Sage 200 CRM Integration Upgrade Guide

(for existing integrated installations)

Table of Contents

Introduction

About this guide

This is a guide for users who are upgrading from a previous version of Sage 200 and Sage 200 CRM. This applies to the following versions:

- Sage 200 Accounts version 3.5 / 4.1 / 5.0
- Sage 200 CRM version 5.8 / 6.0

Important Note: Before running the steps in this guide you should have upgraded your previous version of Sage 200 CRM. These steps are covered in the *Sage 200 CRM Upgrade Guide*.
You must have Sage 200 CRM v6.2a installed before continuing.

This guide covers the following steps, required to successfully upgrade the integration of Sage 200 CRM with your Sage 200 Accounts program.

The latest version of Sage CRM and Sage 200 does not use AIS to integrate the two applications. The upgrade process updates your system to use the new integration process.

In this guide you will;

- Stop the existing AIS Integration service
- Create and configure a new integration process.
- Run the Sage 200 CRM Integration process utility.

Required knowledge

To install or upgrade Sage 200 and Sage 200 CRM, you will need to have some 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
- Sage Integration Services Administrator
- Windows Services Administrator.

Pre-requisites

In order to migrate the existing integration details from the AIS based Sage 200 CRM integration, the following must be installed:

- Sage 200 Accounts 2009 - Server
- Sage 200 Accounts 2009 - Client
- Sage 200 CRM version 6.2 – Refer to the Upgrade CRM to 6.2 guide for instructions.
- Microsoft SQL Server 2000/2005
- Microsoft Internet Information Services (IIS) version 6.0 or above

Preparing to Upgrade

Backup your databases

Make sure that you have current restorable backups of both your Sage 200 accounts and Sage 200 CRM database.

Stop the existing integration processes

You must stop the existing Sage Integration Services processes that synchronise data between Sage 200 CRM and Sage 200 accounts. These are also updated as part of the upgrade process.

If you have left the Sage 200 Integration Services running while upgrading Sage 200 Accounts and Sage 200 CRM, the synchronisation processes will fail. An error message will be written in the log file. This is because the business objects and databases accessed by the integration have been upgraded.

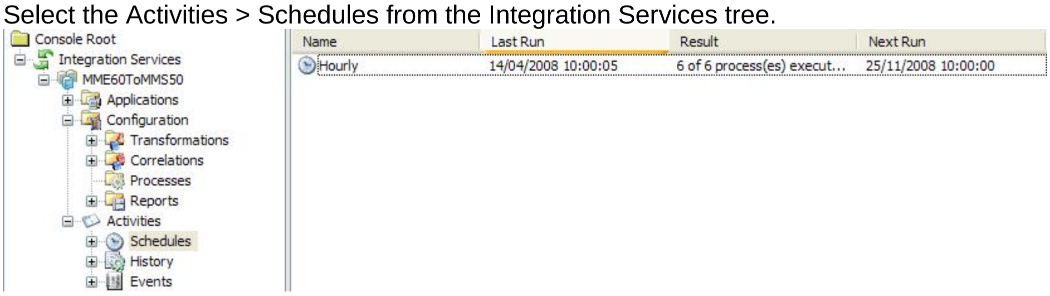
In order to stop the current integration processes, you must:

- Disable the current integration schedules.
- Disable the Sage Integration Service

