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## Lyons Presentations Limited

### Microsoft CRM and Sage Line 50 Integration

Lyons Presentations Group Limited are a major supplier of promotional goods selling over £6 million worth of goods, sourced from all over the world, via their direct sales force and strongly branded websites such as [www.2bsourced.co.uk](http://www.2bsourced.co.uk) and [www.rocketproducts.co.uk](http://www.rocketproducts.co.uk).

Redware were brought in by Aires Technologies Limited, who installed and customised Microsoft CRM, to assist with integration to the **Sage Line 50 accounting system**. This involved uploading over 10,000 **products**, each with 3 price breaks, into the CRM product database to allow a team of 40 salespeople to create **quotations** using Microsoft CRM.

Aires implemented a complex workflow and quotation system whilst we assisted in building the ability to create a job bag for controlling the **manufacturing** process and the creation of **purchase orders** within CRM. The relationship between sales orders and purchase orders allows Lyons to produce **job costing** reports to calculate profitability for each job.

**Sales Orders** and **Purchase Orders** from CRM are automatically loaded into Sage Line 50 by the accounting department using the **SYNC Uploader for CRM** software from redware so that no re-typing is required. This has significantly improved the efficiency of the accounting department and eliminated inaccuracies in the data entry process.

Lyons has also purchased the **SYNC Accounting** software from redware which makes the complete sales history from the accounting database available to sales staff using CRM. Credit limit and account balances are also updated against the account in CRM to allow salespeople to view credit limits CRM as part of the workflow when they create a quotation.

Lyons are successfully using Microsoft CRM to quote for all their business produced by the sales force with sales orders automatically entered into Sage Line 50 without re-typing. CRM was customised to allow purchase orders against each sales order item and to control the manufacturing process. The production department raises the corresponding purchase orders in CRM which are loaded into Sage Line 50 again without re-typing.

**2bsourced.co.uk**  
The **Promotional** Product People

Please email [sync@redware.com](mailto:sync@redware.com) or call Stamati Crook on **0845 3010 444** with your consultancy requirements for Microsoft CRM. We also publish the Microsoft CRM 4.0 User Handbook and software add-ons for CRM including accounting integration, mobile text messaging, telephony, and company credit checking functionality.



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