SYNC for Sage 50 CA and Sugar CRM

App Name: Commercient SYNC for Sage 50 CA and Sugar CRM

Commercient SYNC, the #1 data integration platform for sales, makes it possible for your sales team to see Sage 50 ERP data directly in Sugar CRM. With SYNC, Sage 50 and Sugar CRM are integrated, and you'll be able to access important Sage 50 data directly in the Sugar CRM.

Commercient SYNC is compatible with Sage 50 (Cloud Pro & Premium, UK, US EU, Canada) Sage 100 (Contractor & France), Sage 200 (Pro) Sage 300, Sage 300 Construction Real Estate, Sage 500 (Line) Sage 1000, Sage Intacct, Sage Enterprise Management (Sage X3) and Sage Business Works.

The Commercient SYNC Agent is rapidly deployable and gives you easy access to your Sage 50 information in Sugar CRM. This includes customer information, sales history, invoicing, serial numbers invoiced, inventory, multiple ship-to-addresses, and much more. New accounts, orders, opportunities, etc. created in Sugar CRM are SYNC'd to Sage 50.

About the SYNC:
- Unlike traditional data integration tools such as an ETL, there is no coding, mapping, or server. We handle everything, so you can focus on growing your business.
- Changes are reflected in Sugar CRM in real time as the records in Sage 50 change.
- Commercient SYNC for Sage 50 is built by ERP & CRM integration experts.
- Commercient software provides Sage 50 users with a "CRM in the cloud" experience.
- Any field synced from Sage 50 can be displayed on the Sugar CRM screen. All the data Commercient syncs to Sugar becomes part of Sugar CRM's native database. As such, you can perform any Sugar CRM function on the data—from graphing to dashboards to using third-party apps that can make use of the data.

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- Commercient has provided the means to make the data searchable in Sugar CRM. For instance, if you search for a serial number you can find the Invoice Records and Sales Order records that pertain to it.
- The SYNC tool only uploads or updates data when it has changed.
- Implementing Commercient SYNC creates a simple data integration pathway between Sage 50 and Sugar. Our SYNC solution also enables you to prevent the duplication of data, handle custom objects in Sugar, and take advantage of the premier support.
- Commercient has an eye for detail. It has programmed its services to make efficient use of tracking changes and submitting records to the Sugar CRM API in a single call. The result is that Commercient significantly reduces the likelihood of exceeding the Sugar CRM AP Sage 50 limits. In the event that a daily limit is reached, which can occur during the initial SYNC of a large Sage 50 system, Commercient will continue to SYNC where it left off on the following day.
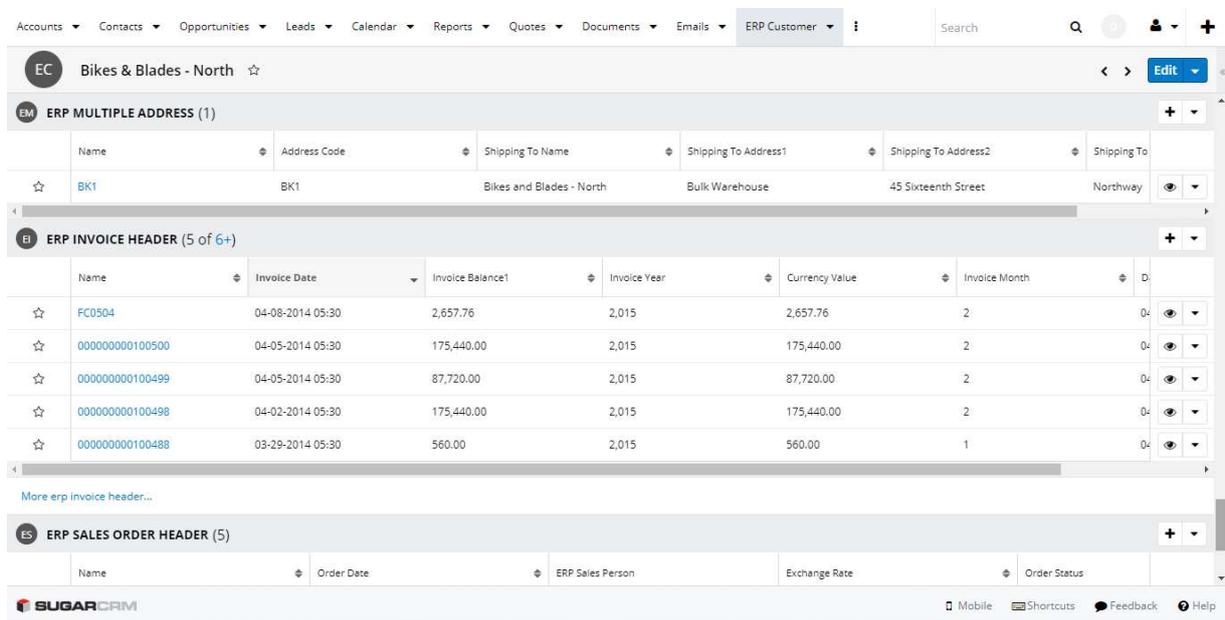
What is Synchronized?

