ACCPAC CRM Order Entry for Sage CRM 6.1k+, 6.2SP1+ Version 4.0

System Administrator and Installation Guide

Publisher: CRM Systems, Winnipeg MB Canada

Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- ACCPAC CRM 6.0S+, 6.1k+ or 6.2a+
- MS SQL Server 2005SP2+
- Sage Accpac ERP 5.5+
- Experience implementing and customizing CRM
- Using Sage Accpac ERP

How this guide is organized

You must read the “End-User License Agreement For CRM Systems Software” in the pages that follow. Acceptance of this agreement is required in order install and use the software.

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of the Sage CRM Order Entry Extension.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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Part 1: Installation

64Bit Operating System Notes

Should your client be the fortunate owner of a 64bit Windows Server, and CRM/CRMOE is to be installed in that environment, there are a few additional prerequisites that need to be addressed, and that will NOT be automatically installed/configured by the CRMOE installer:

- You must download and install J# 2.0 64bit, from the Microsoft Web site. The 32 bit J# is included in the CRMOE installer, but will not operate on a 64 bit Windows instance. Download the 64bit installer at this location: http://www.microsoft.com/downloads/thankyou.aspx?familyId=42c46554-5313-4348-bf81-9bb133518945&displayLang=en
- Many 64 bit OS installations have ASP.NET issues that prevent the “ASP.net” tab from appearing under the IIS Manager, in the properties of a web site. Confirm the ASP.net tab is present in the “properties” of the “Default Web Site” in IIS. If it is not, you will need to correct your 32bit Microsoft.NET Framework installation. You can try one of several repairs, here are a few resources:
    - http://support.microsoft.com/kb/919283
    - http://blogs.msdn.com/tom/archive/2008/04/17/asp-net-tab-missing.aspx
- When you install CRMOE, the installer will NOT automatically find the CRM instance. You will need to manually browse to find it. You should ensure you select the “wwwRoot/custompages” folder of the CRM instance you want to install into. The installer may warn you that it is not a valid custompages folder – ignore this warning.

CRMOE Prerequisites – Read Prior to attempting install!

The CRM Systems Order Entry CRM Extensions have several prerequisites that must be satisfied prior to attempting installation. Not completing any one of these steps may result in a failed installation.

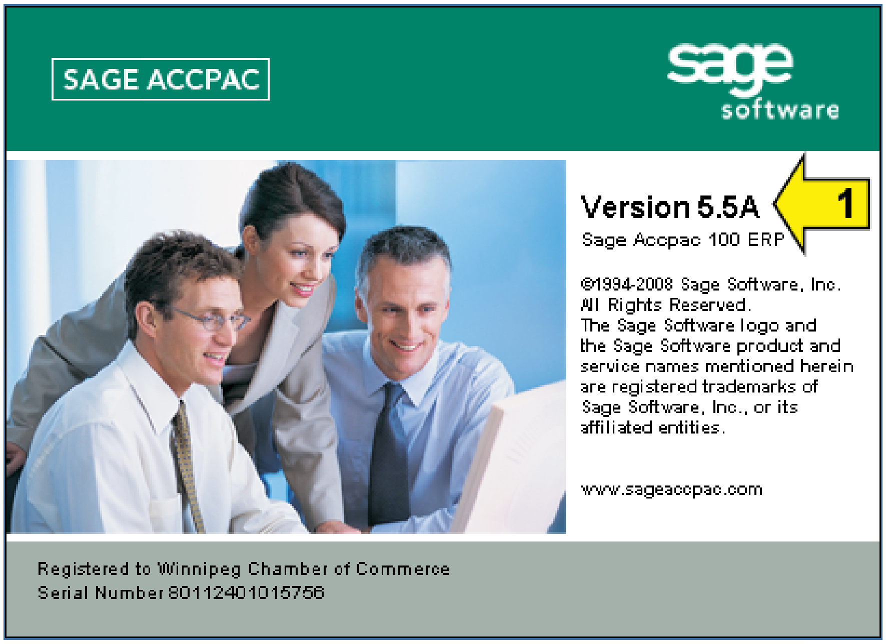
- CRM 6.1k+, 6.2SP1 or higher installed.
- MS SQL Server 2000SP3 + installed
- CRM must be completely configured and functioning correctly.
- CRM integration to ACCPAC Advantage Series 5.5a or higher must be installed, configured and functioning correctly.
- ACCPAC Advantage Series 5.5a integration to ACCPAC CRM must be installed, configured and functioning correctly. Web Services integration can be used, but you must confirm DCOM integration works, even if not used.
- The CRM IIS Web site **must** be configured under Directory Security to run as a windows or domain user that has sufficient rights to run Accpac. To confirm this, log into the server as the user specified in IIS configuration settings, and run Accpac ERP. If you can open the new order screen in Accpac, permissions are likely appropriate. *
- CRM must be completely integrated with ACCPAC Advantage Series 5.4 or higher, and the integration must be fully functional in all respects. Synchronization between the systems, in particular should be functional.
- Dates should be configured to the same format (**mm/dd/yyyy** or **dd/mm/yyyy**) throughout the CRM installation to avoid date entry conflicts. You can use either format, as long as it is consistently used. Confirm the SQL user uses this date format, and the windows user you are logged into the server as also uses this format (regional settings, use “US English” as your language). You can return your original date settings once the install is complete.
- SQL Server tools installed on the CRM server
- Exclusive access to CRM and the SQL Server database (no other users are online).
- J# 2.0 is required, and is included in the installer. It will be installed automatically if not present.
- We strongly recommend backing up your CRM and ERP databases, as well as your CustomPages folder prior to running this installer**. DO NOT SKIP THIS STEP**. We will be unable to help you recover your system if a backup is not taken, and a restore is required.

ERP Configuration Requirements

It is important that the Sage Accpac ERP installation meet the following configuration requirements:

- Tax Configuration must be defined on all IC items, or IC Item Groups, such that each item has defined tax information for it.
- Items being sold through CRMOE must be configured in one or more IC Inventory Locations. These locations must be PHYSICAL locations, and cannot be LOGICAL locations. Once configured for an IC Location, the item(s) must exist in the location, which in general means that if they are stocking items, they must have been received into the location at least once.
- Each AR Customer should be configured to have a defined IC Pricelist, and Tax Group.
- Each IC Item you wish to sell in CRMOE has been placed on one or more pricelists. Note: CRMOE requires an item to be present on the pricelist – items that are not on pricelists cannot be sold or quoted within CRMOE.
- An appropriate number of Sage Accpac IAP (Integration Access Pak) licenses must be installed. In general, this is 1 IAP for the system, plus 1 IAP for each 5 CRMOE users.
- The Accpac ERP system database must have security enabled, such that Accpac ERP users are required to supply a username and password when opening Accpac ERP
- Confirm that you can log into the CRM server as the Windows user configured to run the CRM IIS Web Site (see the section above, marked *). Once logged into the server, confirm you can open and use Accpac ERP, including opening the OE Orders screen in System Manager.
- After installing CRMOE, and before it can be used, the CRM user must have a valid accpac ERP username and password placed on file. The accpac username and password should be entered on the users profile in CAPITAL LETTERS, regardless of how the password is entered in Accpac itself.

CRM is now prepared for the installation process.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sage
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Version 5.5A
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ACCPAC 5.5 Series Configuration Requirements

There are numerous configuration requirements that must be satisfied in ACCPAC Advantage Series in order for CRMOE to function properly.

System Manager

- Each CRM OE user will need an ACCPAC User ID and a password to logon to Sage Accpac ERP when posting orders and payments. This username and password must be placed on the user's CRM user account, and must be typed in CAPITAL LETTERS. Any user id's in ACCPAC associated with CRM OE users must have sufficient rights to A/R Receipts Inquiry, Entry and Posting and O/E Order / Shipment / Invoice Entry processing.

Accounts Receivable

- Receipt Types must be set up in A/R (eg. CASH, CHECK, CHEQ, VISA, MCARD, AMEX, etc.) prior to installing CRM OE and performing the initial AAS Synch. You should add a receipt type "ONACCT" which is used by CRMOE to handle orders that will be invoiced and paid later. You can label this code with whatever label you wish, we suggest "On Account". See "Step 4 – Workflow Integration" for specific names to use for credit cards.
- All A/R customers should have default price lists and tax groups populated.
- Salesperson codes for all CRM OE users need to be setup in A/R Setup, Salespersons in order to successfully configure CRM OE for use.

Inventory Control

- Ensure that all items on each price list to be used by CRM OE.
- Ensure that all IC Categories have all tax authorities and classes set. IC Item tax authority and class settings will override Categories.
- Do not use optional fields that require validation
- Set "Cost Items During" to "Day End Processing" in IC Setup, Options, Processing

Order Entry

- Ship-Via codes need to be created for use by CRM OE if they have not been previously been created for use by AAS OE. CRM OE will display the Ship-Via Descriptions on a drop-down list when entering a Quote.
- Do not use optional fields that require validation

Getting Started

The installation of 21CRM Order Entry is a two step process, and the installation software will step you through these aspects of the software as necessary.

Ensure you:

- Are logged onto the Windows server running CRM V6.1h or higher with an account that has administrative rights
- Know the name of the CRM database. By default, this database is named "CRM", but each instance may be different.
- Have a MS SQL Server username/password combination that has administrative rights to the CRM, ACCPAC Company, and ACCPAC System databases.
- Know the location (path) to the CRM installation. By default, this is "c:\program files\sage\crm\crm\wwwroot\ - however, each instance may be different.
- Have **BACKED UP THE CRM DATABASE**. In the event of an integration failure, or other problem, this backup will be needed to return to a previous state of affairs. **DO NOT SKIP THIS!** To backup the database, right-click on the database in Enterprise Manager, and select "All Tasks / Backup Database". If this is an upgrade, also backup the custompages\crmoe folder to a safe location.

Possible Errors

While in most cases the installation or upgrade should go smoothly, it is possible to encounter errors during the install process. In particular, if upgrading, it is possible that the 21CRM Order Entry configuration may be slightly different than the installer expects. This is due to the fact that there is the ability to customize CRM Order Entry for each installation. If you receive an error message please read it carefully. Any errors reported need to be addressed prior to continuing. Each message should include instructions on how to proceed. Please follow them.

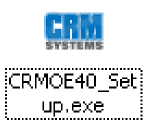
If no instructions are provided, record the error in detail, and restore the backups of the CRM database and application you created prior to starting this installation.

> **Important Note**: If you have customized CRM in any way, it is very possible your customizations will interfere with the functioning of CRM Order Entry, or that CRM Order Entry will interfere with your customizations. You should consult your Order Entry software provider to assess the likelihood of such interference, and how to deal with it.

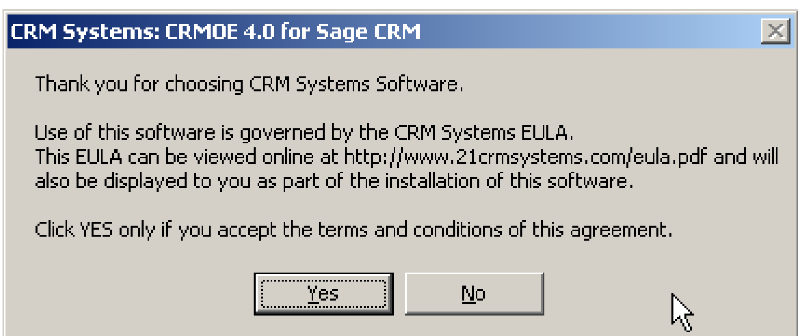
Step 1 – Application Installation

Reminder: The CRMOE installation software must be run on the CRM Server itself. If this is a multiple-server CRM implementation, follow the instructions in this section on the FIRST CRM server, and then see the notes at the end of this section that address how to install the software on the second and additional servers.

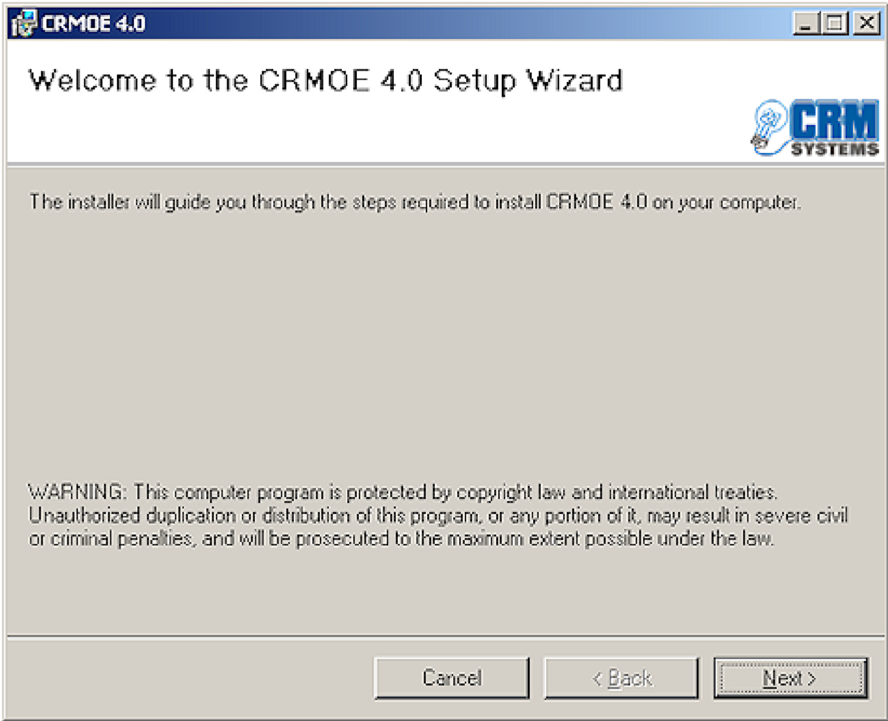
21CRM Order Entry Extensions are delivered in a single file named "21CRMOE40_Setup.exe". Locate and run this file. It will begin the installation process. In this process, the software is installed, then the setup factory runs to modify CRM to work with the software.



