

Sage CRM

Information Session



A man with short dark hair, glasses, and a friendly smile is the central figure. He is wearing a black and white checkered button-down shirt. He holds a dark clipboard with a silver clip at the top, and his hands are positioned as if he is about to write or has just finished writing. The background is a warehouse with high industrial shelving units. The shelves are filled with various items, including large rolls of material in shades of pink, red, and white. The lighting is bright and even, highlighting the man and the products in the background.

What's New in
Sage CRM 2018 R3?

Sage CRM

Sage CRM 2018 R3 in a nutshell



Sage CRM

Sage 300cloud CRM connector

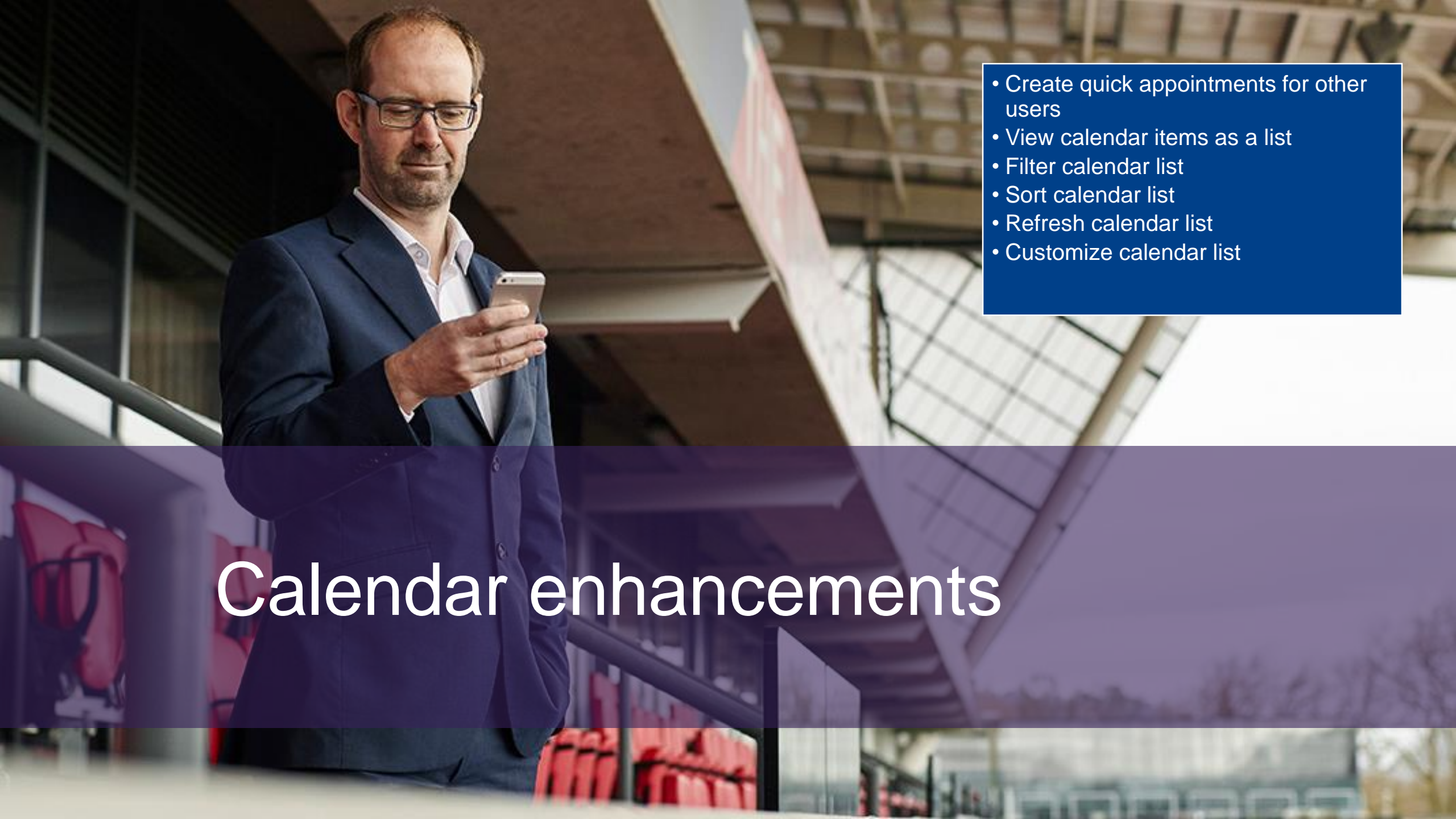
sage



With new &
improved Sage
300 Integration

Sage CRM 2018 R3
Time to look inside



- 
- A man in a blue suit and glasses is looking at his smartphone. He is standing in a stadium, with red seats visible in the background. The image is overlaid with a dark purple semi-transparent banner at the bottom and a blue box in the top right corner containing a list of features.
- Create quick appointments for other users
 - View calendar items as a list
 - Filter calendar list
 - Sort calendar list
 - Refresh calendar list
 - Customize calendar list

Calendar enhancements

Find: [input] My CRM for: Susan Maye

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Work Week Week Month Agenda Tasks

Calendar grid with columns for dates (Mon 07/30/2018 to Sun 08/05/2018) and rows for times (all day, 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM, 12:00 PM, 1:00 PM, 2:00 PM, 3:00 PM). Includes event cards for 'Vacation', 'Meeting Eurolan', 'Team Meeting', 'Marketing Meeting', 'Prospect Meeting', and 'Sales Update'.

Has Attachm...	Date / Time ↓	Type	Action	Person	Company Na...	Phone Full N...	Subject	Details	Status
	09/11/2018 6:05PM	Appointments Only	Meeting				Negotiation Meeting	Negotiation Meeting	Pending
	09/09/2018 2:00PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Touch base with Simon, see if there are any other opportunities. Ensure he is satisfied with progress so far.	Touch base with Simon, see if there are any other opportunities. Ensure he is satisfied with progress so far.	Pending
	08/28/2018 3:25PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Call RE Golf	Call RE Golf	Pending
	08/27/2018 2:20PM	Appointments Only	Meeting				Pricing Discussion	Pricing Discussion	Pending
	08/13/2018 3:00PM	Tasks Only	Phone Out	Janet Andrews	Magnetic Software Ltd.	1 617 720-1530	Phone Janet Andrews. See how the internal solution is progressing. Remind her of our product.	Phone Janet Andrews. See how the internal solution is progressing. Remind her of our product.	Pending
	08/08/2018 1:00PM	Appointments Only	Demo				Tradeshow	Tradeshow - Boston	Pending
	08/06/2018 3:00PM	Appointments Only	Meeting	Peter Williams	T-Zone Chemicals Inc.	1 408 279-4660	Brought forward.	Brought forward. Items for discussion: * T-zone requirements * Our product plans * Setup regular communication	Pending
	08/06/2018 1:30PM	Appointments Only	Meeting	Reg Barrow	Design Right Inc.	1 212 736-4430	call re outstanding bill	call re outstanding bill	Pending

Has Attachm...	Date / Time	Type	Action ↑	Person	Company Na...	Phone Full N...	Subject	Details	Status
	08/01/2018 9:00PM	Appointments Only	Demo	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Demo to Gatecom	Via internet. They have 3 sites dialling in.	Pending
	08/08/2018 1:00PM	Appointments Only	Demo				Tradeshaw	Tradeshaw - Boston	Pending
	08/01/2018 5:00PM	Appointments Only	Meeting				Sales Review		Pending
	08/02/2018 5:00PM	Appointments Only	Meeting				Review Sales Figures		Pending
	08/27/2018 2:20PM	Appointments Only	Meeting				Pricing Discussion	Pricing Discussion	Pending
	08/06/2018 3:00PM	Appointments Only	Meeting	Peter Williams	T-Zone Chemicals Inc.	1 408 279-4660	Brought forward.	Brought forward. Items for discussion: * T-zone requirements * Our product plans * Setup regular communication	Pending
	08/06/2018 1:30PM	Appointments Only	Meeting	Reg Barrow	Design Right Inc.	1 212 736-4430	call re outstanding bill	call re outstanding bill	Pending
	09/11/2018 6:05PM	Appointments Only	Meeting				Negotiation Meeting	Negotiation Meeting	Pending
	07/31/2018 3:00PM	Appointments Only	Meeting				Team Meeting	Team Meeting	Pending
	07/31/2018 7:00PM	Appointments Only	Meeting	Kieran O'Toole	Eurolandia	1 617 227-1340	Prospect Meeting	Initial meeting with Kieran at Eurolandia offices	Pending
							Follow Up with Arthur when he	Follow Up with Arthur when he	

Has Attachm...	Date / Time	Type	Action ↑	Person	Company Na...	Phone Full N...	Subject	Details	Status
	08/01/2018 9:00PM	Appointments Only	Demo	Simon Yaltoy	Gatecom Inc.		to Gatecom	Via internet. They have 3 sites dialling in.	Pending
	08/08/2018 1:00PM	Appointments Only	Demo				show	Tradeshow - Boston	Pending
	08/01/2018 5:00PM	Appointments Only	Meeting				Review		Pending
	08/02/2018 5:00PM	Appointments Only	Meeting				ow Sales Figures		Pending
	08/27/2018 2:20PM	Appointments Only	Meeting				ing Discussion	Pricing Discussion	Pending
	08/06/2018 3:00PM	Appointments Only	Meeting	Peter Williams	T-Zone Chemicals Inc.		ght forward.	Brought forward. Items for discussion: * T-zone requirements * Our product plans * Setup regular communication	Pending
	08/06/2018 1:30PM	Appointments Only	Meeting	Reg Barrow	Design Right Inc.	1 212 736-4430	call re outstanding bill	call re outstanding bill	Pending
	09/11/2018 6:05PM	Appointments Only	Meeting				Negotiation Meeting	Negotiation Meeting	Pending
	07/31/2018 3:00PM	Appointments Only	Meeting				Team Meeting	Team Meeting	Pending
	07/31/2018 7:00PM	Appointments Only	Meeting	Kieran O'Toole	Eurolandia	1 617 227-1340	Prospect Meeting	Initial meeting with Kieran at Eurolandia offices	Pending
							Follow Up with Arthur when he	Follow Up with Arthur when he	

Show items with value that:

Is equal to

And

Is equal to

Filter Clear

Has Attachm...	Date / Time	Type	Action ↑	Person	Company Na...	Phone Full N...	Subject	Details	Status
	08/01/2018 9:00PM	Appointments Only	Demo	Simon Yaltoy	Gatecom Inc.		to Gatecom	Via internet. They have 3 sites dialling in.	Pending
	08/08/2018 1:00PM	Appointments Only	Demo				show	Tradeshow - Boston	Pending
	08/01/2018 5:00PM	Appointments Only	Meeting				Review		Pending
	08/02/2018 5:00PM	Appointments Only	Meeting				ow Sales Figures		Pending
	08/27/2018 2:20PM	Appointments Only	Meeting				ing Discussion	Pricing Discussion	Pending
	08/06/2018 3:00PM	Appointments Only	Meeting	Peter Williams	T-Zone Chemicals Inc.		ght forward.	Brought forward. Items for discussion: * T-zone requirements * Our product plans * Setup regular communication	Pending
	08/06/2018 1:30PM	Appointments Only	Meeting	Reg Barrow	Design Right Inc.		re outstanding bill	call re outstanding bill	Pending
	09/11/2018 6:05PM	Appointments Only	Meeting				Negotiation Meeting	Negotiation Meeting	Pending
	07/31/2018 3:00PM	Appointments Only	Meeting				Team Meeting	Team Meeting	Pending
	07/31/2018 7:00PM	Appointments Only	Meeting	Kieran O'Toole	Eurolandia	1 617 227-1340	Prospect Meeting	Initial meeting with Kieran at Eurolandia offices	Pending
							Follow Up with Arthur when he	Follow Up with Arthur when he	

Show items with value that:

- Starts with
- Is equal to
- Is not equal to
- Is empty
- Is not empty
- Starts with**
- Contains
- Does not contain
- Ends with

Has Attachm...	Date / Time	Type	Action ↑	Person	Company Na...	Phone Full N...	Subject	Details	Status
	08/01/2018 9:00PM	Appointments Only	Demo	Simon Yaltoy	Gatecom Inc.		to Gatecom	Via internet. They have 3 sites dialling in.	Pending
	08/08/2018 1:00PM	Appointments Only	Demo				show	Tradeshow - Boston	Pending
	08/01/2018 5:00PM	Appointments Only	Meeting				Review		Pending
	08/02/2018 5:00PM	Appointments Only	Meeting				ow Sales Figures		Pending
	08/27/2018 2:20PM	Appointments Only	Meeting				ing Discussion	Pricing Discussion	Pending
	08/06/2018 3:00PM	Appointments Only	Meeting	Peter Williams	T-Zone Chemicals Inc.		ght forward.	Brought forward. Items for discussion: * T-zone requirements * Our product plans * Setup regular communication	Pending
	08/06/2018 1:30PM	Appointments Only	Meeting	Reg Barrow	Design Right Inc.	1 212 736-4430	call re outstanding bill	call re outstanding bill	Pending
	09/11/2018 6:05PM	Appointments Only	Meeting				Negotiation Meeting	Negotiation Meeting	Pending
	07/31/2018 3:00PM	Appointments Only	Meeting				Team Meeting	Team Meeting	Pending
	07/31/2018 7:00PM	Appointments Only	Meeting	Kieran O'Toole	Eurolandia	1 617 227-1340	Prospect Meeting	Initial meeting with Kieran at Eurolandia offices	Pending
							Follow Up with Arthur when he	Follow Up with Arthur when he	

Show items with value that:

Starts with [v]

Gate [input]

And [v]

Is equal to [input]

[Filter] [Clear]

Has Attachm...	Date / Time	Type	Action ↑	Person	Company Na...	Phone Full N...	Subject	Details	Status
	08/01/2018 9:00PM	Appointments Only	Demo	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Demo to Gatecom	Via internet. They have 3 sites dialling in.	Pending
	08/05/2018 2:45PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Touch base with Simon. Ensure he is sataisfied with progress so far.	Touch base with Simon. Ensure he is sataisfied with progress so far.	Pending
	08/28/2018 3:25PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Call RE Golf	Call RE Golf	Pending
	09/09/2018 2:00PM	Tasks Only	Phone Out	Simon Yaltoy	Gatecom Inc.	1 206 343-9577	Touch base with Simon, see if there are any other opportunities. Ensure he is satisfied with progress so far.	Touch base with Simon, see if there are any other opportunities. Ensure he is satisfied with progress so far.	Pending

	Mon 07/30/2018	Tue 07/31/2018	Wed 08/01/2018	Thu 08/02/2018	Fri 08/03/2018	Sat 08/04/2018	Sun 08/05/2018
all day							
8:00 AM	8:00AM- Vacation						
9:00 AM	9:00AM- Meeting Eurolan						
10:00 AM		10:00AM-11:00AM Team Meeting		10:00AM-12:00PM Marketing Meeting			
11:00 AM							
12:00 PM			12:00PM Sales Review	12:00PM Review Sale			
1:00 PM							

Find: littl
My CRM for: Brian Little

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Work Week Week Month Agenda Tasks

Calendar grid with columns for dates (Mon 07/30/2018 to Sun 08/05/2018) and rows for times (8:00 AM to 3:00 PM). Events include: 8:00AM Vacation, 9:00AM Meeting Eurolan, 10:00AM-11:00AM Team Meeting, 10:00AM-12:00PM Marketing Meeting, 2:00PM-4:00PM Prospect Meeting Eurolandia Kieran O'Toole, 2:00PM-3:00PM Sales U, 2:00PM-3:00PM Sales U, 3:00PM-4:00PM Sales Update.

Find: [input] My CRM for: Brian Little

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Work Week Week Month Agenda Tasks

Calendar grid with columns for dates (Mon 07/30/2018 to Sun 08/05/2018) and rows for times (all day, 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM, 12:00 PM, 1:00 PM, 2:00 PM, 3:00 PM). Includes 'Action' and 'Pending' dropdowns.



Find:

My CRM for: William Dolan

Today Monday, July 30, 2018 - Sunday, August 05, 2018



Day Work Week Week Month Agenda Tasks

Action

Pending

Mon 07/30/2018

Tue 07/31/2018

Wed 08/01/2018

Thu 08/02/2018

Fri 08/03/2018

Sat 08/04/2018

Sun 08/05/2018

all day

8:00 AM

9:00 AM

10:00 AM

11:00 AM

12:00 PM

1:00 PM

2:00 PM

3:00 PM

Quick Appointment

Subject:

Start Time:

08/01/2018 12:00PM



End Time:

08/01/2018 12:30PM



Save

Cancel

Find:

My CRM for:

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Work Week **Week** Month Agenda Tasks

Action Pending

	Mon 07/30/2018	Tue 07/31/2018	Wed 08/01/2018	Thu 08/02/2018	Fri 08/03/2018	Sat 08/04/2018	Sun 08/05/2018
all day							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM							
1:00 PM							
2:00 PM							
3:00 PM							

Quick Appointment

Subject:

Start Time:

End Time:

Find: [input] My CRM for: Brian Little

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Work Week Week Month Agenda Tasks

Action Pending

Calendar grid with columns for days (Mon 07/30/2018 to Sun 08/05/2018) and rows for times (all day, 8:00 AM to 3:00 PM). Includes a '12:00PM Sales Review' event on Wednesday.



