# Sage 200 CRM Integration Configuration Guide

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# Introduction

## About this guide

This is a guide to assist you to configure the integration of the following versions of Sage 200 and Sage 200 CRM:

- Sage 200 Accounts version 2009
- Sage 200 CRM version 6.2

**Important Note:** This guide should only be used if you are setting up an integration between Sage 200 Accounts and Sage 200 CRM for the first time.
If you have upgraded from a previously integrated system, read the *Sage 200 Integration Upgrade Guide* for instructions on how to upgrade the link between your Sage 200 CRM and Sage 200 Accounts applications.

## Required knowledge

To install or upgrade Sage 200 and Sage 200 CRM, you must have experience of:

- Sage 200 administration and configuration
- Sage 200 CRM administration and configuration
- Microsoft SQL Server 2000/2005
- Microsoft Internet Information Services (IIS) version 6.0 or above.

## Pre-requisites

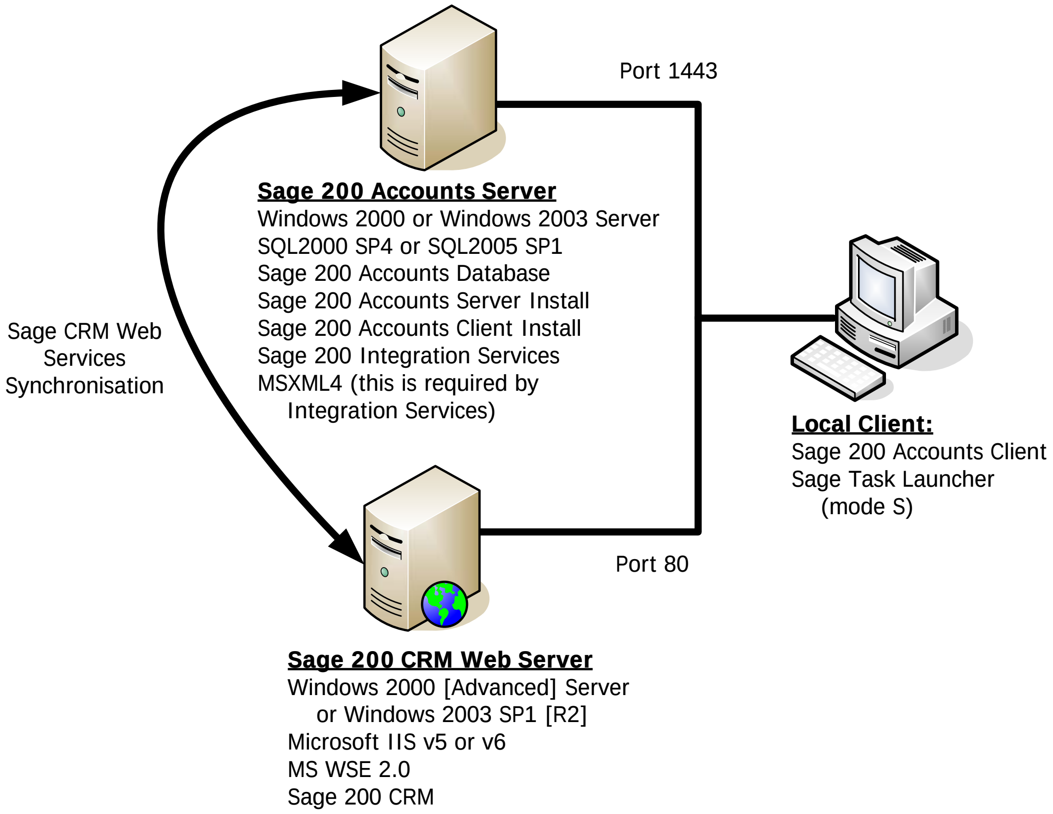
In order to configure the Sage 200 CRM integration, the following should be installed beforehand:

- Sage 200 Accounts 2009 - Server
- Sage 200 Accounts 2009 - Client
- Sage 200 CRM version 6.2
- Sage 200 CRM version 6.2 patch A
- Microsoft SQL Server 2000/2005
- Microsoft Internet Information Services (IIS) version 6.0 or above.

## Sage 200 and CRM configurations

The diagram shows the typical configuration for the installation of Sage 200 and CRM on a network.

**Note**: Publishing Sage 200 CRM on the public Internet is not a supported configuration.



# Summary

In order to integrate and configure the link between your Sage 200 Accounts and Sage 200 CRM applications, follow these steps.

We recommend that you set up your Sage 200 Accounts application first. Once complete, you can set up Sage CRM and start the synchronisation of the application databases.

Full instructions can be found in this guide.

## Sage 200 Accounts Configuration

This is a summary of the steps that you must take in Sage 200 Accounts before you link it to Sage CRM.

1. In Sage 200 System Administration, create a new user account for the CRM Integration.

   The user account must be enabled. It must have access to the company database to be integrated with CRM.

2. In Sage 200 System Administration, create a new role for the CRM Integration.

   The role must be set up as 'Remote Users Access Only'. The user account set up in step 1 must be added to this role.

3. Set up a prospect account in Sage 200 Accounts (Sales Order Processing > SOP Settings).

   If the prospect account does not exist, set up a new account in the Sales Ledger.

4. Enter your CRM integration settings in Sage 200 Accounts.
   (Accounting System Manager > CRM Integration Settings).

Now you can set up Sage CRM.

## Setting up Sage CRM

Once you have set up Sage 200 Accounts, you can set up Sage 200 CRM.

1. Install Sage 200 CRM:
   a. Run the Setup.exe and work through the screens, entering the information.
   b. Enter the installation name, and then enter the installation path.
   c. Select database server and authentication mode (password if necessary.)
   d. Select the 'No Demodata' option.
   e. Ensure that the 'Sample Self Service support site' is NOT selected.
   f. Select your currency
   g. Confirm the changes.
2. Create a new integration in Sage 200 CRM.
3. Log out of CRM and run IISRESET
4. Log into CRM and set up the new integration.
5. Enable the integration
6. Start the CRM Integration Service with an 'Automatic Startup Type'.
7. Synchronise the data.

# Integration Configuration

This section describes how to integrate Sage 200 and Sage CRM for the first time.

## Configure Sage 200 Accounts

Before setting up Sage 200 CRM, it is important to ensure that Sage 200 Accounts has been set up correctly to allow the integration between the two systems.