After clicking on the CRMOE setup link, please read and accept the terms

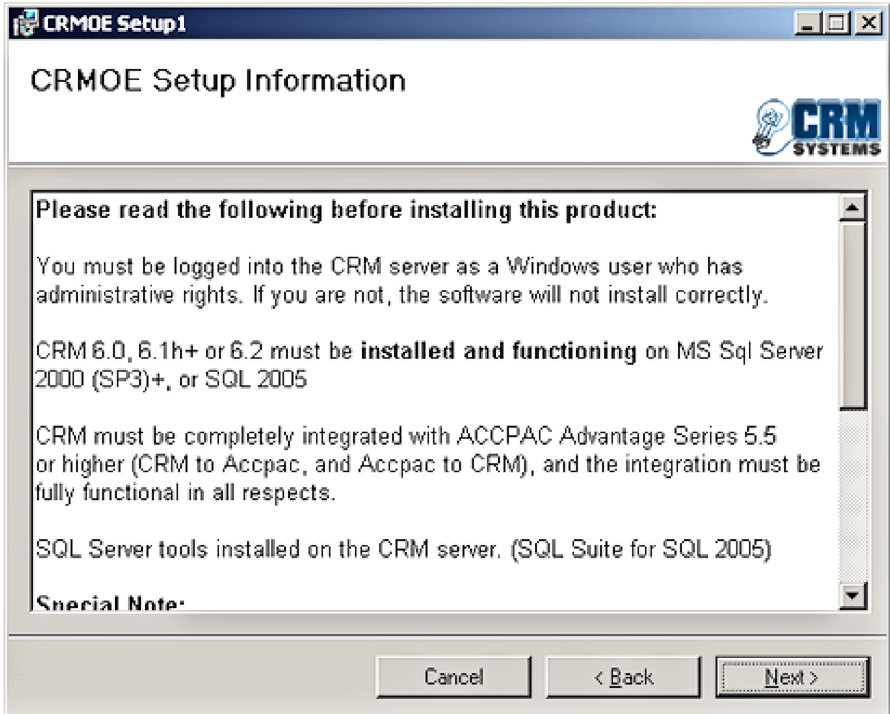


Of this agreement if you are ready to go forward with the installation.



Now the setup begins, Click **Next** to continue.

The following screen will appear:



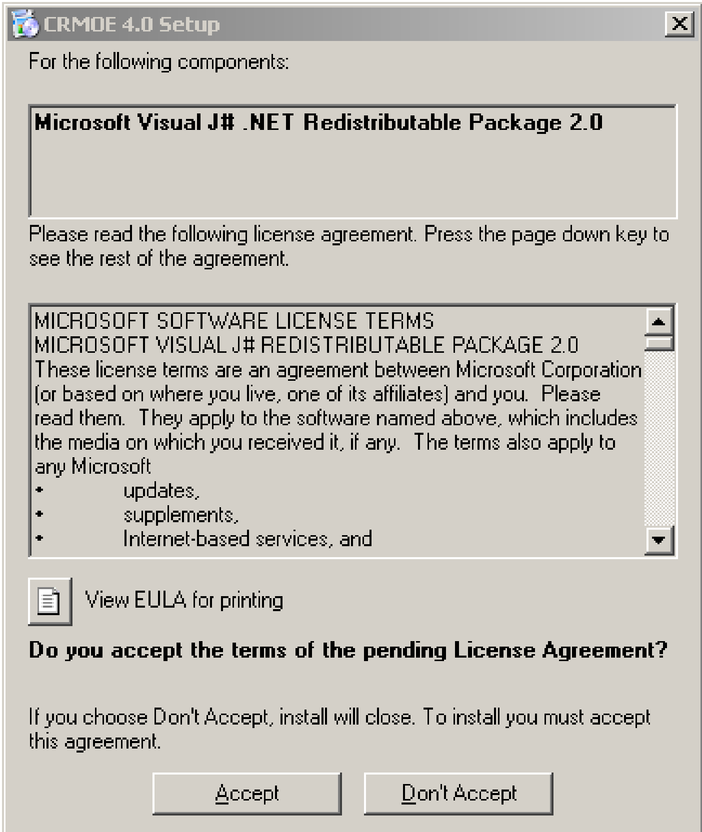
This screen reminds the user of the prerequisites required for the install. As you are reading the manual to view this, these prerequisites are listed in Point 1 of this document.

Please note that these pre-requisites are required prior to installation, as it will make the install process a lot easier and avoid catastrophic failure.

EULA Approval screen.

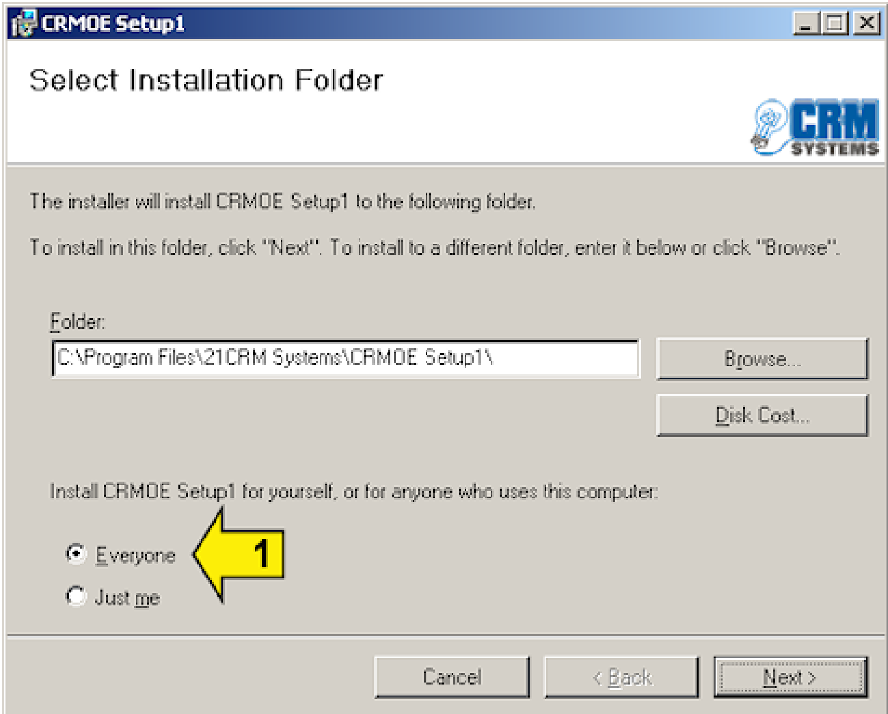
This is the End-User License Agreement ("EULA"). In order to complete the installation you must read and agree to the EULA, then click Next to continue.

If you do not accept the agreement, do not install this software. Installing the software indicates your acceptance to the agreement, and makes you party to a legal agreement, as outlined in the text of the agreement. You have certain rights under this agreement, and you should make yourself aware of them.



The installer checks for the presence of the j# .NET redistributable package. If this is not present, it is automatically installed. Please click on Accept when requested (above) to accept the EULA from Microsoft concerning the J# .NET Redistributable Package.

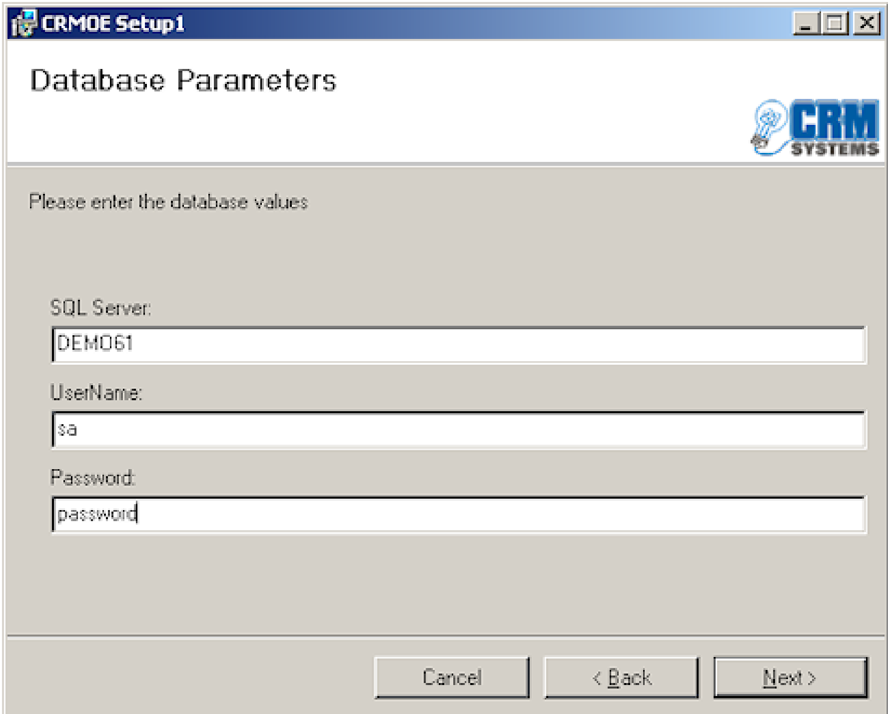
The next window will then appear



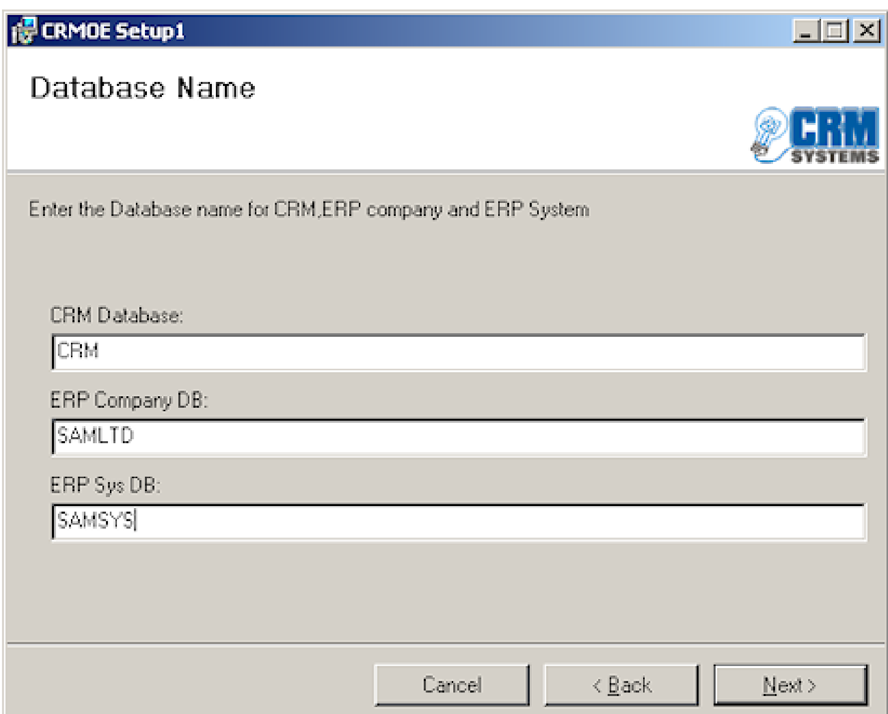
Choose where to install CRM Order Entry on the local machine. The default is C:\Program Files\21CRM\CRMOE\. The directory can be changed to any directory of your choice, by clicking the Browse button, but the default is recommended.

The Disk Cost button can be used to view the amount of space required to install Exchange Contact Sync and the amount of free space left on the selected drive.

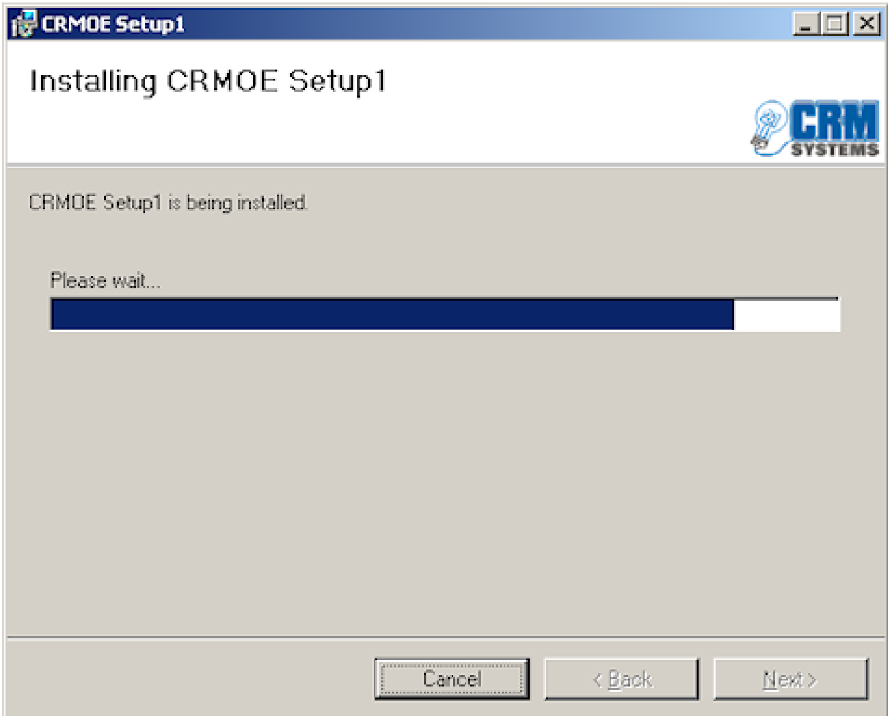
It is **very important** at this stage that to ensure that the radio button has the “Everyone” option selected. If it is not, CRMOE will not function correctly. If “Everyone” is not selected, select it, and then click “Next”.



In this Next screen (above) enter the SQL Server name and login information for that server. You can also use “localhost” for the server name if on the same server. Click on “Next” to continue



Enter the CRM database name, ERP company database and ERP System database. Click on “Next” to Continue.