What Commercient initially SYNCs:

1. Financial accounting data

2. Customer data

3. Sales order data

4. Invoice data

5. Products

6. Custom Workflows / Opportunities / Orders / Invoices / Custom Objects

7. Plus any other data customers request

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The Sage 50 AR Customer record is the first item to be synced. As you can see below. Customers in Sage 50 are synchronized into Sugar CRM Account records. The Customer's Ship To and Bill To addresses in Sage 50 are mapped to Sugar CRM's address fields using a mapping schema. The Sage 50 Customer fields can be displayed on the Sugar CRM screen however, you may decide to show Credit Limit, Outstanding Invoice Value, and the On-Hold status onto the screen while hiding other fields. By clicking on the Sage 50 Customer Record, you can see all the fields that are synchronized.

ERP Customer Record

Once the Customer Record is in the Sugar CRM, Commercient then SYNCs the **Sales Orders and their Detail Lines** and relates them to the corresponding Sugar CRM Account record. Commercient has consolidated the Sales Order data and the **Invoiced Sales Order data** into single merged objects in Sugar CRM to simplify the Sugar CRM screens. As seen below. With this approach, a user can easily see Sales orders and Detail Lines with their Invoices, as well as viewing the status of Sales Orders as they change in Sage 50. Cleansing of Cancelled Sage 50 Sales Order data from Sugar CRM is performed automatically.

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Sale Orders

Commercient has crafted the relationships with the data objects in Sugar CRM so that you have the power to decide which objects you would like to display onscreen. You are still always able to click to other parent- or child-related objects.

For example, an Admin user can remove the Sales Orders from the Account screen but leave their Detail Lines. This allows salespeople to see what was sold and shipped from the main Account screen without clicking anywhere; but they can still click the Sales Order link on the detail line to open the full Sales Order Screen.

The AR Invoice records are synced and related to the **Invoiced Sales Order Data**, and the Invoice Payments. As seen below.

Invoices

The AR Invoice data is useful for spotting unpaid invoices and being able to drill down into the data. The other records which are synchronized include the **AR Customer Ship to Tax Exemptions, Item Master,** and **Item Warehouse.** Commercient creates **Sugar CRM Products** from the **Item Master** and associates the entire **Item** and **Warehouse** records to the Product. This gives you the ability to have accurate product data and Inventory availability. In addition, you can **SYNC any Database, table, or view.**

What if I have an existing Sugar CRM database?

Clients with existing records in both Sage 50 and Sugar CRM must consult with the Commercient Professional Services team to perform a clean-up and match-up of records before the Commercient SYNC is enabled.

Can I limit or control the data that I SYNC?