Regarding

Company: [Search field]

Person: [Search field]

New Company New Person

About: [Search field]

- Save
- Delete
- Cancel
- Show Campaigns
- Help

Details

Action: Meeting

Subject: Sales Review

Location:

Details:

Status: Pending

Priority: Normal

Territory: US & Canada

Private:

Created By: Susan Maye

Created Date: 07/31/2018 10:42 AM

Percent Complete:

Completed Time:

Organizer: Susan Maye*

Scheduling

Date / Time: 08/01/2018 12:00 PM

End Time: 08/01/2018 12:30 PM

All day event:

Reminder: Don't remind me

Send Reminder Message:

Team: Direct Sales

User: Brian Little, Susan Maye (Remove)

Search For: [Search field]

Recurrence:

Add: +



Find:

My CRM for: Brian Little



Today Monday, July 30, 2018 - Sunday, August 05, 2018 Print Day Work Week Week Month Agenda Tasks

Action Pending

	Mon 07/30/2018	Tue 07/31/2018	Wed 08/01/2018	Thu 08/02/2018	Fri 08/03/2018	Sat 08/04/2018	Sun 08/05/2018
all day							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM			👤 12:00PM Sales Review				
1:00 PM							
2:00 PM							
3:00 PM							



Sales | Marketing | Service

User Name

Password

Change Password

Log On

Licensed to Sage

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Welcome Dashboard (Administrators) ▾

New Dashboard ▾

Templates ▾

Turn Snap Off Print Help

Dashboard Template – you must be an Info Manager or Administrator to edit and save changes [Create a copy](#)FAQ Admin    

Welcome, System Administrator

Need help? Can't find what you're looking for? Browse our Frequently Asked Questions (FAQ) below to get started.

Frequent Administration Tasks

- [Setting Up Users](#)
- [Accessing the Administration Area](#)
- [Customizing Reports](#)
- [Managing Dashboards](#)
- [Adding New Fields](#)
- [Modifying Existing Fields](#)

Top Admin Tips





- [About Data Upload](#)

Videos    

Sage CRM Video Channel

Visit the Sage CRM video channel today to get access to the latest video resources on all aspects of Sage CRM.

Watch the latest product tutorials, discover the benefits of Sage CRM and listen to inspirational success stories from businesses like yours.

[Browse videos >](#)Getting Help    

Need help?



Read our [detailed help documentation](#) for System Administration, Developer and Integration users of Sage CRM.

Customer    

Sage customers

Discover how other Sage customers around the world are using Sage CRM.

[Browse Stories >](#)



Welcome, System Administrator

Need help? Can't find what you're looking for? Browse our Frequently Asked Questions (FAQ) below to get started.

Frequent Administration Tasks

- [Setting Up Users](#)
- [Accessing the Administration Area](#)
- [Customizing Reports](#)
- [Managing Dashboards](#)
- [Adding New Fields](#)
- [Modifying Existing Fields](#)

Top Admin Tips

- [About Data Upload](#)



Sage CRM Video Channel

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Watch the latest product tutorials, discover the benefits of Sage CRM and listen to inspirational success stories from businesses like yours.

[Browse videos >](#)

Need help?



Read our [detailed help documentation](#) for

Sage customers

Discover how other Sage customers around the world are using Sage CRM.

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- System



Administration

Administration

Welcome to the Administration home page. Simply select the broad administration area you want to work on, then drill down to related options and more details on that admin area.



Users

Add new users to the system and change details of existing users.



Advanced Customisation

Carry out advanced customisation on the system by setting up key attribute profiles, workflows, escalation rules, and changing system menus.



E-mail and Documents

Create your own E-mail templates and document templates, and configure the system for E-mail and document handling.



Customisation

Customise standard fields and screen areas, work with component manager, and change system translations.



Data Management

Perform data uploads, create products, and add new currencies.



System

Specify and change standard system settings for performance, logging, the database, self service, system behavior, and locks, as well as refresh metadata and work with SLAs.



Users



Customisation



Advanced Customisation



Data Management



E-mail and Documents



System

[Administration](#) -> [Customisation](#)

Customisation

You have reached the Customisation home page. Simply select the Customisation option you want to work on and then complete the administration task.



Translations

Change system translations, create new ones, and activate inline translation mode to change field captions "on the fly".



Component Manager

Upload and install components, and create new ones if you have an EIS license.

Primary Entities

Select the primary entity you want to customise.



Cases

Customise case fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for cases.



Communication

Customise communication fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for communications.



Company

Customise company fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for companies.



Lead

Customise lead fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for leads.



Opportunity

Customise opportunity fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for opportunities.



Orders

Customise order fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for orders.



Person

Customise person fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for persons.



Quotes

Customise quote fields, screens, lists, tabs, blocks, table scripts, views, and summary reports, as well as create notifications specifically for quotes.

Secondary Entities

Select the secondary entity for which you want to customise fields, screens, lists, tabs, blocks, table scripts, and views.

Secondary Entities ▾



Administration -> Customisation -> Communication



Users



Customisation



Advanced Customisation



Data Management



E-mail and Documents



System

	Field Caption ^	Field Name	Field Type	Size	Default	Field Security
	Action	comm_action	Selection		<input checked="" type="checkbox"/>	
	All day event	comm_isalldayevent	Checkbox			
	BCC	comm_bcc	Multiline Text	0		
	CC	comm_cc	Multiline Text	0		
	comm_isstub	comm_isstub	Text	2		
	comm_mailchimpcampaignid	comm_mailchimpcampaignid	Text	40		
	Communication Case ID	comm_caseid	Adv Search Select		<input checked="" type="checkbox"/>	
	Completed Time	comm_completedtime	Date & Time			
	CRM Only	comm_crmonly	Text	1		
	Date / Time	comm_datetime	Date & Time		<input checked="" type="checkbox"/>	
	Description	comm_description	Multiline Text	0		
	Details	comm_note	Multiline Text	0		
	Details	comm_details	Text	21		
	Email Links Created	comm_emaillinkscreated	Text	1		
	E-mail Message	comm_messageid	Integer			
	E-mail Text	comm_email	Multiline Text	0		
	End Time	comm_todatetime	Date & Time		<input checked="" type="checkbox"/>	
	From	comm_from	Multiline Text	0		
	Has Attachments	comm_hasattachments	Checkbox			

New

Help



[Administration](#) -> [Customisation](#) -> [Communication](#)



Users



Customisation



Advanced Customisation



Data Management



E-mail and Documents



System

Devices

Desktop HTML ▾

List Name	Customise	Change
Communication List		
Communication To Do List		
CommunicationLeadList		
Communication Solution List		
accmassemailrecipients		
CalendarList		
Communication Find Grid		
CommunicationGrid		
Communication Opportunity List		
Communication TaskList		
Group Comm Recipients List		
Keyword Comm Dedupe List		
Lead Mass Email Recipients		
Mass Email Recipients		
ORQU Comm Dedupe List		
Quick Look Communication List		







Maintain List Definition CalendarList



[Administration](#) -> [Customisation](#) -> [Communication](#)

Note: You can add only the following field types to the Calendar List:
 Checkbox, Date Only, Date & Time, Email Address, Integer, Multiline Text, Numeric, Phone Number, Selection, Text, User Select, WWW URL.
 When you add a field whose type isn't supported, that field doesn't appear in the Calendar List

This customisation will be labelled with Component Name 'Changed'

-  Users
-  Customisation
-  Advanced Customisation
-  Data Management
-  E-mail and Documents
-  System

Desktop HTML List Contents

- Communication : Has Attachments
- Communication : Date / Time
- Communication : Type
- Communication : Action
- Person : Person
- Company : Company Name
- Person : Phone Full Number
- Communication : Subject
- Communication : Details
- Communication : Status



Properties

Field:

Communication : Has Attachments (comm_hasattachments) ▾

Hyperlink to:

▾

Alignment:

▾

Show Heading:

▾

Default Order By

▾

-
-
-
-

Maintain List Definition CalendarList



Administration -> Customisation -> Communication

Note: You can add only the following field types to the Calendar List: Checkbox, Date Only, Date & Time, Email Address, Integer, Multiline Text, Numeric, Phone Number, Selection, Text, User Select, WWW URL. When you add a field whose type isn't supported, that field doesn't appear in the Calendar List

be labelled with Component Name 'Changed'

- Users
- Customisation
- Advanced Customis
- Data Manageme
- E-mail and Docum
- System

Advanced Customisation

- Key Attributes
- Workflow
- Escalation
- Workflow & Escalation
- Configuration
- System Menus
- Devices
- Tables and Databases
- Button Groups

Contents

- Attachments
- Time
- ame
- mber
- ct
- s



Properties

Field:
 Communication : Has Attachments (comm_hasattachments)

Hyperlink to: [Dropdown]

Alignment: [Dropdown]

Show Heading: [Dropdown]

Default Order By: [Dropdown]

- Save
- Delete
- Cancel
- Help



Users



Customisation



Advanced Customisation



Data Management



E-mail and Documents



System



Administration -> Advanced Customisation -> System Menus

Devices

Desktop HTML ▾

Tab Group Name	Customise
MainMenu	
User	
Channel	
Admin	
AdminAdvanced	
AdminCasesTabs	
AdminCommunicationTabs	
AdminCompany	
AdminCompanyTabs	
AdminCustomization	
AdminDataManagement	
AdminEmailDocuments	
AdminExtraTabs	
AdminIntegration	
AdminLeadTabs	
AdminOpportunityTabs	
AdminOrdersTabs	
AdminPersonTabs	

New

Help

Customise Tabs for User



[Administration](#) -> [Advanced Customisation](#) -> [System Menus](#)

This customisation will be labelled with Component Name 'Changed'

Desktop HTML Tab Group Contents

Properties

- Dashboard
- Calendar
- Calendar List
- Contacts
- Leads
- Outbound Call Lists
- Opportunities
- Forecasts
- Cases
- Solutions
- Shared Documents
- Preferences
- Groups
- MailChimp Campaigns
- Exchange Integration Logs



Caption:

My eCRM

Action:

other ▾

System Act:

myeware ▾

SQL:

Bitmap:

Sensitive:

Save

Cancel

Help

Update Remove Add

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- System

Customise Tabs for User



[Administration](#) -> [Advanced Customisation](#) -> [System Menus](#)

This customisation will be labelled with Component Name 'Changed'

Desktop HTML Tab Group Contents

Properties

- Dashboard
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- Forecasts
- Cases
- Solutions
- Shared Documents
- Preferences
- Groups
- MailChimp Campaigns
- Exchange Integration Logs



Caption:

CalendarList

Action:

other ▾

System Act:

responsiveCalendarList ▾

SQL:

Bitmap:

Sensitive:

Save

Cancel

Help

Update Remove Add

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- System

A woman with long brown hair and a man with a grey mustache are looking at a computer screen. The woman is on the left, and the man is on the right. They are in an office environment with bookshelves in the background. A purple semi-transparent banner is overlaid on the bottom half of the image.

Quick Find Improvements

- Search for Person and Company records by phone, email or postal address

Quick Find enhancements



Find:

My CRM for: Susan Maye ▾ →



Today ◀ ▶ 📅 Monday, July 30, 2018 - Sunday, August 05, 2018 🖨️ Day Work Week **Week** Month Agenda Tasks

Action ▾ Pending ▾

	Mon 07/30/2018	Tue 07/31/2018	Wed 08/01/2018	Thu 08/02/2018	Fri 08/03/2018	Sat 08/04/2018	Sun 08/05/2018
all day							
8:00 AM	☀️ 8:00AM- Vacation						
9:00 AM	👤 9:00AM- Meeting Eurolan						
10:00 AM		👤 10:00AM-11:00AM Team Meeting		📞 10:00AM-12:00PM Marketing Meeting			
11:00 AM					👤 11:00AM fussball gam		
12:00 PM			👤 12:00PM Sales Review	👤 12:00PM Review Sale	👤 12:00PM coaching ses		
1:00 PM							
2:00 PM		👤 2:00PM-4:00PM Prospect Meeting Eurolandia Kieran O'Toole			✅ 2:00PM- Sales U ✅ 2:00PM- Sales U		
3:00 PM					✅ 3:00PM-4:00PM Sales Update		

Call Center

0 00 00 00 00 00 00 00

227-1386

Find: [input] My CRM for: Susan Maye

- Garreth McDaid (Business) <1 6...
Eurolandia (Business) <1 617 2...
Kieran O'Toole (Business) <1 6...
Kieran O'Toole (Fax) <1 617 22...

Today Monday, July 30, 2018 - Sunday, August 05, 2018 Day Agenda Tasks

Action Pending

Calendar grid with columns for days (Mon 07/30/2018 to Sun 08/05/2018) and rows for time slots (8:00 AM to 3:00 PM). Events include: 8:00AM-Vacation, 9:00AM-Meeting Eurolan, 10:00AM-11:00AM Team Meeting, 10:00AM-12:00PM Marketing Meeting, 11:00AM fussball gam, 12:00PM Sales Review, 12:00PM Review Sale, 12:00PM coaching ses, 2:00PM-4:00PM Prospect Meeting Eurolandia Kieran O'Toole, 2:00PM-Sales U, 2:00PM-Sales U, 3:00PM-4:00PM Sales Update.



Person: Garreth McDaid
Company: [Eurolandia](#)

Phone: 1 617 227-1336
E-mail: GMcDaid@demosagecrm.com



Person ▶

Last Name:
McDaid

Middle:

Title Code:
Manager

Territory:
US East

Opt out of E-marketing communications:

This record was sent to:

First Name:
Garreth

Suffix:

Title:
Operations Manager

Website:

Salutation:
Mr.

Gender:
Male

Department:

Account Manager:
Susan Maye

Address ▶

Street:
22 Beacon Street #100

City:
Boston

Zip Code:
02108

State:
MA

Country:
United States

Phone/E-mail ▶

Business: 1 617 227-1336

Business: GMcDaid@demosagecrm.com

Company ▶

Company Name:
[Eurolandia](#)

Source:
Customer Referral

Type:
Customer

Region:
US East

Status:
Active

Segment:
Computers Software

MailChimp Integration

- MailChimp Campaigns can be marked as closed within Sage CRM
- Sage CRM Setup has been improved to verify the integrity of the MailChimp Integration-related database tables and views during upgrading

MailChimp Related Changes



MailChimp Campaigns

MailChimp Campaign Details

Campaign Name: Campaign_01	Group: Import from Comp_10.csv	Last Updated: 26/07/2018 11:07
From Email Address: dkqasagecrm@qasagecrm.com	From Name: QA	

- View in MailChimp
- Refresh
- Close Campaign
- Continue
- Delete
- Help

MailChimp Campaign Results

Total Opened: 0	Total Clicked: 0	Soft Bounce: 0	Hard Bounce: 0	Unsubscribed: 0
Emails Sent: 10	Unique Opened: 0	Unique Clicked: 0	Last Opened:	





MailChimp Campaigns

MailChimp Campaign Details

Campaign Name: Campaign_01	Group: Import from Comp_10.csv	
From Email Address: dkqasagecrm@qasagecrm.com	From Name: QA	Last Updated: 26/07/2018 11:07

- View in MailChimp
- Refresh
- Close Campaign**
- Continue
- Delete
- Help

MailChimp Campaign Results

Total Opened: 0	Total Clicked: 0	Soft Bounce: 0	Hard Bounce: 0	Unsubscribed: 0
Emails Sent: 10	Unique Opened: 0	Unique Clicked: 0	Last Opened:	





MailChimp Campaigns

MailChimp Campaign Details

Campaign Name: Campaign_02	Group: Import from Comp_10.csv	
From Email Address: dkqasagecrm@qasagecrm.com	From Name: QA	Last Updated: 26/07/2018 11:10

- View in MailChimp
- Continue
- Delete
- Help

MailChimp Campaign Results

Total Opened: 0	Total Clicked: 0	Soft Bounce: 0	Hard Bounce: 0	Unsubscribed: 0
Emails Sent: 10	Unique Opened: 0	Unique Clicked: 0	Last Opened:	



MailChimp Campaigns

2 Campaigns, Page 1 of 1

Campaign Name ▾	Status	Sent Date
Campaign_01	Sent	Today 11:07
Campaign_02	Closed	Today 11:10

Campaign Name:

Status:

--All-- ▾

Filter

New

Help





UX Improvements

- Improved support for Unicode Characters (special characters and emojis) in Email Manager and Outlook Plugins
- 50+ customer cases addressed





UX Enhancements



  **Company:** Gatecom Inc.
Phone: 1 206 343-9577
E-mail: info.GatecomInc@demosagecrm.com



2 Communications, Page 1 of 1

	Date / Time ▾	Action	Person	Subject	User	Territory	External Attendees	About	Status
	Today 1:14 PM	E-mail Out	Simon Yaltoy	Please join us for this wonderful summertime event. 🌟🔔	Susan Maye	US West	<input type="checkbox"/>		
	Today 1:06 PM	E-mail Out	Simon Yaltoy	Please join us for this wonderful summertime event. 🌟🔔	Susan Maye	US West	<input type="checkbox"/>		

Action:

E-mail Out ▾

Status:

Complete ▾

Type:

--All-- ▾

Territory:

--All-- ▾

Filter

New Task

New Appointment

New E-mail

Help

New Email New Items Ignore Clean Up Junk Delete Archive Reply Reply All Forward Meeting IM More Move to? Team Email Reply & Delete To Manager Done Create New Move Rules OneNote Unread/ Read Categorize Follow Up Search People Address Book Filter Email Read Aloud Send/Receive All Folders Send/Receive Report Phishing PhishMe File e-mail Sage CRM

Search Current Mailbox Current Mailbox

All Unread By Date ↑

Today

Simon Yaltoy
Test of Emojis 12:54
* Face With Tears O...

support@panoply-te...
Case Ref: 1-10093. Please q... 12:44
Your mail has been logged

Simon Yaltoy
Test of Emojis 12:38
* Face With Tears O...