### Assumptions

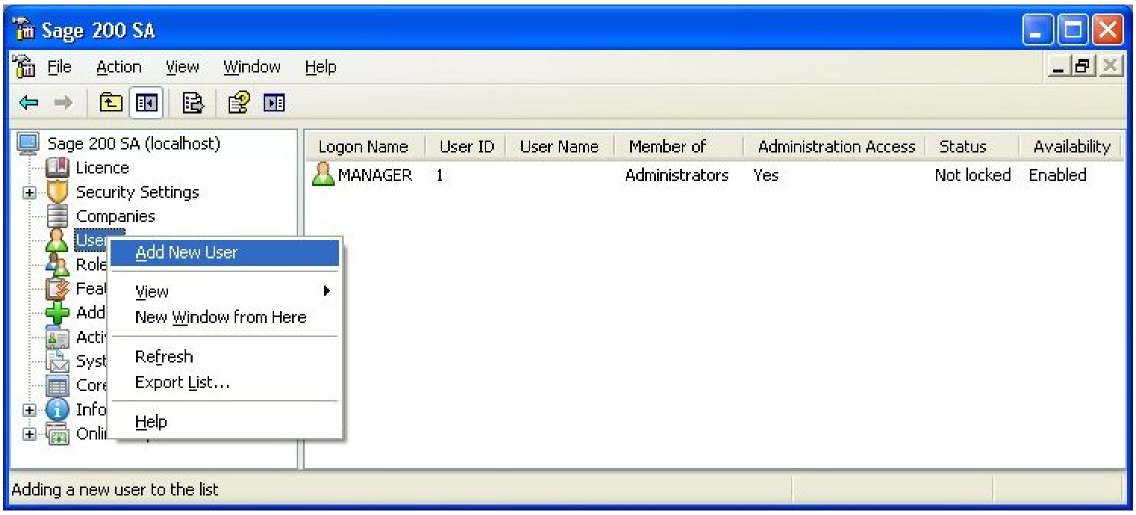
- Access to System Administration has already been set up with the creation of the System Administration database.
- Access to Sage 200 has already been created with the setup of users, roles and companies within the Sage 200 System Administration application.
  For more information, please refer to the help system that accompanies Sage 200 System Administration.

# Setting the integration in Sage 200 System Administration

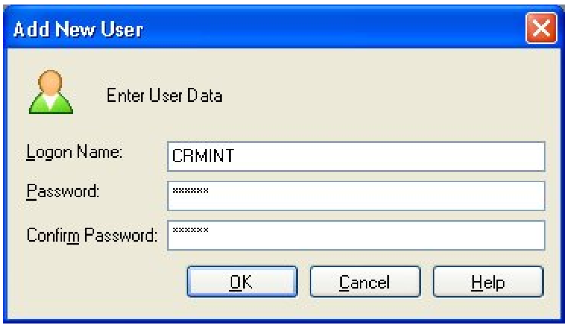
It is recommended that a new dedicated user is set up within Sage 200 that will deal solely with the integration.

## To create a user in Sage 200 System Administration

1. Open and logon in to Sage 200 System Administration.
2. Right click Users, and select Add New User.

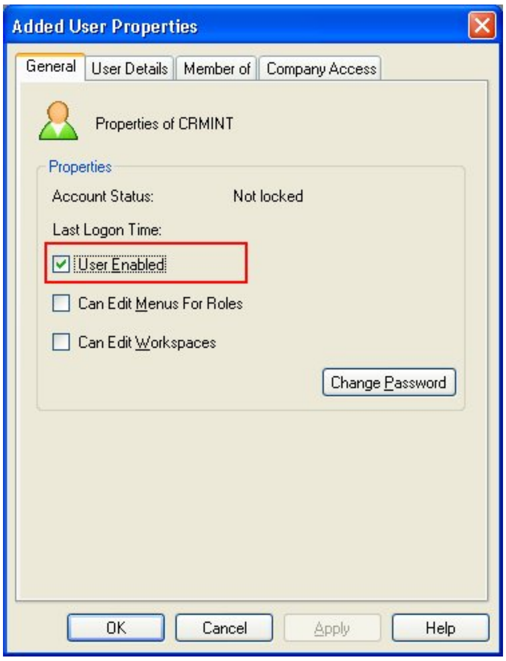



The Add New User screen appears.

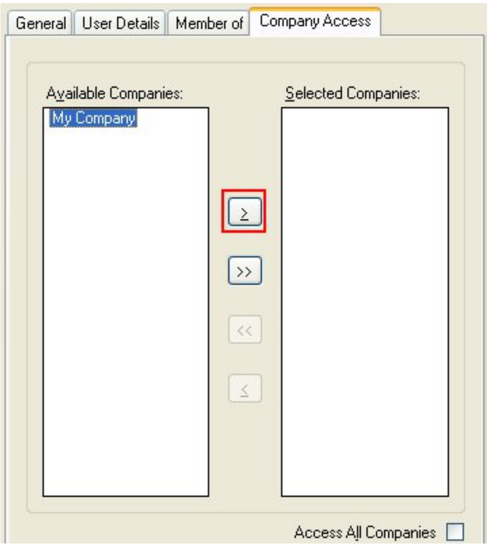



3. Enter the user's logon name and password details.

4. Click OK. The Added User Properties screen for the new user appears.




5. Ensure that the User Enabled setting is selected.
6. Select the Company Access tab.




7. Select the company that the integration is for and click the Add button (highlighted). The company moves across to the ‘Selected Companies’ list box.

   **Note:** it is possible to allow this user to have access to each company by selecting the Access All Companies checkbox.
   We recommend that there is one user set up for each company. This ensures that he system doesn’t use the same user for different company synchronisations at any one time.

8. Click OK.

   As the user is not assigned to a role at this point, a warning message will appear.

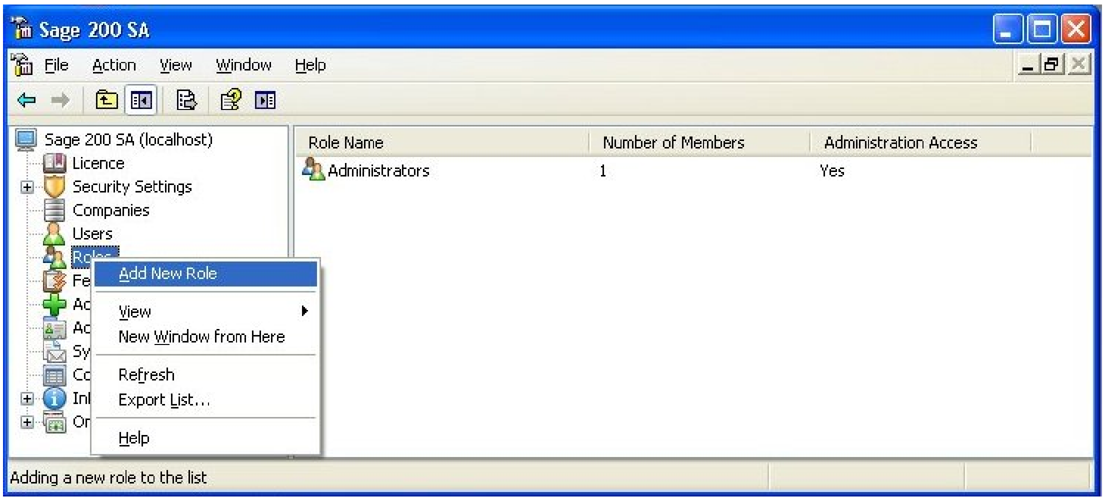

9. Click Yes to accept the message. We will assign the role in the next section.

   The user has been created successfully.