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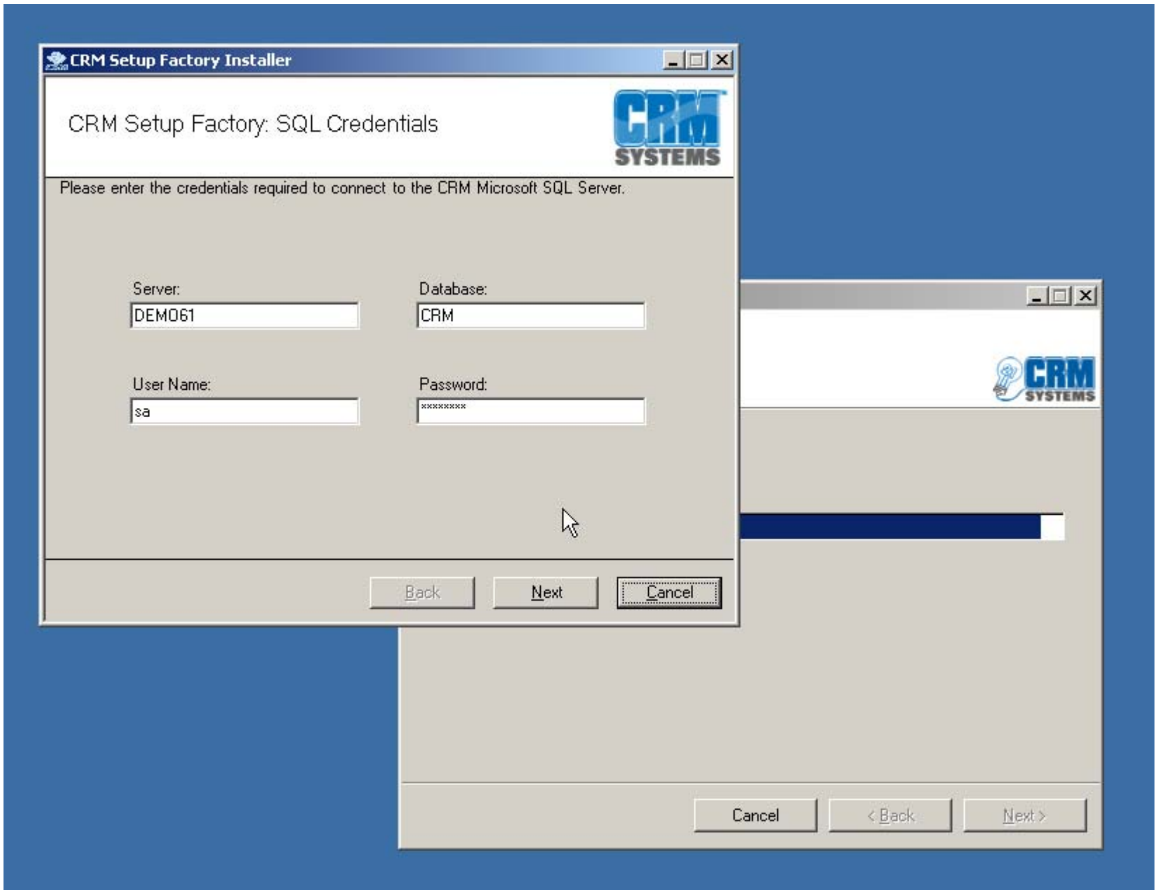
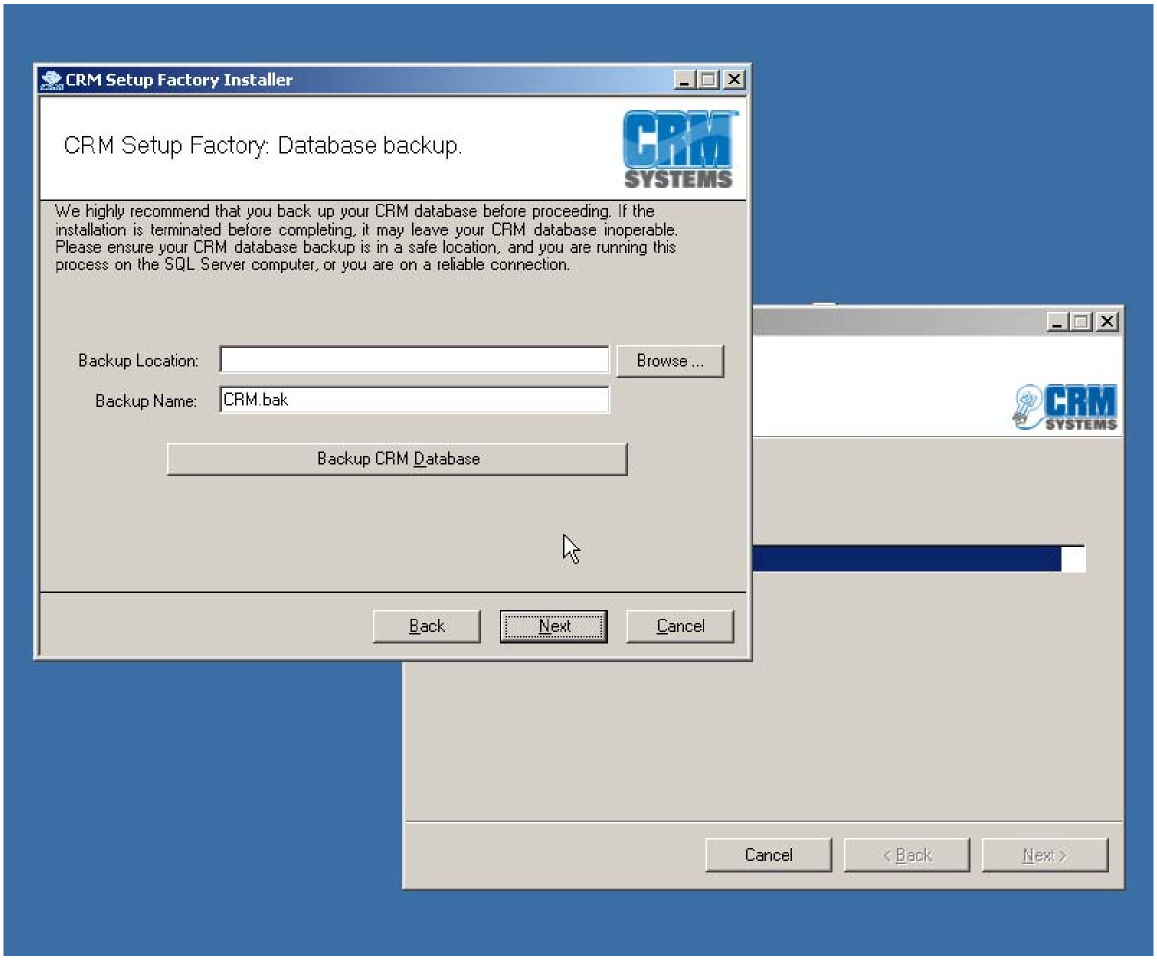
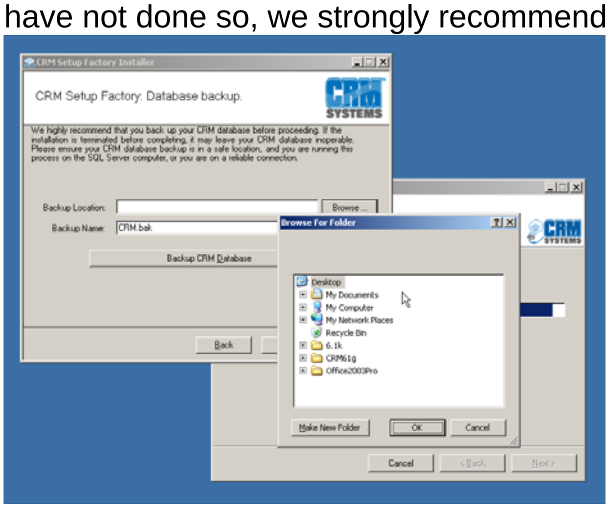
The software is now installing onto your computer. Upon completion the setup factory screen will open to setup CRMOE on the CRM System



Setup Factory will now setup CRM for CRM Order Entry. It will have the fields prefilled for the server and database information.

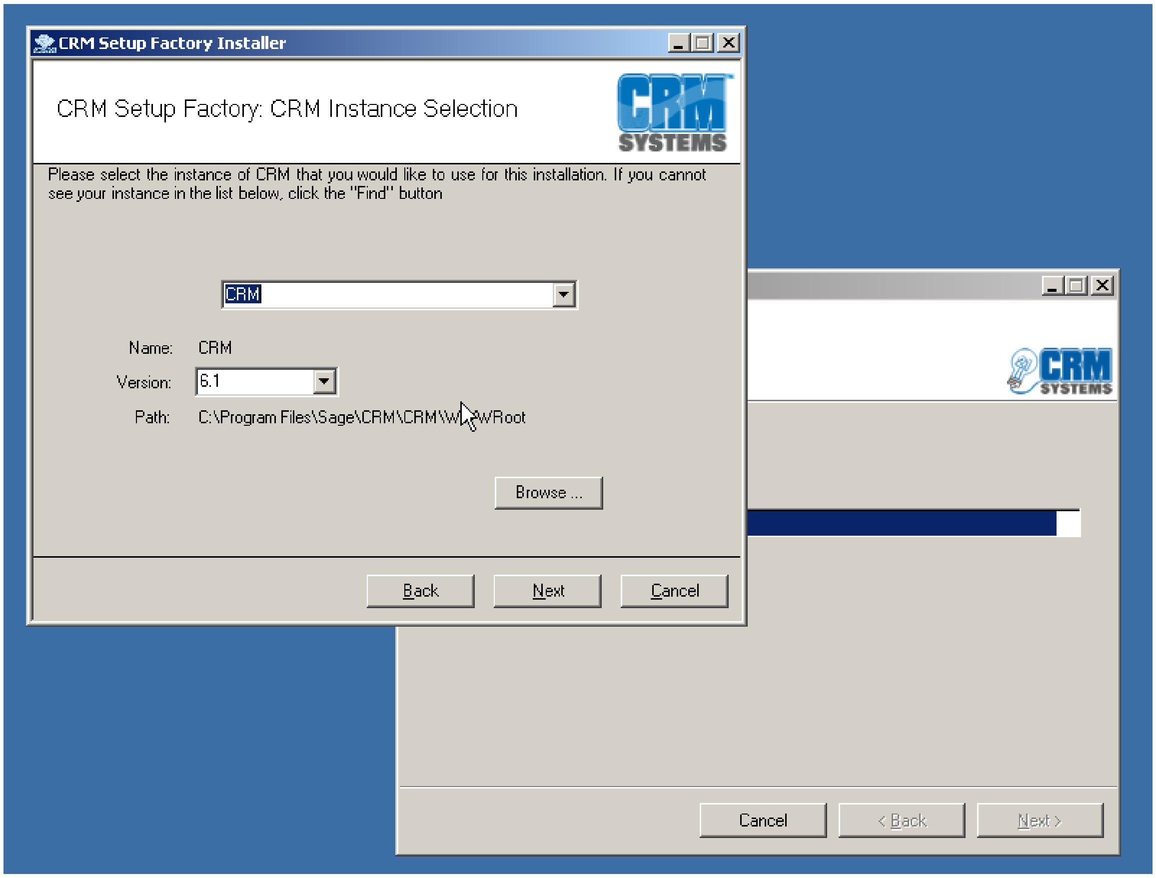


Prior to installing, setup factory will ask that you back up your database. If you have not done so, we strongly recommend doing this.

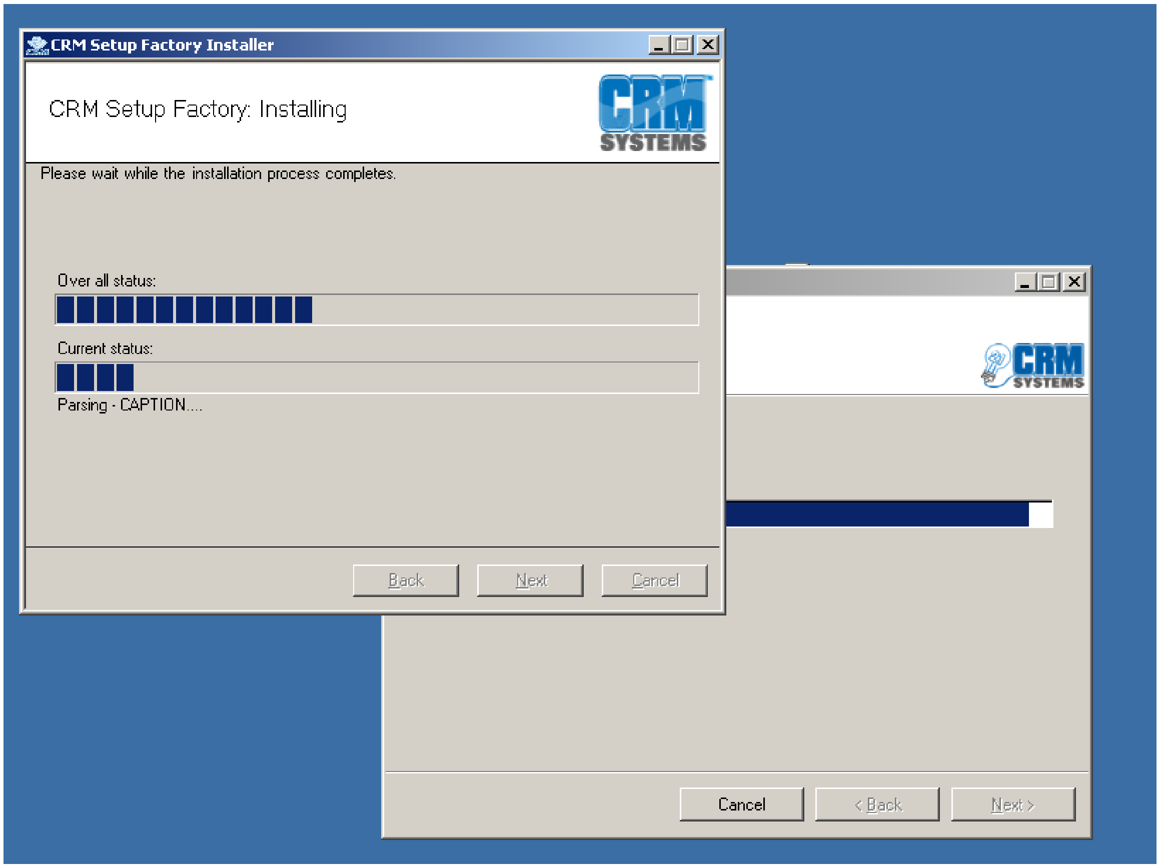


Click “browse” to choose a backup location (left) and after choosing this location and clicking on “ok”, then click on Backup CRM Database to

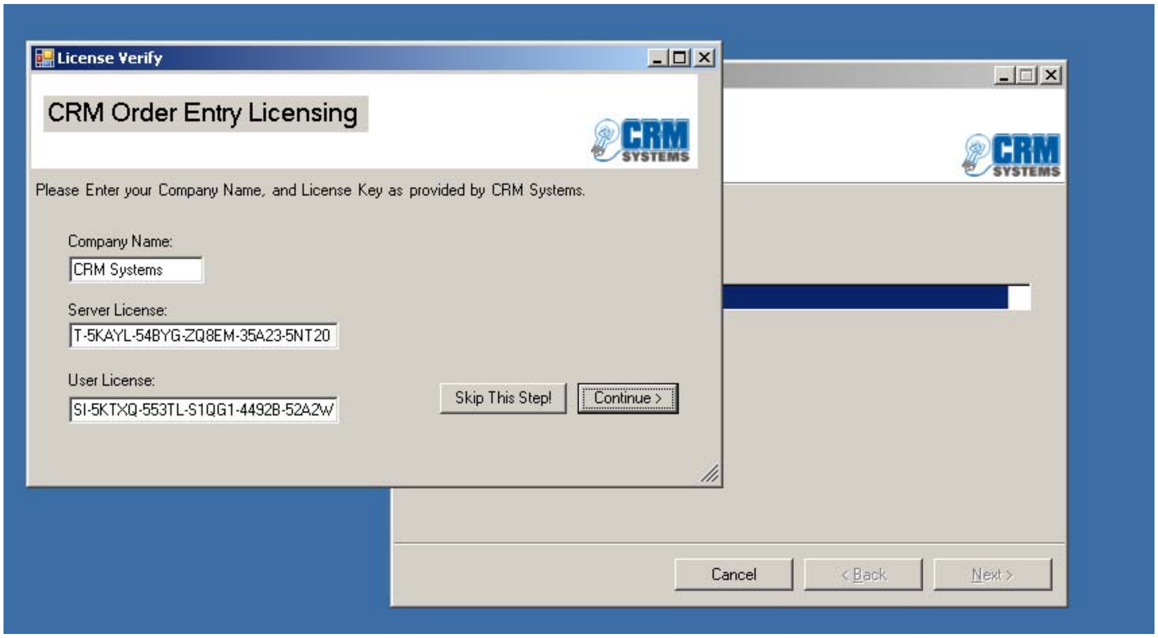
Back up your database.