Yes. Commercient has created an open methodology of allowing you to control the filtering of data in the SQL WHERE statement while maintaining the integrity

of relationship mapping and efficient syncing methodologies. Within the WHERE you can perform subqueries, filters, and cross-table and cross-database sub-queries to affect the rules. In addition, you can also map custom tables or views. (Charges may apply.)
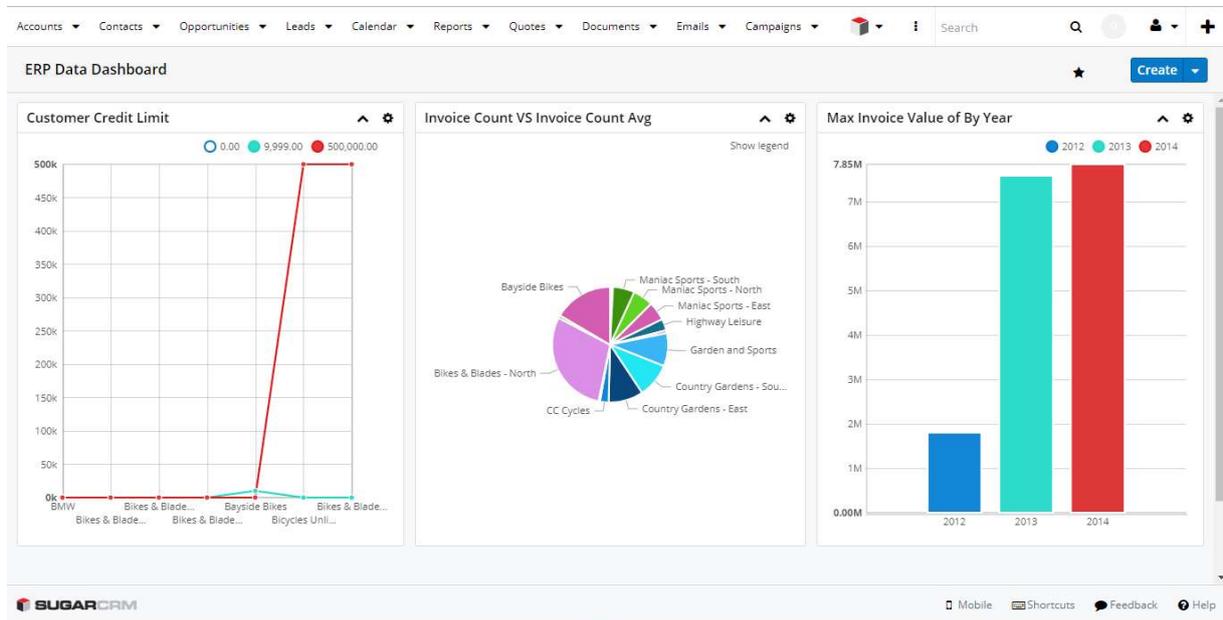
What else does Commercient do with Sugar CRM?

Data synchronization is the first step towards a total solution. Ask about these additional modules for Sage 50:

- Quote Processing
- Web-based Product Configurator
- Opportunity and Quote -> Sales Order Conversion
- Products and Price Book SYNC
- Product Record Types
- Cases with Serial Numbers Invoiced and Service Orders
- Opportunity Commissions Calculations based on Sage 50 Invoices
- Automatic Sage 50 Sales Order Email Engine
- Automatic Invoice Email Engine
- Dealer/Wholesaler Self-Service Portal
- Custom Data synchronization
- SF Account Conversion to Sage 50 AR Customer

ERP Data Dashboard

System Requirements:

Sugar CRM Group, Professional, Enterprise editions or higher. Sugar CRM API is included at no charge.

Company Information:

Commercient is a cloud-based company that connects Sugar CRM directly to your Sage 50 system. Our open SYNC Agent works with ERPs such as Sage 50, SYSPRO, Traverse, and other Sage accounting systems. Commercient improves the efficiency of getting CRM, B2B, and B2C eCommerce orders directly into your accounting system in real time, with all of the associated business rules.

For more information, please use the Contact Us link on www.commercient.com.