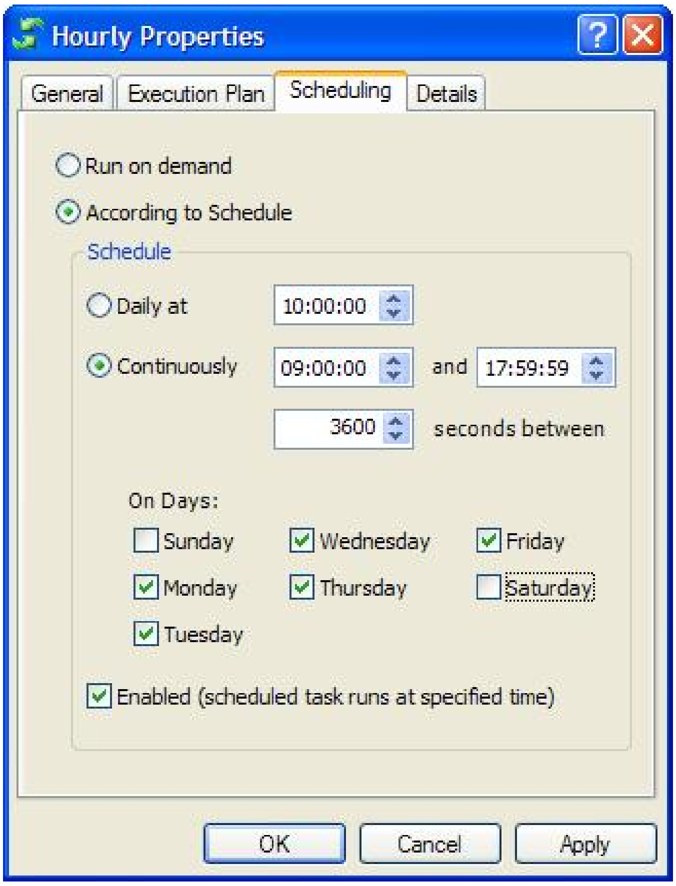
To disable the current integration schedules

1. On the server that runs the Sage Integration Services, right-click the Integration Services Manager icon in the system tray.
2. Select Integration Services Administrator from the pop-up menu.

3. Select the Activities > Schedules from the Integration Services tree.



4. Select the schedule that runs the Sage CRM to Sage 200 synchronisation.
5. Right-click the schedule name and select Properties from the pop-up menu.



6. Clear the ‘Enabled’ check box to stop the schedule.
7. Click ‘OK’ to continue.
8. Repeat for all other processes that synchronise Sage 200 and Sage 200 CRM data.

Next, you must stop the Sage Integration Services and make sure the Sage Integration Services are not set to automatically start in the Windows Services application.

To stop Sage Integration Services:

1. Open the Control Panel.
2. Select Administrative Tools > Services.
3. Right-click on ‘Integration Services’ and select ‘Properties’ from the pop up menu.
4. Select Disabled from the ‘Startup type:’ drop-down list.
5. To save these settings, select OK.
   Note: You must not stop any other Sage Integration Service processes, such as Sage 200 Web Time and Expenses, as this will prevent them being synchronised.

Create and configure the new integration

You must then configure a new integration to allow the creation of accounts for each customer and supplier. The required steps are explained briefly here. For more information, see your Sage 200 Integration Configuration Guide.

1. Set up the new integration:
    a. Open CRM and create a new integration.
    b. Make sure you specify name and URL of the Sage 200 web service (SageCRM.asmx).
    c. Enter the username and password details specified in the Sage 200 Administration tool.
    d. Enter the ERP company name specified in the Sage 200 Administration tool.

    You may have to wait while the details are set up by the system.
2. Log out of CRM.
3. Reset Internet Information Services (IIS). From the Start menu, select Run. Enter IISRESET in the Open box and click OK.
4. Log back into CRM.
5. Check that the 'Create New Company for New Account' option to No.
6. Click Save to confirm the changes.

Next you must re-start the integration service.

1. Start the CRM Integration Service.
2. Set the 'Startup Type' to Automatic.
3. Check you configuration settings. To do this, in CRM, select Integration > Change
    - Set the Integration Timeout Settings to180 seconds.
    - If you use territories, you must set it up now.
    - Ensure that you have set up the company URL correctly.
4. Click Save to accept any changes.
5. Synchronise the data for the first time by clicking 'Immediate Sync'.

Upgrade the existing Integration Data

This section explains how to upgrade existing Sage 200 4.1, Sage 200 5.0 and Sage 200 5.1 integrated data to Sage 200 2009.