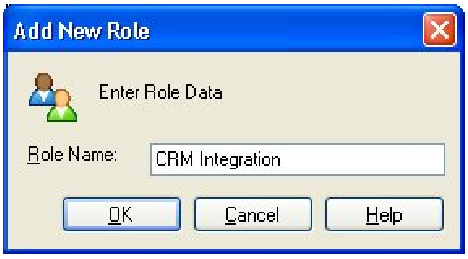
## Create a role for Integration in Sage 200 System Administration

Next, we require a Role for our new user. It is recommended that this role is used solely for CRM Integration.

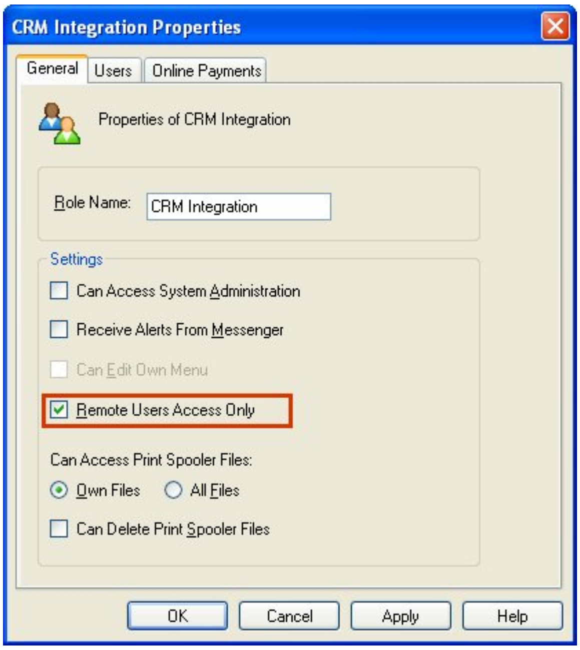
1. Right-click Roles and click Add New Role from the pop-up menu.




The Add New Role screen appears.

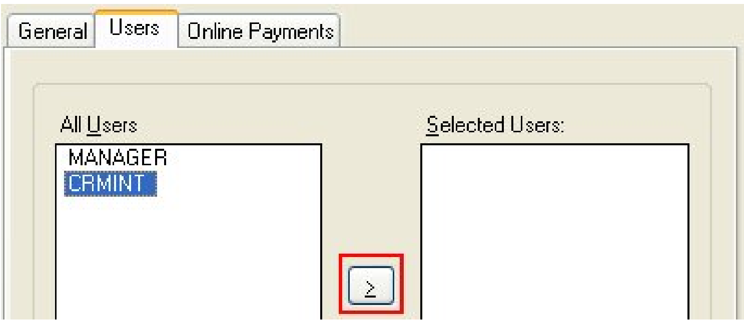



2. Enter the name (for example CRM Integration), and click OK. The Added Role Properties box appears.




- If the user we need to create is for the use of integrating with CRM only, it is not necessary to allow the full functionality of the Sage 200 accounts system.
  Ensure that the ‘Remote Users Access Only’ tab is checked.
  **Note:** If you do not do this an additional user licence will be used.
- If this role is required by Sage 200, then these settings (including those on the ‘Online Payments’ tab) may need to be modified.

3. Click the ‘Users’ tab.




4. Select the new user that has been created for CRM and click the > button. The select user name moves to the Selected Users list box.
5. Click OK once you have complete added you users to the role.

The role has been created successfully and the user assigned to that role. If you want to use ‘prospect quotations’ in Sage 200 CRM, you should set up an account so that it can be used by Sage 200 Accounts.

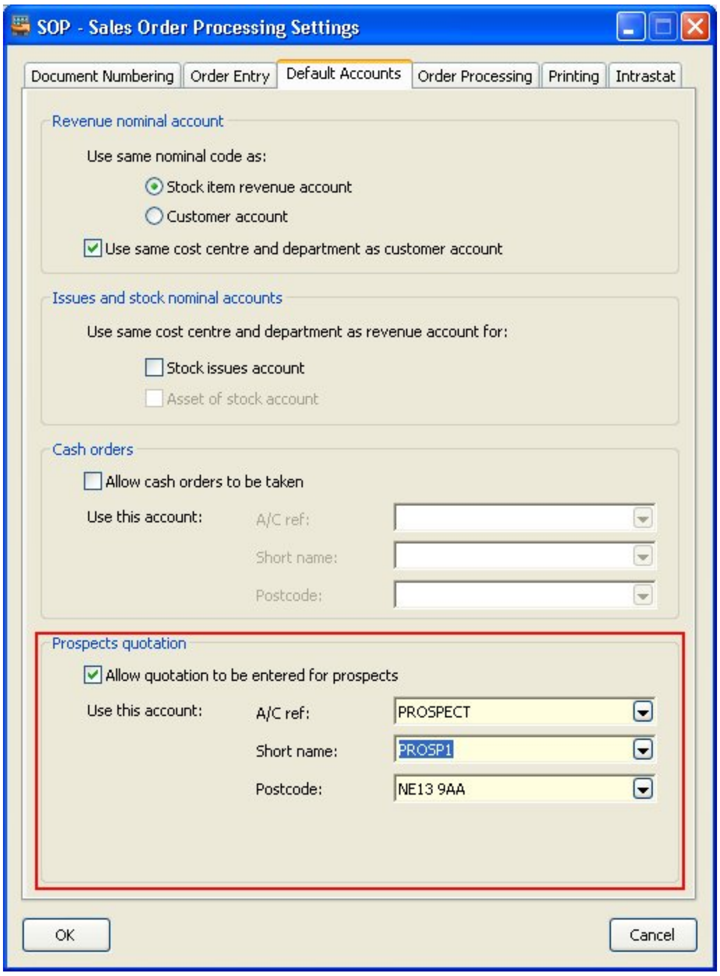
## Set up an account for prospect quotations in Sage 200 Accounts

If prospect accounts are to be used within CRM, they also need to be created within Sage 200 Accounts.

It is possible to create a new account to be used as a 'prospect account'. Alternatively you can use an existing account. By creating a new account you can see the prospect accounts that have been raised on your Sage CRM system and sent to Sage 200 Accounts.

If you set up a separate account for prospect accounts, you must set this up as the default account in the Sales Order Processing module in your Sage 200 accounts application.

1. Open the Sales Order Processing module in Sage 200 Accounts.
2. Click on SOP Utilities > SOP Settings.
3. Click on the 'Default Accounts' tab.



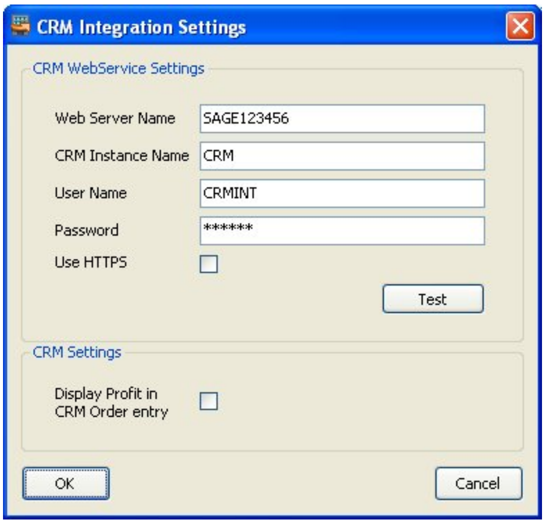

4. Select the 'Allow quotation to be entered for prospects' checkbox.
5. Select the account that will be used from the A/C Ref drop-down list.
6. Click OK to accept the changes.