Yesterday

Simon Yaltoy
Tue 18:11
<end>

Simon Yaltoy
Summer is here! Tue 18:03
This is a :) test <end>

mailer-daemon@pan...
Message undeliverable: Lic... Tue 18:02
Your message did not reach

Older

Simon Yaltoy
Example inbound email 11/06/2018
Lorem ipsum dolor sit amet,

admin@panoply-te...

Reply Reply All Forward IM

Wed 01/08/2018 11:38










support@panoply-tech.com

Case Ref: 1-10093. Please quote this number in all correspondence

To support@panoply-tech.com; Simon Yaltoy

Cc 'Susan Maye'

Your mail has been logged
Thank you
Panoply Support

-  Face With Tears Of Joy
-  Smiling Face With Heart-Eyes
-  Red heart
-  Grinning Face
-  Smiling Face With Sunglasses
-  Party Popper
-  Smiling Face With Smiling Eyes
-  Thumbs Up
-  Pile Of Poo



E-mail In



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



E-mail In

Links: Simon Yaltoy Gatecom Inc.
Sent: 08/01/2018 12:53 PM
Received: 08/01/2018 12:53 PM
From: syaltoy@demosagecrm.com
To:
CC:
BCC:
Subject: Test of Emojis

[😭 Face With Tears Of Joy](#)
[😍 Smiling Face With Heart-Eyes](#)
[❤️ Red heart](#)
[😎 Smiling Face With Sunglasses](#)
[🎉 Party Popper](#)
[😊 Smiling Face With Smiling Eyes](#)
[👍 Thumbs Up](#)
[💩 Pile Of Poo](#)

Change

Reply

Reply All

Forward

Delete

Continue

Cancel

Help

Create:

New Opportunity

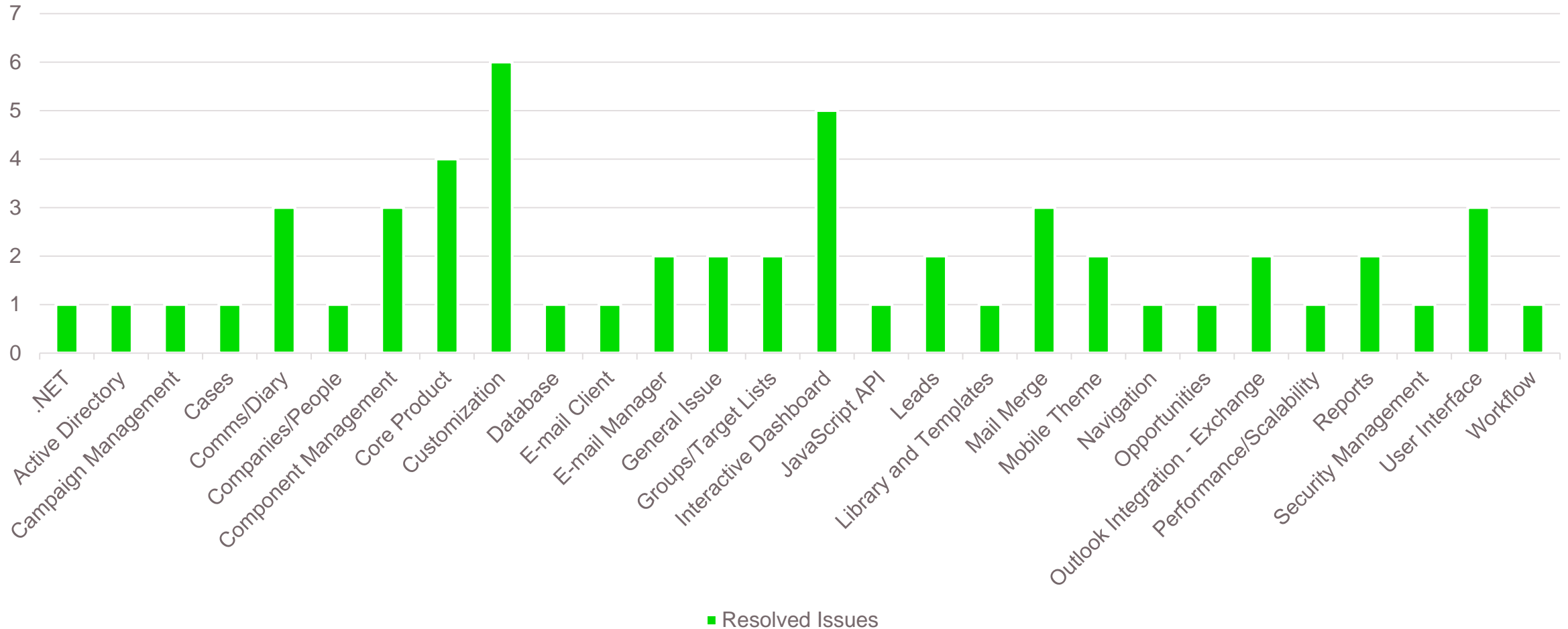
New Lead

Sage CRM 2018 R3



Resolved Customer Issues

Resolved Issues





Supporting Educational Content

- New training material
- Community content and updates

Supporting Educational Content



What resources and documentation are available to support the release?




Help Center

<http://help.sagecrm.com/>

Sage CRM Help Center BETA



2018 R2

 [Release Notes](#)

 [Software Requirements](#)


 [User Help/Guide](#)

 [System Admin Help/Guide](#)


[4 more...](#)

2017 R2

2018 R1

 [Release Notes](#)

 [Software Requirements](#)


 [User Help/Guide](#)

 [System Admin Help/Guide](#)

[4 more...](#)

2017 R1

2017 R3

 [Release Notes](#)

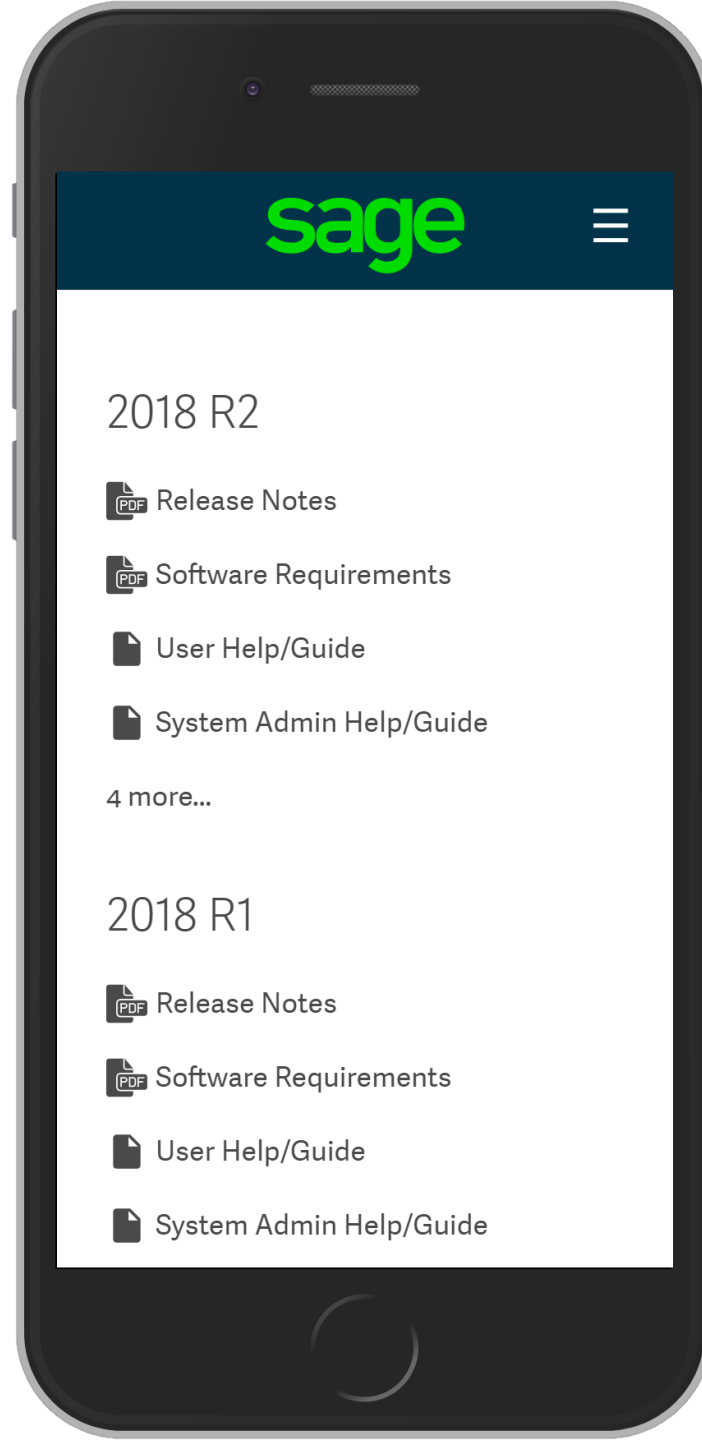
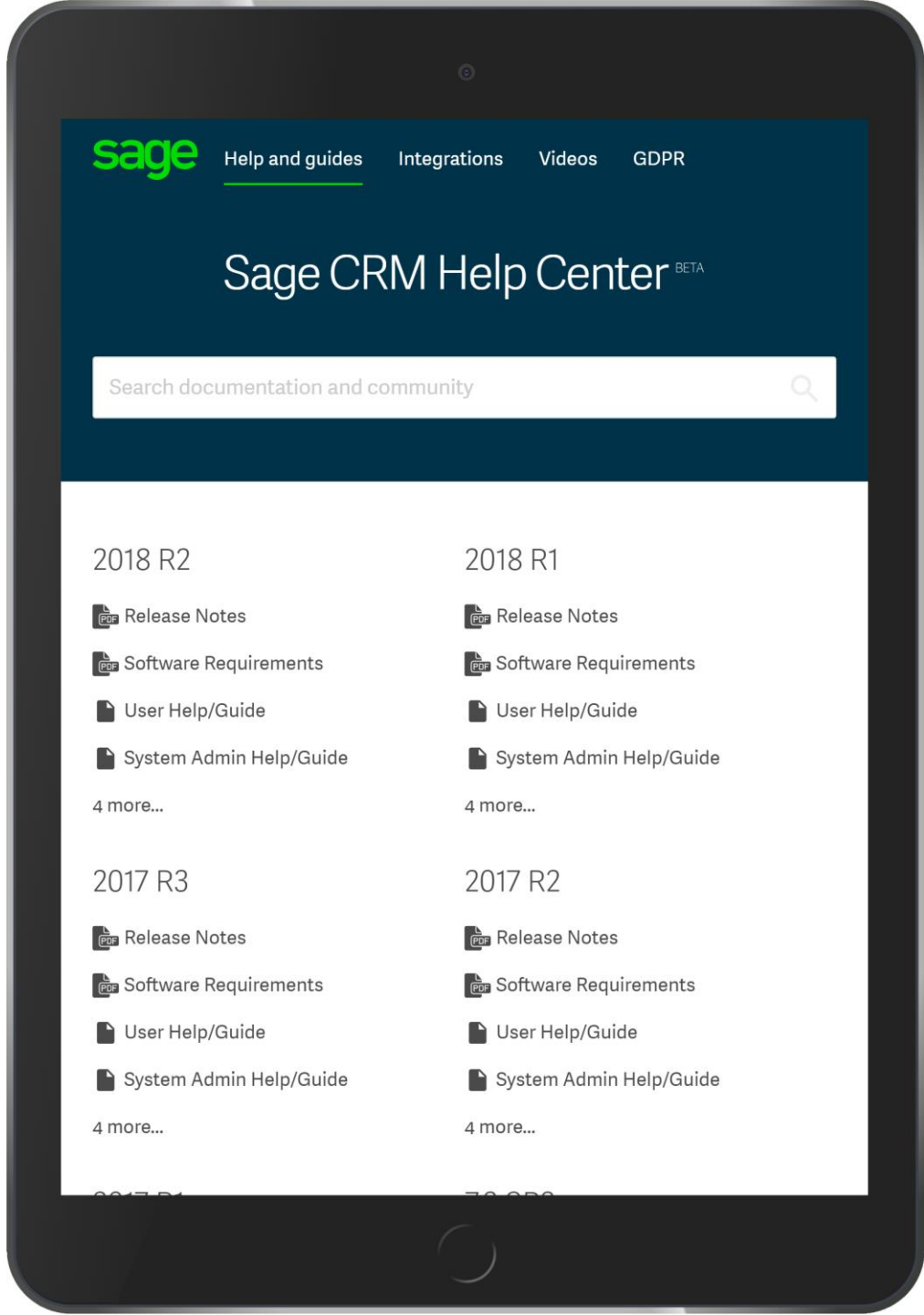
 [Software Requirements](#)

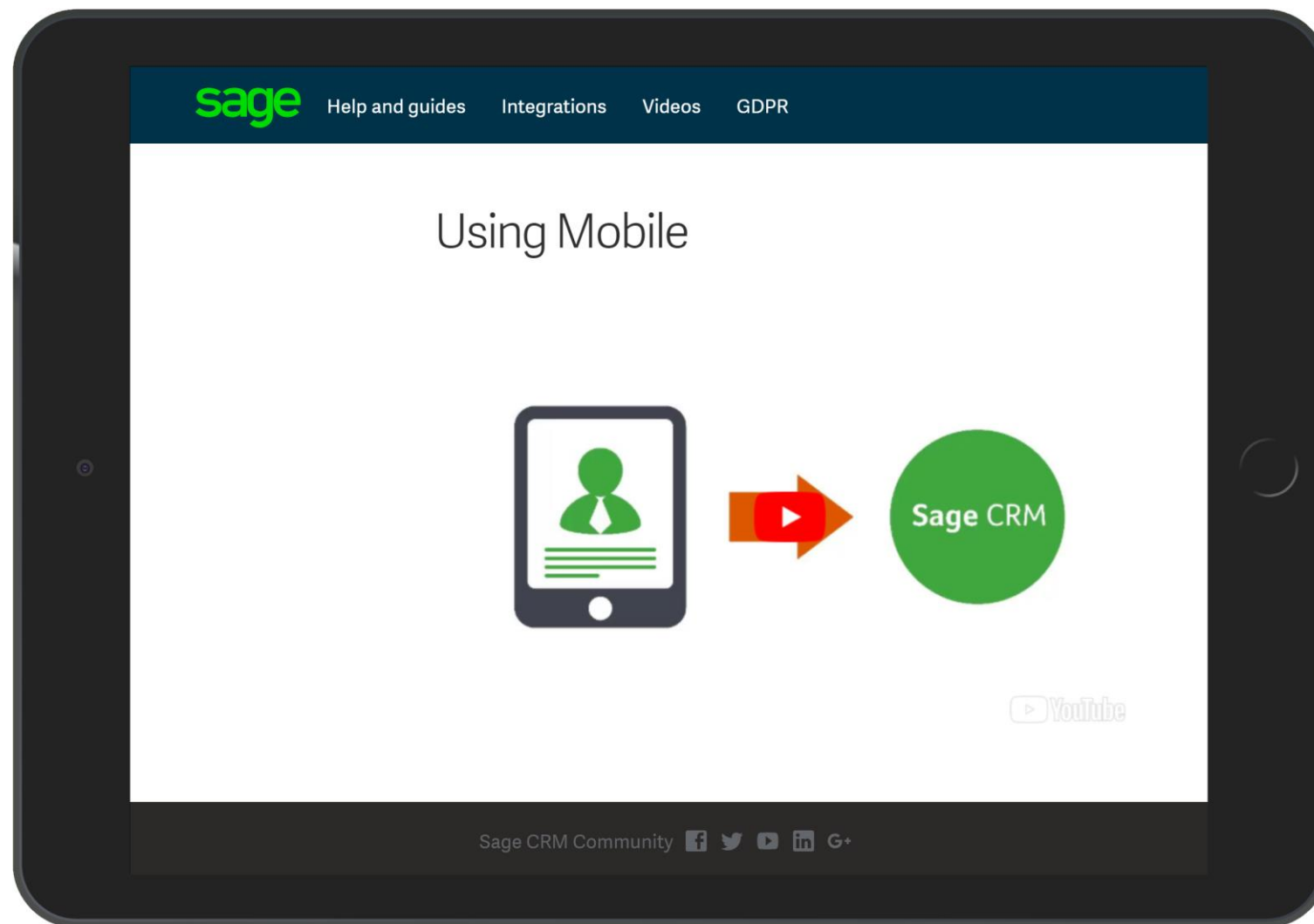
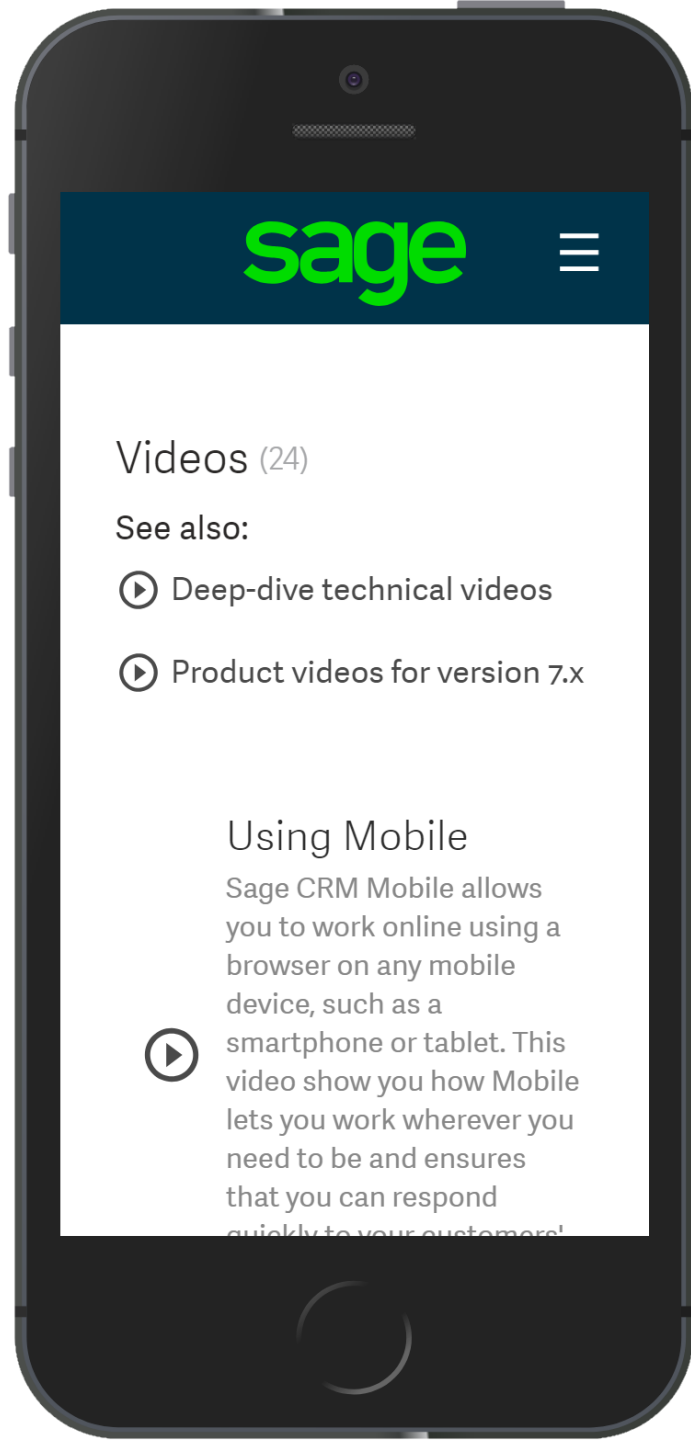
 [User Help/Guide](#)

