Differences between Sage CRM and Sage 200 CRM

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About this guide

Sage CRM 6.2 can be used by itself or it can be integrated with Sage 200 Accounts.

If Sage CRM is integrated with Sage 200 Accounts, the CRM interface and functionality is different. The differences between Sage CRM 6.2 and Sage 200 CRM 6.2 are explained in this guide.

The following naming conventions are used throughout this guide:

Sage CRM is the standalone CRM application.

Sage 200 Accounts is the standalone Accounts application.

Sage 200 CRM is Sage CRM integrated with Sage 200 Accounts.

For information about setting up and configuring the link between Sage CRM and Sage 200 Accounts, please refer to the *Sage 200 CRM Integration Configuration Guide*.

User interface changes

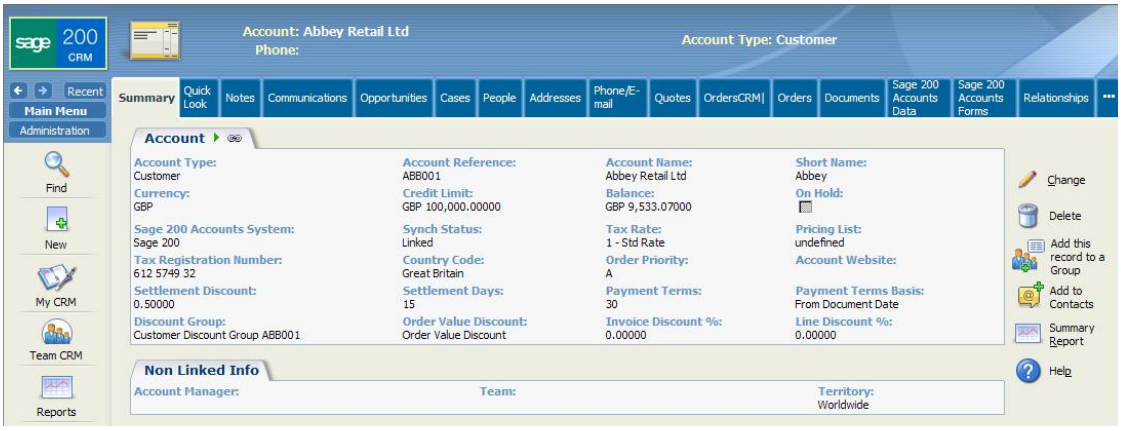
Once integrated, the application displays the Sage 200 CRM logo.

Standalone CRM

Integrated Sage CRM and Sage 200 Accounts

Account information

Sage 200 Accounts information is not available in Sage CRM. The integrated version, Sage 200 CRM, extends the functionality.



Additional fields from Sage 200 Accounts such as Account Reference, Account Name and Short Name have been added to allow you to create accounts in Sage 200 CRM. These can then be linked to Sage 200 Accounts.

Select this information from the on-screen lists. The information is taken from Sage 200 Accounts.

Order and Quotation Entry

In Sage CRM, orders and quotations are raised against customer accounts. In the integrated version, Sage 200 CRM, the Orders and Quotes tabs have been removed from the Company tab and added to the Account tab. In Sage 200 CRM, orders and quotations are saved in Sage 200 Accounts.

