Sage 200 CRM Real Time Data View Guide

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Introduction

About this guide

This guide explains how to use the Sage 200 CRM Real Time Data Views.

These are available in:

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

System requirements

You must have the following installed and set up:

- Sage 200 Accounts 2009 – Server.
- Sage 200 Accounts 2009 – Client.
- Sage 200 CRM version 6.2.
- An Integration(s) between Sage 200 CRM and Sage 200 Accounts.

About Sage 200 CRM Real Time Data Views

What Are Real Time Data Views?

Real Time Data Views allow you to view real-time information from a remote application, from within Sage 200 CRM. In this case, the remote application is Sage 200 Accounts.

Real Time Data View Functionality

The Real Time Data Views are imported into Sage 200 CRM as ‘entities’ in their own right. You can customise these ‘entities’. This adds or removes information belonging to the data view.

For some of the Real Time Data Views, you can open further information by clicking the information displayed.

You cannot add a field from Sage 200 Accounts to an existing Real Time Data View. To add a Sage 200 field to a data view, you must create a new ‘view’ and then import the view into Sage 200 CRM.

What Real Time Data Views are available?

The default Real Time Data Views available within Sage 200 CRM are related to an ‘Account entity’. The information you see from within Sage 200 CRM, will relate to a customer or supplier account in Sage 200 Accounts.

Setting up access rights for the data views

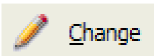
By default, you do not have access to the Real Time Data Views. Each Sage 200 CRM user account must be granted access to the data views in the Administration area of Sage 200 CRM.

If you do not have access to the Administration area of Sage 200 CRM, please see your System Administrator.

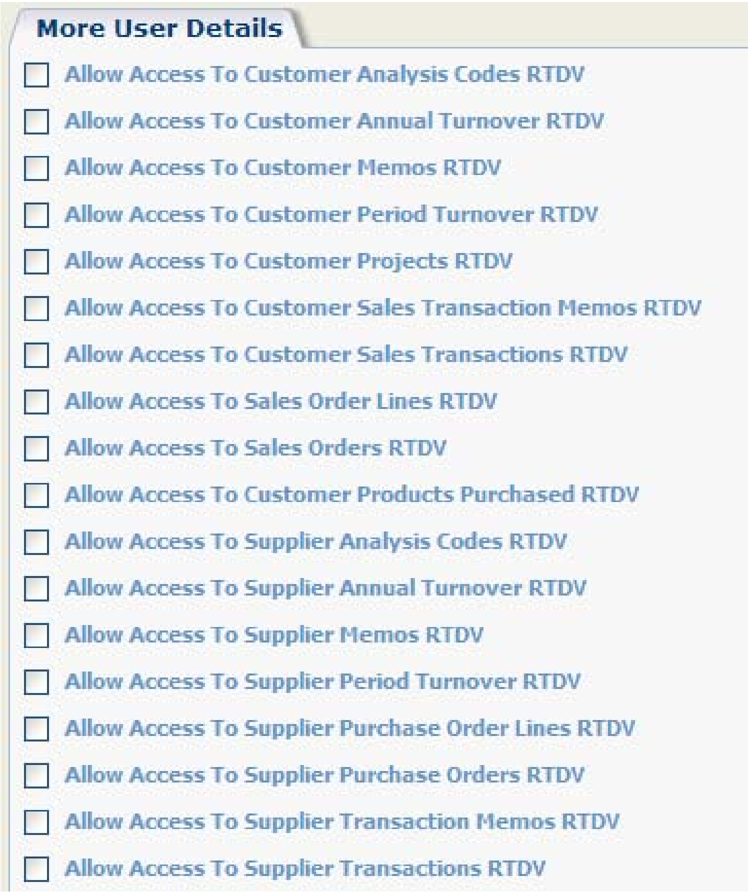
Note: You must also grant your Sage 200 CRM Administrator accounts access to the real Time Data Views.

To grant access to the Real Time Data Views

1. Open Sage 200 CRM.
2. Click the Administration button. The Administration menu appears.
3. Select Users. The users menu appears.
4. Select 

.
5. Click 

. The User Details window appears with the fields available to change.
6. Scroll down to the More User Details area. A selection of available ‘data views’ are listed.



7. Select the data views that you want to access.
8. Click Save to confirm the changes.

   Note: You must log off and log back on for the changes to take effect.