You can now set up the integration settings in Sage 200 Accounts.

## Set up CRM Integration Settings in Sage 200 Accounts

You must now set up Sage 200 Accounts so that it can access your CRM web server.

1. Log into Sage 200 Accounts.
2. Open the Accounting System Manager module.
3. Open Settings > CRM Integration Settings.



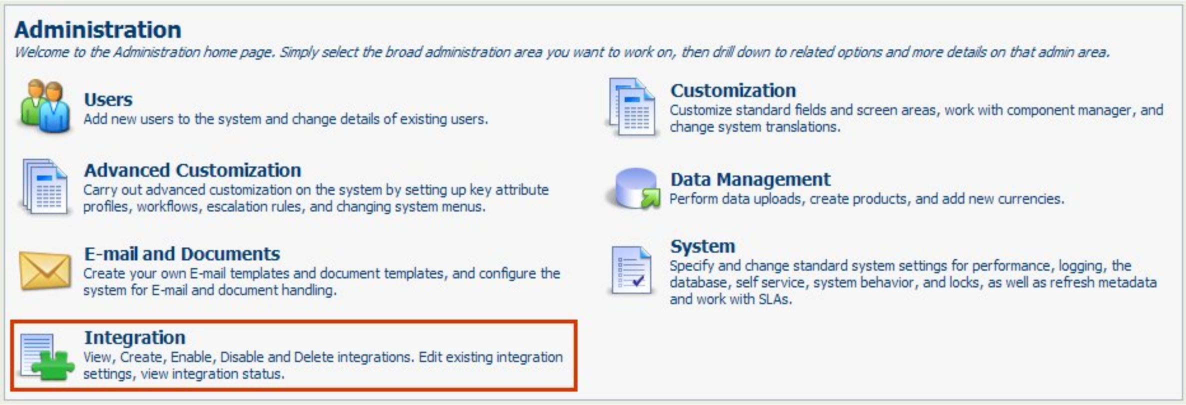

4. Enter the information in the boxes:
   - Web Server Name
     By default the value here is set to ‘localhost’. Enter the name of the Sage CRM web server.
   - CRM Instance Name
     This is the instance name that was entered when Sage 200 CRM was installed. This setting is entered automatically. You only need to change this if instance name is incorrect.
   - Username
     Enter the username that you set up in the Sage 200 Administration application.
   - Password
     Enter the password that was set up for the username.
   - Use HTTPS
     If your web server is configured so that it only to allows connections through a secure channel (HTTPS), select this checkbox.
5. Click Test to ensure that the settings that you have entered are correct.
   - Display Profit in CRM Order Entry
     This setting determines whether the profitability information is made available to all users when entering web orders.
6. Click OK to save the information that has been entered.

Sage 200 is now configured so that it can be integrated with CRM.

# Enable Sage 200 CRM Integration

Sage CRM 6.2 automatically updates the CRM database to ensure that the Integration module is enabled. This is different to previous versions.

Open Sage CRM and click on Administration to access the Administration home page. This is where you set up the integration with Sage 200 Accounts.




Enabling the Sage 200 CRM integration is a four-step process. You must:

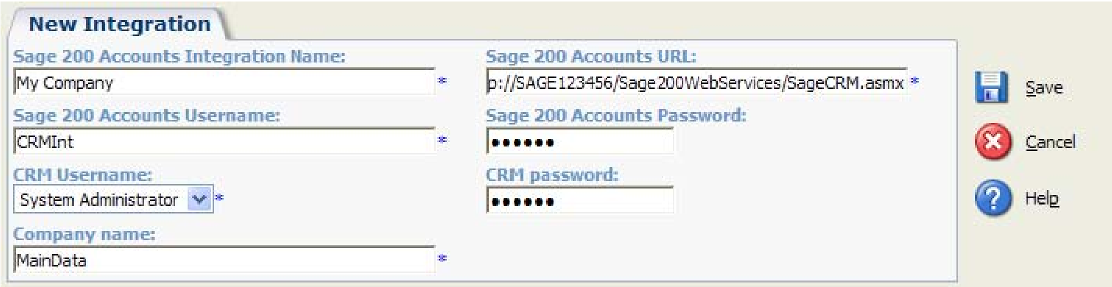
- Configure a new Sage CRM integration
- Restart Internet Information Service (IIS)
- Set up the new integration
- Check the integration is working

The following instructions show you how to do this.

## Configuring a new Sage CRM Integration

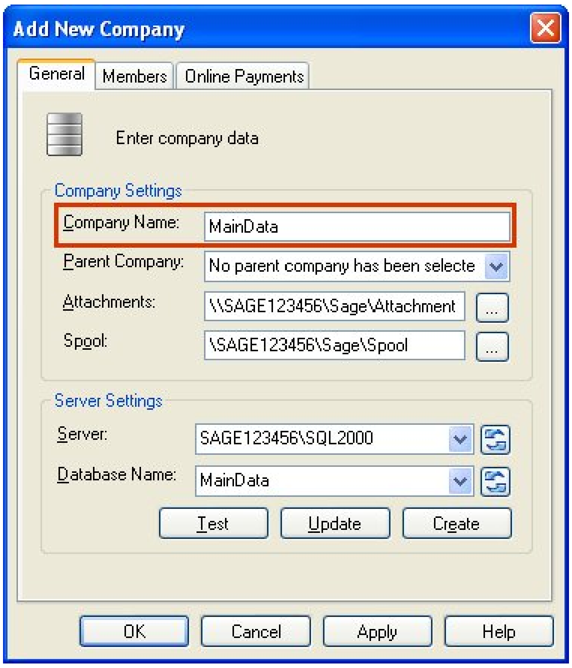
1. From the Administration home page, select Integration, and then select Integration List.
2. Click New.

   The New Integration will appear. This is where you set up the integration details.




3. Enter the following information:

   - Sage 200 Accounts Integration Name
     Enter a description of the Sage 200 Accounts data that is being integrated.
   - Sage 200 Accounts URL
     Enter the web address that links to your server's WebServices folder, followed by the web service name itself (SageCRM.asmx).
     The usual format is:
     http://<servername>/Sage200WebServices/SageCRM.asmx
     **Note:** Once the URL has been saved, you cannot change it in the user interface.
   - Sage 200 Accounts Username
     Enter the username that you want the integration to use when you connect to Sage 200 Accounts.
   - Sage 200 Accounts Password
     Enter the password for the Sage 200 username.
   - CRM Username
     Enter the CRM username that is being used for the integration. We recommend that you set this to the System Administrator.
   - CRM Password
     This is the password for the username that you have selected in the CRM Username field.
   - Company Name
     Enter the name of the company data set up in System Administrator. For example;




4. Click Save to accept the details.

   The integration setup will begin. This may take a few minutes to complete. When complete, a Continue button will appear:


5. Click Continue to save the information.
6. Close Sage CRM.

In order for these changes to be recognised, you must restart the Internet Information Services (IIS).