Before you begin you must have:

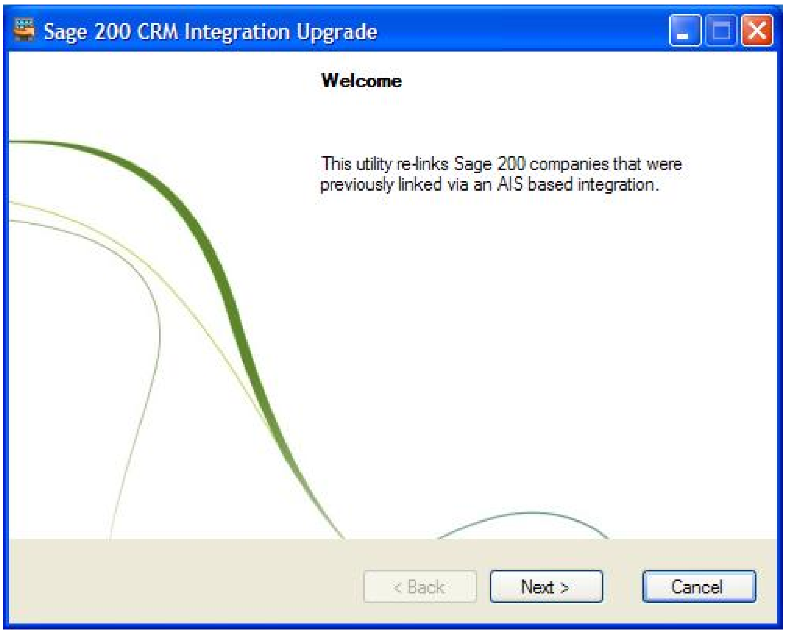
- Upgraded the Sage 200 Account Server installation to Sage 200 2009.
- Upgraded the Sage 200 CRM installation. This is explained in full in the Upgrading CRM to 6.2 guide.
- Configured the Integration service as explained in the previous section.
- Run the initial synchronisation to create an account for each customer and supplier.

Run the Sage 200 CRM Integration Upgrade utility

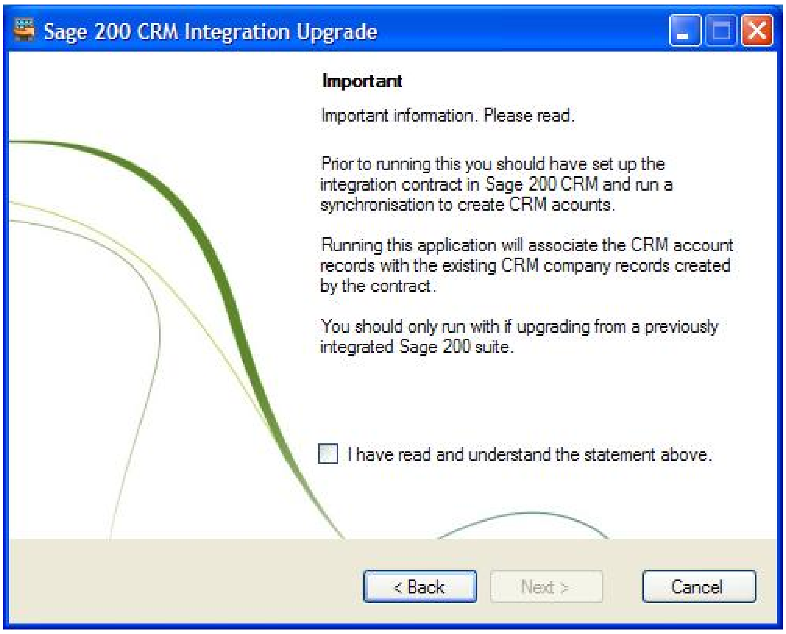
The integration migration utility links newly created CRM accounts to existing CRM companies. This is based on the existing links set up in the AIS based integration.

The utility can be found on your CD in the 'Webservices' folder.