Opening the Real Time Data Views in Sage 200 CRM

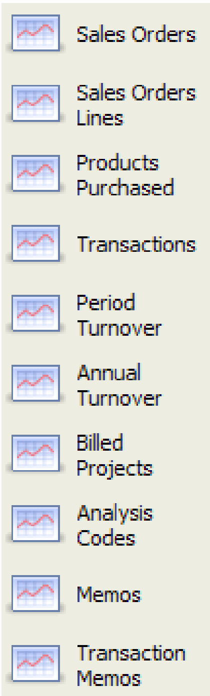
To view the real time data for an account:

1. View an account in Sage 200 CRM.

2. Select the 

tab. The Sage 200 Accounts Data screen appears.

   A list of Real Time Data Views is shown on the right hand side of the screen:



   Note: Any unlinked accounts will not be able to access the Real Time Data Views. The following message will appear:

3. Select the appropriate view.

Real Time Data View Details

This section explains the information displayed in each Real Time Data View available from Sage 200 Accounts. All Real Time Data Views display the details of the Sage 200 CRM account currently selected.

Sales / Purchase Orders

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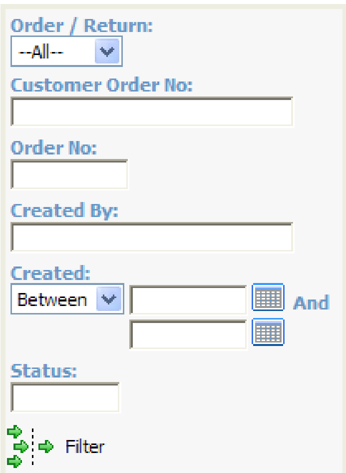
SalesOrdersFilterBox

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
0000000339	Sales Order	11/08/2008	Live	29/08/2008	29/08/2008	90807	L	19,609.44000
0000000345	Sales Order	29/10/2008	Live	29/10/2008	29/10/2008		2	11.74000

The Sales / Purchase Orders Real Time Data View displays a list of sales/purchase orders and returns held within Sage 200 Accounts.

Filters
Use filters to display or hide information.

The following filters are available:



- Order / Return: View orders, returns or both.
- Customer Order No: Search using the customer order number as specified on the sales/purchase order.
- Order No: Search using the sales/purchase order number (document number)..
- Created By: See all orders created by a certain Sage 200 user account.
- Created: See orders or returns created between certain dates, or relative to the current date (e.g. the next week, the previous month)
- Status: View orders and returns, based on the status of the transaction. These are Active, Completed, Inactive, Disputed or Cancelled.

Sales / Purchase Order Lines

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CustOrdersLinesFilterBox

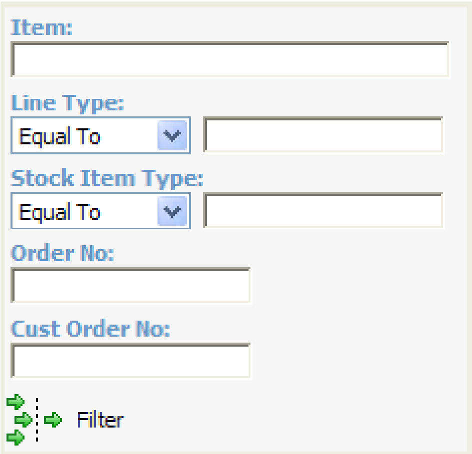
Item	Description	Despatched / Received Quantity	Unit Price	Disc %	Tax Code	Net	Order No
ACS/BLENDER	Professional Blender 5 Speed	10.00000	256.50000	0.00000	1	2,565.00000	0000000268
ACS/BLENDER	Professional Blender 5 Speed	0.00000	256.50000	0.00000	1	256.50000	0000000015
ACS/ESPRESSO	Espresso Machine	10.00000	299.60000	0.00000	1	2,996.00000	0000000268
ACS/FILTER-COFFEE	Filter Coffee Maker	10.00000	169.20000	0.00000	1	1,692.00000	0000000268
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00000	169.20000	0.00000	1	846.00000	0000000281
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00000	169.20000	0.00000	1	846.00000	0000000309
ACS/MEAT-SLICER	Commercial Meat Slicer	5.00000	325.50000	0.00000	1	1,627.50000	0000000268
ACS/MIXER	Professional Mixer 3 Speed	10.00000	289.50000	0.00000	1	2,895.00000	0000000268
ACS/MIXER	Professional Mixer 3 Speed	5.00000	120.00000	0.00000	1	600.00000	0000000281
ACS/MIXER	Professional Mixer 3 Speed	5.00000	120.00000	0.00000	1	600.00000	0000000309
ACS/TOASTER	Polished Steel 4 Slice Toaster	5.00000	209.00000	0.00000	1	1,045.00000	0000000309
ACS/TOASTER	Polished Steel 4 Slice Toaster	20.00000	209.00000	0.00000	1	4,180.00000	0000000268

The Sales/Purchase Orders Lines Real Time Data View displays a list of item lines for sales and purchase orders in Sage 200 Accounts.