 [System Admin Help/Guide](#)

[4 more...](#)

7.3 SP3







Support & Training YouTube Channel

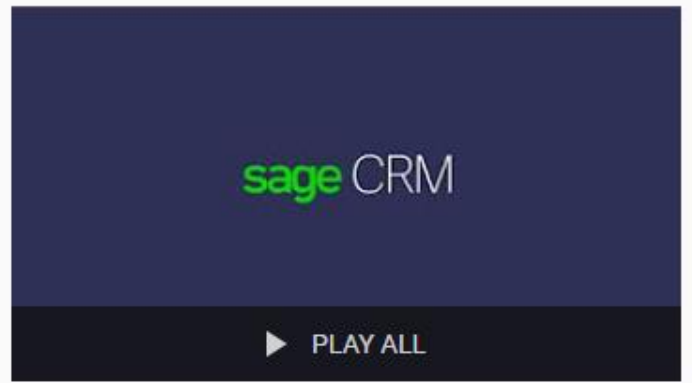
<https://www.youtube.com/SageSoftwareNA>

<http://bit.ly/SageCRMPlaylist>

- Home
- Trending
- Subscriptions

- LIBRARY
- History
 - Watch later
 - Sage CRM - Supp...**
 - Favorites
 - Liked videos



- SUBSCRIPTIONS
- Sage customer support and training** 3
 - British Pathé 1
 - LondonsScreen... 1
 - SageViews
 - QuantaCRM 2
 - Sage 2
 - Sage CRM










Sage CRM - Support and Training

118 videos • 3,615 views • Updated 7 days ago




Sage customer support and training
SUBSCRIBED 5K


- 
Sage CRM: Create a Simple Workflow - Global and Conditional Rules
 Sage customer support and training
- 
Sage CRM: Create a Simple Workflow - Primary and Transition Rules
 Sage customer support and training
- 
Sage CRM: Create a Simple Notification
 Sage customer support and training
- 
Sage CRM: Workflow Configuration
 Sage customer support and training
- 
Sage CRM: Related Entities - Using the Relationships
 Sage customer support and training
- 
Sage CRM: Related Entities - Defining the Relationships
 Sage customer support and training
- 
Sage CRM: Data Management - Building a price list
 Sage customer support and training



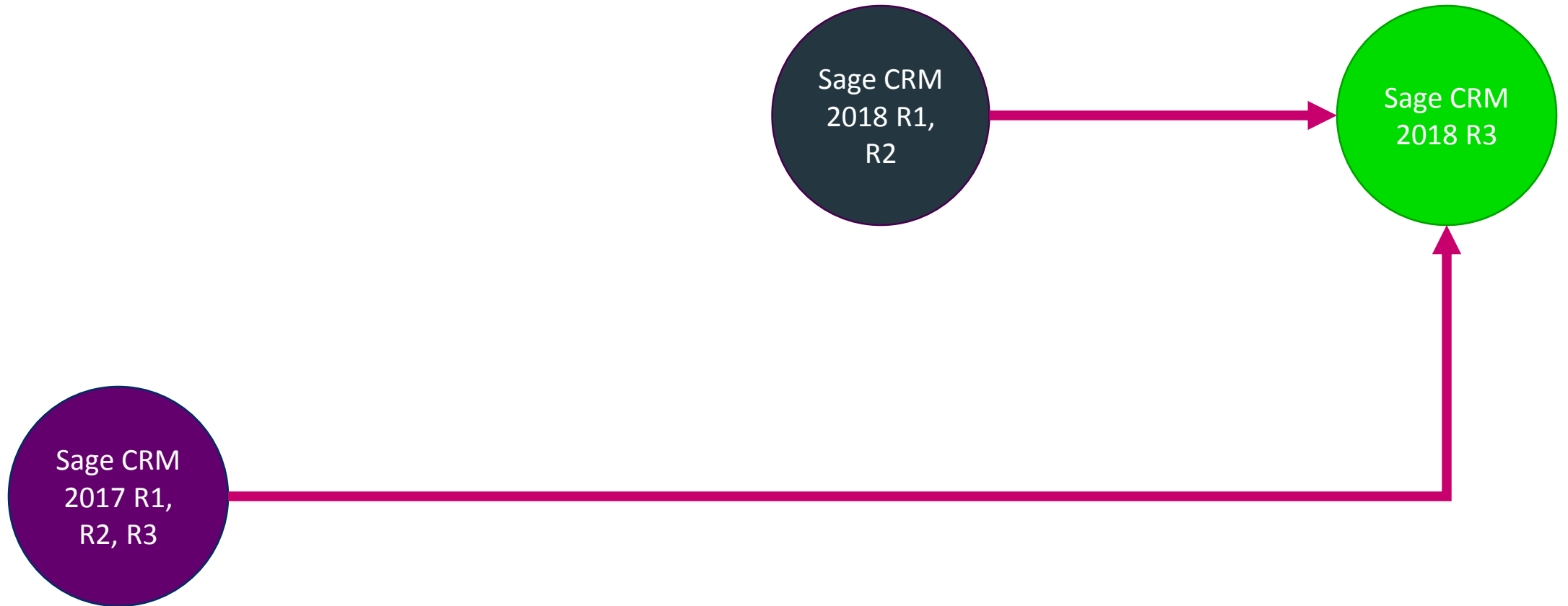
Community Resources

Materials to support partner and colleague education

<http://community.sagecrm.com>

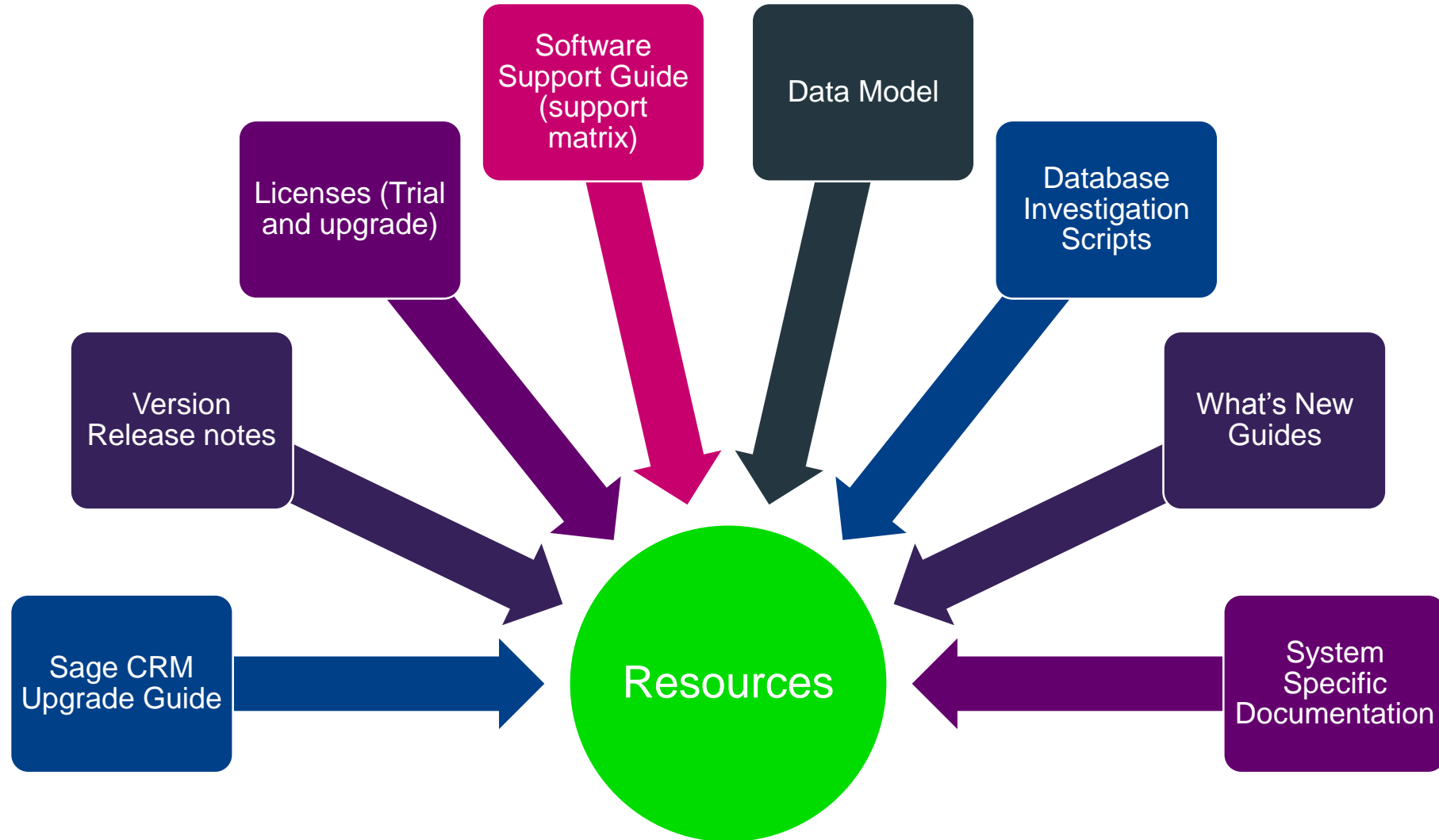
Sage CRM 2018 R3

Planning your upgrade



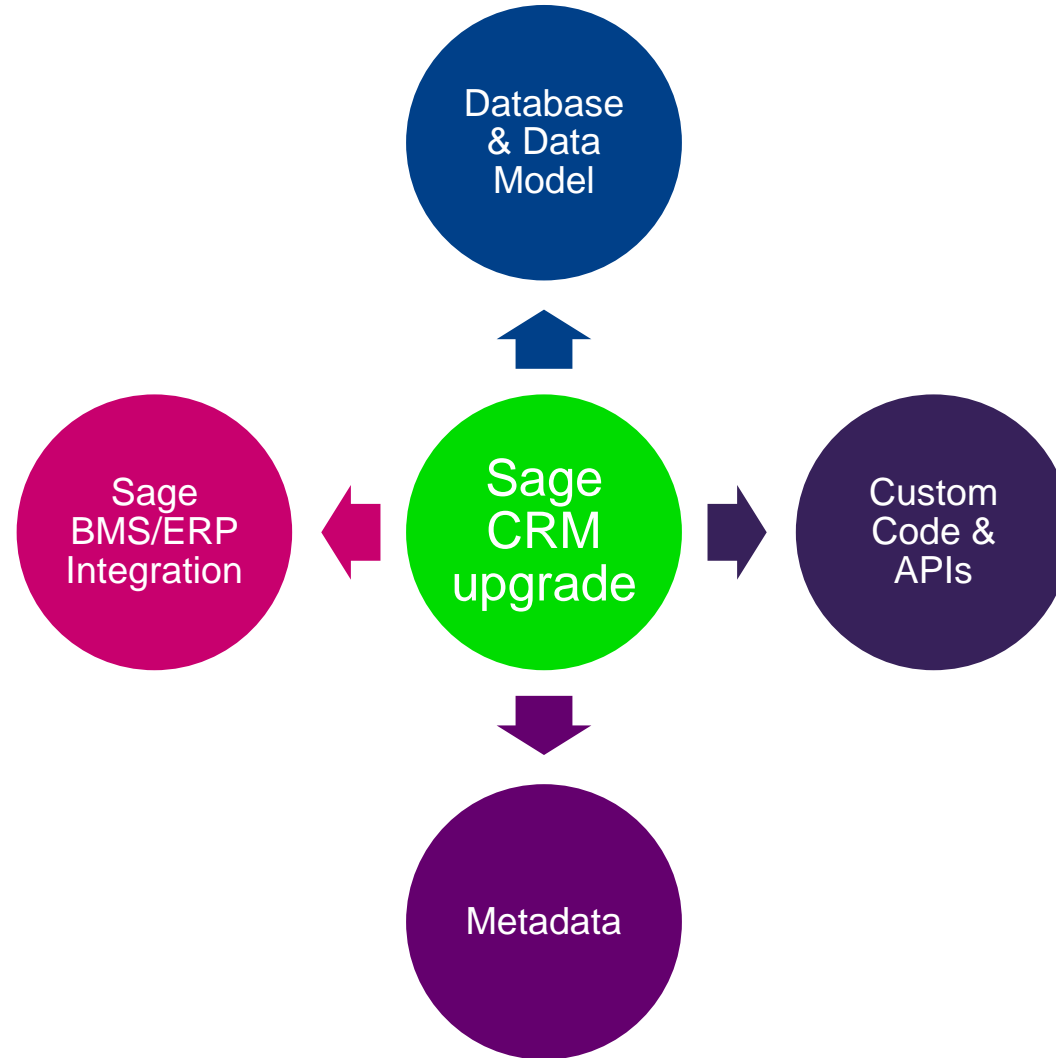
Preparing to upgrade

Assemble the resources you need



Sage CRM

Impact of upgrade



Changes to the database and metadata

New Views

- vAddressComposer
- vPhoneComposer
- vCalendarList

New ScreenObjects

- CalendarList

New System Action

- responsiveCalendarList

File Home Insert Page Layout Formulas Data Review View Add-ins Help Team Tell me what you want to do Share

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color, Paragraph Spacing, Bullets, Numbering, Merge & Center

Alignment: Left, Center, Right, Indent, Decrease Indent, Increase Indent

Number: General, Percentage, Currency, Accounting, Date, Time, Text, Fraction, Scientific, Decimals, Thousands Separator, Rounding

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

A1 Table of Contents

Table Name	Column Name	Nullable?	Data Type	Character Maximum Length	Character Octet Length	Numeric Precision	Numeric Precision
vAddressComposer	crmId	YES	varchar	69	69	NULL	NULL
vAddressComposer	view_EntityName	NO	varchar	7	7	NULL	NULL
vAddressComposer	view_RecordId	NO	int	NULL	NULL	10	NULL
vAddressComposer	view_descriptor	YES	nvarchar	259	518	NULL	NULL
vAddressComposer	index_descriptor	YES	varchar	154	154	NULL	NULL
vAddressComposer	territory	YES	int	NULL	NULL	10	NULL
vAddressComposer	channel	YES	int	NULL	NULL	10	NULL
vAddressComposer	assignedTo	YES	int	NULL	NULL	10	NULL
vAddressComposer	createdBy	YES	int	NULL	NULL	10	NULL
vAddressComposer	deleted	YES	int	NULL	NULL	10	NULL
vAddressComposer	updateddate	YES	datetime	NULL	NULL	NULL	NULL
vAddressComposer	AdLinkDeleted	YES	tinyint	NULL	NULL	3	NULL
vAddressComposer	AddressDeleted	YES	tinyint	NULL	NULL	3	NULL
vCalendarList	Pers_FullName	YES	nvarchar	71	142	NULL	NULL
vCalendarList	Pers_PhoneFullNumber	YES	nvarchar	47	94	NULL	NULL
vCalendarList	Comp_EmailAddress	YES	nvarchar	255	510	NULL	NULL
vCalendarList	Comp_PhoneCountryCode	YES	nchar	5	10	NULL	NULL
vCalendarList	Comp_PhoneAreaCode	YES	nvarchar	20	40	NULL	NULL
vCalendarList	Comp_PhoneNumber	YES	nvarchar	20	40	NULL	NULL
vCalendarList	Comp_PhoneFullNumber	YES	nvarchar	47	94	NULL	NULL

Table of Contents | New Tbls & Cols | Cols Dropped | New Views | Views Dropped | New Cols in Existing Tables | Changed Data Types | New Custom System Parameters

Changes in supported software



Support added

- Microsoft SQL Server 2016 SP2, Standard or Enterprise
- Web browsers
 - iOS 11.x
- Mobile devices
 - iOS 11.x

Support dropped

- Microsoft SQL Server 2016 SP1, Standard or Enterprise
- Microsoft SQL Server 2014 SP2, Standard or Enterprise
- Apple Safari on desktop computers (macOS and OS X)

sage

When is the release date?