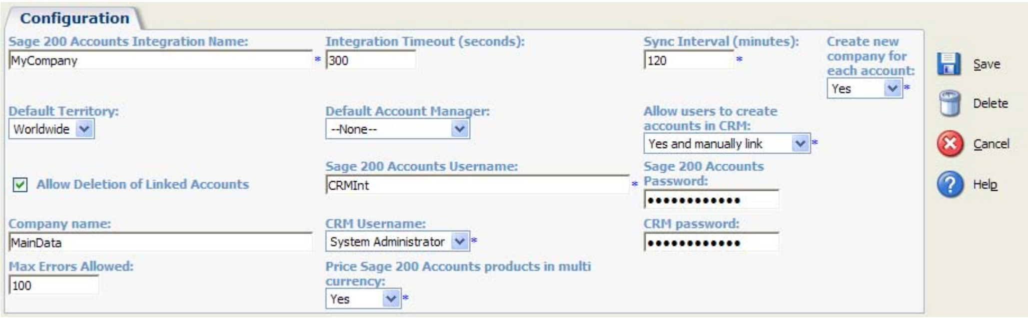
## Restarting Internet Information Services (IIS)

1. To restart, click Start > Run to open the run box.
2. Enter IISRESET.
3. Click OK.
4. IIS will restart.

You must now go back into Sage CRM to set up your configuration options.

## Setting up your integration settings

1. Once IIS has restarted, log back into CRM and click Administration.
2. Click ‘Integration and Integration List options’.
3. Select the name of the new integration that you set up in step 3. The Configuration screen appears.




4. Enter the following information:
   - <u>Integration Timeout (seconds)</u>
     This is the length of time that CRM will wait for a response from the Sage 200 Web Service method to return a response. The recommended setting is 300 seconds (5 minutes).
   - <u>Sync Interval</u>
     This is the time taken for each synchronisation to start. If a synchronisation is started manually, then the next synchronisation will take place the number of minutes specified from then. It is worth taking into account two factors: if a setting is chosen where a synchronisation takes place frequently, there will be a greater load on the server. However, if the synchronisation takes place less frequently, the amount of data available within CRM will not be as high.

     **Note:** If the Sync Interval is set to 0, there is no delay between synchronisations.
   - <u>Create New Company With Each Account</u>
     If this setting is set to Yes, then for each account that is created by the synchronisation with Sage 200 Accounts will automatically have a linked CRM company record created along with it. If this option is set to No (the default option), then no linked company will be created.

     It is recommended that if this is the first integration between Sage 200 CRM and Sage 200 Accounts, this setting should be set to Yes. If not (i.e. an upgrade has taken place), it is recommended that this setting is set to No until after the first synchronisation has taken place. Once this has run, this setting should be changed to Yes.

**Note:** A linked company is only created when an account is first synchronised. If this setting is set to No and an account has been synchronised without a company, then changing this setting to Yes will **not** subsequently create a company on the next synchronisation. Hence, if company records are required, this option must be set to Yes.

- Default Territory
  This is the territory that will automatically be assigned to every new account created by the synchronisation. The default territory is Worldwide.

  **Note:** orders and quotes are created using the same territory as their parent account.
- Default Account Manager
  The selected user will automatically be assigned as the account manager for any new accounts that are created via the synchronisation. The primary team of the selected account manager will be used as the default team of the new record. This is not set as default.
- Allow users to create accounts In CRM
  This setting determines how accounts should be created and linked to the Sage 200 Accounts system.

  If set to Disable, accounts may not be created within CRM.

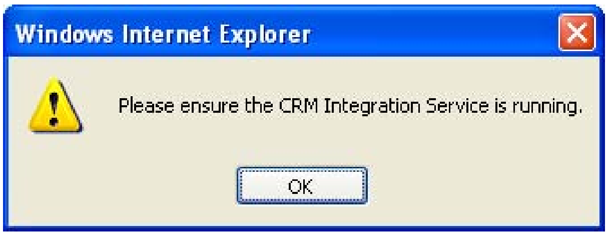
  If set to Yes and No Link, then any accounts created within CRM will not get linked to Sage 200 Accounts.

  If set to Yes and Manually Link, the account will only be linked to Sage 200 Accounts once the Link Account button is clicked within the Account Summary screen and the next synchronisation is run (this is the default setting).

  If set to Yes and Automatically Link, the account will automatically be linked once the next synchronisation is run.
- Allow Deletion of Linked Accounts
  This allows the System Administrator to override normal user security options in order to delete any accounts in CRM that are linked to Sage 200 Accounts. The default option is set to true (checked).
- Max Errors Allowed
  This is the maximum number of errors that a synchronisation can report before the synchronisation is stopped. The default value is 100.
- Price Sage 200 Accounts products in multi-currency
  If set to Yes, the products can be selected on a quote or order even if they are not priced in the same currency as the account, quote or order. The default is No. We recommend you ensure that this is set to Yes.

5. Click Save to apply these changes to the integration.
6. Click Enable.

   A warning prompt appears.




7. Click OK to continue.

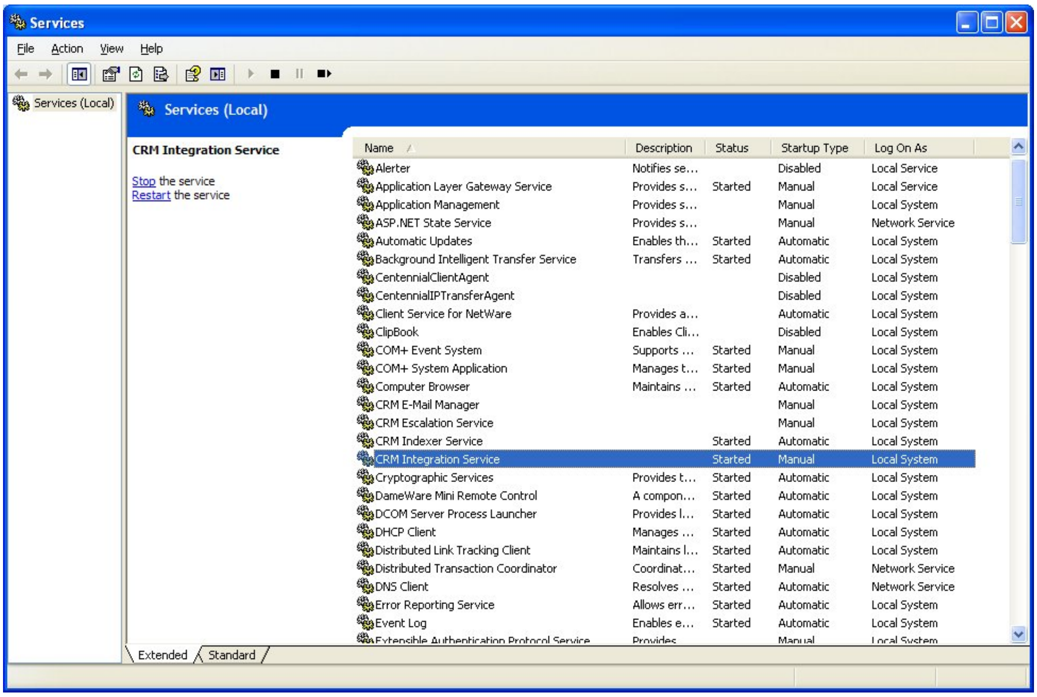
Next we must make sure that the CRM Integration Service is running.

