

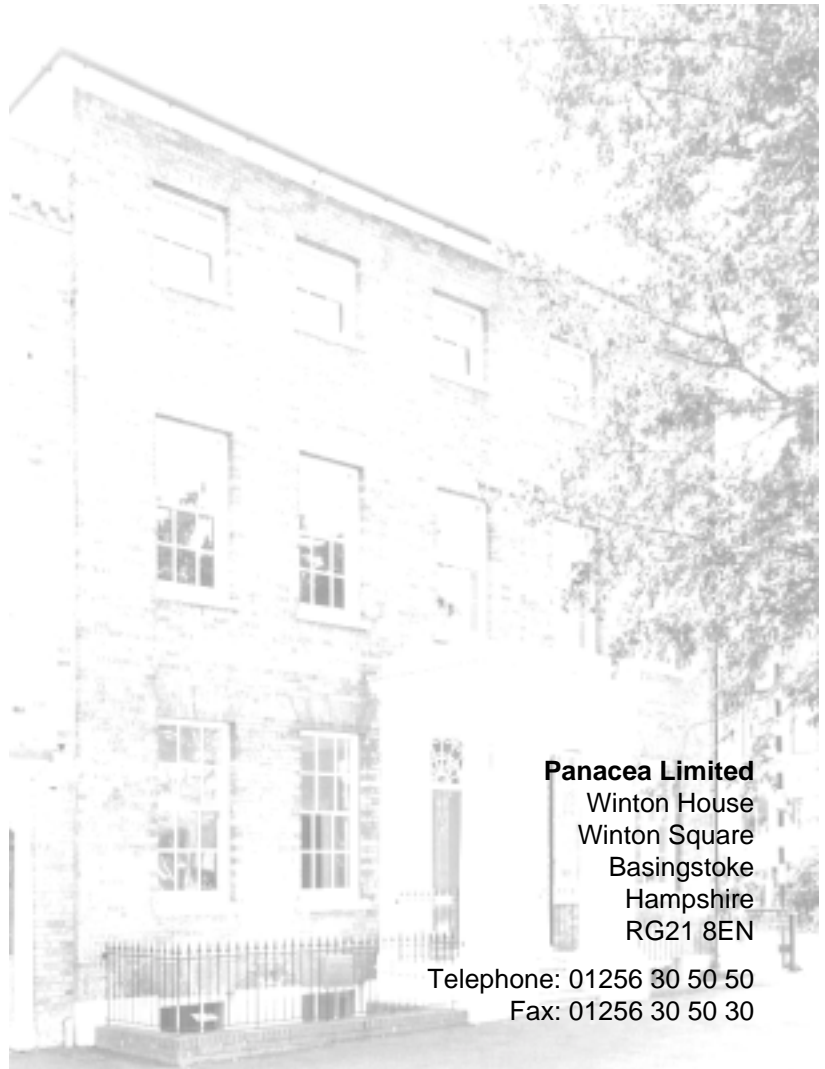


www.panacea.co.uk



## **Panacea Software Technology**

### ***SLX2SAGE Sage Enterprise to SalesLogix Integration Interface White Paper***



**Panacea Limited**  
Winton House  
Winton Square  
Basingstoke  
Hampshire  
RG21 8EN

Telephone: 01256 30 50 50  
Fax: 01256 30 50 30



**Table of Contents**

- 1. Introduction .....3**
  - 1.1 Purpose ..... 3
  
- 2. SLX2SAGE - The Panacea Solution.....4**
  - 2.1 Supported Sales Logix Modes of Operation..... 4
  - 2.2 Supported Sage Modes of Operation ..... 4
  
- 3. The Technical Solution .....5**

# 1. Introduction

An effectively integrated Customer Relationship Management (CRM) architecture is greater than the sum of its components. The system is only of value when enhanced with functionality and data from the back office, such as Enterprise Resource Planning (ERP) systems. An integrated ERP / CRM architecture needs to function as a single, coordinated tool for satisfying the customer's needs, fulfilling their expectations and maximising opportunity.

Integration is a major challenge for most businesses today, yet it's one of the most important aspects of a CRM implementation. Data stored in ERP systems can be used to boost customer loyalty and improve customer service significantly. Information needs to be dependable, consistent and propagated in real time across all channels. Only when this level of integration exists can a truly consistent customer experience be achieved.

## 1.1 Purpose

- Provide for faster and more informed decisions
- Empower users to work more efficiently
- Improve responsiveness to customer needs
- Share information across the enterprise
- Reduce data redundancy and inaccuracy
- Reduce duplication of data entry

ERP / CRM integration should be flexible enough to support a variety of architectural options to address specific customer needs. Furthermore, it should not require changes to the existing infrastructure and should minimise installation of additional software on the systems that need to be connected. Panacea's solution has been designed to embody all of these key objectives.

