

Full two-way upload for MS CRM 3.0 and Sage



The **SYNC Sage Connector for CRM** provides two-way data integration between **Microsoft CRM 3.0** and the **Sage Line 50** sales ledger and complements our **SYNC for CRM** software which publishes the sales ledger to CRM users. We also have a version available for **Sage MMS** users on a consultancy basis.

The connector is designed to satisfy businesses that use the full range of sales processing functionality available within CRM and do not want to have to enter data once more into the accounts packages. New customers can be entered either in CRM or in the accounting database and automatically synchronised between the databases.

Existing customer accounts within CRM are given the existing accounting reference for new invoices to be uploaded automatically from the Invoice entity in CRM. New customers need to have the **accountnumber** field in CRM set with a unique sales reference before uploading. These customers are then created automatically within the accounting database as invoices are uploaded.

The products database is also validated and new products added into the accounting database where necessary. Some of our customers add new products into the accounting database before uploading the invoice so that they can set up the nominal ledger and VAT settings specifically for each product before uploading the invoice items.

Our upload utility also transfers new customers from Sage into CRM creating both account and contact entities. The address, credit limit, account balance, and credit on hold fields are also updated automatically from Sage if required. Our companion **SYNC for CRM** software makes all the customer and sales invoice and credit note documents available to CRM users in real time.

The **SYNC Sage Connector for CRM** retails at £995 plus VAT for a 10 user CRM installation with additional 10 user license packs available for £495. We recommend that you purchase annual software updates at 20% of the software price and we can install the software over a VPN for a fee of £100. SYNC for CRM is available separately for a similar price.

Please email or call us on **0845 3010 444** with your requirements and we can often integrate your Sage accounting system with CRM within 24 hours.