Let's talk CRM

Join David Beard & Jeff Richards online

Tuesday 0700 BST <http://bit.ly/TalkCRMTuesdays>

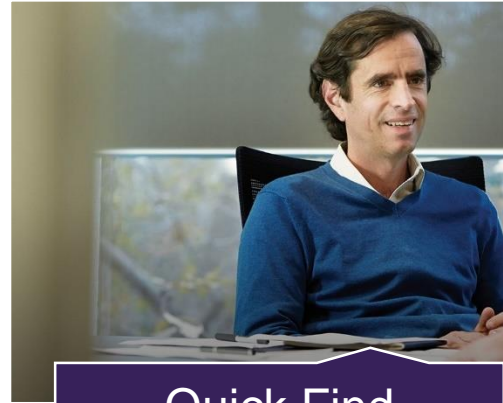
Thursday 1600 BST <http://bit.ly/TalkCRMThursdays>

Sage CRM

Sage CRM 2018 R3 in a nutshell



Calendar
enhancements



Quick Find
improvements



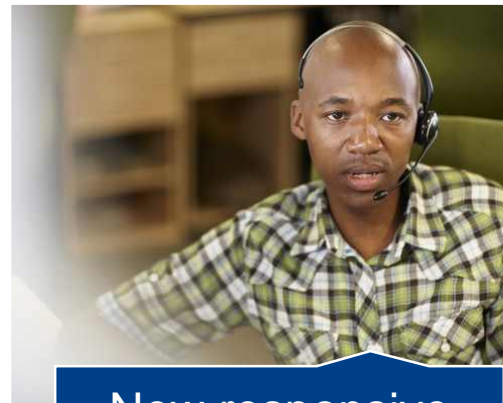
MailChimp
changes



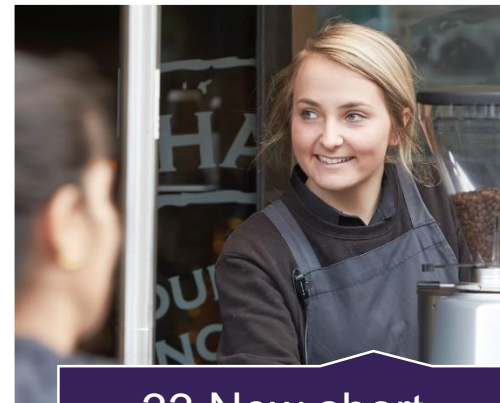
Improved Unicode
Support



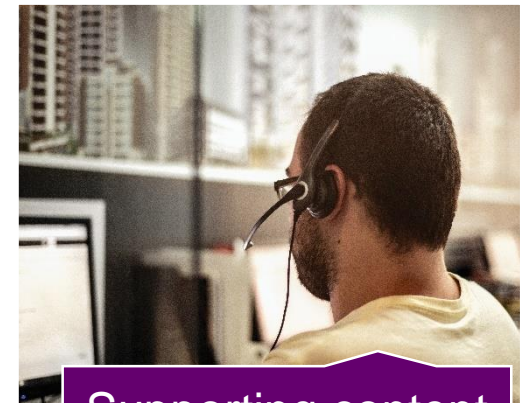
50+ cases resolved



New responsive
Help Center



33 New short
training videos



Supporting content
on Community

Sage CRM

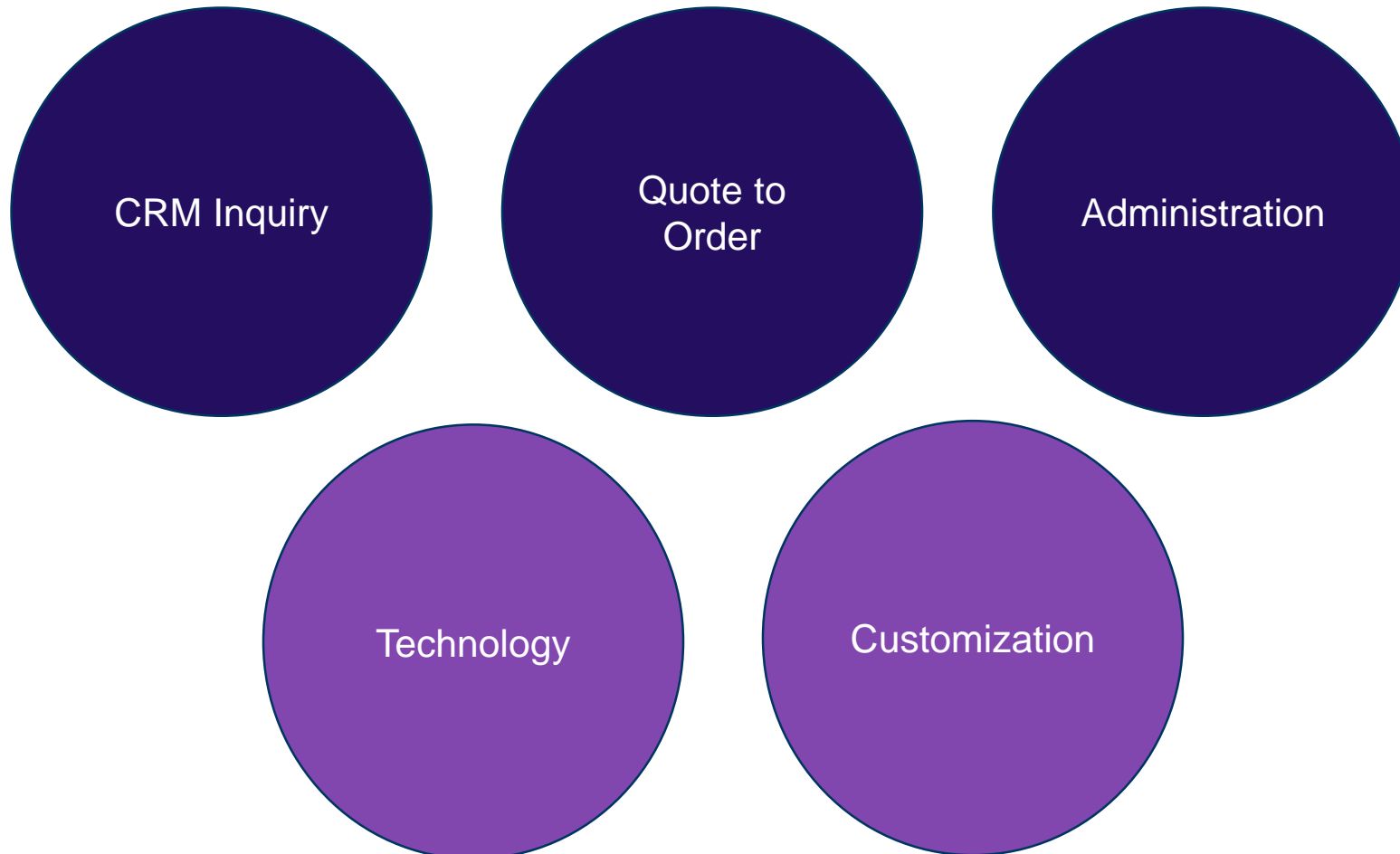
Sage 300cloud CRM connector

sage



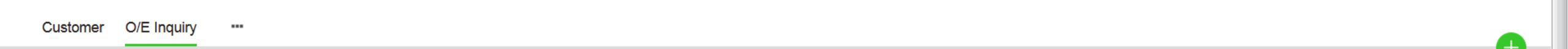
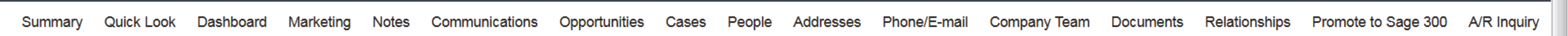
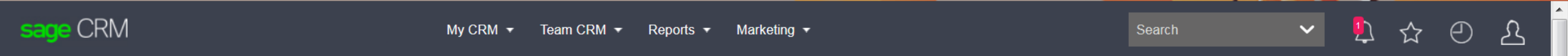
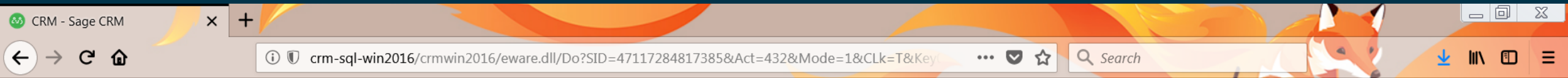
With new &
improved Sage
300 Integration

What's New - Sage300cloud Integration





OE Inquiry - move from ASP to DotNet DLL



Company: Mr. Ronald Black **Sage 300 Customer Number:** 1200
Phone: 213 5550274 **Sage 300 Company Name:** Sample Ltd Win2016

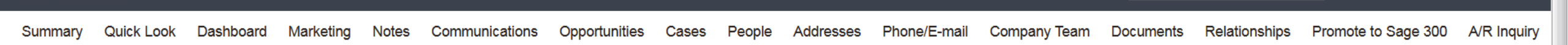
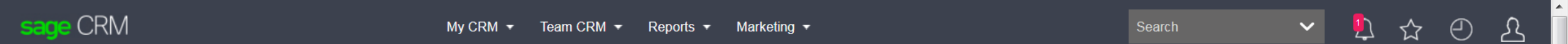
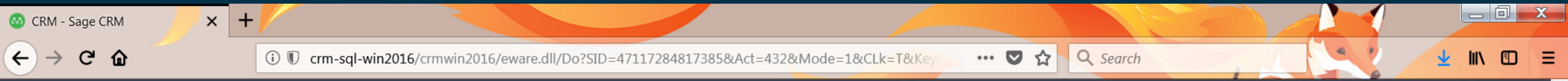
This screen lets you:

- Create a new sales order. In the Menu Selection column, select New Order, to open the Order Entry screen.
- List existing documents, for viewing or editing. In the Menu Selection column, select one of the "list" options.

O/E Inquiry Menu

	Menu Selection	Description
	All Orders	List all Orders.
	All Shipments	List all Order and Standalone Shipments.
	All Invoices	List all Invoices.
	Credit/Debit Notes	List all Credit/Debit Notes.
	Pending Shipments	List all Pending Shipments.
	Sales History	List Item Sales History.
	Customer Price List	List all Item Prices for the Customer Price List Code.
	Serial Number Sales History	List Serial Number Sales History.
	Lot Number Sales History	List Lot Number Sales History.
	Item Inventory	List Item Inventory.

O/E All Invoices (Sage 300cloud Generic Inquiry Engine)



Customer O/E Inquiry ...



Company: Mr. Ronald Black
Phone: 213 5550274

Sage 300 Customer Number: 1200
Sage 300 Company Name: Sample Ltd Win2016



This screen lets you:

- Create a new sales order. In the Menu Selection column, select New Order, to open the Order Entry screen.
- List existing documents, for viewing or editing. In the Menu Selection column, select one of the "list" options.



Inquiry

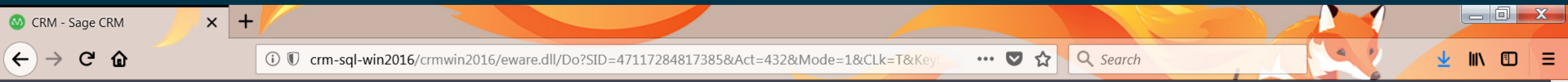
Inquiry - O/E All Invoices

Per Page : 10 50 100 Clear All Filters

No Filter

Invoice Number	Invoice Date	Order Number	Bill To	Ship To	Purchase Order Nu...	Territory	Terms Code	Description
IN0000000000061	7/1/2020		Mr. Ronald Black	Mr. Ronald Black		CA	DUETBL	
IN0000000000048	5/28/2020	ORD0000000000050	Mr. Ronald Black	Warehouse		MO	DUETBL	Ship asap
IN0000000000038	4/5/2020	ORD0000000000040	Mr. Ronald Black	Warehouse		MO	DUETBL	Overnight shipment ple
IN0000000000030	1/4/2020	ORD0000000000032	Mr. Ronald Black	Mr. Ronald Black		BC	DUETBL	Received Dec 2009

O/E All Invoices (Sage 300cloud Generic Inquiry Engine)



sage CRM My CRM Team CRM Reports Marketing Search [notification] [star] [clock] [user]

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Relationships Promote to Sage 300 A/R Inquiry

Customer O/E Inquiry ...

Company: Mr. Ronald Black **Sage 300 Customer Number:** 1200
Phone: 213 5550274 **Sage 300 Company Name:** Sample Ltd Win2016

This screen lets you:

- Create a new sales order. In the Menu Selection column, select New Order, to open the Order Entry screen.
- List existing documents, for viewing or editing. In the Menu Selection column, select one of the "list" options.

Inquiry

Inquiry - O/E All Invoices

Per Page : 10 50 100 Clear All Filters

Invoice Number	Order Number	Bill To	Ship To	Purchase Order Nu...	Territory	Terms Code	Description	Reference
IN0000000000061		Mr. Ronald Black	Warehouse		CA	DUETBL		
IN0000000000048		Warehouse	Warehouse		MO	DUETBL	Ship asap	Ref #1005-2-1
IN0000000000038	ORD0000000000040	Warehouse	Warehouse		MO	DUETBL	Overnight shipment please	Ref 1004-1-1
IN0000000000030	ORD0000000000032	Mr. Ronald Black	Warehouse		BC	DUETBL	Received Dec 2009	REF #Q2009-78442

O/E All Invoices (Sage 300cloud Generic Inquiry Engine)



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&... | Search

sage CRM | My CRM | Team CRM | Reports | Marketing | Search | [Notification] | [Star] | [Clock] | [User]

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Relationships Promote to Sage 300 A/R Inquiry

Customer O/E Inquiry ...

Company: Mr. Ronald Black | Sage 300 Customer Number: 1200 | Phone: 213 5550274 | Sage 300 Company Name: Sample Ltd Win2016

Inquiry - O/E All Invoices

Per Page : 10 50 100 | Clear All Filters

Filter: Order Number Contains '01'

Invoice Number	Order Number	Bill To	Ship To	Purchase Order Nu...	Territory	Terms Code	Description	Reference
IN0000000000009	ORD000000000011	Mr. Ronald Black	Home office		MO	DUETBL	Ship asap	Ref 0908-1-2
IN0000000000013	ORD000000000015	Mr. Ronald Black	Warehouse		BC	N30	No backorder please	Ref 0909-1-1

O/E All Invoices (Sage 300cloud Generic Inquiry Engine)



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&...

sage CRM | My CRM | Team CRM | Reports | Marketing | Search

Summary | Quick Look | Dashboard | Marketing | Notes | Communications | Opportunities | Cases | People | Addresses | Phone/E-mail | Company Team | Documents | Relationships | Promote to Sage 300 | A/R Inquiry

Customer | O/E Inquiry | ...

Company: Mr. Ronald Black | Sage 300 Customer Number: 1200 | Sage 300 Company Name: Sample Ltd Win2016
Phone: 213 5550274

Invoice Number	Order Number	Bill To	Ship To	Purchase Order Nu...	Territory	Terms Code	Description	Reference
----------------	--------------	---------	---------	----------------------	-----------	------------	-------------	-----------

IN0000000000013	ORD0000000000015	Mr. Ronald Black	Warehouse		BC	N30	No backorder please	Ref 0909-1-1
IN0000000000009								Ref 0908-1-2

O/E Order Entry

Options [Settings] [Fullscreen] [Create New]

* Required

Order Number:

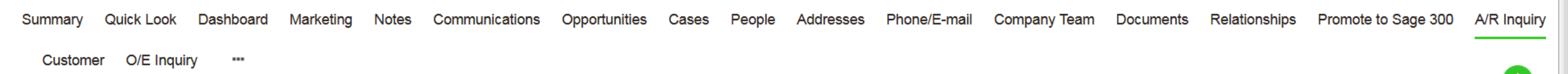
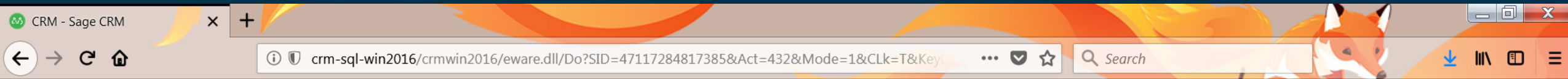
Customer Number *

Customer Name:

Order Summary

Number of Shipments: 1
Last Shipment Number: SH000000000000000000013
Last Invoice Number: IN000000000000013







A/R National Account (Sage 300cloud Web Screen)



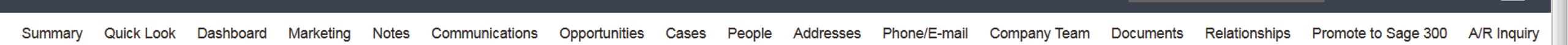
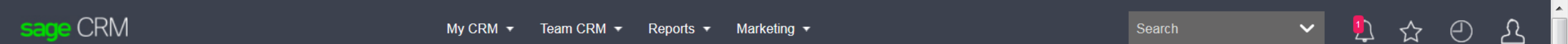
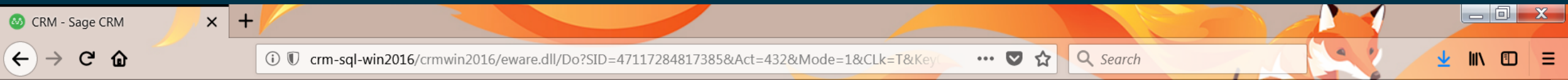
Company: Bargain Mart - Oakland **Sage 300 Customer Number:** 1105
Phone: 408 4518981 **Sage 300 Company Name:** Sample Ltd Win2016
E-mail: Jose@bargainmart.com

On the A/R Inquiry menu, choose to display the National Account if this is a National Account company, a list of posted, unposted Accounts Receivable documents and also Aged Trial Balance.