## Checking the CRM Integration Service

By this stage you should have configured CRM and set up the new integration. You now need to setup the CRM Integration Service so that it runs automatically. You do this in the Services section of the Control Panel on your PC. Alternatively you can use the Run box.

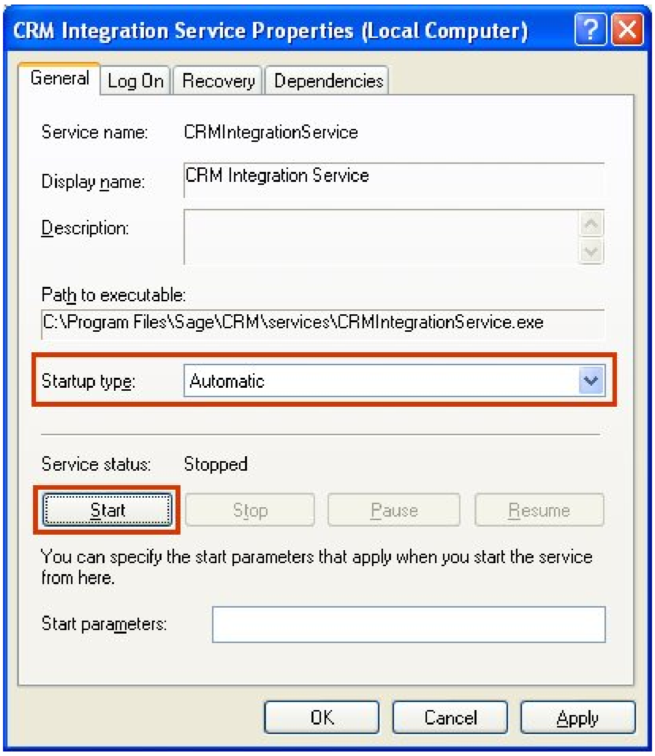
1. From the desktop, click Start > Run.
2. Enter **services.msc** in the box.
3. Click OK.

   The Services window appears:




4. Double-click on the CRM Integration Service from the list.

   The Properties window is displayed.



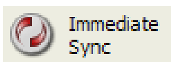

5. Ensure the Startup type option is set to Automatic.
   This ensures that each time the server is restarted, this service is also started.

   **Note:** If the service status is 'Stopped', click the Start button to restart the service.
6. Click OK.

   The integration setup is complete.

   Now that the integration is set up and running you must now set off the 'synchronisation process'. This passes your accounts and CRM information between your Sage CRM and Sage 200 Accounts program.

## Running the synchronisation for the first time

1. Log into Sage CRM.
2. Open the Integration Setting that you created previously.
3. Click the Immediate Sync button. 

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   The synchronisation begins. The time it takes to complete the synchronisation depends on the size of your Sage CRM and Sage 200 Accounts databases.

# Troubleshooting

The following section highlights issues that we have identified when configuring Sage 200 CRM.

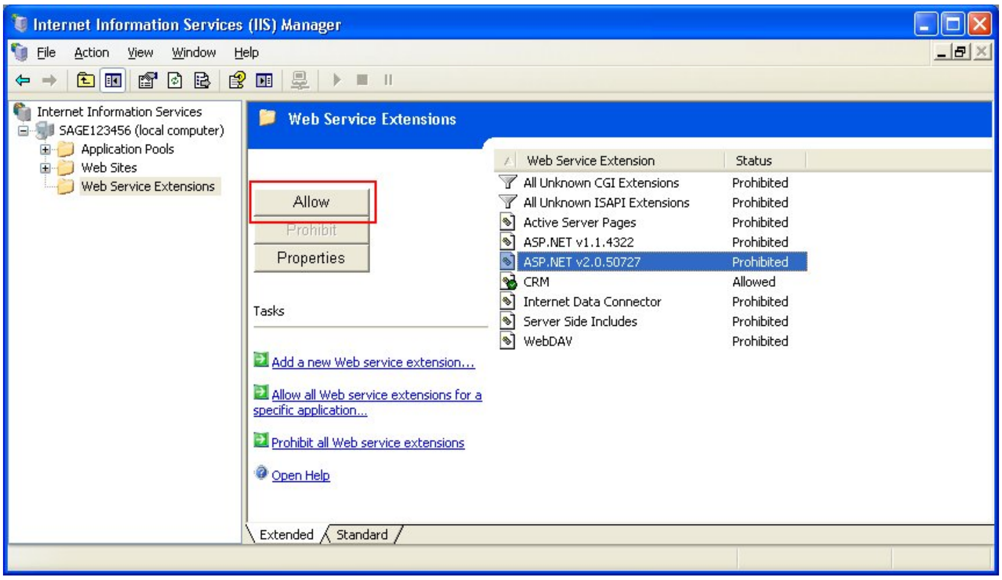
## Enable Active Server Pages using Windows Server 2003

If you are using Internet Information Services (IIS) 6.0, you must configure it to allow Active Server Pages (ASP). ASP is disabled by default.

### To enable ASP

1. Open the Control Panel.
2. Open Administrative Tools.
3. Open the Internet Information Services Manager.

   The IIS Manager screen is displayed.




4. Open the local computer node and select the Web Service Extensions folder.
5. Click Active Server Pages to open the pop-up menu.
6. Click Allow.
7. Click on ‘ASP.NET v2.0.50727’ from the Web Service Extension list.
8. Click Allow.

   **Note:** If ASP .NET v2.0.50727 is not shown in the list:

   a. Close IIS Manager

   b. Click Start > Run and type **Command** in the box. A command prompt appears. Enter the following text at the command prompt: **C:\Windows\Microsoft.NET\Framework\v2.0.50727\ASPNET_REGIIS -I**’

   c. Click Enter.

   d. Restart the PC, and open IIS Manager. ASP.NET v2.0.50727 will be displayed in the list.