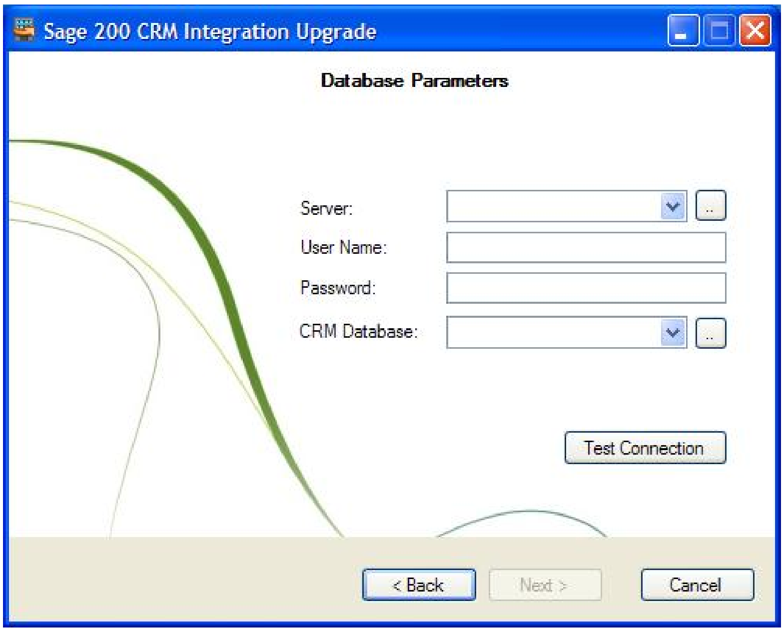
1. Open the Sage 200 CRM Integration Upgrade utility. This is the 'AIStoCRMContractMigration.exe' file. The Welcome screen appears.



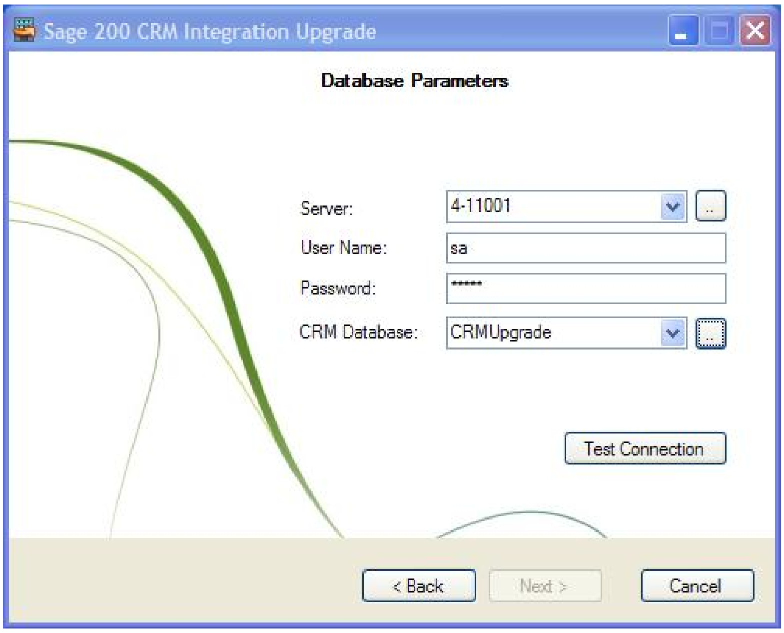
2. Click Next to continue.



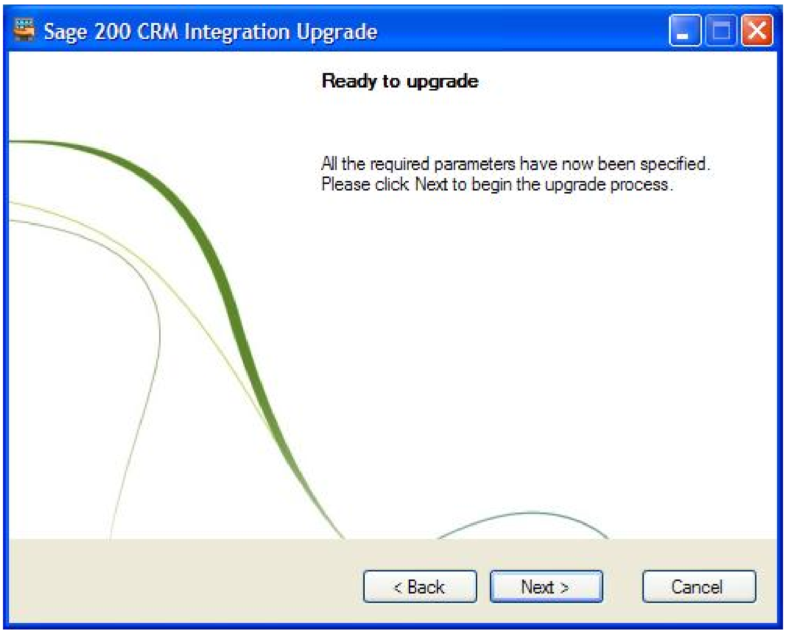
3. Select the tick box to confirm you have read and understood the Important Information message.
4. Click Next to continue.



