data Source=(Local)
```

Modify the text in **red** to exactly match the Infor CRM connection details as follows:

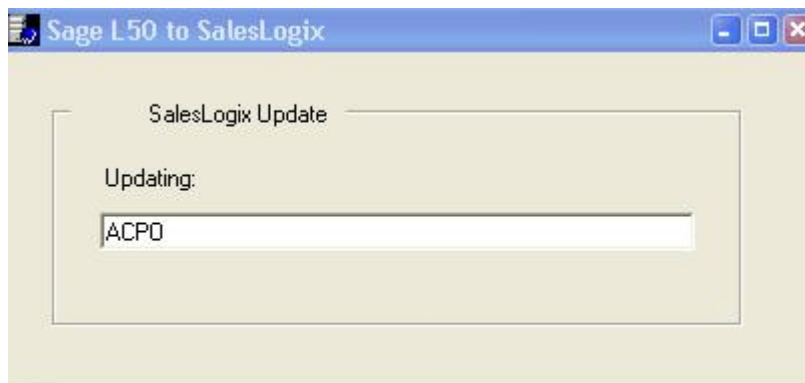
Provider: Either SQLNCLI.1 (2005) or SQLOLEDB.1 (2000) depending on your version of SQL Server.
Catalog: The database name of your SQL Server database
Source: (Local) if installed locally on the SQL Server, or the server name of your SQL Server

Task 4 – Install the application

Copy the file `"Sage_SLX_Update.exe"` to the folder (it can be placed anywhere you prefer)

Task 5 – Run the application

Prior to running the link application you should run it manually (just double-click) to ensure it is working correctly.



After a successful run, you can now setup the exe to run as a scheduled task.



5.0 CHECKING THE LINK

(This task is for the system administrator)

A file called "em_SageL50.txt" is created in "c:\program files\Infor CRM" and you can examine the output occasionally to ensure the link is working.

```

em_SageL50.txt - Notepad
File Edit Format View Help
30/11/2008 19:42:16 : Starting...
30/11/2008 19:42:16 :
30/11/2008 19:42:19 : --- Deleted Item History ....
30/11/2008 19:42:20 : --- Updating: 209SIGNA
30/11/2008 19:42:20 : --- Updating: 3IPLCLB3
30/11/2008 19:42:21 : --- Updating: AACOR1RG
30/11/2008 19:42:21 : --- Updated AccountingInfo for : AACOR1RG
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5770
30/11/2008 19:42:21 : --- Updated AccountingItem for : 6016
30/11/2008 19:42:21 : --- Updating: AAHME1B6
30/11/2008 19:42:21 : --- Updated AccountingInfo for : AAHME1B6
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5409
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5545
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5546
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5649
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5650
30/11/2008 19:42:21 : --- Updated AccountingItem for : 5651
30/11/2008 19:42:21 : --- Updating: AAHPHARM
30/11/2008 19:42:21 : --- Updated AccountingInfo for : AAHPHARM
30/11/2008 19:42:22 : --- Updated AccountingItem for : 517
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9746
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9760
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9790
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9908
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9909
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9942
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9943
30/11/2008 19:42:22 : --- Updated AccountingItem for : 9952
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10096
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10155
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10173
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10200
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10273
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10438
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10476
30/11/2008 19:42:22 : --- Updated AccountingItem for : 10497

```