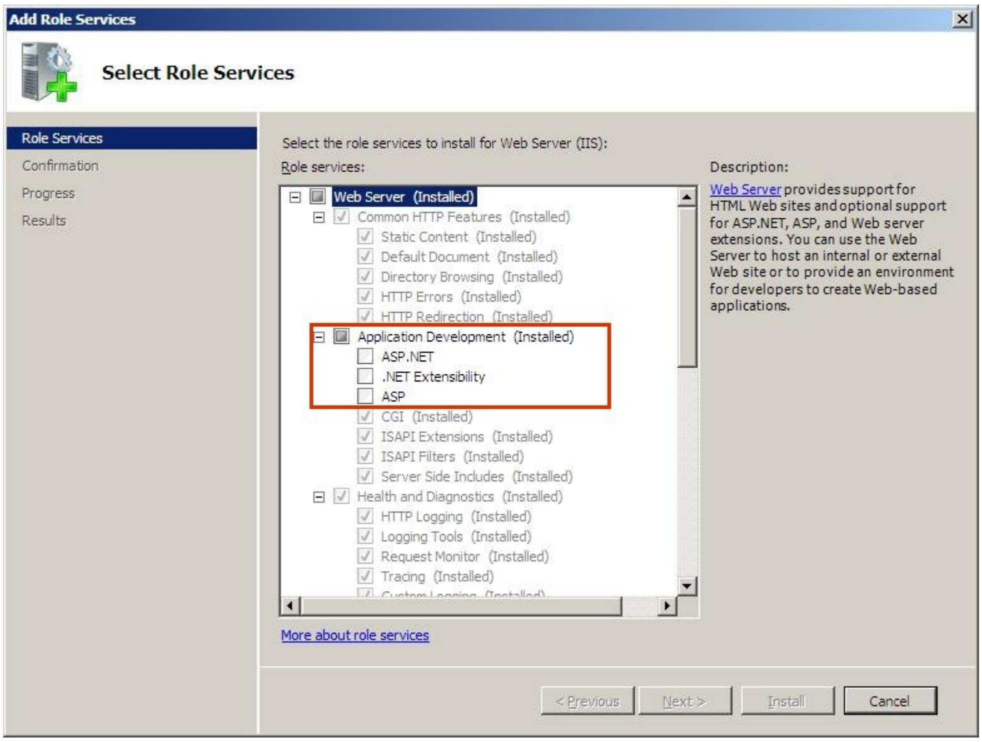
e. Click Allow.

## Enable Active Server Pages using Windows Server 2008

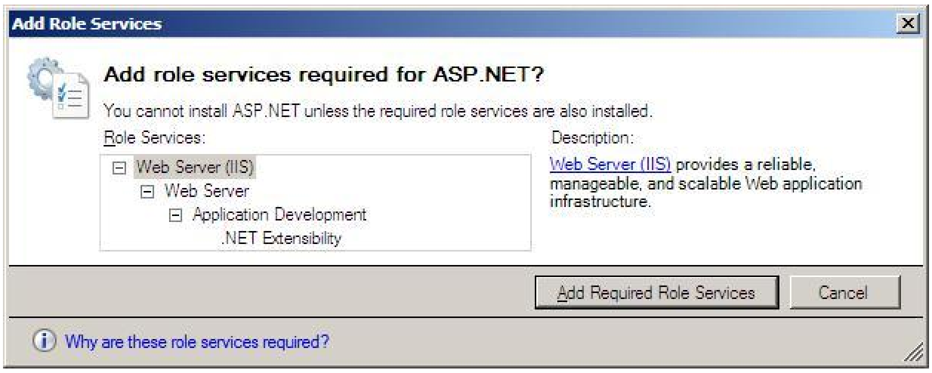
If you are using Internet Information Services (IIS) 7.0, you must configure it to allow Active Server Pages (ASP). ASP is disabled by default.

### To enable ASP

1. Open the Control Panel. (Click Start > Settings > Control Panel.)
2. Click Programs and Features.
3. Click the ‘Turn Windows Features On/Off’ link. The Server manager Screen appears.
4. Click on ‘Roles’ from the list. The Roles options open in the list.
5. Select Web Server item on the tree. The information in the right-hand panel will update.
6. Click on the ‘Add Role Services’ link on the right-hand panel. The Add Role Services screen appears:




7. Select the ASP.NET checkbox. The following message appears.



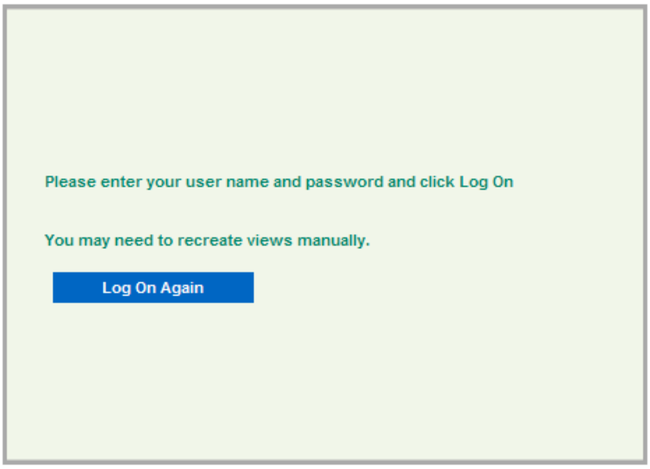

8. Click the Add Required Role Services button. The screen will close and return to the Server Manager screen.
9. Select the ASP checkbox.
10. Scroll down the list and ensure that the ‘IIS 6 Metabase Compatibility’ checkbox is selected.
11. Click Next. This will then install and activate ASP.NET.

**Note**: Once installed, restart your PC if prompted.

## IIS Directory Security Configuration

IIS needs to be configured so that Sage 200 CRM has the necessary permissions to access the CRM Server.

After you have logged into CRM for the first time, you may see the following error.



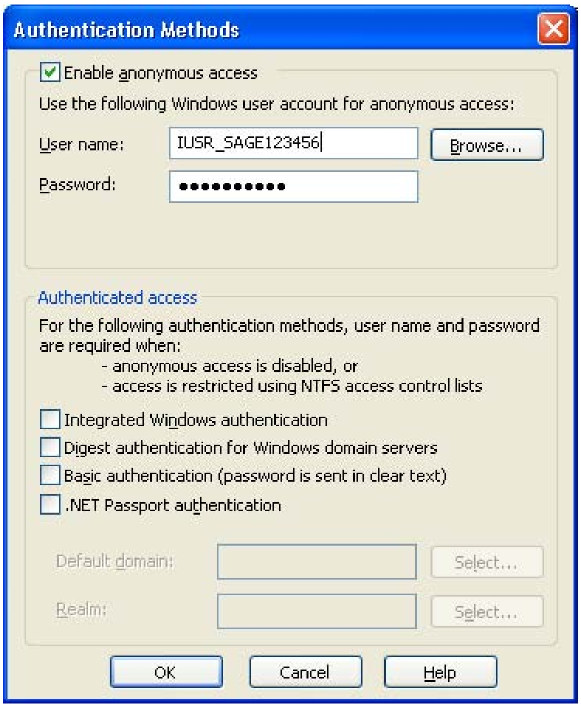

There are two possible reasons why this message appears:

- IIS cannot connect to the server, or
- The password used to connect SQL Server to Sage CRM has changed since Sage 200 CRM was installed.

## To connect IIS with the server

By default, the anonymous login details are used for the system account IUSR_COMPUTERNAME. These details are only used by that PC. Therefore it cannot exist on any other PC or servers. If these details are being used, you should change the security settings.