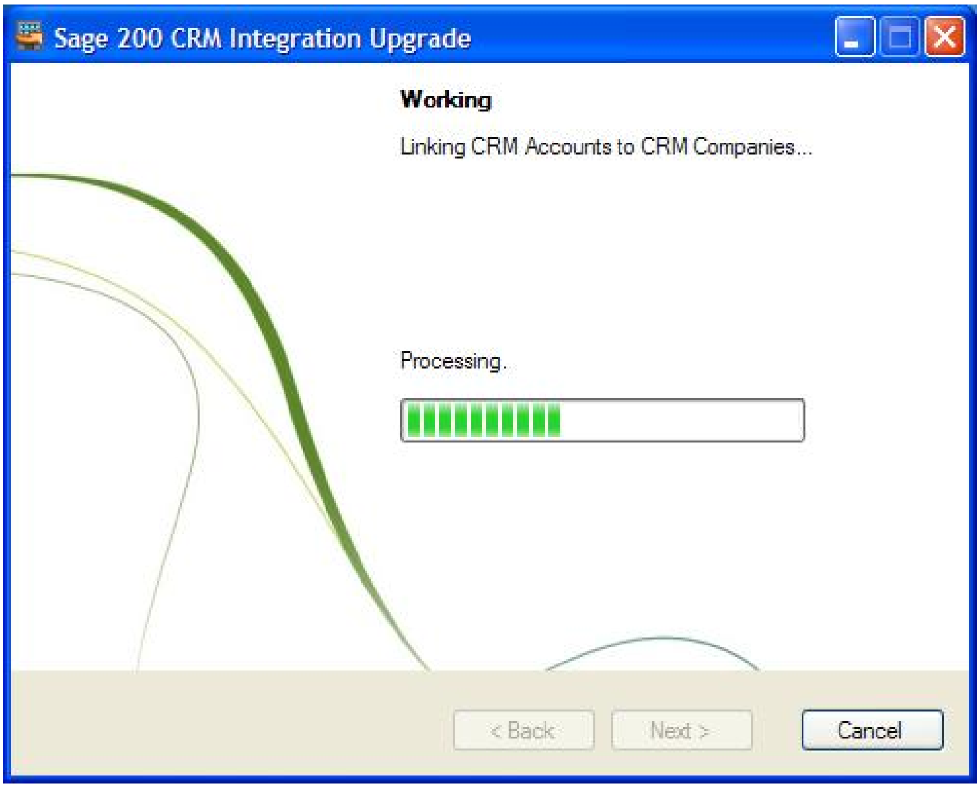
5. Enter the following information:
   - The name of your SQL server. Click the Browse button to see a list all servers that can be found on the network.
   - Enter an SQL username that has full access to the CRM database on the selected SQL server.
   - Enter the password for the username you have entered.
   - Enter the name of the CRM database that you want to upgrade the integration for. Click the browse button to search for the database.



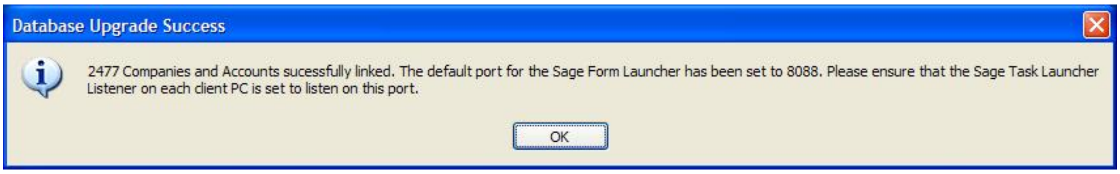
6. Click 'Test Connection' to test the connection to the database specified and check you can upgrade the database selected.
   Note: See the Troubleshooting section at the end of this guide for an explanation of any errors that may occur in the Test Connection process.
7. Click Next to continue. The 'Ready to upgrade' window appears.



