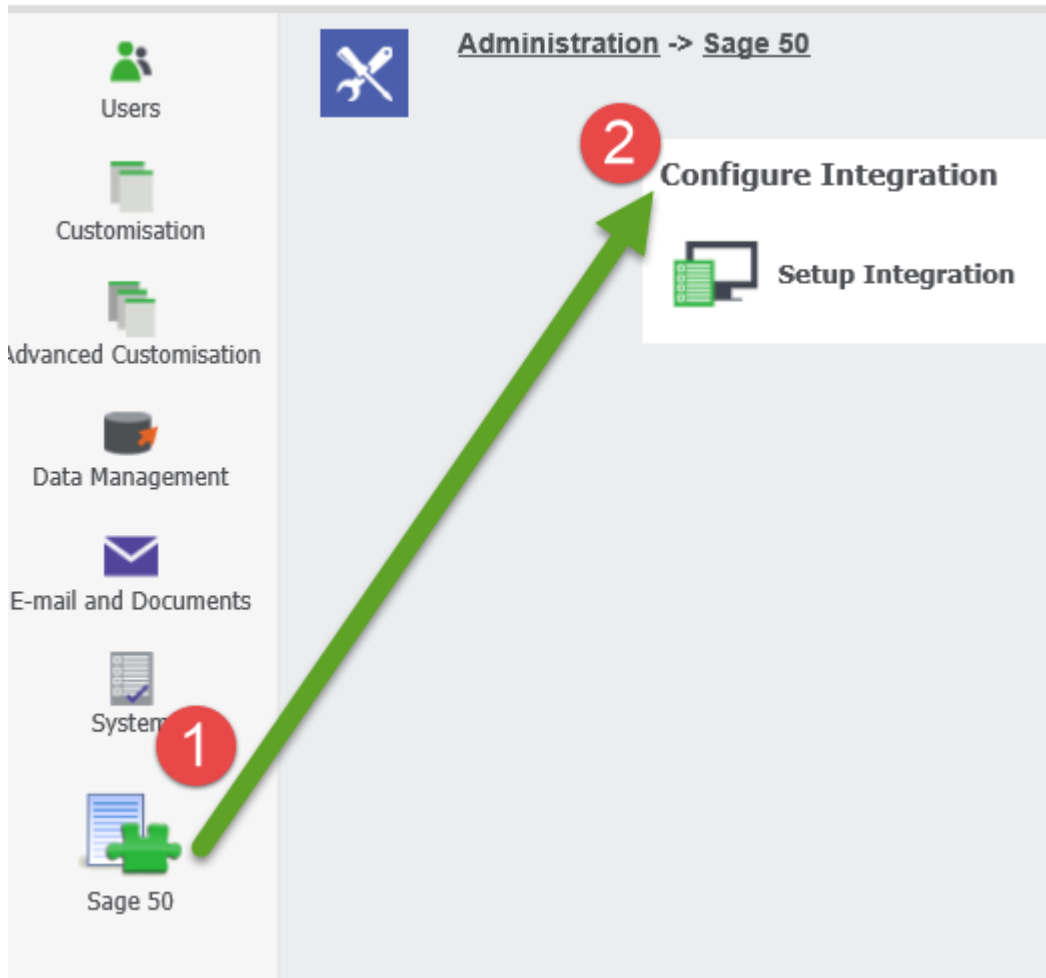


SAGE 50 INTEGRATION FOR SAGE CRM

Sage 50 Integration: Administration section

- 1) Allowing the Admin to access and Configure the Sage 50 Integration
- 2) Setup the Integration



- 3) Listing of all the Sage 50 Integration

The screenshot shows the Sage CRM Administration interface with the breadcrumb path 'Administration -> Sage 50 -> Setup Integration'. A red circle '3' is placed over the table title 'Sage 50 Integration Details'. The table has the following data:

Sage 50 Product	Edition	Company Name	Data Source Name	Status
Sage 50 Premium	US Edition	Stone Arbor Landscaping	SAL	Active

On the right side of the table, there are two buttons: 'Add' and 'Go to Sage 50'.

SAGE 50 INTEGRATION FOR SAGE CRM

4) Editing the Sage 50 Integration

Administration -> Sage 50 -> Setup Integration

Edit Sage 50 Integration Details 4

Sage 50 Product:
Sage 50 Premium

Edition:
US Edition

Company Name:
Stone Arbor Landscaping

Data Source Name:
SAL

User Name:
Peachtree

Password:
Peach123

Status:
Active

Save
Delete
Cancel

Sage 50 Integration: Company/ Customer section

- 1) Listing of Sage 50 Orders for the linked Sage 50 Customer
- 2) Button to Link Sage 50 Customer
- 3) Button to remove the link with Sage 50 Customer

Sage CRM

My CRM - Team CRM - Reports - Marketing

Summary Quick Look Dashboard Sage 50 Orders Key Attributes Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Relationships

Company: Gatecom Inc. 1
Phone: 1 206 343-9577
E-mail: info.Gatecominc@demossagecrm.com

This is the Company Summary screen. If you want to change any of the details on this screen, select the Change action button on the right-hand side of the screen. You can change some Company details from the Summary tab in edit mode, but you need to select the Address, Phone, E-mail, or Person tab to change this type of company information.

Company

Company Name: Gatecom Inc.	Type: Prospect	SLA:	Website: http://www.gatecom.com
Status: Active	Segment: Computers - Hardware	Employees: 101 - 200	Revenue: \$5M - \$10M
Source: Advertisement	Territory: US West	Account Manager: Brian Little	Mail Restriction: No

Opt out of E-marketing communications:

Address

1 = Tab that displays all Sage 50 Order
2 = Button used to link the Sage 50 Company (Customer)
3 = Button used to remove the link between CRM > Sage 50 Company (Customer)

Street: 400 Pine Street #300	City: Seattle	County: WA	Business: 1 206 343-9577
Post Code: 98101	Country: United States	Fax: 1 206 343-9580	Business: info.Gatecominc@demossagecrm.com
		Sales: sales.Gatecominc@demossagecrm.com	

Change
Delete
Add to Group
Add to Contacts
Summary Report
2 Link Sage 50 Company
3 De-Link Sage 50 Company
Help