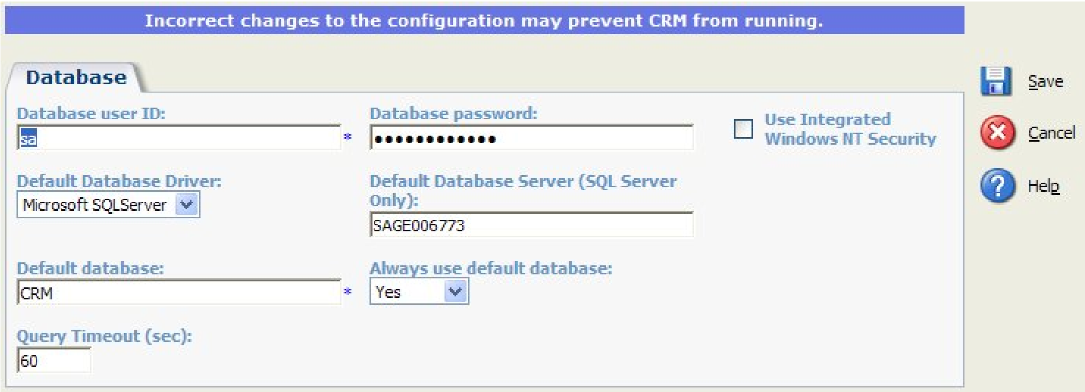
1. Open the IIS Manager.
2. Find the name of the PC in the list. Click on the list to open the options for the PC.
3. Click on the Web Sites option for the PC.
4. Click on the Default Web Site. More folders will be displayed underneath this option. A folder labelled CRM is one of the folders that will be displayed.
5. Right-click CRM folder and select Properties from the pop-up menu. The CRM Properties window appears.
6. Click on the Directory Security tab.
7. In the Authentication and Access Control section, click Edit. The Authentication Methods window appears.




8. Enter the User name and Password details.
9. Ensure that the 'Integrated Windows authentication' checkbox is not enabled.
10. Click OK to save any changes.
11. Close the IIS Manager.
12. Restart IIS.
    a. Click Start > Run
    b. Type **IISRESET** in the run box..
    c. Click OK.

## To change the Sage 200 CRM password

1. Within SQL Server, change your password to the password that was used when Sage 200 CRM was originally set up.
2. Log into Sage 200 CRM.
3. Click Administration > System > Databases.
4. Click Change. The Database screen appears:




5. Change the 'Database user ID' and/or 'Database password' that will be used as the new user/password combination.
6. Click Save.

   You can now change the password in SQL Server.

## Enabling the integration with Windows 2003 Server or Windows 2008 Server

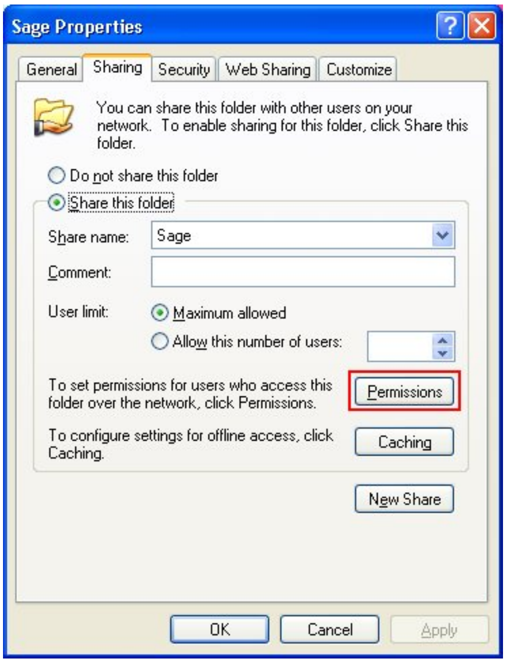
The integration may fail if Sage CRM does not have access to the Sage 200 Accounts server installation folders.

If this happens, the following error is displayed.


To allow access, you must change the access rights to the folder that holds the Sage 200 Accounts server information.

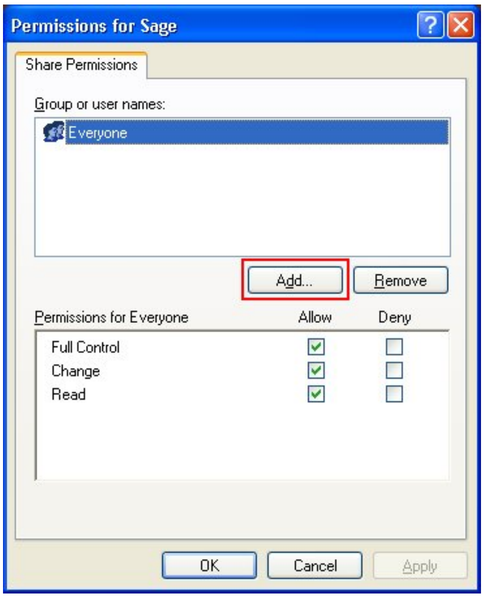
### Setting up access to the Sage 200 server folder

1. To close the message, click Continue. This allows you to retry the integration setup.
2. Locate the Sage 200 server folder.
   By default, the Sage 200 server is installed in a folder and location named, ‘C:\Sage’.
3. Right-click on the folder and click Sharing and Security from the pop-up menu. The Sage Properties screen appears.

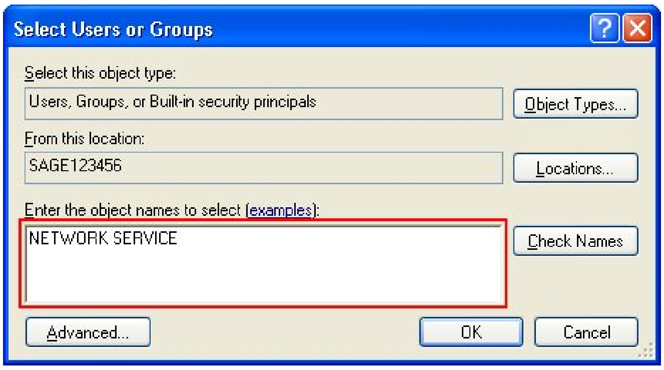



4. Click on the Sharing tab.
5. Ensure that the ‘Share this folder’ option is selected.

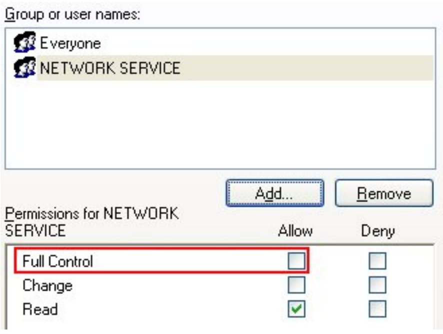
6. Click Permissions to see the permissions information.




7. Click the Add button. The Select Users or Groups screen appears:




8. In the ‘Enter the object names to select’ box, type **NETWORK SERVICE**.
9. Click OK. You are returned to the Permissions screen. The NETWORK SERVICE user is highlighted.
10. Check the ‘Allow’ checkbox for the Full Control option.




11. Click OK to accept the changes.

You are returned to the Permissions screen. You have now set up a user account. This account must now have the correct security permissions.

12. Click on the Security tab.
13. Click Add.
14. In the ‘Enter the object names to select’ box, type **NETWORK SERVICE**.
15. Click OK.
16. Check the ‘Allow’ checkbox for the Full Control option.
17. Click OK.

    The new user account now has full rights to the Sage 200 server folder.
18. Log into Sage 200 CRM again and click Save. The integration setup starts again.