Customer tabs

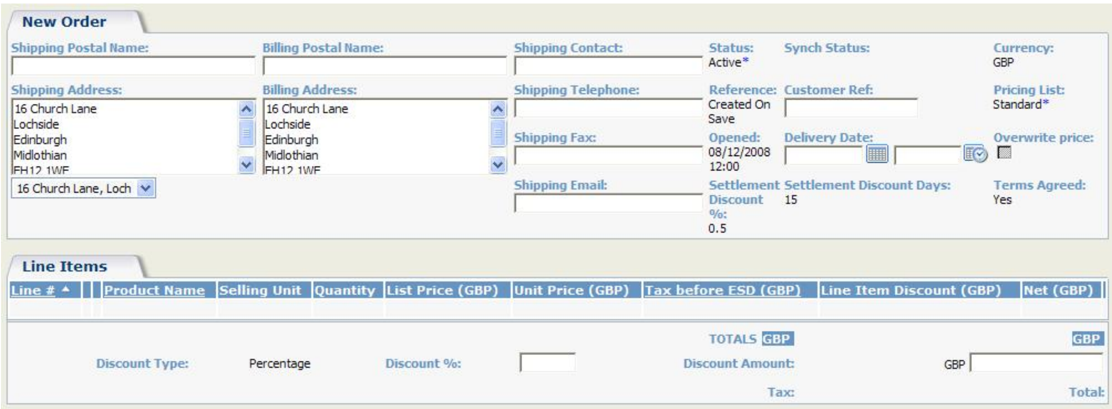
Account tabs

When using the Sage 200 suite, you can choose whether you want to use the Sage 200 CRM order entry forms or use the Sage 200 Accounts order entry forms. You can set this up for individual users.

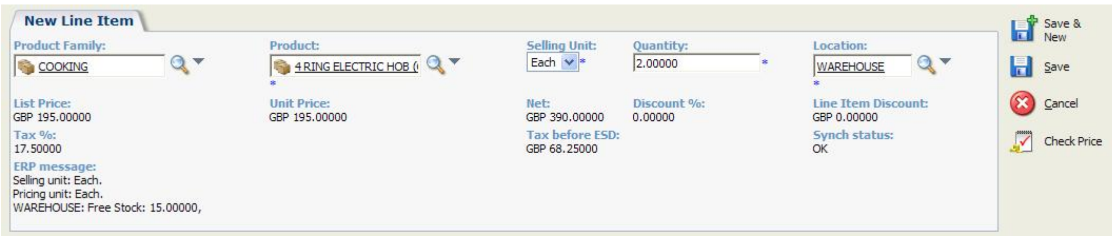
See the *Order Entry* screen for more information on how to set up Sage 200 CRM to use each type of order entry form.

Order Entry

Additional fields are included within Sage 200 CRM.



When adding order lines, the pricing and discount details are retrieved from Sage 200 Accounts. This is done in 'real time'. So, if the details change in Sage 200 Accounts, the details are also updated on this screen.



You can check the calculated price for an order line by using the 'Check Price' button.

Note:

This passes the order line details to Sage 200 Accounts where the best price is chosen for this customer. Additional information, such as the quantity available, is displayed within the Sage 200 CRM Order Entry screen.

When you save an order line, the order is checked in Sage 200 Accounts. Any order level discounts are applied to the order line.

You can set a CRM user to have rights to change product prices when entering order lines. If you have manually entered a calculated price (overriding the price assigned by Sage 200 Accounts), the overridden price is used. No further discounts are applied by Sage 200 Accounts.

Quotation Entry

When using Sage 200 CRM quotation entry, additional fields are included.

When adding quotation lines, the pricing and discount details are retrieved from Sage 200 Accounts. This is done in 'real time'. So, if the details change in Sage 200 Accounts, the details are also updated in Sage 200 CRM.

You can check the calculated price for a quotation line by using the 'Check Price' button. This passes the quotation line details to Sage 200 Accounts where the best price is chosen for this customer. Additional information, such as the quantity available, is displayed within the Sage 200 CRM Quotation Entry screen.

When you save a quotation line, the quotation is checked in Sage 200 Accounts. Any quotation level discounts are applied to the quotation line.

You can set a CRM user to have rights to change product prices when entering quotation lines. If you have manually entered a calculated price (overriding the price assigned by Sage 200 Accounts), the overridden price is used. No further discounts are applied by Sage 200 Accounts.

Prospect Quotation Entry

You can enter quotations for Sage 200 CRM accounts that are not linked to accounts within Sage 200.

If form launching is used, the Sage 200 Enter New Quotation for Prospect window is used and the address details of the Sage 200 CRM account are displayed in the window automatically.