A/R Inquiry Menu

Menu Selection	Description
 National Account	A/R National Account
 Posted Transactions	List all Posted A/R Transactions.
 Unposted Invoices	List all Unposted A/R Invoices.
 Unposted Receipts	List all Unposted A/R Receipts.
 Unposted Refunds	List all Unposted A/R Refunds.
 Aged Trial Balance	Run Aged Trial Balance Report

A/R National Account (Sage 300cloud Web Screen)



Company: Bargain Mart - Oakland **Sage 300 Customer Number:** 1105
Phone: 408 4518981 **Sage 300 Company Name:** Sample Ltd Win2016
E-mail: Jose@bargainmart.com

On the A/R Inquiry menu, choose to display the National Account if this is a National Account company, a list of posted, unposted Accounts Receivable documents and also Aged Trial Balance.

Inquiry

A/R National Accounts

Options [Create New](#)

National Account Number * **National Account Name** * Required

BARMART Bargain Mart Stores, Inc.

Address Contact Processing Optional Fields Statistics Activity

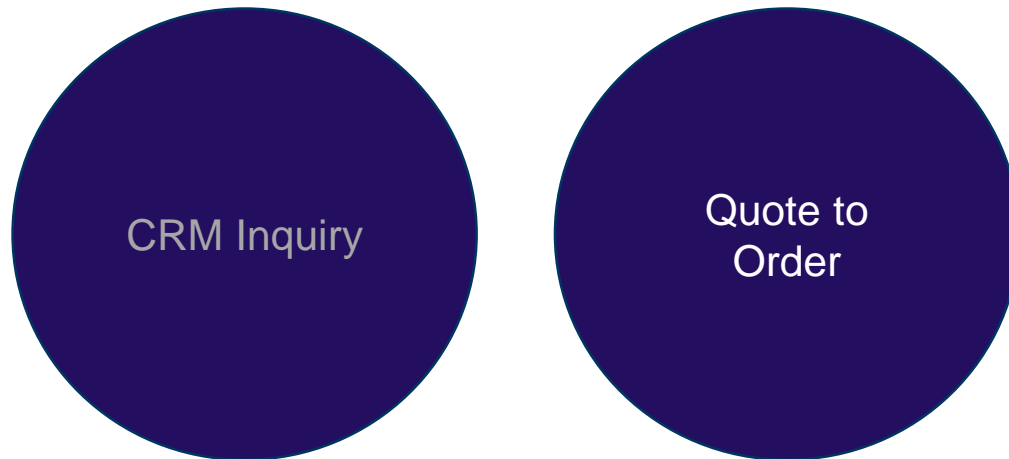
Group Code * **Group Code Description**

WHL Wholesale Sales Group

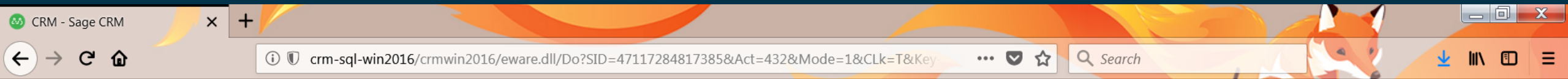
Last Maintained Inactive (as of) On Hold

8/18/2010


Sage300cloud Integration: Quote to Order



New Sage 300cloud Quote Summary Screen



Summary Notes Communications Documents Tracking Relationships Quotes Orders ...

 ★ **Opportunity:** 275 **Phone:** **Sage 300 Company Name:** Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

This is the **Quote** screen. You can use this screen to review quotes for the current opportunity, and to promote quotes to Sage 300 orders.

- To create a new quote for the current opportunity, click **New Quote**. The Quote screen below changes to the O/E Order Entry screen, which you use to create and post the new quote. After posting the quote, the O/E Order Entry screen changes back to the Quote screen. The **New Quote** button is unavailable if the opportunity is closed or the customer is inactive.
- To view or edit an existing quote in the Quote Entry screen, click the link in the **Document Number** column.
- To promote one or more quotes to a Sage 300 order, click one or more checkboxes to select the quote(s) to promote, and then click **Promote to Order**. Note that you cannot select expired quotes, quotes that have already been promoted, or quotes that belong to a closed opportunity.

If you are in the Quote Summary page, the following fields show quote totals for the current opportunity:

- **Quote Total.** If a quote is included in opportunity totals, this amount is included when calculating Promoted, Pending, and Quote Amount (even if the quote has expired).
- **Promoted.** The sum of all quotes included in the opportunity that have been promoted to an order.
- **Pending.** The sum of all quotes included in the opportunity but not yet promoted to an order.
- **Quote Amount.** The sum of all pending and promoted quotes included in the opportunity.

Opportunity ID: 275

Opportunity Description: 275

Selected	Document Number	Description	Associated Order	Document Date	Expiration Date	Include in O...	Quote Total
<input checked="" type="checkbox"/>	QT0000000000127			7/19/2018	8/18/2018	Yes	165.840
<input checked="" type="checkbox"/>	QT0000000000128			7/19/2018	8/18/2018	Yes	33.830

New Quote
Promote to Order

O/E Order Entry with CRM Opportunity Tab



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key | Search

- Summary
- Notes
- Communications
- Documents
- Tracking
- Relationships
- Quotes**
- Orders
- ...

★ Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016
★ Company: Bargain Mart - Oakland
Person: Jose Grange

O/E Order Entry

Options Create New

Order Number
*** NEW ***

Customer Number *
1105

Customer Name
Bargain Mart - Oakland

Order Summary

Number of Shipments	0
Last Shipment Number	
Last Invoice Number	

- Order**
- Customer
- Taxes
- Optional Fields
- Sales Split
- Rates
- Totals
- CRM Opportunity

Template Code: ACTIVE
Purchase Order Number:
Status:
Entered By:

Order Date: 7/19/2018
Order Type: Active
 On Hold

O/E Order Entry with CRM Opportunity Tab



CRM - Sage CRM

crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key

Search

Summary Notes Communications Documents Tracking Relationships **Quotes** Orders ...

Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016

Company: Bargain Mart - Oakland

Person: Jose Grange

Customer Name

Bargain Mart - Oakland

Order Customer Taxes Optional Fields Sales Split Rates Totals **CRM Opportunity**

Sage CRM User: admin

CRM Opportunity: 275

To...: Jose@bargainmart.com

Cc...: albert.ho@sage.com

Email Subject: Quote/Order confirmation

Report: OECONF01.RPT

Send Email

Email Message

O/E Order Entry Ship All & Create Invoice



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key | Search

Summary | Notes | Communications | Documents | Tracking | Relationships | **Quotes** | Orders | ...

★ Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

Template Code: ACTIVE | Purchase Order Number: | Status: | Entered By: |

Order Date: 7/19/2018 | Order Type: Active | On Hold

Calculate Taxes Create Invoice From Multiple Quotes

Order Description: | Reference: |

▼ Shipment Details

Ship-To Location Code: | Default Location Code: 1 | Location Description: Central warehouse - Seattle | Deliver By: 7/19/2018 | Expected Ship Date: 7/19/2018

Ship-Via Code: CCT | Ship-Via Description: Cross-Country Trucking Lines | Shipment Tracking Number: |

O/E Order Entry Ship All & Create Invoice



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key | Search

Summary | Notes | Communications | Documents | Tracking | Relationships | **Quotes** | Orders | ...

★ Opportunity: 275 | Phone: | Sage 300 Company Name: Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

Template Code	Purchase Order Number	Status	Entered By
ACTIVE			
Order Date	Order Type	<input type="checkbox"/> On Hold	
7/19/2018	Active		
<input checked="" type="checkbox"/> Calculate Taxes	<input checked="" type="checkbox"/> Create Invoice	<input checked="" type="checkbox"/> From Multiple Quotes	
Order Description	Reference		

▼ Shipment Details

Ship-To Location Code	Default Location Code	Location Description	Deliver By	Expected Ship Date
	1	Central warehouse - Seattle	7/19/2018	7/19/2018
Ship-Via Code	Ship-Via Description	Shipment Tracking Number		
CCT	Cross-Country Trucking Lines			

O/E Order Entry Print Confirmation



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key

Summary | Notes | Communications | Documents | Tracking | Relationships | **Quotes** | Orders | ...

★ Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

Confirmation

Posting Completed

Order Number : ORD000000000182
Shipment Number : SH0000000000000000104
Invoice Number : IN00000000000080

Do you want to print?

Order Confirmation
 Shipment Picking Slip
 Invoice
 Prepayment Receipt

Page 1 of 1

	Quantity on
Location 1 (Ea.)	
All Locations (Ea.)	

Components

1 - 2 of 2 items

O/E Order Entry Print Confirmation



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key

Summary Notes Communications Documents Tracking Relationships **Quotes** Orders ...

Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

Customer Number * 1105
Customer Name Bargain Mart - Oakland

O/E Invoices

Use Invoice
OEINV01.RPT

Invoice Number
IN0000000000080

Delivery Method
Print Destination

Require Shipping Labels
 Include Backordered Items
 Print Kit Component Items

Print

Order Customer

Template Code
ACTIVE

Order Date
7/19/2018

Calculate Taxes

Order Description

Shipment Details

number of shipments
Last Shipment Number
SH000000000000000000000000104
IN000000000000080

O/E Order Entry Print Confirmation



CRM - Sage CRM | crm-sql-win2016/Sage300/WebFor... | crm-sql-win2016/Sage300/WebForms/ReportViewer.aspx?token=b777ae98-b0e9-4684-a41f-2fe527f28d... | Search

SAP CRYSTAL REPORTS*

Find... | 1 of 1 | 100%

Main Report

Sample Company Limited 123 Sample Company Plaza Any City, Any Province, V6J 9T3 Canada Phone: (123) 456-7890 Fax: (123) 456-7891		Invoice	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">Date</td> <td style="text-align: center;">Page</td> </tr> <tr> <td style="text-align: center;">Jul 19, 2018</td> <td style="text-align: center;">1</td> </tr> <tr> <td colspan="2" style="text-align: center;"> Invoice Number IN0000000000080 </td> </tr> </table>	Date	Page	Jul 19, 2018	1	Invoice Number IN0000000000080	
Date	Page								
Jul 19, 2018	1								
Invoice Number IN0000000000080									
Sold To: Bargain Mart - Oakland Bargain Mart Plaza Corner 182nd and 34th street Anytown, CA 45112 USA		Ship To: Bargain Mart - Oakland Bargain Mart Plaza Corner 182nd and 34th street Anytown, CA 45112 USA							
Order No. ORD000000000182	Order Date Jul 19, 2018	Customer No. 1105	Salesperson BB	PO Number	Ship Via CCT	Terms N30			
Qty. Ord.	Qty. Shp.	Qty. B/O	Item Number	Description	Unit Price	UOM	Extended Price		
4	4	0	A1-103/0	Fluorescent Desk Lamp	38.30	Ea.	153.20		
5	5	0	A1-105/0	13W Mini Fluorescent Bulb	6.25	Ea.	31.25		
			Due Date Aug 18, 2018	Amount Due 199.67	Discount Date Jul 19, 2018		Disc. Amount 0.00		

New Sage 300cloud Order Summary Screen



CRM - Sage CRM | crm-sql-win2016/crmwin2016/eware.dll/Do?SID=47117284817385&Act=432&Mode=1&CLk=T&Key | Search

Summary | Notes | Communications | Documents | Tracking | Relationships | Quotes | **Orders** | ...

★ Opportunity: 275 Phone: Sage 300 Company Name: Sample Ltd Win2016
Company: Bargain Mart - Oakland
Person: Jose Grange

- **Quote Total.** If a quote is included in opportunity totals, this amount is included when calculating Promoted, Pending, and Quote Amount (even if the quote has expired).
- **Promoted.** The sum of all quotes included in the opportunity that have been promoted to an order.
- **Pending.** The sum of all quotes included in the opportunity but not yet promoted to an order.
- **Quote Amount.** The sum of all pending and promoted quotes included in the opportunity.

Opportunity ID: 275

Opportunity Description: 275

Document Number	Description	Associated Quotes	Document Date	On Hold	Order Total
ORD000000000182		QT0000000000127 ; QT0000000000128	7/19/2018	No	0.000

New Order

Sage300cloud Integration: Administration



CRM Inquiry

Quote to
Order

Administration

Sage 300 Administration



CRM - Sage CRM | crm-sql-win2016/CRMWIN2016/eware.dll/Do?SID=133757070824298&Act=432&Mode=1&CLk=T&dotnet | Search

sage CRM | My CRM | Team CRM | Reports | Marketing | Search | 9 | [Icons]

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration**
- System



Administration -> Sage 300 Administration

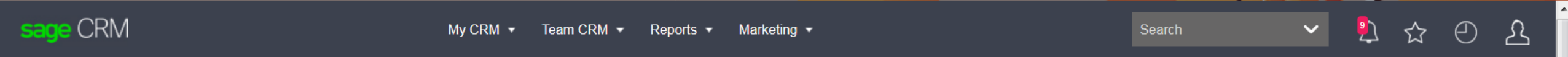
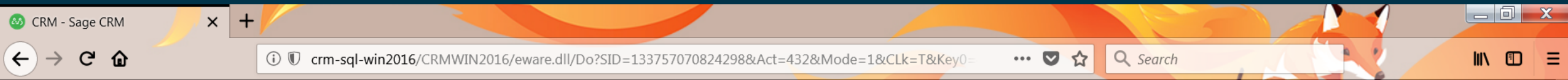
This screen updates SageCRM database tables with the tables defined for certain fields in the Sage 300 database. The tables are listed on the tab below. The tables should be synchronized after the installation is completed and before you add any data to the system. To synchronize the tables:

- Select the Sage 300 company name.
- Select each of the tables that you want to synchronize.
- Click the Synchronise button. When synchronization is completed, SageCRM displays the values extracted from the Sage 300 database.
- Select Continue to proceed.

Sage 300 Administration

	Menu Selection	Description
	Setup Integration	Sage 300 Integration Settings.
	Synchronize Tables	Synchronize Sage 300 Integration Tables.
	Import Customers	Import Sage 300 A/R Customers.
	Import Vendors	Import Sage 300 A/P Vendors.
	Import National Accounts	Import National Account and Customer Relationships.
	Synchronize Currencies	Synchronize Existing Currencies.
	Sage 300 User-Level Security	Define user-level security for Sage 300 integrated screens.
	Sage 300 Database-Level Security	Define database-level security for each Sage 300 integrated database.
	About Sage CRM Integration	About Sage CRM Integration for Sage 300.

Sage 300 Administration - Database Setup



- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration**
- System

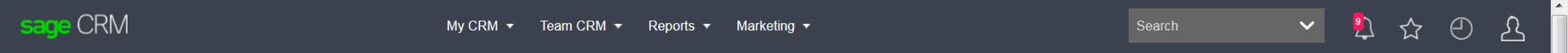
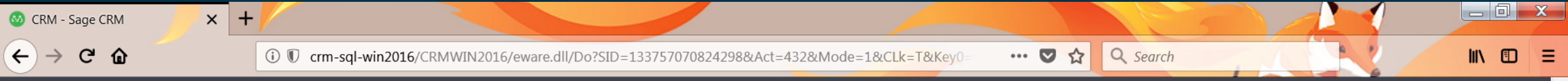
Administration -> Sage 300 Administration

This screen is to setup SageCRM with Sage 300 Database Integration. To setup the integration with Sage 300 database:

- Click the Add button to create a new entry.
- Enter the Sage 300 database ID that you want to integration into SageCRM.
- Enter the Sage 300 server location into Sage 300 server name. For example: http://localhost or https://localhost. This URL is where you launch the Sage 300 webscreen Portal and WebApi.
- Select Save and Continue to proceed.

Sage 300 Database ID	Sage 300 Company Name	Sage 300 Server Name	Company Email	Default Company	Delete
W16LTD	Sample Ltd Win2016	http://crm-sql-win2016	albert.ho@sage.com	<input checked="" type="checkbox"/>	
IN2LTD	Sample LTD Win2012	http://crm-int2	sijun.dong@sage.com	<input type="checkbox"/>	

Synchronize Tables



- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System



Administration -> Sage 300 Administration

This screen updates SageCRM database tables with the tables defined for certain fields in the Sage 300 database. The tables are listed on the tab below. The tables should be synchronized after the installation is completed and before you add any data to the system. To synchronize the tables:

- Select the Sage 300 company name.
- Select each of the tables that you want to synchronize.
- Click the Synchronise button. When synchronization is completed, SageCRM displays the values extracted from the Sage 300 database.
- Select Continue to proceed.