The next step is to select the CRM instance. The drop down field will have this information preselected, or you can direct Setup Factory to it via browse. Also select the version

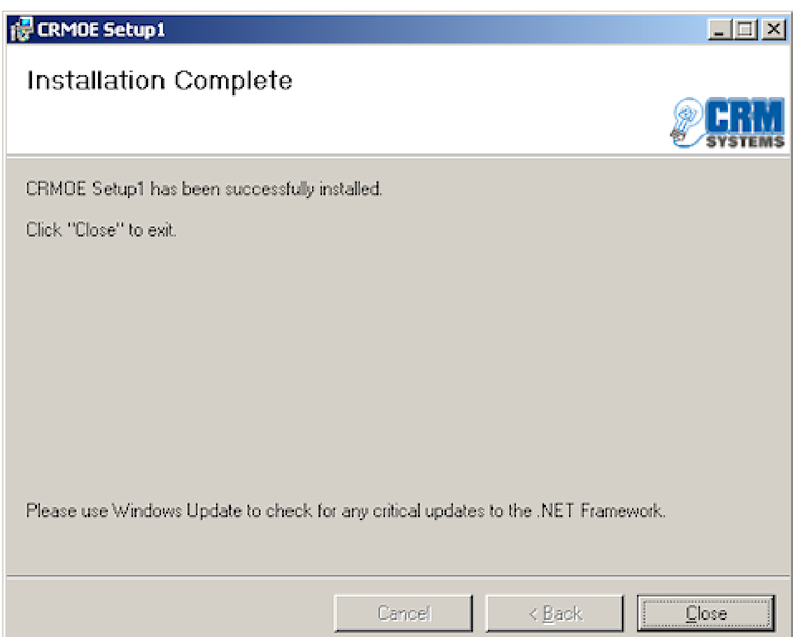


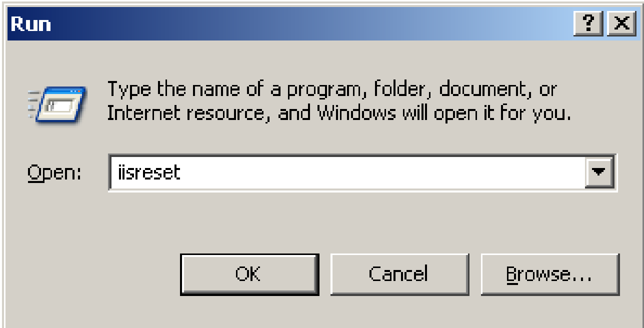
Setup Factory will now setup CRM with the necessary modifications for CRM Order Entry. Please be patient during this process.



The final step will be to enter the company name and the serial numbers which were provided to you. Please do so and click “continue” to complete the installation.

However, the license keys pertaining to the secondary and additional servers will need to be entered manually in the 21CRM Admin, Settings area described in the following pages.





Reminder: It's always a good idea to perform a web server reset (IISRESET) after installing any 3rd party extension to CRM. We strongly recommend performing one before continuing on to configuration.

Part 2: CRMOE Configuration

To first configure your system

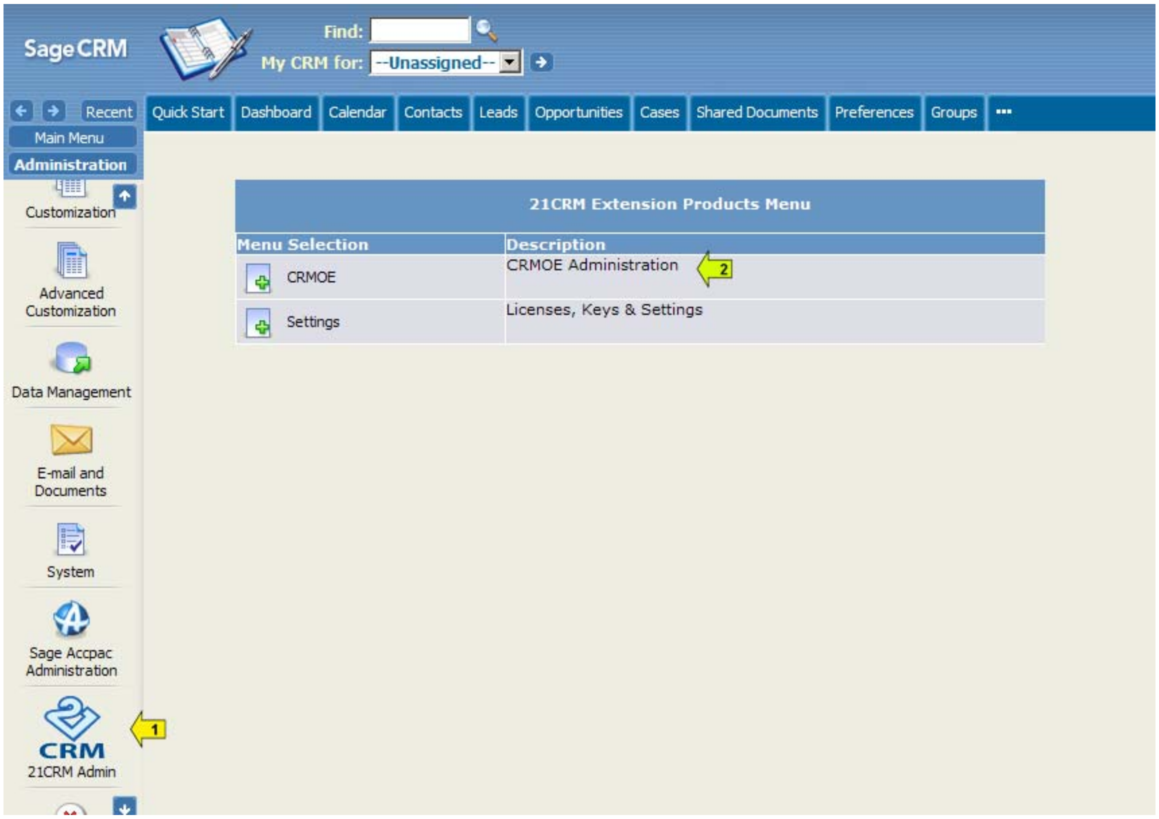
1. go to CRM menu in Admin
2. run AAS sync
3. Item import from blank to ZZZZZZZZZ
4. set up user to be

> **Reminder:** All of CRM Systems' extension products to Sage CRM utilize a common administrative interface, the "21CRM Admin" option, found in the CRM Administration menu.

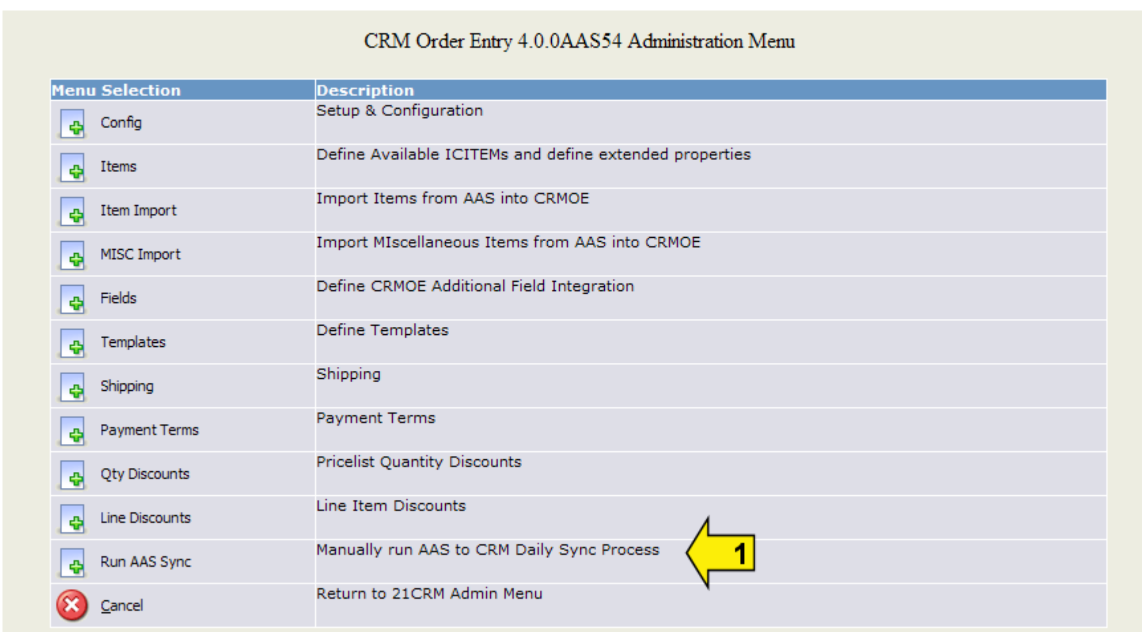
Step 1: Synchronizing CRMOE to ACCPAC Advantage Series (AAS)

If, during the installation of the CRMOE software, the ACCPAC Synchronization failed, or it was not run, it will be necessary to manually run the synchronization prior to configuring CRMOE.

The manual synchronization process can be accessed via the 21CRM Admin option (yellow arrow 1 below), which was added to your CRM Administration menu during installation. Once selected, the CRMOE Administration option (Green arrow 2 below) will appear. Selecting this option will allow access to all of CRMOE's administration tools:



The CRMOE Administration menu is your launch pad for all CRMOE administrative functions.



Select the “Run AAS Sync” option from the menu (yellow arrow 1 above), to manually force AAS to synchronize with CRMOE. When done, this process will automatically refresh CRM's metadata, and a screen similar to the one below will appear:

AAS to CRM Sync for 21CRM CRMOE

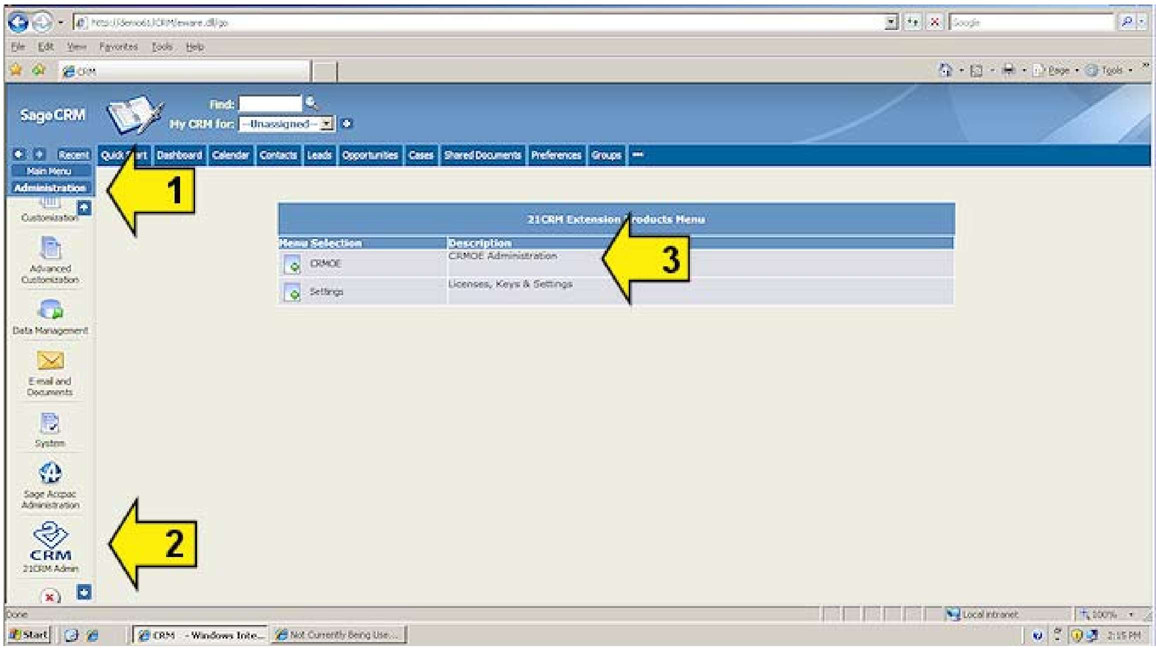
Completed Synch of quot_template from OEPLAT To CRM
Completed Synch of quot_location from ICLOC To CRM
Completed Synch of quot_shipvia from OEVIA To CRM
Completed Synch of quot_pricelist from ICPCOD To CRM
Completed Synch of quot_taxgroup from TXGRP To CRM
Completed Synch of quot_codepaymtyp from ARPTP To CRM
Completed Synch of qtdt_category from ICCATG To CRM
Completed Synch of quot_codeterm from ARRTA To CRM
Completed Synch of comp_idgrp from ARGRO To CRM
Completed Synch of quot_curid from CSCCD To CRM
Completed Synch of pmtt_idbank from BKACCT To CRM
Completed Synch of popo_termscode from APRTA To CRM
Completed Synch of pmtt_refunddistcode from APRDC To CRM
Completed Synch of popo_taxgroup from TXGRP To CRM
Completed Synch of comp_vidgrp from APVGR To CRM
Completed Synch of popo_viacode from POVIA To CRM
Completed Synch of popo_template from POPLAT To CRM
Completed Synch of crsd_glnonstkcr from GLAMF To CRM

Continue

Click Continue to return to the CRMOE Administrative menu.

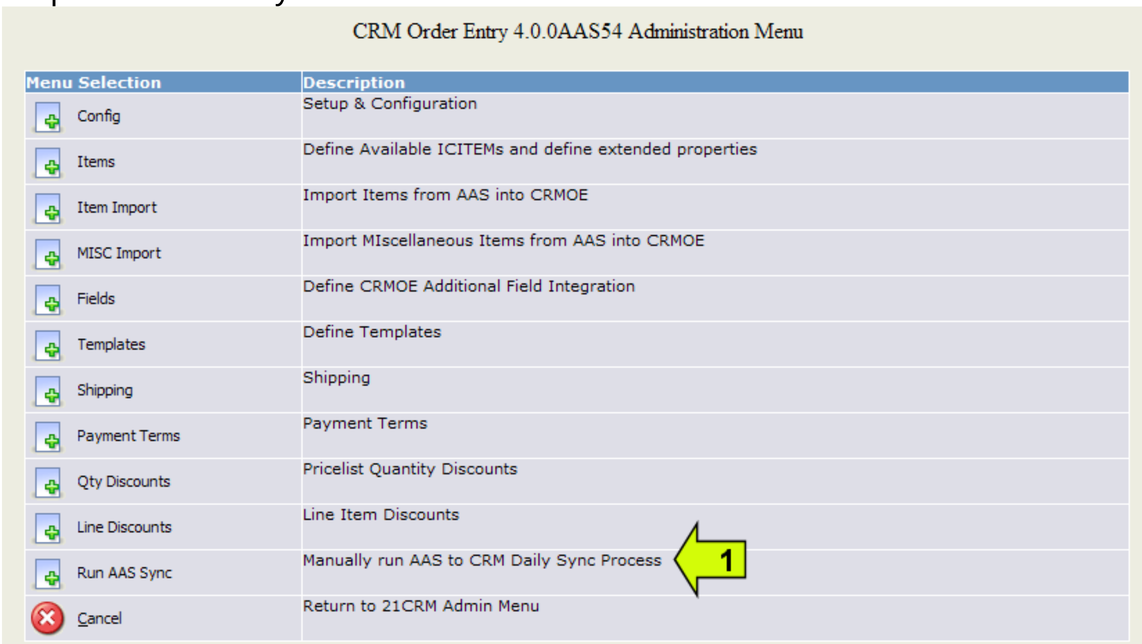
Step 2 – CRMOE Setup & Configuration

To configure the CRMOE, enter the administration area (arrow 1) and click on 21CRM Admin (arrow 2).