Filters

Use filters to display or hide information.

The following filters are available:



- Item Code: Search using all or part of the stock item code
- Line Type: Search a using the order/return line type. Choose from Standard Item, Free Text Item, Additional Charge item or Comment Line.
- Stock Item Type: Search using the stock item type, as set from the product group. Choose from stock, service/labour or miscellaneous type.
- Order No: Search the sales order number (document number).
- Customer Order No: Search using the customer order number as specified on the sales/purchase order.

Products Purchased

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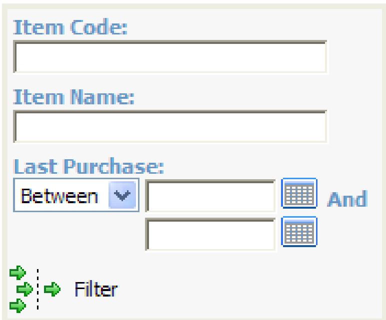
ProductsPurchasedFilterBox

Item Code	Item Name	Quantity	Unit Issue Price	Value	Last Purchase
ACS/BLENDER	Professional Blender 5 Speed	10.00000	256.50000	2,565.00000	05/01/2008
ACS/ESPRESSO	Espresso Machine	10.00000	299.60000	2,996.00000	05/01/2008
ACS/FILTER-COFFEE	Filter Coffee Maker	10.00000	169.20000	1,692.00000	05/01/2008
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00000	169.20000	846.00000	06/02/2008
ACS/FILTER-COFFEE	Filter Coffee Maker	5.00000	169.20000	846.00000	06/02/2008
ACS/MEAT-SLICER	Commercial Meat Slicer	5.00000	325.50000	1,627.50000	05/01/2008
ACS/MIXER	Professional Mixer 3 Speed	10.00000	289.50000	2,895.00000	05/01/2008
ACS/MIXER	Professional Mixer 3 Speed	5.00000	120.00000	600.00000	06/02/2008
ACS/MIXER	Professional Mixer 3 Speed	5.00000	120.00000	600.00000	06/02/2008
ACS/TOASTER	Polished Steel 4 Slice Toaster	5.00000	209.00000	1,045.00000	06/02/2008
ACS/TOASTER	Polished Steel 4 Slice Toaster	20.00000	209.00000	4,180.00000	05/01/2008
BS/ARIZONA/BOM	Arizona Kitchen	1.00000	2,950.00000	2,950.00000	11/07/2008

The Products Purchased Real Time Data View displays a list of products that have been purchased by the selected customer account.

Filters
Use filters to display or hide information.

The following filters are available:



- Item Code: Search using all or part of the stock item code.
- Item Name: Search using all or part of the stock item name.
- Last Purchase: Search for stock items purchased between a date range, or a time period relative to the current date, e.g. the next week, the previous month.

Transactions

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Transaction Date	Type	Source	Reference	Posted Date	Goods Value In Account Currency	Tax Value	Discount Percent	Discount Value	Days Discount Valid	Due Date	Allocated Value
01/01/2007	Opening Balance Invoice	Not Specified	Open Bal	01/01/2007	12,678.90000	0.00000	0.00000	0.00000	0	01/01/2007	12,678.90000
01/01/2007	Invoice	Sales Order Processing	0000000000	01/01/2007	831.90000	123.90000	0.00000	0.00000	0	31/01/2007	831.90000
01/01/2007	Invoice	Sales Order Processing	0000000001	01/01/2007	2,087.39000	310.89000	0.00000	0.00000	0	31/01/2007	2,087.39000
02/01/2007	Invoice	Sales Order Processing	0000000005	02/01/2007	1,106.94000	164.86000	0.00000	0.00000	0	01/02/2007	1,106.94000
03/01/2007	PurchasePaymentSalesReceipt	Cash Book	00000501	03/01/2007	-5,567.89000	0.00000	0.00000	0.00000	0	03/01/2007	-5,567.89000
04/01/2007	Invoice	Sales Order Processing	0000000015	04/01/2007	1,386.50000	206.50000	0.00000	0.00000	0	03/02/2007	1,386.50000
16/01/2007	Invoice	Sales Order Processing	0000000027	16/01/2007	1,263.13000	188.13000	0.00000	0.00000	0	15/02/2007	1,263.13000

This view displays a list of sales or purchase ledger transactions for the selected account.