When you save the quotation, it is held within Sage 200 Accounts for the Prospect Account, set up within Sage 200 Sales Order Processing Settings. Once you synchronise Sage 200 CRM and Sage 200 Accounts, you can view the details of the quotation on the Sage 200 CRM account.

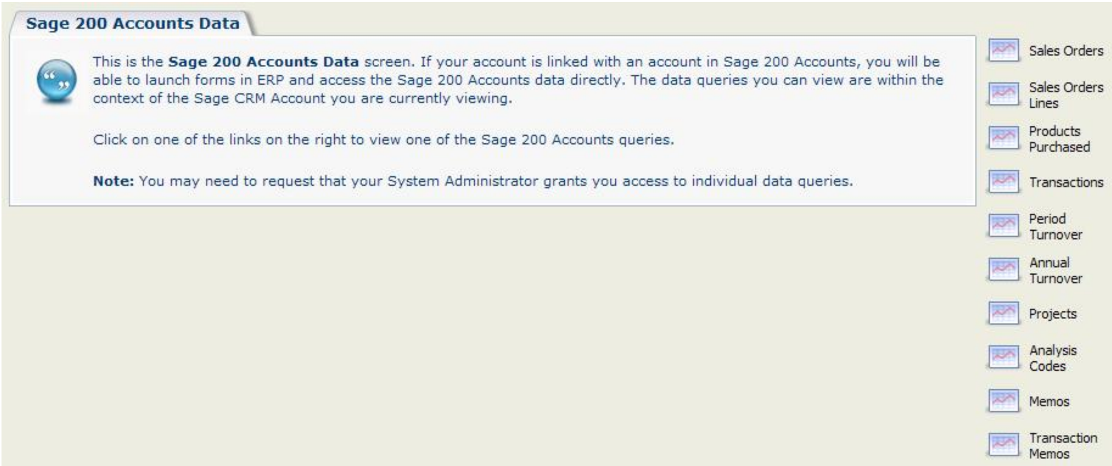
If you link the Sage 200 CRM account to an account within Sage 200, quotations held for this Sage 200 CRM account are transferred from the Prospect Account in Sage 200 Accounts to the linked account.

Sage 200 Data Views

You can set up access rights to allow users to access Sage 200 Accounts data, from the Sage 200 CRM desktop. For more information, see *User Settings*.

To view Sage 200 Accounts data:

1. View Sage 200 Accounts data by selecting one of the report options from the 'Sage 200 Accounts Data' tab.



2. Select one of the report options on the right hand side of the screen. The selected Sage 200 Accounts data is displayed.

Order No	Document Type	Created	Status	Date Requested	Date Promised	Customer Order No	Created By	Gross
0000000169	Sales Order	04/04/2007	Completed	04/04/2007	04/04/2007			3,749.98000
0000000169//01	Sales Order	04/04/2007	Completed	04/04/2007	04/04/2007			16,141.59000
0000000222	Sales Order	14/06/2007	Completed			9879	L	7,288.62000
0000000232	Sales Order	14/07/2007	Completed	30/07/2007	30/07/2007	854kj	L	1,074.32000
0000000253	Sales Order	25/10/2007	Completed			HGF387	L	0.00000
0000000256	Sales Order	09/10/2007	Completed			675547	L	19,024.64000
0000000268	Sales Order	14/12/2007	Completed			54309	L	22,218.32000
0000000281	Sales Order	06/02/2008	Completed			76909-0	L	1,697.78000
0000000309	Sales Order	17/05/2008	Completed			8787	L	4,212.83000
0000000323	Sales Order	20/07/2008	Completed	20/07/2008	20/07/2008	53763	L	5,827.22000

3. Restrict the data shown using the 'filter' settings on the right-hand side of the screen.

Some columns are linked to other screens. These are underlined and shown in blue. For example, when you click on an Order No, the order details will be displayed.