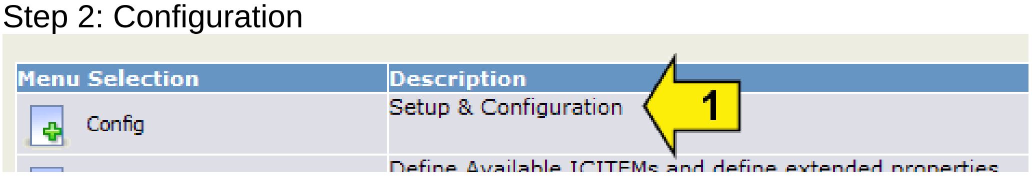
This will bring up the 21CRM menu (show above). In this click on CRMOE to view the CRMOE admin menu.

Step 1: Run AAS Sync



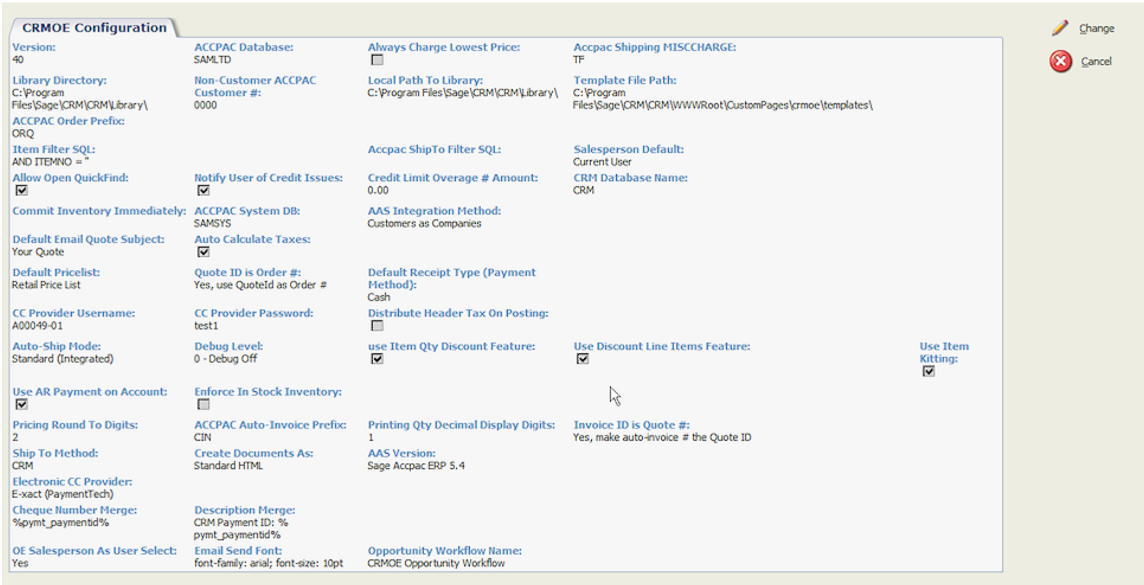
First run AAS Sync to sync Accpac with CRMOE.

Step 2: Configuration



In the CRMOE Admin menu, click on “Config” (arrow 1 above) to view the configuration menu.

Configuration details for CRMOE must now be specified. The CRMOE Configuration screen will also allow defaults to be set, and features of the software to be enabled or disabled.



Each of the fields on this screen is described below:

Row 1:

- **Version** - The software version running. In this case it should read "40".

- **ACCPAC Database** - The ACCPAC Company database CRMOE will integrate to. The ACCPAC Company database name should be the same as the SQL Server database name.

- **Always Charge Lowest Price** - CRMOE has the ability to always select the lowest possible price during pricing calculations. AAS itself will, for example, always enforce a contract price on an item for a customer, even if the current sale price is lower. Turning this option on will override the AAS pricing and always select the lowest.

- **Accpac Shipping MISCCHARGE** – Default to fall back on if can't determine and item number for shipping – actual is in shipping detail setup.

Row 2:

- **Library Directory** - The full path to the CRM library folder. Ensure this ends in a backslash "\".

- **Non-Customer ACCPAC Customer #** - CRMOE can quote (but not post orders) for companies in CRM that are not customers in AAS. To do so, it must use an AAS Customer number for the purposes of pricing. Enter that customer number here.

- **Local Path to Library** – The path to library items

- **Template File Path** - The full path to the CRMOE Template folder. By default this is “C:\inetpub\wwwroot\crm\custompages\crmoe\templates\”. Ensure this ends in a backslash “\”.

Row 3

- **ACCPAC Order Prefix** - CRMOE will use this prefix on each order number when posting to AAS. This allows CRMOE to use a different order range than AAS itself does, avoiding conflicting order numbers.

Row 4

- **Item Filter SQL** - This is the “WHERE” clause of the SQL Select statement that determines which items are returned to the order detail screen when initially opened. The default value “AND ITEMNO = ‘’” returns no items prior to the user conducting a search. This default setting ensures that, in cases where there are a large number of items in the AAS database, the user does not bring the system down by inadvertently launching an unlimited search.

- **ACCPAC ShipTo Filter SQL** - This is the “WHERE” clause of the SQL SELECT statement that determines which SHIP-TOs should be returned when entering an order. To limit SHIP-TOs that satisfy a particular condition, do so here.

- **Salesperson Default** - CRMOE will set the order salesperson to whichever value selected here. The options are: Current User, Person Account Manager, Company Account Manager, Opportunity Assigned to. Select the appropriate value.

Row 5

- **Allow Open Quickfind** - Check this box for users to be able to search “nothing”, and therefore return ALL products in the AAS Inventory Control database when entering an order. This is a performance issue – if this is allowed and there are many items in the product database it could take a very long time for the item search to complete.

- **Notify User of Credit Issues** - If enabled, CRMOE will automatically notify the user of things like customers on hold, or customers over credit limit when entering orders.

- **Credit Limit Overage # Amount** - Specify an amount that CRMOE will allow customers to go over their credit limit prior to resulting in an “over credit limit” error. (Only used if Notify user of Credit Issues is enabled.)

- **CRM Database Name** – name of the CRM database

Row 6

- **Commit Inventory Immediately** - Determines if CRMOE will automatically commit inventory when posting to ACCPAC.

- **ACCPAC System DB** - The ACCPAC System database with which CRMOE will integrate. The ACCPAC System database name should be the same as the SQL Server database name.

- **AAS Integration Method** - CRMOE can function if Companies are customers in CRM, or if People are customers in CRM. Sage CRM, out-of-the-box, only supports Companies as customers. With the use of the CRM Systems "AAS Connect" product, there is flexibility in defining who is a customer, which allows organizations to better meet their process needs. Unless AAS Connect is used, choose "Customers as Companies."

Row 7

- **Default Email Quote Subject** - CRMOE can email documents (quotes, order confirmations, invoices, etc). This is the default email subject. The user will be able to override it when sending a message.

- **Auto Calculate Taxes** - If CRMOE should automatically calculate taxes, enable this. If not, the user will need to press the "Calculate Taxes" button manually to do so. Every time a detail line is added, taxes are automatically recalculated. To increase the speed of data entry, turn this option off and have users press the "Calculate Taxes" button immediately prior to saving the quote.

Row 8

- **Default Pricelist** - This is a CRMOE fallback setting. If the AAS Accounts Receivable Customer does not have a default pricelist defined in AAS, this pricelist will be selected automatically for the order.

- **Quote ID is Order #**- CRMOE can make the AAS order numbers "equivalent" to the CRMOE Quote number (prefixed by the above defined prefix), or CRMOE can sequentially number each posted order.

- **Default Receipt Type - The Payment Method** (analogous in AAS AR to "Receipt Type") used on each order by default. This list is populated by the AAS Sync and should match the list of AR Receipt Types in AAS.

Row 9

- **CC Provider Username** – asdf
- **CC Provider Password** – asdf
- *ExactID - If planning to use integrated electronic CC processing from E-xact, the Exact User ID goes here.*

- *ExactPW - If planning to use integrated electronic CC processing from E-xact, the Exact PW goes here.*

- *AAS Phantom Shipment Status - Default: Disabled. This setting refers to CRMOE's integrated shipping functionality. Use of this feature requires system customization and should only be enabled with the assistance of CRM Systems.*

- **Distribute Header Tax On Posting** - Default: Disabled. CRMOE uses taxation rollup from detail lines to order header by default. To reverse this, and have CRMOE distribute order header taxes to the detail lines when posting to AAS, enable this option. Enabling this option could result in small discrepancies in the amount of tax on an order between CRM OE and AAS OE.

ROW 10

- **Auto-Ship Mode** - CRMOE ships with a feature that allows orders to automatically have shipping (freight) added to the order. Use of this feature requires the Shipping function be completely configured (see the Shipping option in the CRMOE Administration menu). This switch enables or disables that feature. If CRMOE is customized with a new freight calculator, it will be added to this select list for use.

- **Debug Level** - Used for debugging / testing purposes. If set to anything other than 0, CRMOE will display status, error, and audit logs while using the software. This would most commonly be used when contacting technical support to diagnose an issue. The values to be entered are 0 = no messages, 1 = Terse, 2 = Verbose and 3 = Halt on error.

- **Use Item Qty Discount Feature** - CRMOE supports unlimited quantity discount levels. This would be used instead of the AAS quantity discounting, which supports up to 5 levels. This feature requires full configuration of the feature using the “Pricelist Quantity Discount” option on the CRMOE Administration Menu. Note: this option will only appear on the menu if this checkbox is turned on

- **Use Discount Line Items Feature** - CRMOE supports Discounts - predefined “coupons” that can be added to an order. This feature needs to be fully configured from the CRMOE Administration menu to work.

- *Use Install DB Quantity for Volume Disc - This option only applies if when using the optional “21CRM License Management System”, an optional addition to CRMOE that is designed for the Software reseller / developer marketplace. If enabled, historical purchase quantities will be used to calculate unit price discounts (as configured by the unlimited Quantity Discount feature.)*

- *Use CRM Installation Integration - Enabled integration to the 21CRM License Management System, if installed.*

- **Use Item Kitting** - CRMOE Supports flexible, customizable item kitting during order entry. Use of this feature requires kit configuration in the CRMOE Item Manager.

- *Enforce In Stock Inventory - If enabled, CRMOE will notify the user when items are added to an order that are out of stock. CRMOE inventory calculations are real-time (based on Quantity Available). If enabled, orders that contain out of stock items will not be eligible for posting to AAS until the inventory issue is resolved.*

- *Pricing Sig Digits - How many decimal places CRMOE will round to when pricing.*

- *Print Qty Sig Digits - When printing documents, how many decimal places will be displayed in quantity fields in the detail section.*

- Use AR Payment on Account
- Enforce in Stock Inventory

- Pricing Round to Digits – How many decimal points to round prices to. Default is 2.
- Accpac Auto-Invoice Prefix – When CRMOE auto-invoices in Accpac, what prefix should the invoices have.
- Printing Qty Decimal Display Digits – When quantities are output on a CRMOE quote, how many decimal places should the quantity have. Default is 2.
- Invoice ID is Quote # - If YES, then the Invoice number in Accpac will be equal to the Invoice prefix (see above) concatenated with the Quote # from CRMOE, for example: INV1001

- Ship To Method – Select from “ACCPAC AR” or “CRM”. If “ACCPAC AR” is selected, the CRMOE user will be able to select from a dropdown list of ship-tos defined in Accpac. If the “CRM” option is selected, the user will be able to select a company from within CRM, then select any address from that company.

- Create Documents As
- AAS version – 5.3 or 5.4. The 5.4 option also supports ERP 5.5.

- Electronic CC Provider. Select from one of the included CC Providers. If you wish to use another, contact your CRMOE Provider for details on integration of another provider.

- Cheque Number Merge
- Description Merge

- OESalesperson as User Select – If Yes, salespeople will be selected in CRMOE as a user select. If no, the fields will be text boxes, into which a ERP salesperson code can be typed.

- Email Send font
- Opportunity Workflow Name – The name of the Opportunity Workflow that CRMOE Opportunities will be inserted into and use. By Default this is “CRMOE Opportunity Workflow”, but if you wish to use an alternative workflow, enter its name here.

Ensure that all fields are filled in, as appropriate. In a normal installation the only “blank” field on the screen would be “ACCPAC ShipTo Filter SQL”. All other non-checkbox fields should be populated with some value.

When all the settings have been defined, click Save, and then click Continue.

The system configuration has been completed. The CRMOE Administration menu looks different now. This is because additional features may have been enabled that were previously disabled. The complete menu looks like this:

CRM Order Entry 4.0.0AAS54 Administration Menu

Menu Selection	Description
Config	Setup & Configuration
Items	Define Available ICITEMs and define extended properties
Item Import	Import Items from AAS into CRMOE
MISC Import	Import MIscellaneous Items from AAS into CRMOE
Fields	Define CRMOE Additional Field Integration
Templates	Define Templates
Shipping	Shipping
Payment Terms	Payment Terms
Qty Discounts	Pricelist Quantity Discounts
Line Discounts	Line Item Discounts
Run AAS Sync	Manually run AAS to CRM Daily Sync Process
Cancel	Return to 21CRM Admin Menu

Step 3 – User Configuration

Now configure a CRM user account of each individual to use CRMOE. To do so, find the user in CRM's user editor, and edit their profile. Scroll down to the Other Details section:

Note: In addition to enabling the user for CRMOE you must also CONFIRM that the User's basic Accpac ERP integration is configured properly. Check to ensure the user's ACCPAC Username and Accpac Password are entered, are valid, and are recorded in CAPITAL LETTERS. The password, in particularly must be entered in CAPITAL LETTERS regardless of whether the password is recorded in capitals in Accpac ERP, or not. Pricing, and posting functions to Accpac will not function if this requirement is not met.

Once you have confirmed ERP credentials, continue configuring the CRMOE user:

The CRMOE related fields on this screen are described below:

- **CRMOE Permission Level** – (arrow 1 above) Define what level of security this user has. For the most part, this setting is only enforced when CRMOE is customized to specific requirements. However, any user with a NON-ZERO (ie, not 0 – No Access) will use a CRMOE Seat license, and level 6 – Administrator enables access to administrator features that no other level can access.

- **Can Take Cash** – (arrow 3 above) If this user should be able to receive CASH payments into CRMOE, enable this.