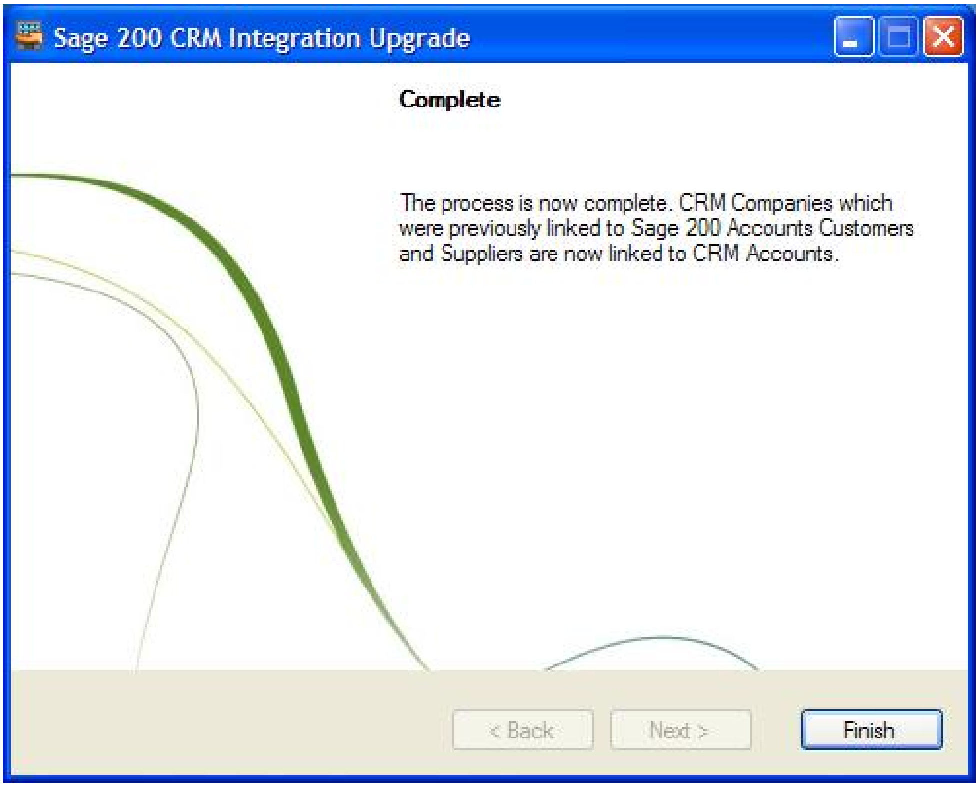
8. Click Next to begin upgrading your Sage 200 CRM Integration.



9. When the Integration upgrade is finished, the following message is displayed.



10. Click OK to continue.



11. The Sage 200 CRM Integration upgrade is now complete. Click Finish to close the window.

You can now continue to use Sage 200 CRM.

Troubleshooting

ISO currency warning

When you try to set up the integration you may get a warning about having currencies that are not ISO currency codes.

In this case you will need to change any currency symbols you are using to ISO currency codes.

1. Open Sage 200 CRM.
2. Select Administration > Data Management > Currency Configuration.
3. Check if your base currency is using an ISO currency code. If not, click Change.
4. Change the base currency symbol to –None—
5. Click Save.
6. Select Administration > Data Management > Currency.
7. Select the currency Description hyperlink for each currency in turn.
8. Change the currency symbol for each currency to the ISO currency code. For example, $ may become USD for US dollars or CAD for Canadian dollars.
9. Change the base currency back to the original value.

Database test connection messages

On testing the database connection you may receive one of the following messages. See below each message for an explanation of what this means and how you can resolve it.

Could not establish a connection

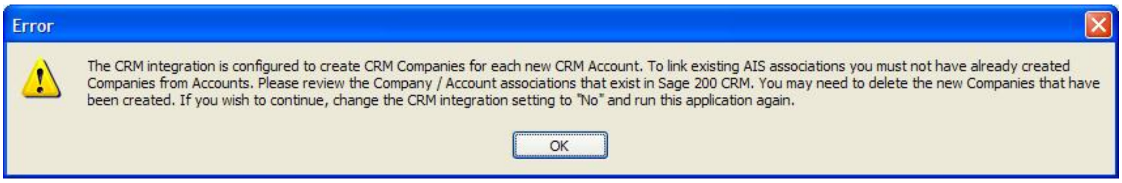
If you see this message, check the following:

- Check the server name is correct.
- Check the username is a SQL login with access to SQL on the named server.
- Check the password is correct for the user.
- Check the database exists on the named server and that the username has access to this database.