An integration solution is only as valuable as the systems it binds together; Panacea has chosen the leading mid-market CRM provider, SalesLogix. Our SLX2SAGE integration solution has been developed to provide 'out-of-the-box' links to Sage's Enterprise ERP system, but the unique technology behind the scenes gives it the flexibility to integrate with any ERP system available today.

## 2. SLX2SAGE - The Panacea Solution

We offer a comprehensive ERP / CRM integration through a solution which is based upon proven business practices coupled with innovative technology. From within SalesLogix it is possible to:

- View real time key financial information; including YTD spend, credit status and limit and aged days. Provides enhanced visibility of finance information, improving customer profiling and credit control.
- View summary and detailed order information; including status, value and delivery dates.
- View price list information. Ensures your customer receives the appropriate price and gives greater control over margin.
- Initiate the creation of Sage Enterprise Orders. Automates the creation of the order and advances it to stage of product/service selection.
- Initiate the creation of new customers in Sage Enterprise. Automates the conversion of a suspect or prospect to a customer on credit hold ready for approval.

SalesLogix gains full control over the Sage Enterprise screens, passing parameters to those screens and automating the processes managed by the ERP system. Thus a button in SalesLogix provides 'one-click' ordering in a completely seamless fashion allowing users to benefit from the strengths of both systems.

The information displayed in pre-defined SalesLogix tabs and business rules that exist in the background can be tailored to meet individual requirements.

It is also possible to provide for bespoke data requirements, using the integration solution, such as complex calculated data that does not exist as discrete data within Sage Enterprise.

### 2.1 Supported Sales Logix Modes of Operation

SLX2SAGE has been designed to operate in many different environments. Full support for the SalesLogix Synchronisation engine has been included to support the use of disconnected clients. SLX2SAGE can operate in:

- Standard client/server mode
- Disconnected client/server mode
- Citrix and Terminal Services thin client mode.

### 2.2 Supported Sage Modes of Operation

SLX2SAGE comes in three different versions to offer flexibility for the Sage environment. The variations are split into two main modes:

- Standard Ordering
- Telesales Ordering

- The Telesales environment supports two modes of customer creation:
- Standard Sales Ledger and Telesales customer creation
- Quick Customer account creation

These options allow the sales person to create new contacts and then at the point of winning their first order they are then able to create the new account within the Sage system with the minimum of effort.

### **3. The Technical Solution**

SLX2SAGE uses the built in elements of both systems in order to produce an effective and efficient solution. The building blocks for the module are

- Sage OLE Automation
- Sage FCE's (Form Control Extensions)
- Sales Logix API
- Sales Logix Scripting
- Sales Logix Bundles

The integration of these technologies with Microsoft Visual Basic components produces a solution that works with the applications to ensure a solid platform for integration.

The SLX2SAGE module offers seven main areas of functionality.

#### **3.1 View Customer Orders**

The module will retrieve on demand a list of the most recent customer orders. These are displayed in a grid with the a ability to drill down and view the details of the order. If the customer does not exist within the Sage Sales Ledger then the system will notify the user.

**Accounts**

Account:   
 Division: HQ  
 Address: 5400 Bayfront Plaza  
 City: Santa Clara, CA  
 Postal: 95052-8145 County: USA

Main: (408) 326-5000  
 Fax: (408) 326-5001  
 Toll Free:   
 Misc.:   
 Web URL: www.3com.com  
 Region:

CS3 Acc No: C001

Name: Laporte cash sale report  
 Address:   
 Postcode:   
 Telephone:

Type: Vendor  
 Status: Active  
 Owner: Everyone  
 Acct Mgr: Administrator

Notes/History | Contacts | Activities | Literature Requests | Attachments | Opportunities | Associations | Summary | More Tabs... | Net Profile | Orders | P

Data from Sage CS3

Order No	Date Entered	Date Requested	Date Despatched	Status	Hold	Total
200512	04/04/2002	04/04/2002		4		£130.50
005501	09/08/2001	09/08/2001	09/08/2001	8		£3,990.00
DN009500	09/08/2001	09/08/2001	09/08/2001	8		£3,990.00
DN005257	27/06/2001	27/06/2001	27/06/2001	8		£594.00
DN004408	19/03/2001	19/03/2001	19/03/2001	8		£118.02
DN004410	19/03/2001	19/03/2001	19/03/2001	8		£170.40
DN004250	06/03/2001	06/03/2001	28/02/2001	8		£487.29

Fig. 1. Customer Orders

Double clicking on an order entry will open another grid displaying the selected orders details.