- **OE Invoice All On Post -** if enabled, when this user posts an order to AAS, Advantage Series will automatically "Invoice All" items on the order. Invoice All also implies Ship All.

- **OE Ship All On post** – (arrow 5) If enabled, when this user posts an order to AAS, Advantage Series will automatically "Ship All" detail lines.

- **ACCPAC Salesperson Code** – (arrow 9) Each CRM user will need to be associated with an AAS AR Salesperson. Enter the AAS Salesperson code here. CRM will validate this value when the user settings are saved, to ensure it is a valid salesperson code. All CRMOE users must have a salesperson code defined, and this code must be present in Accpac AR.

Note: The single most common "problem" that occurs when posting orders to Accpac from within CRMOE is an error that reads "value fall outside expected range". In almost all cases, this error is caused by a CRMOE user whose Accpac Salesperson Code is incorrect, or where a code has been entered into the CRM user profile, but does not exist in Accpac AR. Should you experience such an error during posting, first confirm the salesperson code is correct.

- **Can Receive Cheques** - If this user should be able to receive Cheques (Checks) into CRMOE, enable this.

- **OE Can Adjust Costs** – (arrow 2)If this user should be able to edit the unit cost on order line items, enable this. This will only take effect if the item itself is also configured to have CRMOE expose costing information. See Item Detail configuration for more information.

- **Preferred Location (Override)** - When users enter quotes into CRMOE, the location is set on the Quote Header and applies to all detail lines. The location is obtained by looking up the location specified in the AAS default template.

  However, each user can be configured to populate the Quote Header with a specific IC location other than the default location. This feature should be used whenever the selling location is to be determined by the CRM OE user and not the default.

- **Preferred Pricelist (Override)** - When users enter quotes into CRMOE, the pricelist is normally determined by the AAS AR Customer settings. However, each user can be configured to automatically override the AR Customer pricelist as appropriate.

Define the appropriate values, and supply a valid AAS Salesperson code. Click Save. The user is now configured.

Repeat this step for each user to be enabled for CRMOE access.

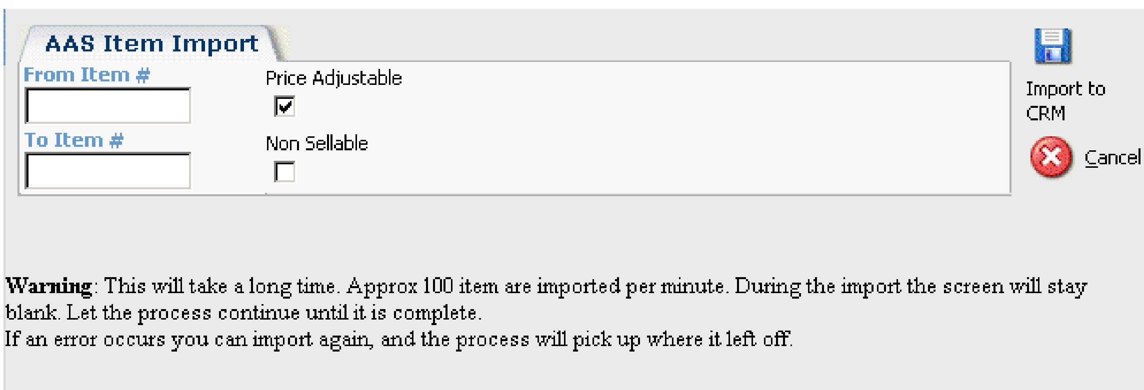
Step 4 – Item and Miscellaneous Charge Import / Setup

Reminder: CRMOE has requirements for how the IC database must be configured, particularly as it pertains to taxation. These configuration changes to AAS should be completed prior to item setup in CRMOE.

Importing Items

Importing items from AAS to CRM is simple. However, it is NOT automatic. Any time any changes are made to the IC database in AAS, the changes need to be imported into CRMOE, in order for CRMOE to have access to those items for sales purposes.

To import the items, return to the CRMOE Administration menu, and select the “Item Import” option. The following screen will appear:



Any range of item numbers can be entered into the From and To fields. To import all items, leave the “From Item #” field blank, and fill the “To Item #” field in with as many “Z” characters as will fit. Only unformatted item numbers are valid in CRMOE.

To expedite some of the setup of the items, the two most common setup items are listed here as well:

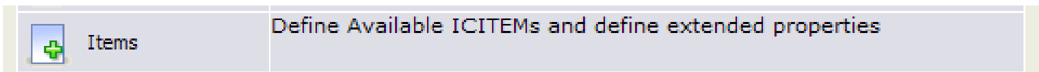
- Price Adjustable - Can the user in CRMOE edit the price of this item?
- Non Sellable - Can orders that contain this item be posted to AAS?

Select the appropriate configuration. The settings will be applied to all items that are successfully imported after clicking the “Import to CRM” button.

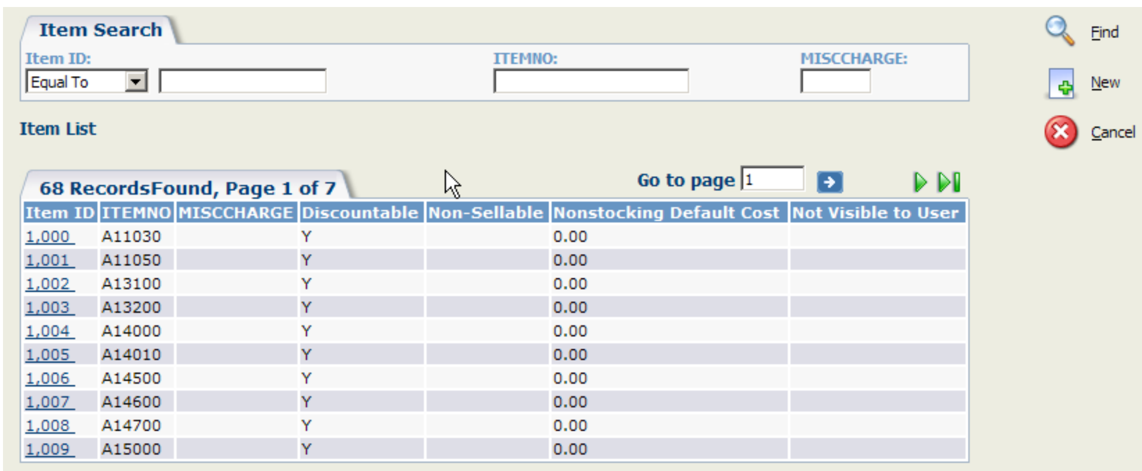
Note: CRMOE will NOT re-import items already in the database. It will simply skip any items that match the criteria but are already in the database. Therefore import all items at anytime if to ensure CRMOE has a complete listing of AAS item numbers.

Item Setup

Once an item has been imported into CRMOE, it can be further configured. The CRMOE Item Detail administration screen can be accessed by returning to the CRMOE Administration menu, and selecting the “Items” option.



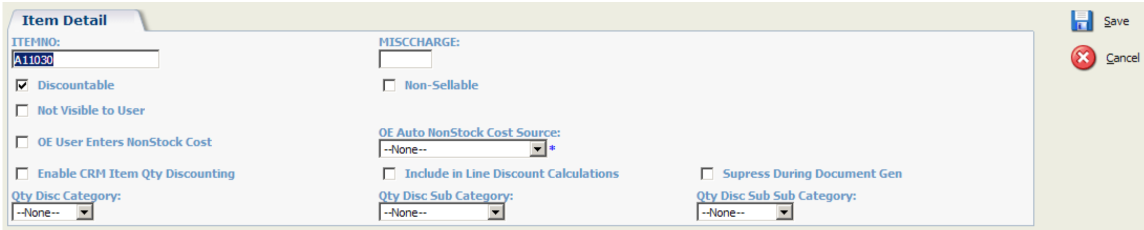
The following search screen will appear. This can be used to find any items in the database:



Item ID	ITEMNO	MISCCHARGE	Discountable	Non-Sellable	Nonstocking Default Cost	Not Visible to User
1,000	A11030		Y		0.00	
1,001	A11050		Y		0.00	
1,002	A13100		Y		0.00	
1,003	A13200		Y		0.00	
1,004	A14000		Y		0.00	
1,005	A14010		Y		0.00	
1,006	A14500		Y		0.00	
1,007	A14600		Y		0.00	
1,008	A14700		Y		0.00	
1,009	A15000		Y		0.00	

The “Item ID” field is the record identification field for the table and has no relationship to is AAS counterpart.

Click on the ItemID of any particular item to edit its details:



The CRMOE fields on this screen are described below:

- ITEMNO - The AAS unformatted Item number for this item.

- MISCHARGE - This field is irrelevant in this context. In CRMOE, Items and Miscellaneous charges are stored in the same database, unlike in AAS where they are stored separately.

- Price Adjustable (aka. Discountable) - If users are allowed to adjust the price of this item, enable this.

- Non-Sellable - If the presence of this item on an order should prevent the order from being posted to AAS, enable this. This is sometimes used by CRMOE users to have a generic part that doesn't exist in IC yet but is used for quoting type function. Of course, if the part is unknown it should not be sold. Posting of quotes to AAS will fail until all items exist in IC.

- Not Visible to User - It is sometimes appropriate to hide items from users so they cannot select them for sale. For example, components of a KIT, where the component could not be sold separately, could be hidden and would then only be available when the kit was broken down into component parts.

- OE User enters NonStock Cost - If enabled, CRMOE will expose the non-stock unit cost field for the user to edit. If the user has been granted access to edit costs (see User configuration in the previous section), they can edit the cost. If they do not have access, then the value will appear on the screen, but will be read-only. This should only be used on non-stocking items.

- OE Auto NonStock Cost Source - CRMOE can auto-source the non-stock unit cost from one of two locations. If no source is defined, then the cost will always default to zero.
    - o Pricelist markup cost - Use the markup cost field on the item settings in the AAS pricelist (this is an entirely AAS based setup) to specify the cost to use.

- C21NONCOST Optional Field - Use AAS 5.4 optional fields and define an ICITEM optional field named "C21NONCOST". Specify the default cost for the item there. If selected, CRMOE will use this value.

- OE Taxed Based on Alternate Item Details - If an alternate item is defined in AAS IC for the item, it is possible to have CRMOE calculate taxes for this item, based on the tax configuration of the ALTERNATE item. This would most likely be used in scenarios where the item sold in AAS, and the actual item delivered were different – for example in situations using an integrated shipping module where inventory needed to be "shipped" in the future, but invoicing needed to occur today. In this case this item may be a "non-stock" item that is sold, and the item shipped may be a physical item.

- PO Receive as NonInventory - Used only if also using the CRMPO module. Indicates if the item, when received on a PO, is a Non Inventory item.[1]

- PO NonInventory Suffix - If PO Receive as NonInventory is enabled, this suffix will be added to the end of the item number of the received item to ensure it does not already exist in the ICITEM database. Leaving this blank would disable this uniquifying function.

- PO Cost Adjustable - If using CRMPO, and this is enabled, then the item cost will be adjustable when entering a PO.

- Enable CRM Item Qty Discounting - Unlike AAS, CRMOE allows you to define, item by item, if that item "counts" for quantity discounting purposes. This is because CRMOE's quantity discounting does so across detail lines on an order, and across item IDs (based on categories). So, if you had the same item on 5 detail lines, the quantity discount is calculated based on the aggregate quantity of all line items that match the setup criteria (see Item Quantity discounting for more details). However, if this setting is disabled, this item will NOT be "counted" for the purposes of aggregating quantity.

[1] CRM PO is a customized add-on to CRM OE

- Include in Line Discount Calculations - Similar to Enable Item Qty Discounting. If enabled, this item will be included when calculating the "Discountable Subtotal" of the order, if the line discount is based on the order subtotal. If it is disabled, then this item will be excluded, and therefore will not be made part of the discount calculation. See Line Discounting for more information.

- Suppress During Document Gen - If selected, this item will not print on documents within the CRM OE application (order confirmations, invoices, etc) but item will be posted to AAS.

- Item Category1, 2, 3 - These are definable by the administrator, and are used by the Item Qty Discounting when grouping items. These fields are also used by the integrated CRM License Management System if installed. They can also be used for reporting purposes.

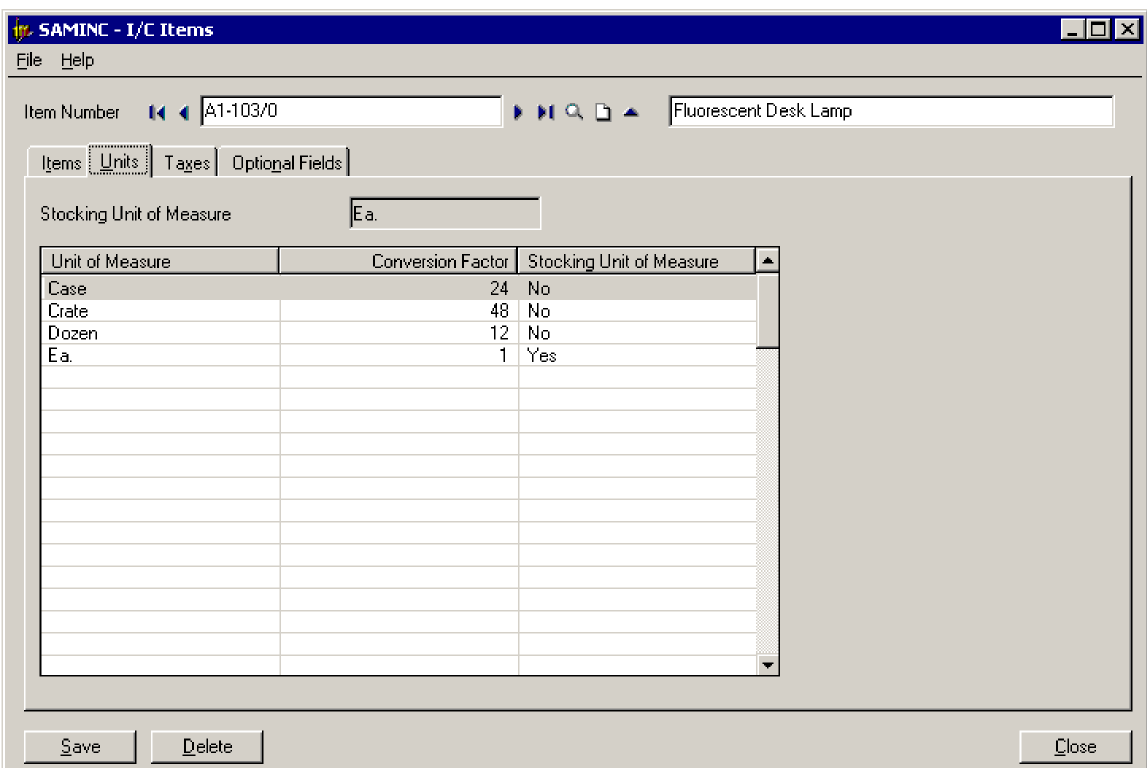
Item Kitting

Reminder: Item Kitting is only available in CRMOE if the software has been configured to enable the feature. See the CRMOE Setup & Configuration section for instructions on how to “Use Item Kitting”.