If these settings look correct, use SQL Management Studio to check your settings. When logging into the SQL server, use SQL Server authentication (not Windows authentication).

The server name is displayed on the log in screen, enter your SQL username and password. Next, check that you have access to the database you are trying to upgrade.

CRM integration is configured to create companies



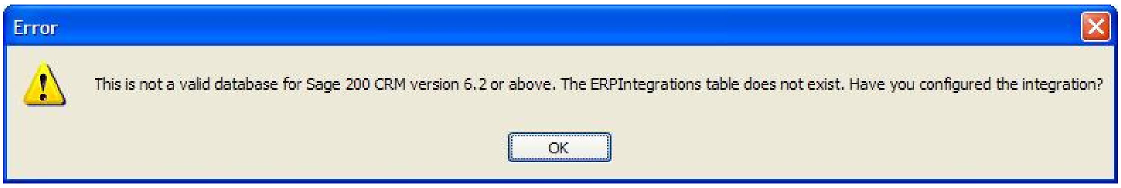
The CRM integration is configured to create companies on synchronisation.

If you are upgrading from a previously integrated installation, companies will already exist. When the integration runs the first time, you will create duplicate companies for each account.

To resolve this:

- Check the CRM integration settings to make sure you have synchronised the data.
- If you have duplicate companies:
  - Restore your CRM database.
  - Make sure you change the Integration service settings as explained in the xxxx section.
  - Run the upgrade utility again.
- If you do not have duplicate companies:
  - Open CRM and make sure the Create New Company option is set to No.
  - Run this upgrade again
  - Open CRM and change back to the original setting.

Not a valid database

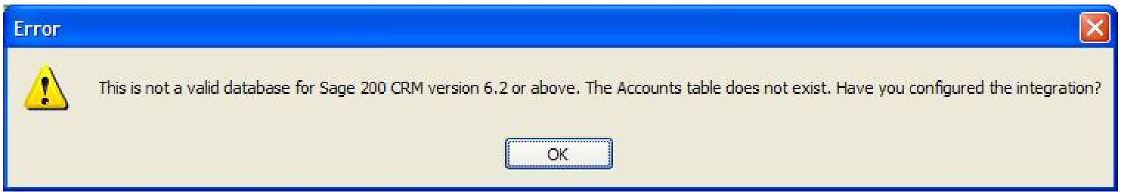


A table called ‘ERP integrations’ cannot be found in the CRM database.

This table is created as part of the installation of the integration service.

Check you have set up the integration in Sage 200 CRM and that the synchronisation has run successfully.

Not a valid database



A table called ‘Accounts’ cannot be found in the CRM database.

This table is created as part of the installation of the integration Service.

Check you have set up the integration in Sage 200 CRM and that the synchronisation has run successfully.

Contains no data from any previous integration

Integration details from Sage 200 version 3.5, 4.1, 5.0 or 5.1 could not be found in the CRM database.

This message appears if the database has not previously been integrated using the Sage 200 suite integration.

You can only upgrade previously integrated installations.

Upgrade and Migration Checklist

This is a checklist for upgrading an existing AIS based CRM integration.

- ☐ Upgrade Sage 200 Accounts to Sage 200 Accounts 2009.
- ☐ Upgrade Sage 200 CRM to version 6.2
- ☐ Backup your Sage 200 Accounts database
- ☐ Backup your Sage 200 CRM database
- ☐ Stop any Sage Integration Server processes that synchronise Sage 200 CRM and Sage 200 Accounts data.
- ☐ Stop Sage Integration Services.
- ☐ Set up a new integration.
- ☐ Configure the integration not to create companies for accounts.
- ☐ Run an initial synchronisation of the data.
- ☐ Run the CRM Integration Upgrade utility.