Select Sage 300 Integration Tables to Synchronize

Sage 300 Company Name

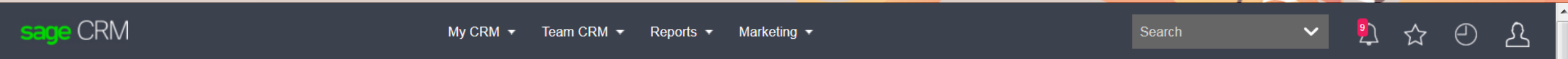
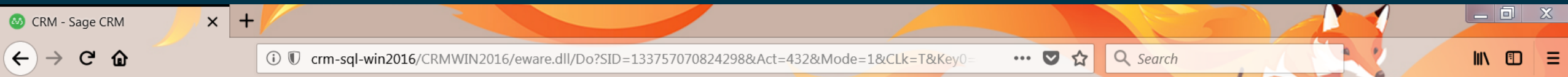
Sample Ltd Win2016 ▾

- Group Code**
- Tax Code**
- Terms Code**
- SalesPerson Codes**

Synchronise

Continue

Synchronize Tables Results



- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System

Administration -> Sage 300 Administration

This screen updates SageCRM database tables with the tables defined for certain fields in the Sage 300 database. The tables are listed on the tab below. The tables should be synchronized after the installation is completed and before you add any data to the system. To synchronize the tables:

- Select the Sage 300 company name.
- Select each of the tables that you want to synchronize.
- Click the Synchronise button. When synchronization is completed, SageCRM displays the values extracted from the Sage 300 database.
- Select Continue to proceed.

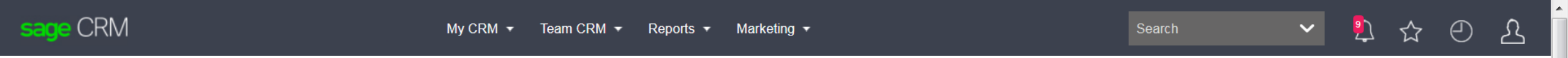
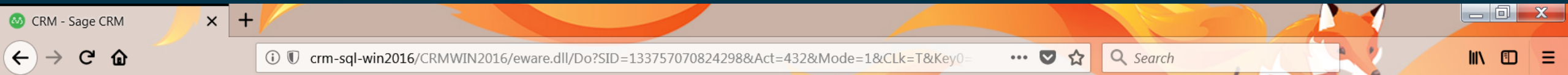
Synchronized Tables from W16LTD

Group Code

Type	Group Code	Description
Customer	BF	Balanced Forward Group
Customer	EMP	Employee Sales Group
Customer	RTL	Retail Sales Group
Customer	WHL	Wholesale Sales Group
Vendor	ASC	Inventory Purchases - Access.
Vendor	INV	Inventory Purchases
Vendor	MIS	Miscellaneous Purchases
Vendor	SVC	Service Purchases
Vendor	USA	USD Vendors

Continue

Import Customers



Administration -> Sage 300 Administration

The Import Customers function let you import a range of customers and vendors from Sage 300 Accounts Receivable into SageCRM. To populate SageCRM with customers:

- Select the company that you are importing from.
- Enter the customer range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZ" to import all customers.
- Select the Import button. NOTE: Importing data from a large database for the first time may be lengthy. We recommend to import 500 customers at a time.
- When the process is complete, click Continue to exit.

Import Sage 300 A/R Customers

Sage 300 Company Name:
Sample Ltd Win2016

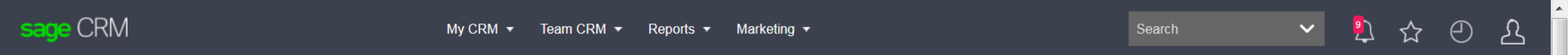
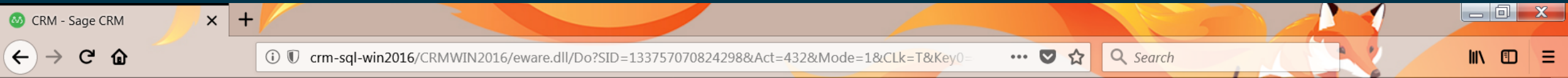
Import Customer

Import Ship-To Address

From Customer Number

To Customer Number

Import Vendors



- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System



Administration -> Sage 300 Administration

The Import Vendors function let you import a range of vendors from Sage 300 Accounts Payable into SageCRM. To populate SageCRM with vendors:

- Select the company that you are importing from.
- Enter the vendor range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZ" to import all vendors.
- Select the Import button. NOTE: Importing data from a large database for the first time may be lengthy. We recommend to import 500 vendors at a time.
- When the process is complete, click Continue to exit.



Import Sage 300 A/P Vendors

Sage 300 Company Name:

Sample Ltd Win2016

Import Vendor

Import Remit-To Address

From Vendor Number

To Vendor Number ZZZZZZZZZZ

Import

Continue

Import National Accounts



CRM - Sage CRM | crm-sql-win2016/CRMWIN2016/eware.dll/Do?SID=133757070824298&Act=432&Mode=1&CLk=T&Key0=

sage CRM | My CRM | Team CRM | Reports | Marketing | Search | 9 | [User Profile]

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System



Administration -> Sage 300 Administration

The Import National Account function let you import a range of nationalaccounts from Sage 300 Accounts Receivable into SageCRM. To populate SageCRM with national account:

- Select the national account that you are importing from.
- Enter the national account range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZZZ" to import all national accounts.
- Select the Import from Sage 300 button. NOTE: Importing data from a large database for the first time may be lengthy. When the process is complete, click Continue to exit.

Import National Account Relationships

Sage 300 Company Name:

Sample Ltd Win2016

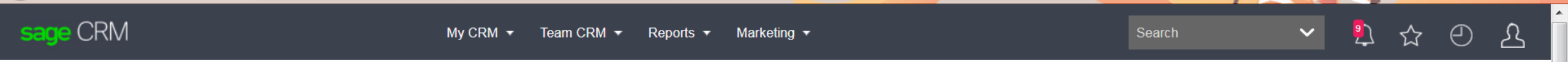
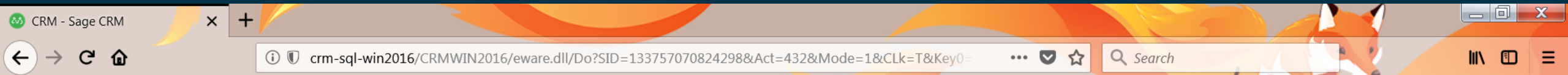
National Account From

National Account To

Import from Sage 300

Continue

Import Vendors Results



Users
 Customisation
 Advanced Customisation
 Data Management
 E-mail and Documents
 Sage 300 Administration
 System

Administration -> **Sage 300 Administration**

The Import Vendors function let you import a range of vendors from Sage 300 Accounts Payable into SageCRM. To populate SageCRM with vendors:

- Select the company that you are importing from.
- Enter the vendor range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZZZ" to import all vendors.
- Select the Import button. NOTE: Importing data from a large database for the first time may be lengthy. We recommend to import 500 vendors at a time.
- When the process is complete, click Continue to exit.

Import options Continue

Sage 300 Company Name: **W16LTD**

Import Vendors: **True**

Import Remit-To Location: **True**

From Vendor Number:

To Vendor Number: **ZZZZZZZZZZZZ**

Import Successful

Import 37 Vendors and 6 locations

Synchronize Currency



CRM - Sage CRM

crm-sql-win2016/CRMWIN2016/eware.dll/Do?SID=133757070824298&Act=432&Mode=1&CLk=T&Key0=

Search

sage CRM My CRM Team CRM Reports Marketing Search

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System

Administration -> Sage 300 Administration

The Synchronize Currencies function let you synchronize SageCRM currency codewith Sage 300 currency code.

Select Sage 300 Integration Tables to Synchronize Currency

Sage 300 Company Name

Sample Ltd Win2016

- Load Currency Info
- Continue

Load Currency Info



CRM - Sage CRM | crm-sql-win2016/CRMWIN2016/eware.dll/Do?SID=133757070824298&Act=432&Mode=1&CLk=T&Key0=

sage CRM | My CRM | Team CRM | Reports | Marketing | Search

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System

Administration -> Sage 300 Administration

The Synchronize Currencies function let you synchronize SageCRM currency codewith Sage 300 currency code.

Sage CRM Currency Codes

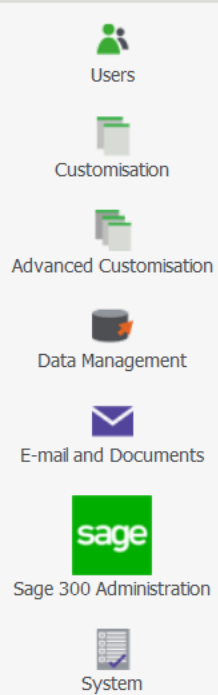
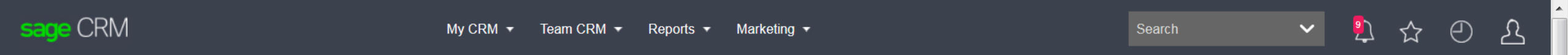
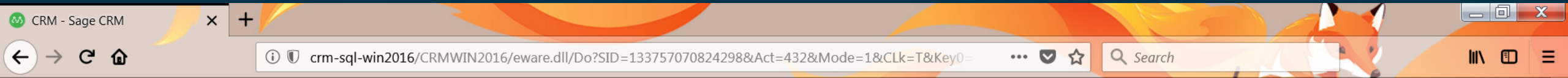
CRM Id	Description	Symbol	Currency Code	New Symbol
1	US Dollar	USD	<input type="text"/>	<input type="text"/>
2	Euro	EUR	<input type="text"/>	<input type="text"/>
3	British Pound	GBP	<input type="text"/>	<input type="text"/>
4	Japanese Yen	JPY	<input type="text"/>	<input type="text"/>

Save
Cancel

Currency Codes

<input type="checkbox"/> Select All	Currency Code	Description	Symbol	Decimal Precision
<input type="checkbox"/>	ATS	Austrian Schilling	AtS	2
<input type="checkbox"/>	AUD	Australian Dollars	\$	2
<input type="checkbox"/>	BEF	Belgian Franc	BeF	2
<input type="checkbox"/>	CAD	Canadian Dollars	\$	2
<input type="checkbox"/>	CHF	Swiss Francs	SwF	2
<input type="checkbox"/>	CNY	People's Rep of China Renminbi	RMB	2
<input type="checkbox"/>	DEM	Deutsche Mark	DM	2

Set Up User-Level Security



Administration -> Sage 300 Administration

The Import Vendors function let you import a range of vendors from Sage 300 Accounts Payable into SageCRM. To populate SageCRM with vendors:

- Select the company that you are importing from.
- Enter the vendor range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZ" to import all vendors.
- Select the Import button. NOTE: Importing data from a large database for the first time may be lengthy. We recommend to import 500 vendors at a time.
- When the process is complete, click Continue to exit.

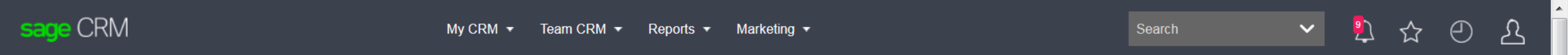
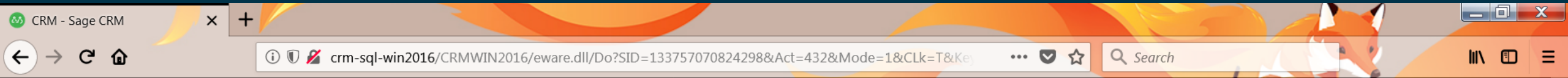


Sage 300 Integration Screen Access - User-Level Security

User Name	Last Name	First Name
Admin	Administrator	System
FinchJ	Finch	John
JohnsonP	Johnson	Peter
MayeS	Maye	Susan
WardK	Ward	Kylie
McGrawT	McGraw	Tim
DolanW	Dolan	William
ONeillS	O'Neill	Simon
EbdenM	Ebden	Matthew
MullerH	Muller	Hans
parcellsw	Parcells	Wayne

Continue

Set Up User-Level Security



- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System



Administration -> Sage 300 Administration

The Import National Account function let you import a range of nationalaccounts from Sage 300 Accounts Receivable into SageCRM. To populate SageCRM with national account:

- Select the national account that you are importing from.
- Enter the national account range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZ" to import all national accounts.
- Select the Import from Sage 300 button. NOTE: Importing data from a large database for the first time may be lengthy. When the process is complete, click Continue to exit.



Sage 300 User-Level Security: Admin

Sage 300 User ID

Sage 300 Password

- | | | |
|---|--|--|
| <input checked="" type="checkbox"/> Select All | <input checked="" type="checkbox"/> Company A/P Promote | <input checked="" type="checkbox"/> Company A/P Vendors UI |
| <input checked="" type="checkbox"/> Company A/P Inquiry | <input checked="" type="checkbox"/> Company A/R Customers UI | <input checked="" type="checkbox"/> Company A/R Promote |
| <input checked="" type="checkbox"/> Company A/R Inquiry | <input checked="" type="checkbox"/> Opportunity O/E Inquiry | <input checked="" type="checkbox"/> Company P/O Inquiry |
| <input checked="" type="checkbox"/> Company O/E Inquiry | | |

Set Up Database-Level Security



CRM - Sage CRM

crm-sql-win2016/CRMWIN2016/eware.dll/Do?SID=133757070824298&Act=432&Mode=1&CLk=T&Key0=

sage CRM My CRM Team CRM Reports Marketing Search

- Users
- Customisation
- Advanced Customisation
- Data Management
- E-mail and Documents
- Sage 300 Administration
- System



Administration -> Sage 300 Administration

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- Enter the national account range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZZZ" to import all national accounts.
- Select the Import from Sage 300 button. NOTE: Importing data from a large database for the first time may be lengthy. When the process is complete, click Continue to exit.



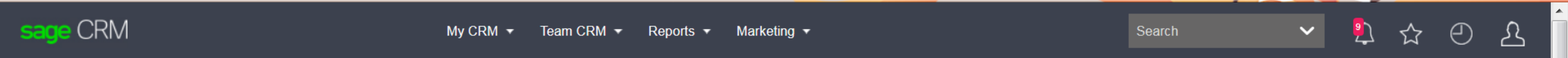
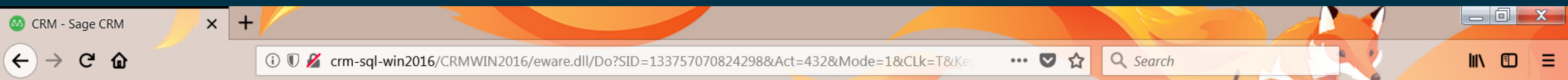
Sage 300 Integration Screen Access - Database-Level Security

User Name	Last Name	First Name	Sage 300 Company Name	Sage 300 User ID
FinchJ	Finch	John	W16LTD	ADMIN

New

Continue

Set Up Database-Level Security



Administration -> Sage 300 Administration

The Import National Account function let you import a range of national accounts from Sage 300 Accounts Receivable into SageCRM. To populate SageCRM with national account:

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- Enter the national account range that you want to import, or leave the "From" field blank and the "To" field as "ZZZZZZZZZZZZ" to import all national accounts.
- Select the Import from Sage 300 button. NOTE: Importing data from a large database for the first time may be lengthy. When the process is complete, click Continue to exit.