Once an item has been imported into CRMOE and configured, it can be made into a kit or can be included in a kit, or both.

CRMOE Kits are based on the principle that an AAS Item Unit of Measure is defined for the purposes of identifying each “Kit”, and then the kit has one or more items added to it. This list of items can include the item configured to be the kit itself. One cannot, however put an item with a unit of measure that itself identifies a kit into a kit. (ie, nested kits). This may be possible in the next release of CRMOE.

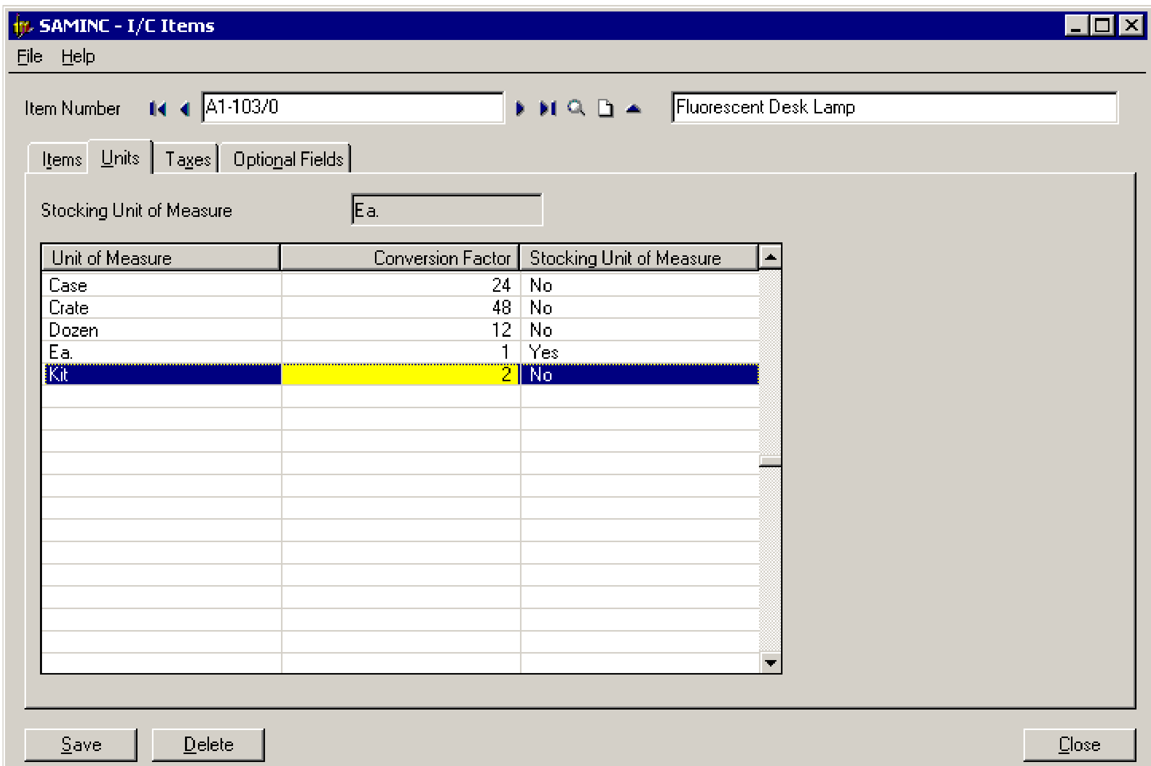
In this example we will configure the sample company “Fluorescent Desk Lamp” to have an available kit that also includes a light bulb and a freight charge.
To begin configuring a kit, first setup ACCPAC to define an appropriate unit of measure. Find the item in AAS IC:



Add a new unit of measure "Kit".

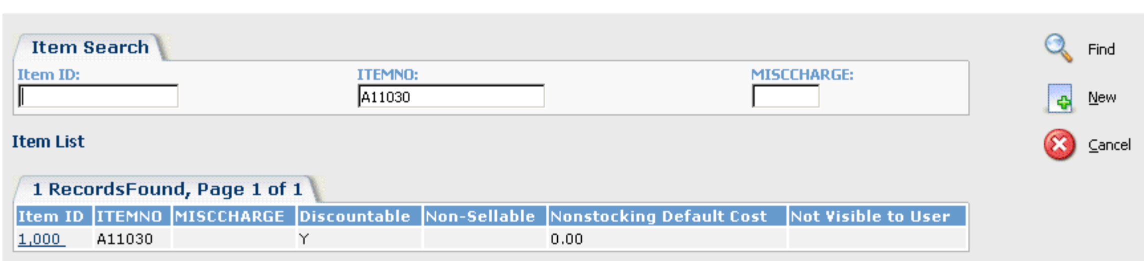
The "Conversion Factor" will become important later, if (and only if) the kit will be priced by a "Kit Price" (as opposed to sum of components). In this case, specify the appropriate conversion factor such that CRMOE will calculate the appropriate price based on the conversion factor multiplied by the price of the stocking unit of measure. This operates the same as AAS normally does when using units of measure and conversion factors.

In this example, we're using a conversion factor of 2.

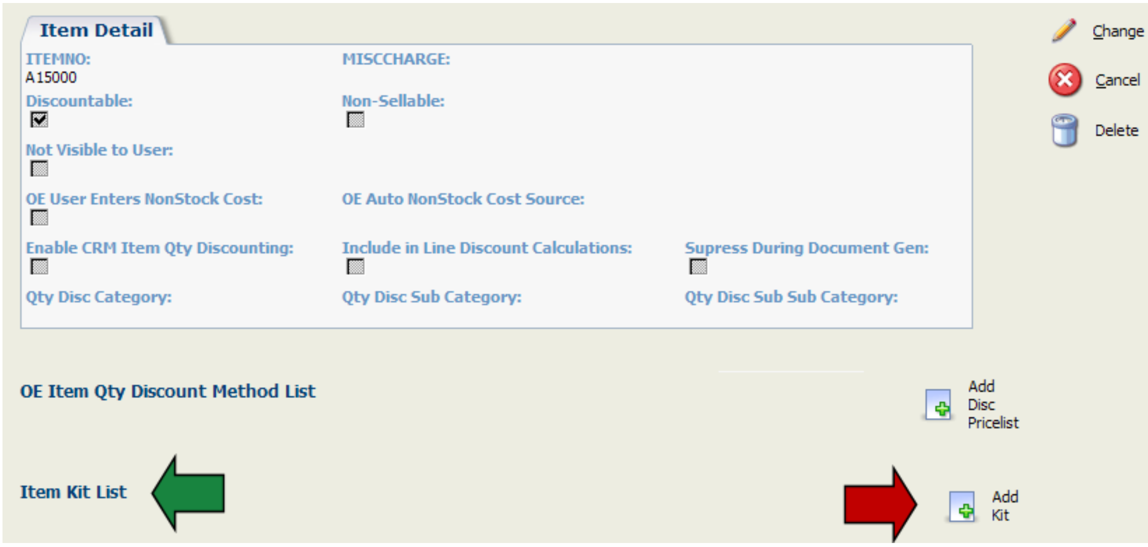


Save the changes. The AAS configuration is done.

Find the item in the CRMOE item admin finder



Click the Item ID to view its details:



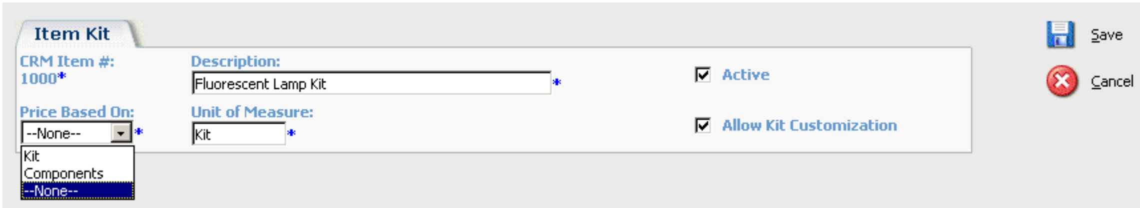
The green arrow highlights the Item Kit list, the red arrow highlights the “Add Kit” button.

You can define as many kits as necessary for a particular item, but each kit can only be associated with one unit of measure.

Before creating the kit, know the CRM Item ID’s of each of the items to be included in the kit. Use the CRM item finder to identify the ID numbers. For example, the A11030 is CRM item # “1000”. The additional parts we’ll be adding are:

- A11050 – 13w Mini Fluorescent Light Bulb - CRM Item ID 1001
- TF – Miscellaneous charge for Taxable Freight – CRM Item ID 1073

Once you know the CRM Item ID's, click the "Add Kit" button to create a new kit.



Each of the fields on this screen is described below:

- CRM Item # - The CRM Item # of the item being added to the kit. This is a Read-Only field.

- Description – Enter a description of the kit.

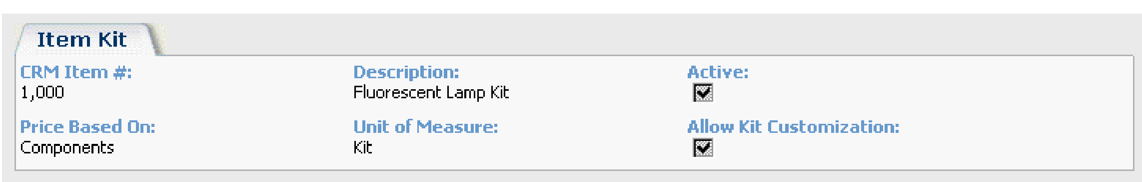
- Active – If checked, this kit will be useable.

- Price Based On:
    - Kit – if selected, the price of this kit will be based on the AAS stock unit price multiplied by the conversion factor for the unit of measure of this kit.
    - Components – if selected, the price of the kit will be based on the sum total of the extended amounts of the components of the kit.

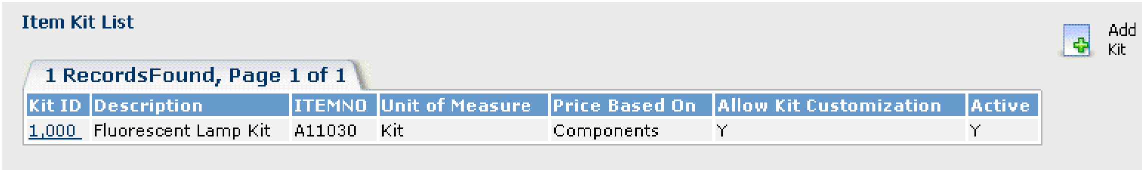
- Unit of Measure – Enter the unit of measure previously added to the AAS Item that indicates the user is selling the kit.

- Allow Kit Customization – if enabled, then the kit will be customizable based on the setting attached to each of the items in the kit, and the security level of the user. If it is not selected, then this kit cannot be customized while being sold.

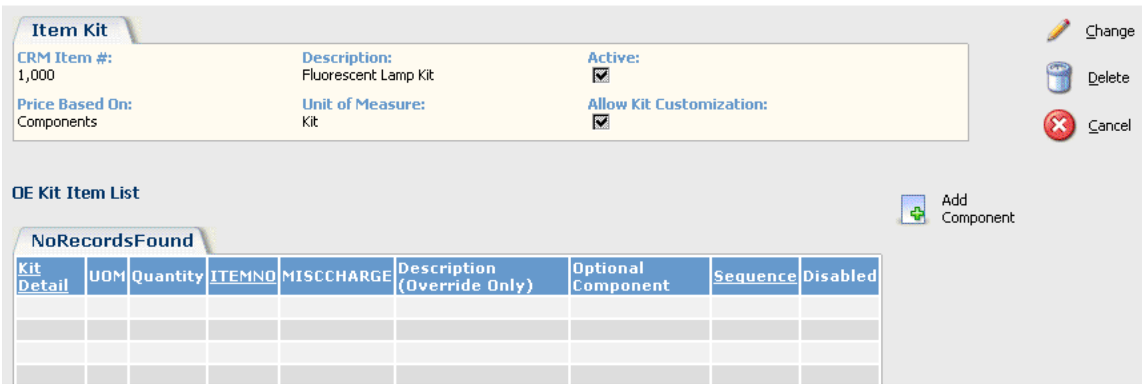
Fill in the appropriate values for the kit itself. In this example, we'll price the kit based on its components. Click Save, and click Continue.



The item detail screen will be displayed, but now a kit has been added.

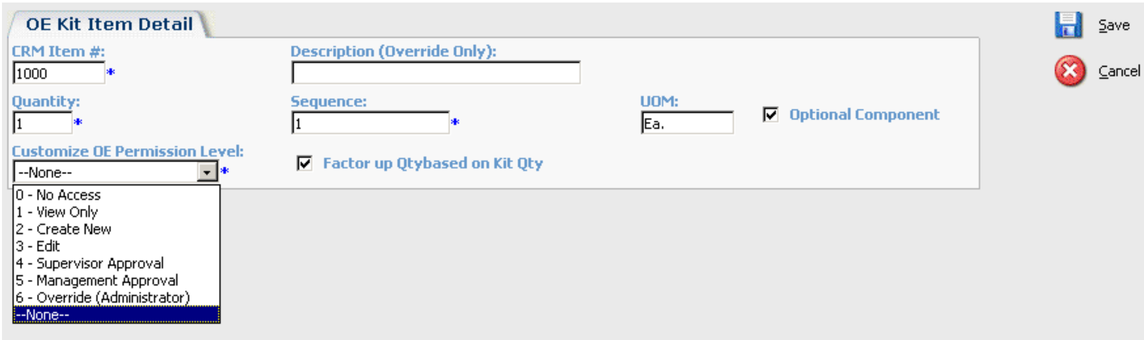


Click on the Kit ID to return to the kit detail screen. It is here that items will be added to the kit.



Click the “Add Component” button to add a new item to the kit.

The first item we’ll add to the kit is the fluorescent desk lamp itself, with a unit of measure of “Ea.” (corresponding to the Stocking Unit of Measure for this item in AAS). In this way we’re putting a single desk lamp in the desk lamp kit. We could use any unit of measure defined on the item in AAS, such as “Crate” or “Dozen” if we wanted so long as it exists on “Units” tab in AAS IC Items.



Each of the fields on this screen is described below:

- CRM Item # - Enter the CRM Item number for the AAS item to use here. The Fluorescent Desk lamp is item # 1000.

- Description – Use this field only to override what is displayed to the user in the CRMOE entry screen, such as “Fluorescent Desk Lamp Kit”.

- Quantity – How many of these items to include in the kit.

- Sequence – Use this field to order the items in the kit. This is sometimes important both for display purposes and other technical reasons. This is of particular importance when using the optional CRM License Management extension to CRMOE.