Filters
You can choose to show outstanding transactions only, or all transactions

This view displays information from the Customer or Supplier Transaction Enquiry screen within Sage 200 Accounts.

Period Turnover

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Period Reference	Start Date	End Date	Invoices	Credit Notes	Receipts / Payments
1	01/01/2008	31/01/2008	18,923.30000	0.00000	0.00000
2	01/02/2008	28/02/2008	1,446.00000	0.00000	22,218.32000
3	01/03/2008	31/03/2008	0.00000	0.00000	1,697.78000
4	01/04/2008	30/04/2008	0.00000	0.00000	0.00000
5	01/05/2008	31/05/2008	3,588.06000	0.00000	0.00000
6	01/06/2008	30/06/2008	0.00000	0.00000	2,000.00000
7	01/07/2008	31/07/2008	0.00000	0.00000	1,000.00000
8	01/08/2008	31/08/2008	19,861.80000	0.00000	15,000.00000
9	01/09/2008	30/09/2008	0.00000	0.00000	0.00000
10	01/10/2008	31/10/2008	0.00000	0.00000	0.00000
11	01/11/2008	30/11/2008	0.00000	0.00000	0.00000
12	01/12/2008	31/12/2008	0.00000	0.00000	0.00000

The Period Turnover Real Time Data View displays the list of periods for the current financial year, for the selected account.

This view displays information for the current year. This information is taken from the Turnover tab on the Customer or Supplier Account Enquiry screen in Sage 200 Accounts.

Annual Turnover

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Financial Year Start Date	Year	Invoices	Credit Notes	Receipts / Payments
01/01/2003	5 Years Ago	0.00000	0.00000	0.00000
01/01/2004	4 Years Ago	0.00000	0.00000	0.00000
01/01/2005	3 Years Ago	0.00000	0.00000	0.00000
01/01/2006	2 Years Ago	0.00000	0.00000	0.00000
01/01/2007	Last Year	77,934.36000	0.00000	89,333.66000
01/01/2008	This Year	43,819.16000	0.00000	41,916.10000
01/01/2009	Next Year	0.00000	0.00000	0.00000

The Annual Turnover Real Time Data View displays the financial year turnover figures for the selected account.

This information is taken from the Turnover tab of the Customer or Supplier Account Enquiry screen in Sage 200 Accounts..

Billed Projects

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Project Code	Project Title	Project Status	Description	Quantity Quoted	Price Quoted	Quantity Billed	Total Value Billed
0000000008	Kitchen Install Project	Open	Initial Building Works	10.00000	10,000.00000	2.00000	782.55000
0000000008	Kitchen Install Project	Open	Intermediate Construction	10.00000	10,000.00000	100.00000	37,012.50000

The Projects Real Time Data View displays a list of projects where a bill has been entered for the selected customer account.

This Real Time Data View is only available for Customer accounts.

The following information is displayed:

- Project Code
- Project Title
- Project Status
- Description: The description of the bill created for this project.
- Quantity Quoted: The quantity as specified within the Quotation Information section of the Customer Billing Details.
- Price Quoted: The price as specified within the Quotation Information section of the Customer Billing Details.
- Quantity Billed: The quantity as specified on the bill.
- Total Value Billed: The total gross value of the bill.

Customer / Supplier Analysis Codes

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Header	Value
Acct Mgr	JPR Jack Powers
Region	EUR Europe

The Analysis Codes Real Time Data View displays a list of analysis codes for the selected account.

This information is taken from the Analysis Code tab on the Customer or Supplier Account Enquiry screen in Sage 200 Accounts.

Customer / Supplier Memos

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Memo Text ▲	Memo Created By	Memo Created	Active
Customer letter sent regarding Christmas opening times	2	Today	True
Remember to chase for outstanding invoice	2	03/11/2008	True

The Memos Real Time Data View displays a list of memos for the selected customer or supplier account.

This information is taken from the Memos tab of the Customer or Supplier Account Enquiry screen in Sage 200 Accounts.

Customer / Supplier Transaction Memos

2 RecordsFound, Page 1 of 1

Memo Text	Created By	Memo Created	Active
Charge for white goods	2	09/10/2008	True
Invoice for initial building installation work done	2	Today	True

The Transaction Memos Real Time Data View displays a list of transaction-level memos for the selected account.

This information is taken from the Memos details on the Transaction Detail section of the Customer or Supplier Transaction Enquiry screen in Sage 200 Accounts.