Sage 300 Database-Level Security: FinchJ

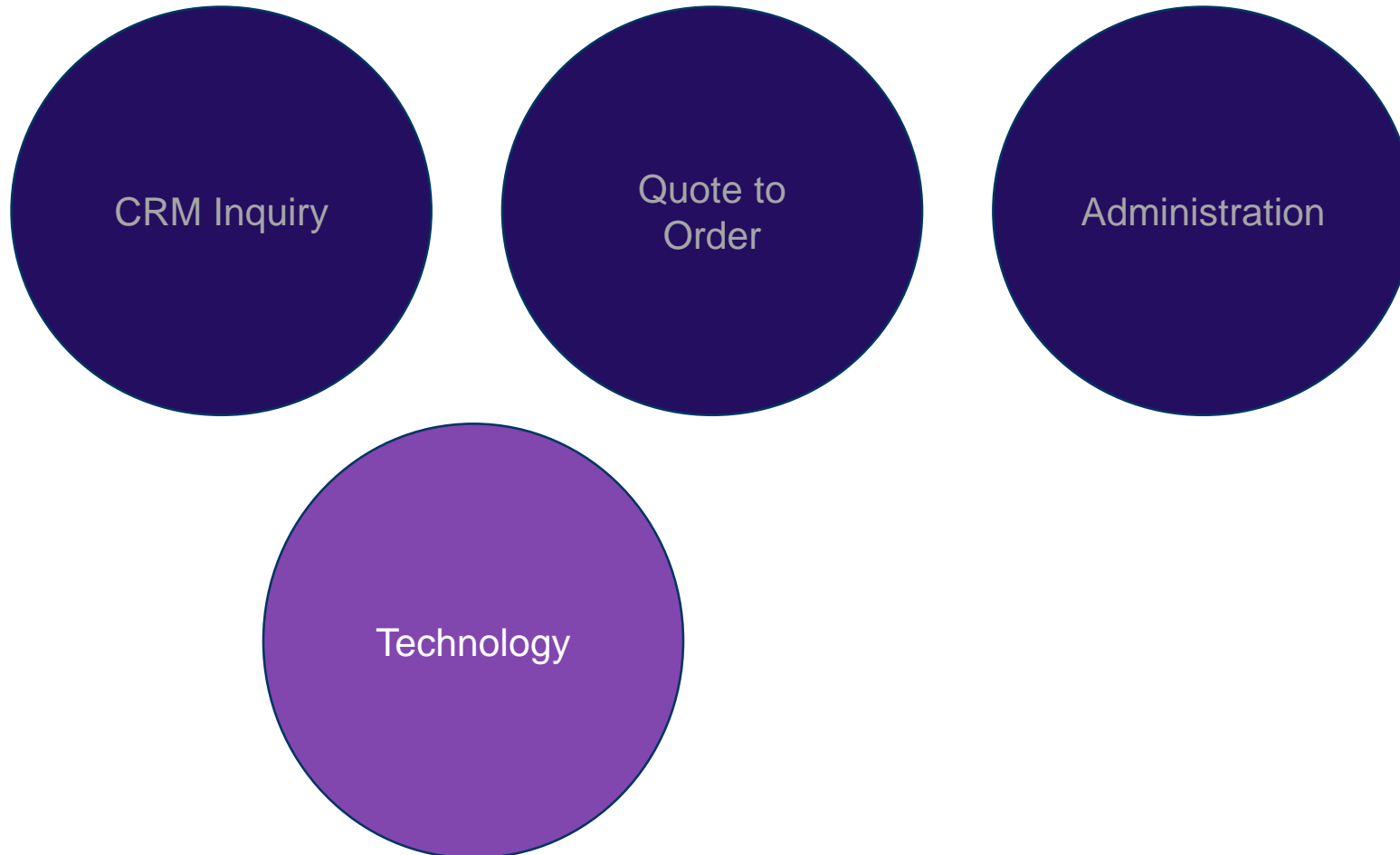
User Name Sage 300 Company Name

Sage 300 User ID Sage 300 Password

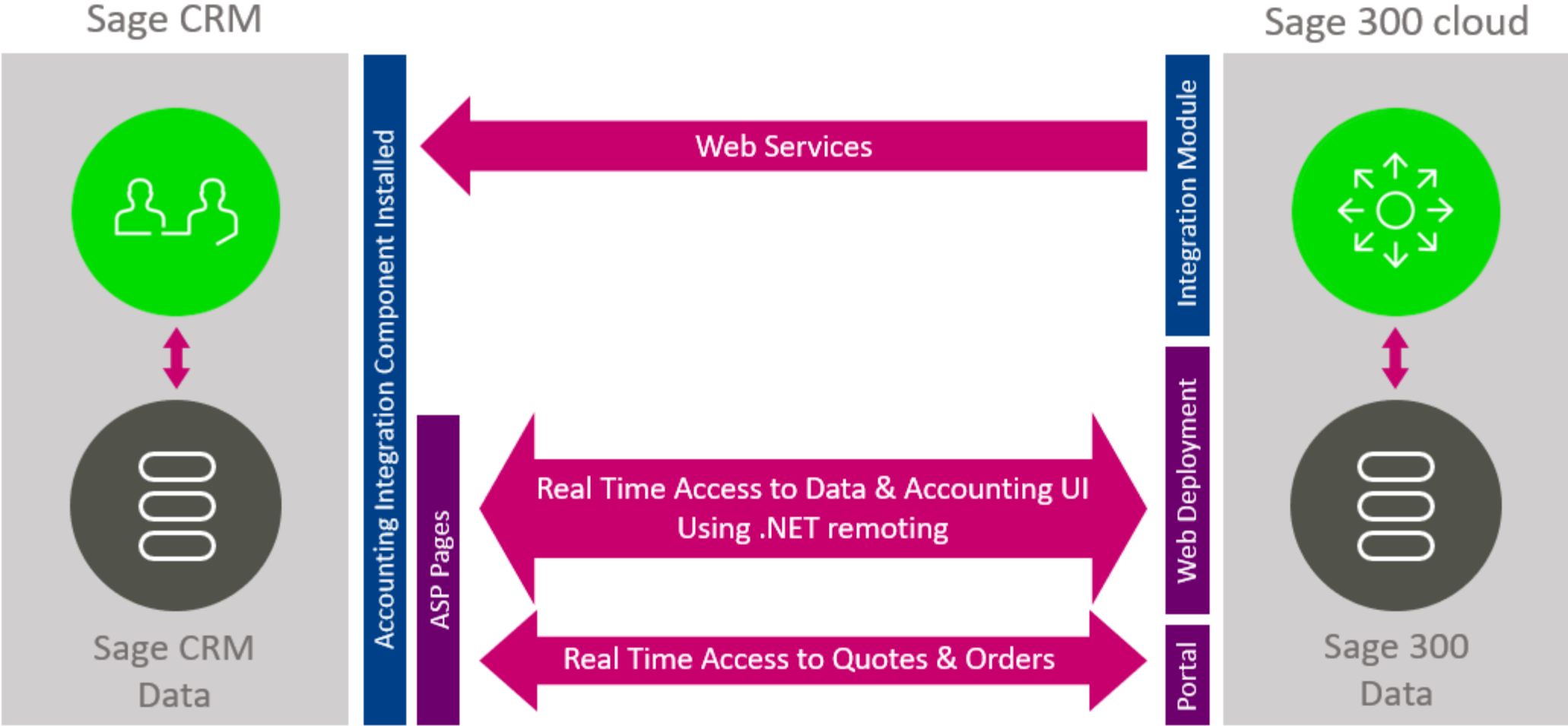
Select All

<input checked="" type="checkbox"/> Company A/P Inquiry	<input checked="" type="checkbox"/> Company A/P Promote	<input checked="" type="checkbox"/> Company A/P Vendors UI
<input checked="" type="checkbox"/> Company A/R Inquiry	<input checked="" type="checkbox"/> Company A/R Customers UI	<input checked="" type="checkbox"/> Company A/R Promote
<input checked="" type="checkbox"/> Company O/E Inquiry	<input checked="" type="checkbox"/> Opportunity O/E Inquiry	<input checked="" type="checkbox"/> Company P/O Inquiry

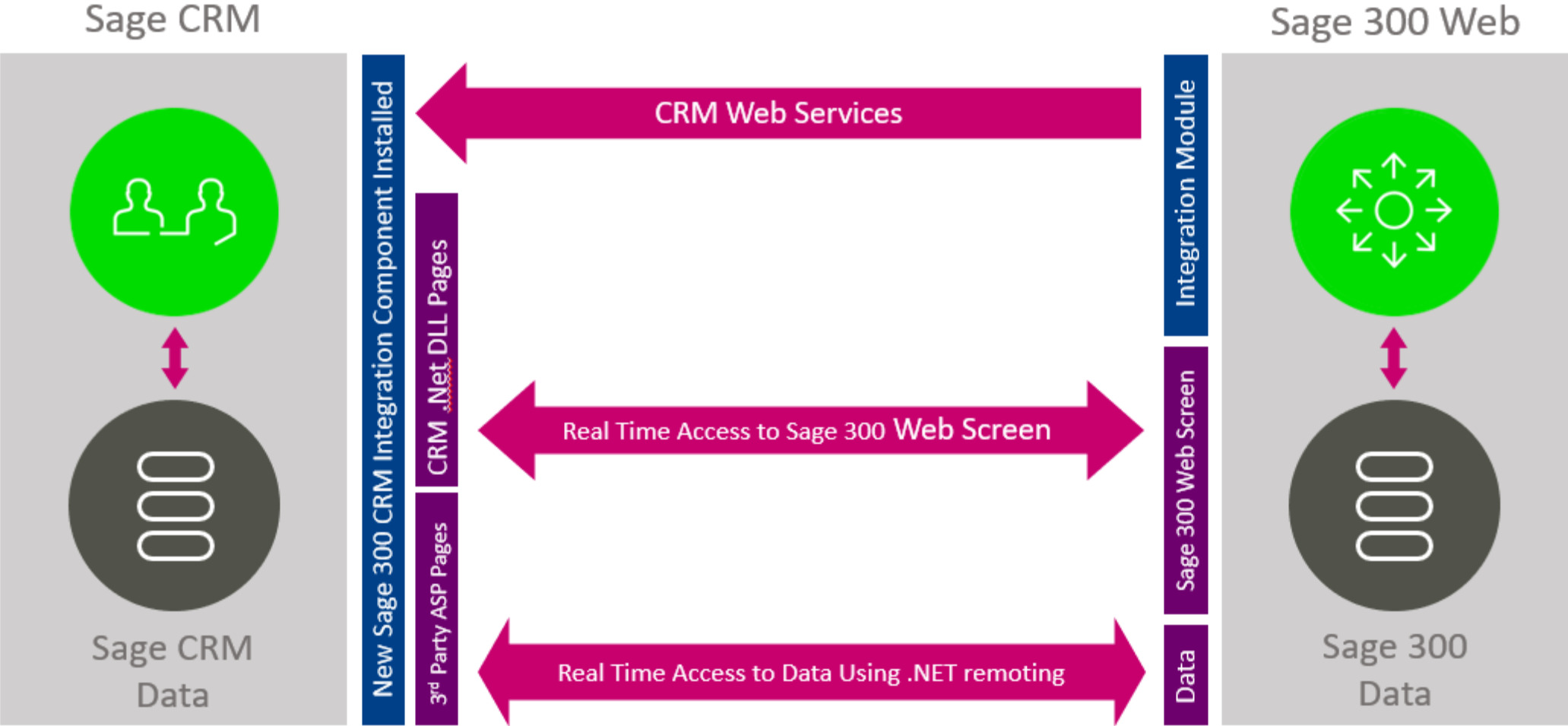
Sage300cloud Integration: Technology



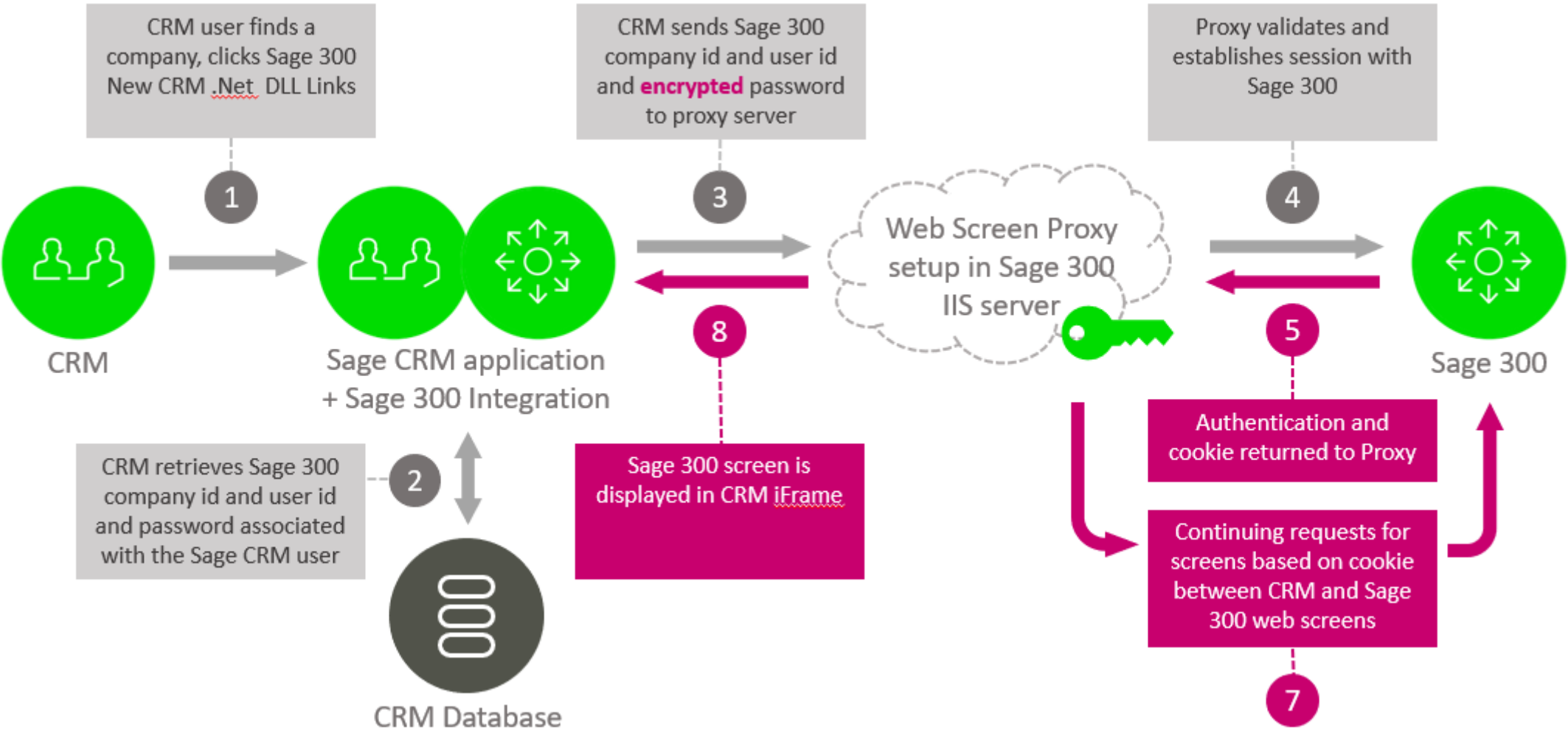
Sage300cloud Integration: Old Integration



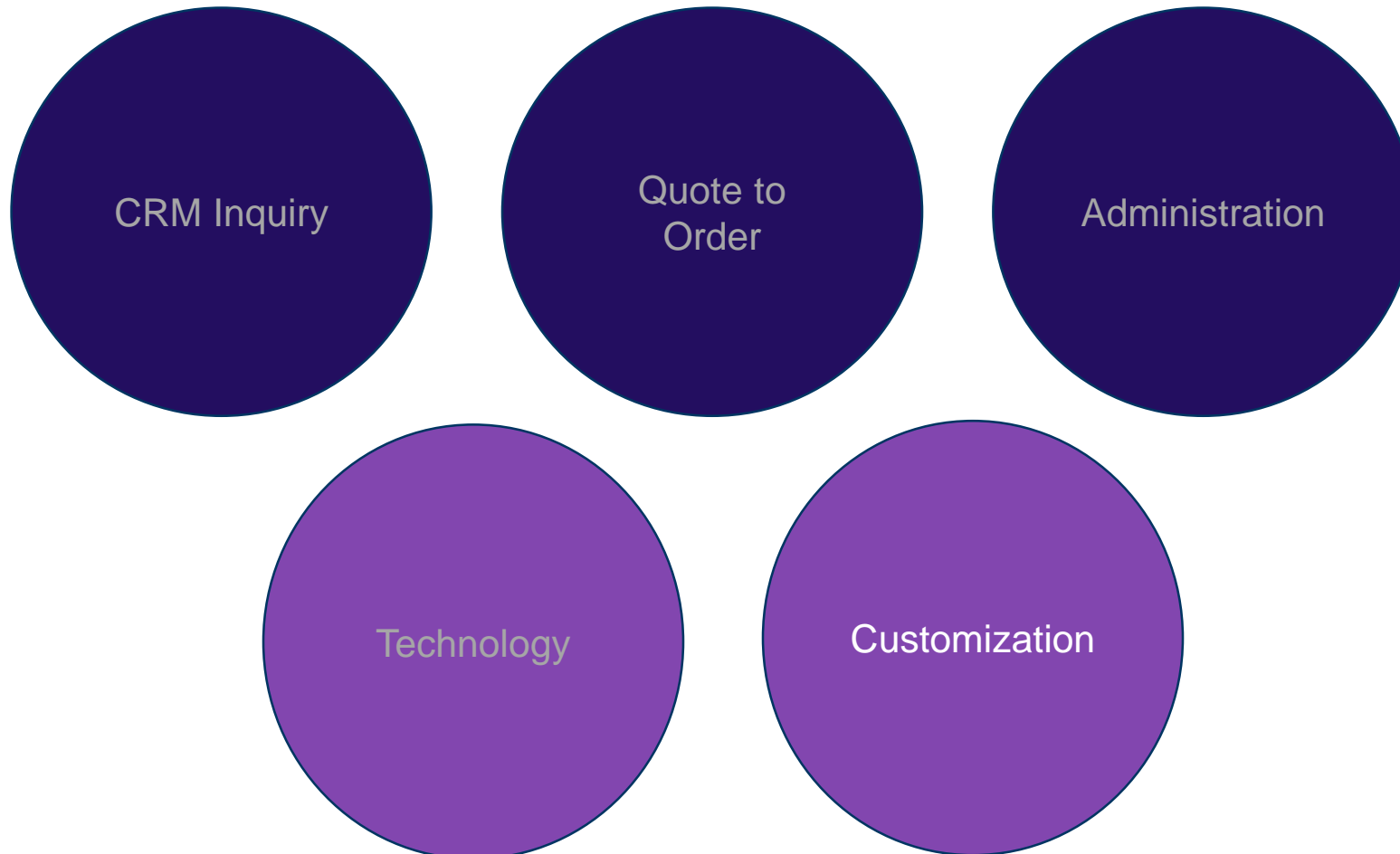
Sage300cloud Integration: New Integration



Sage300cloud Integration: New Web Screen Proxy



Sage300cloud Integration: Customization





Any Questions?

<http://community.sagecrm.com>



Thank you