Notes/History | Contacts | Activities | Literature Requests | Attachments | Opportunities | Associations | Summary | More Tabs... | Net Profile | Orders | Price Lists

Data from Sage CS3

Order No	Date Entered	Date Requested	Date Despatched	Status	Hold	Total
200512	04/04/2002	04/04/2002		4		£130.50
005501	09/08/2001	09/08/2001	09/08/2001	8		£3,990.00
DN009500	09/08/2001	09/08/2001	09/08/2001	8		£3,990.00
DN005257	27/06/2001	27/06/2001	27/06/2001	8		£594.00
DN004408	19/03/2001	19/03/2001	19/03/2001	8		£118.02
DN004410	19/03/2001	19/03/2001	19/03/2001	8		£170.40
DN004250	06/03/2001	06/03/2001	28/02/2001	8		£487.29

Order: 005501 Details

Order Line No	Status	Product	Description	Product Group	Order Qty	Discount	Line Total	Cost (3)	Margin	Invoice	Unit of Sale
1	No	SP147	MULTI TILT BASE	LAPORTE	1	0%	£150.00	£86.46	42.54%		4 ZONE EACH
3	No	SP062L	RC 2BTN H/SET 30MHz	LAPORTE	2	0%	£20.96	£25.14	17.77%		1,777.955 EACH
4	No	SP080	RC RECEIVER	LAPORTE	2	0%	£289.12	£47.41	84.78%		EACH

Fig. 2. Customer Order Details

### 3.2 Customer Financial Details

The module will enable the user to view up to date information about the customers financial status to ensure that a customer is in the position to place an order.

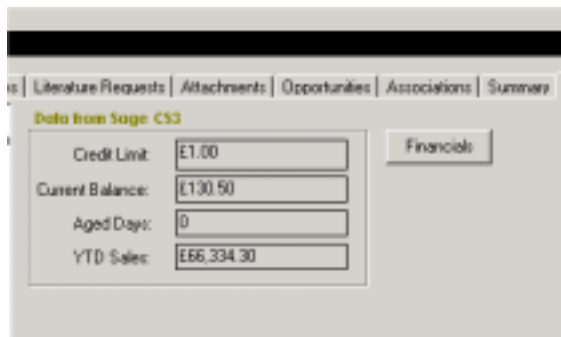


Fig. 3. Customer Financial Details

### 3.3 Customer Price Lists

The user may want to know what the customer has on their price list maintained in Sage. This could be used to inform the customer of special offers or promotions on products within their list or perhaps notify a customer of possible problems with a line specific to that customer.

The screenshot shows a software interface with a navigation bar at the top containing 'Notes/History', 'Contacts', 'Activities', 'Literature Requests', 'Attachments', 'Opportunities', and 'Associations'. Below the navigation bar, there is a section titled 'Data from Sage CS3'. This section contains a table with the following columns: 'Product Code', 'Price', 'Unit Quantity', 'Per Price', and 'Val Inclusive'. The table contains 12 rows of data. To the right of the table is a button labeled 'Price Lists'. On the left side of the interface, there is a vertical sidebar with icons and labels for 'Activities', 'Library', 'Reports', 'Processes', and 'Campaigns'.

Product Code	Price	Unit Quantity	Per Price	Val Inclusive
CCI-24500	£530.00	0		
CCI-24501	£635.00	0		
CCI-24502	£635.00	0		
CCI-24503	£780.00	0		
CCI-24505	£635.00	0		
CCI-24506	£635.00	0		
CCI-24507	£635.00	0		
CCI-24508	£635.00	0		
CCI-24509	£815.00	0		
CCI-24510	£815.00	0		
CCI-24511	£865.00	0		

Fig. 4. Customer Price List

### 3.4 Customer Detail Summary

The SLX2SAGE module can retrieve the details of the customer directly from Sage. In certain SalesLogix setups, where the main account is also the contact, this can be used to ensure that the data is kept synchronised between the two systems.

Fig. 5. Sage Customer Details

### 3.5 Place Customer Orders

The module is able to call up the Sage Customer entry form and automatically enter the correct Sage Customer number. This ensures that an order can be taken quickly and accurately with the minimum of error.

Fig. 6. Sage Telesales Order Screen

### 3.6 Set Up New Customers in Sage

If a customer does not exist within Sage at the point of placing an order the system will call up the Sage order entry form and automatically populate the customer details fields from data within the Sales Logix system. This allows the user to accurately set up a new account with the minimum of fuss and reduces the problems of inaccuracies and ensures data synchronisation.