Sage 200 Accounts: Customer Sales Order Lines

3 RecordsFound, Page 1 of 1

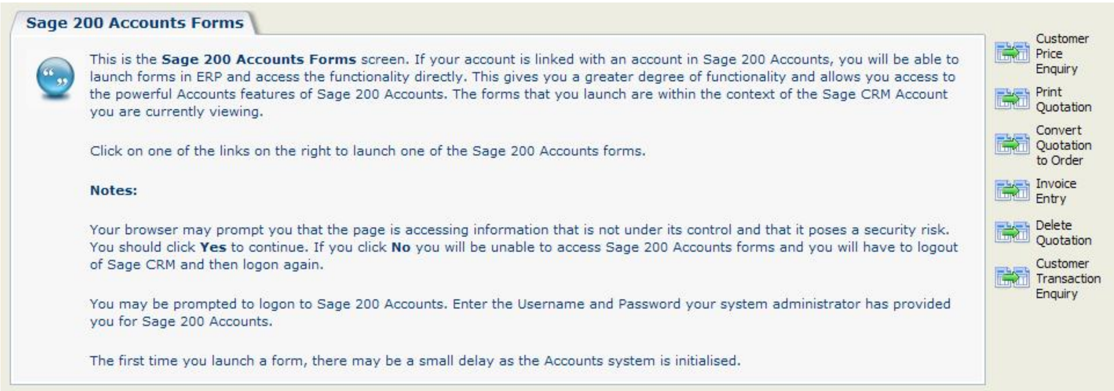
SalesOrderLinesFilterBox

Seq	Item	Description	Quantity	Unit Price	Disc %	Tax Code	Net	Back to Back
1	CA/BASE/SNG/BEECH	Beech Base Single Cabinet H58cm	9.00000	163.20000	10.00000	1	1,321.92000	_
2	CA/WALL/H70/BEECH	Beech Wall Cabinet H70cm	11.00000	192.10000	10.00000	1	1,901.79000	_
3		Thank-you for your order. Complete satisfaction guaranteed.	0.00000	0.00000	0.00000	1	0.00000	_

Sage 200 Form Launching

You can set up access rights to allow users to access Sage 200 Accounts screens from the Sage 200 CRM desktop. For more information, see *User Settings*.

From a linked account you can launch a Sage 200 form by selecting one of the form options from the 'Sage 200 Accounts Forms' tab.



Note: To be able to launch Sage 200 Accounts forms you must have Sage 200 Client installed on the machine that you are using to access Sage 200 CRM.