CS3 Drive App - ENTERPRISE V2 DEMO  
 File Edit View Actions Tools Window Help

Fast Customer Creation Screen

Title	<input type="text"/>	Name/Initials	<input type="text"/>	Surname	<input type="text"/>
House No:	<input type="text"/>			Analysis A:	<input type="text" value="SOM"/>
Address:	<input type="text" value="132 High Street"/>			Analysis B:	<input type="text" value="AWALON"/>
	<input type="text" value="Street"/>			Analysis C:	<input type="text" value="YES"/>
	<input type="text" value="Somerset"/>			Analysis D:	<input type="text"/>
Postcode:	<input type="text"/>			Analysis E:	<input type="text"/>
	<input type="text"/>			Analysis F:	<input type="text"/>
Alpha Code:	<input type="text"/>			Territory:	<input type="text"/>
Tel No. 1:	<input type="text" value="01458 447505"/>			Ind. Class:	<input type="text"/>
Tel No. 2:	<input type="text"/>			Region:	<input type="text"/>
Fax:	<input type="text"/>			VAT Type:	<input type="text"/>
E-Mail:	<input type="text"/>				

### 3.7 View All Sales Ledger Customer Details

The SLX2SAGE module is able to call up the Sage Customer Maintenance for the displayed customer in Sales Logix automatically passing the correct customer number to the screen and then displaying the first details screen.

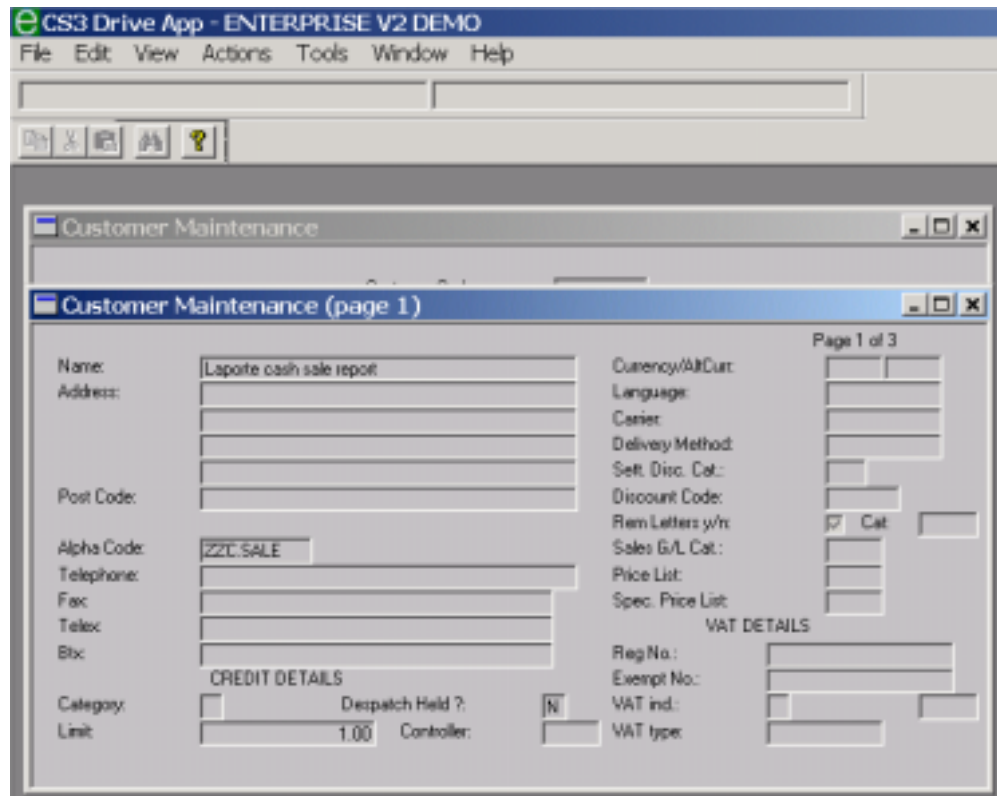


Fig. 7. Sage Customer Maintenance Screen

## 4. Summary

The SLX2SAGE module offers an opportunity to deliver increased customer service alongside improved systems integration. The module has been designed in close partnership with consultants and our customers to ensure that the functionality offers real benefits to the business.

Panacea's SalesLogix / Sage Enterprise application Integration Toolkit is, we believe, the only product offering full integration between the two products in real time with full support for SalesLogix's internal synchronisation facilities. Panacea's Customer Relationship Management to Back Office link module ensures full visibility of all relevant information real time.

**“Out of the box” integration between SalesLogix to Sage Back Office applications allow:**

- Total visibility of finance information, improving credit control and customer profiling
- Distribution - Sales order information, status, value and delivery dates etc.
- Customer Service to react to bottlenecks before they become an issue and proactively manage issues
- Customer specific pricing and ensures your customer receives the best deal appropriate, increased accuracy of qualification and control of margin including, real value pipeline forecasting.
- Screen popping of additional applications through CRM front end giving fast effective service on-line.