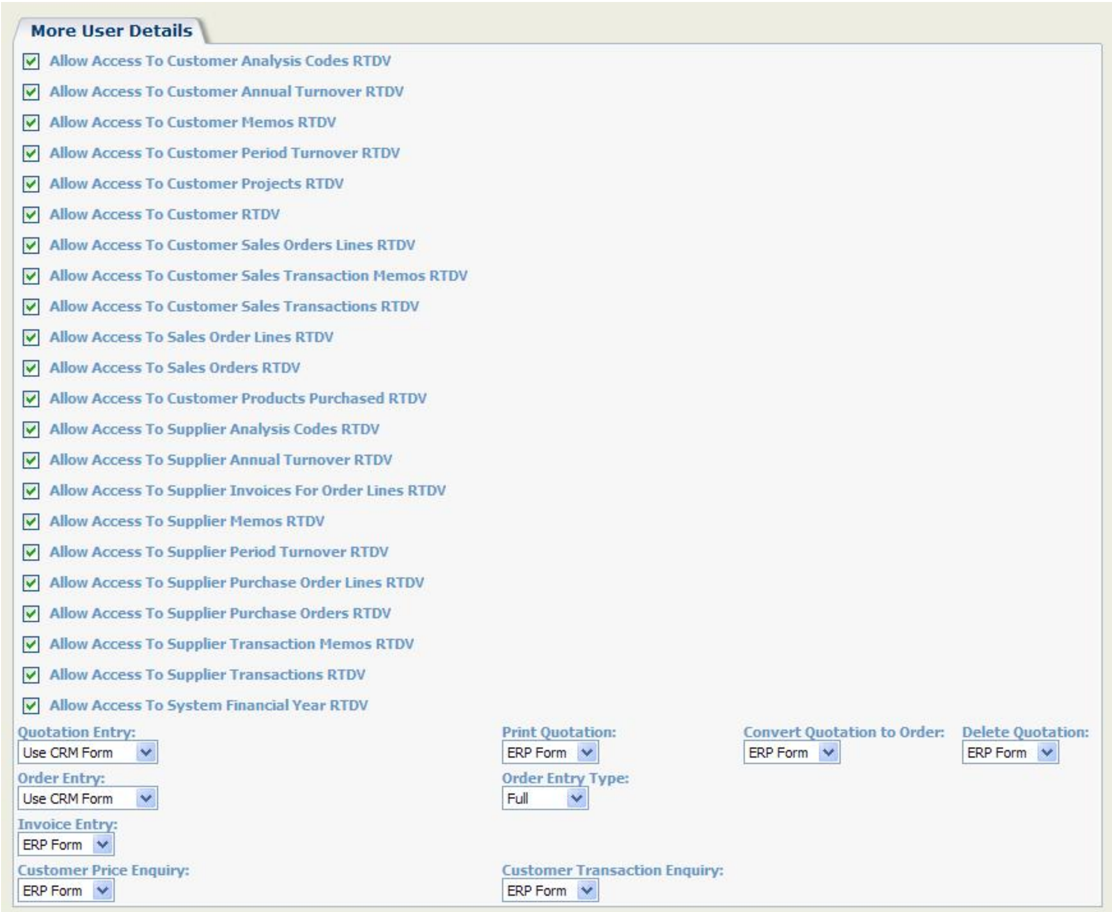
User Settings

User settings let you specify for each user:

- The Sage 200 reports that can be viewed from Sage 200 CRM.
- The Sage 200 forms that can be launched from Sage 200 CRM.

To allow a user to access a Sage 200 Accounts data view, select the tick box next to the data view name.

The allow a user to launch Sage 200 forms then select the ERP form option for the Sage 200 form name,


More User Details
Allow Access To Customer Analysis Codes RTDV
Allow Access To Customer Annual Turnover RTDV
Allow Access To Customer Memos RTDV
Allow Access To Customer Period Turnover RTDV
Allow Access To Customer Projects RTDV
Allow Access To Customer RTDV
Allow Access To Customer Sales Orders Lines RTDV
Allow Access To Customer Sales Transaction Memos RTDV
Allow Access To Customer Sales Transactions RTDV
Allow Access To Sales Order Lines RTDV
Allow Access To Sales Orders RTDV
Allow Access To Customer Products Purchased RTDV
Allow Access To Supplier Analysis Codes RTDV
Allow Access To Supplier Annual Turnover RTDV
Allow Access To Supplier Invoices For Order Lines RTDV
Allow Access To Supplier Memos RTDV
Allow Access To Supplier Period Turnover RTDV
Allow Access To Supplier Purchase Order Lines RTDV
Allow Access To Supplier Purchase Orders RTDV
Allow Access To Supplier Transaction Memos RTDV
Allow Access To Supplier Transactions RTDV
Allow Access To System Financial Year RTDV
Quotation Entry: Use CRM Form
Print Quotation: ERP Form
Convert Quotation to Order: ERP Form
Delete Quotation: ERP Form
Order Entry: Use CRM Form
Order Entry Type: Full
Invoice Entry: ERP Form
Customer Price Enquiry: ERP Form
Customer Transaction Enquiry: ERP Form

Integration Settings

The Administration section of Sage 200 CRM has an ‘Integration’ option. This is used to set up and configure the integration between Sage 200 CRM and Sage 200 Accounts.

For details about how to set up integration please refer to the *Integration Configuration Guide*.