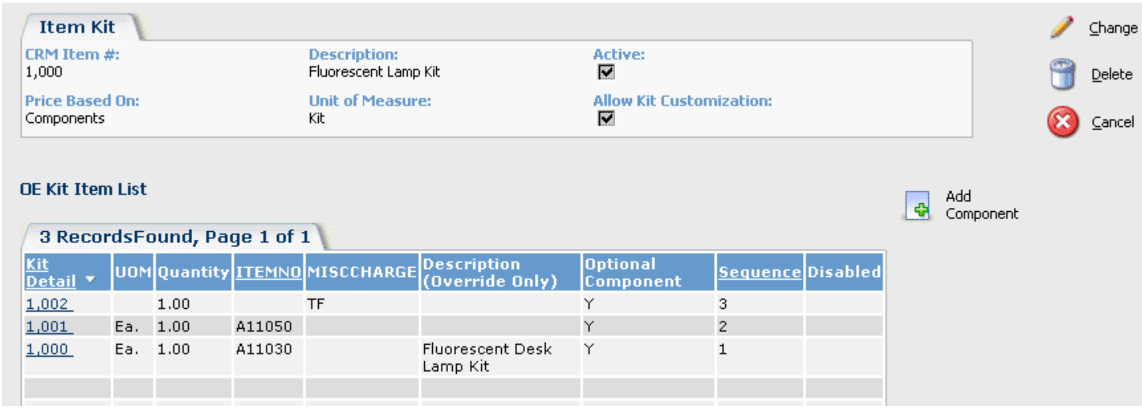
- UOM – The AAS unit of measure.

- Optional Component – Only optional components can be customized at the time of sale. If this item is a required component of the kit, leave this unchecked.

- Customize OE Permission Level – If this item is optional, which security level is needed to customize. Any user with this level and above can customize the item, if lower they will see it as if it were not customizable.

- Factor Up Qty based on Kit Qty – If enabled, the Quantity previously entered will be multiplied by the quantity of kits the user enters. For example, if the user entered “3” in the quantity field on this screen, and the customer wanted to buy 2 kits, then 6 of these items would be added to the order. If this is not selected, then the quantity remains constant regardless of the number of kits purchased.

Fill in the fields appropriately and click Save and Continue. Use the “Add Component” button to add the other remaining items to the kit:



When completer, the kit should look like this. Note: the miscellaneous charge, “TF” has no unit of measure. This is because in AAS, miscellaneous charges do not have units of measure.

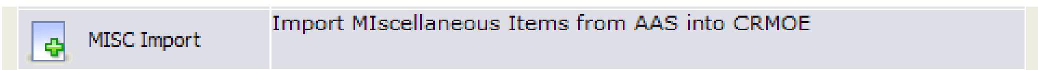
The configuration of a CRMOE Kit has been completed.

Reminder: Stocking and Non-Stocking items can be added, as well as miscellaneous charges to the kits, providing complete flexibility in the kitting configuration!

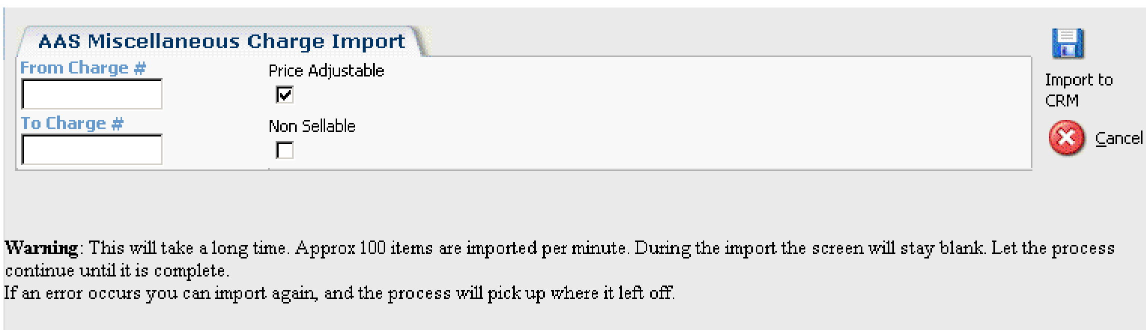
Importing Miscellaneous Charges

Importing Miscellaneous Charges from AAS to CRM is simple. However, it is NOT automatic. Any time any changes are made to the IC database in AAS, they will need to be imported into CRMOE, in order for CRMOE to have access to those items for sales purposes.

To import the items, return to the CRMOE Administration menu, and select the



“Item Import” option. The following screen will appear:



Enter any range of item numbers into the From and To fields. To import all items, leave the “From Charge #” field blank, and fill the “To Charge #” field in with as many “Z” characters as will fit.

To expedite some of the setup of the miscellaneous charges, the two most common setup items are listed here:

- Price Adjustable - Can the user in CRMOE edit the price of this item?
- Non Sellable - Can orders that contain this item be posted to AAS?

Select the appropriate configuration. The settings will be applied to all miscellaneous charges that are successfully imported when the “Import to CRM” button is clicked.

Note: CRMOE will NOT re-import miscellaneous charges already in the database. It will simply skip any items that match the criteria but are already in the database. Therefore import all miscellaneous charges at anytime if to ensure CRMOE has a complete listing of AAS MISCCHARGE codes.

Miscellaneous Charge Setup

There is no separate Miscellaneous Charge Setup interface. Refer to the Item Setup section for instructions.

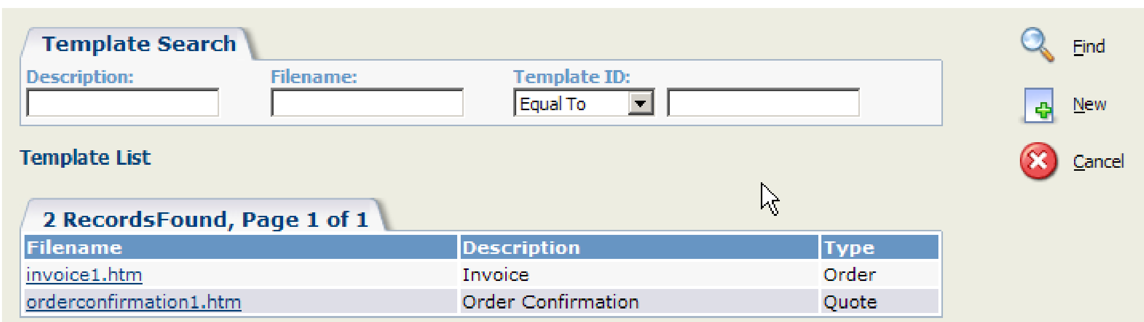
Step 5 – Template Setup

Modify templates in the CRMOE menu

CRMOE ships with one example template, “orderconfirmation1.htm”.

This template is automatically enabled in the system as a “Quote” template.

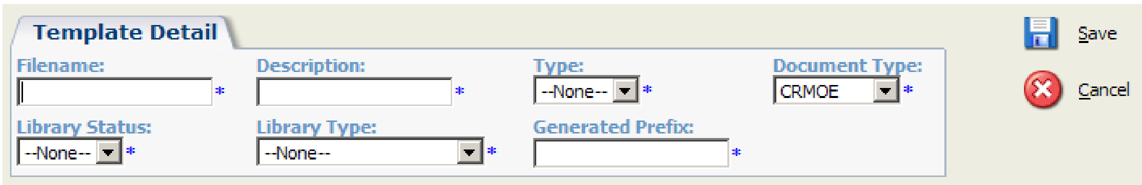
To manage CRMOE templates, return to the CRMOE Administration Menu, and select the “Templates” option. The following a template search screen will appear:



Creation of templates is outside the scope of this document. Please contact your software provider for more information on this topic.

Enabling Templates

To enable a new template, click the “New” button in the template search screen.



The CRMOE fields on this screen are described below:

- Filename - The filename of the template file, ex: Orderconfirmation1.htm

- Description - The description of the template that will be displayed to the user, ex: “Order Confirmation A”

- Type:
  - Quote – This template will be available only when the CRMOE quote is of type “Quote” (ie, before posting to AAS)
  - Order – This template will be available only when the CRMOE quote is of type “Order” (ie, after AAS posting)
  - Invoice – The use of this option is limited to CRMOE implementations that have been enhanced for bi-directional communication from AAS, such that CRMOE is made aware of invoicing being done in the accounting system.
- Document Type
- Library Status
- Library Type
- Generate Prefix

Click on Save to complete the configuration

Note: It is clearly not possible to have one template definition be available for both Quotes and Orders. To have one template file available in both states, then define it in the template list once for each state it should be available to.

The template configuration is now complete.

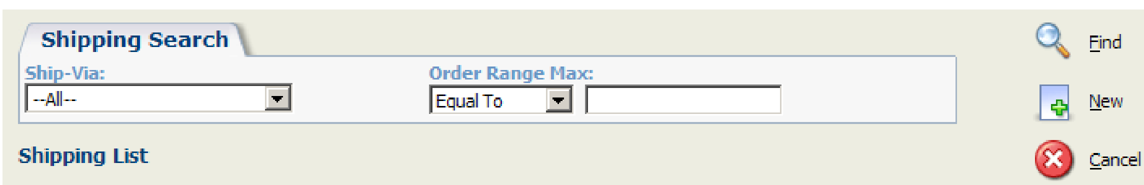
Additional Configuration

Shipping

CRMOE includes the ability to define shipping configurations that can be automatically added to an order based on setup parameters.

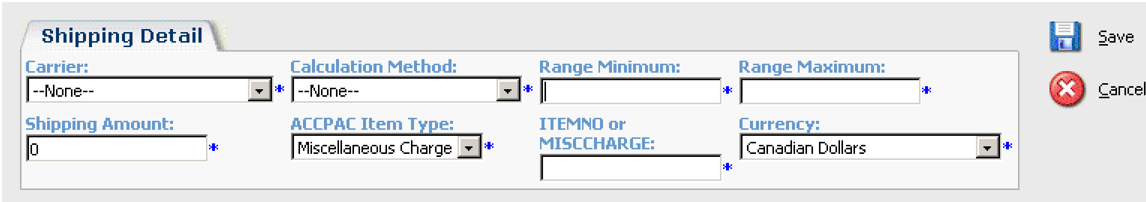
Freight / Shipping charges, when properly detected based on this setup, will be added to the order as an additional line item, automatically. As an order is updated, if, for example, it moved past the currently applied freight entry's maximum, and into the min/max range of the next entry in your setup, the freight charge on the order would automatically adjust when the order is refreshed. Order refreshes occur automatically when a line item is added or edited, or can be done manually by clicking the "Refresh" button on the order detail screen.

To access the shipping configuration return to the CRMOE Administration screen and choose the "Shipping" option (above). The Shipping search screen will appear:



Search for existing shipping configurations, or create a new one. Searches can be done by "Carrier" (analogous to AAS 'ShipVia')

To add a new shipping auto configuration click **New**.



The CRMOE fields on this screen are described below:

- Carrier - Select the AAS ShipVia that will be specified on the order. The ship via the user defines on the order will partially determine which of the shipping entries is applied

- Calculation Method:
  - Percentage Based on Total - Use this option for the amount of the shipping line item to be equal to a percentage of the order subtotal.
  - Amount Based on Total - Use this option for the amount of the shipping line item to be equal to a fixed amount.

- Range Minimum - the minimum order subtotal amount

- Range Maximum - the maximum order subtotal amount. The entry selected will be the one where the order subtotal (excluding the shipping entry) falls between the Minimum and Maximum

- Shipping Amount - This is a dollar amount when using Amount Based on Total, and a decimal percentage when using Percentage Based on Total. For example. 0.10 would be 10%.

- ACCPAC Item Type:
  - Item - The freight charge will be added as an item that must already exist in CRMOE's item database.
  - Miscellaneous Charge - The freight will be added as a Miscellaneous Charge that must already exist in CRMOE's item database.

- ItemNo or Misccharge - The AAS ITEMNO or MISCCHARGE code (unformatted) to be used.

- Currency - The currency this entry applies to. There needs to be a complete set of entries in this setup for each currency code used.

Click Save. Upon saving, this entry takes effect immediately.

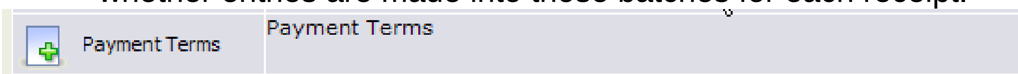
Reminder: The auto-shipping feature only operates if it is enabled in the CRMOE Configuration. Enable the feature for these setup parameters to have an effect.

Payment Terms

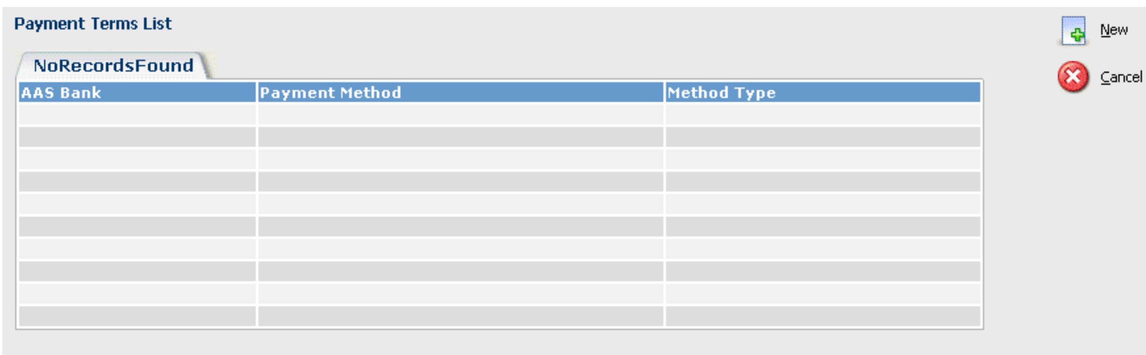
Payment Terms setup serves two main purposes:

- It enables the payment method in CRMOE such that the appropriate payment procedure is executed prior to posting to AAS.

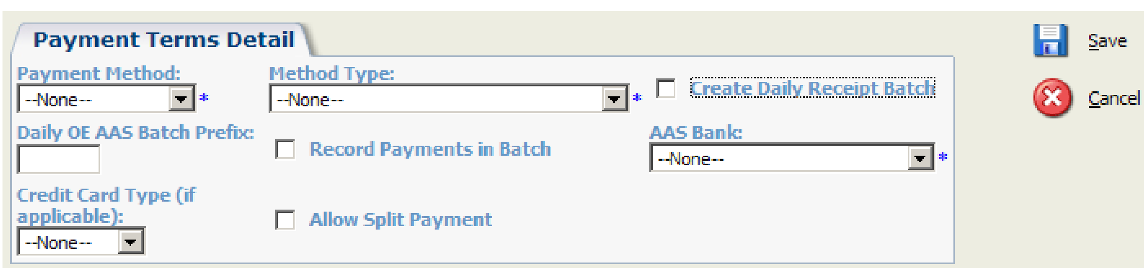
- It serves as the configuration that CRMOE will use when recording the order prepayment in AAS. It determines the AR Receipt batch names, and whether entries are made into those batches for each receipt.



To access Payment Terms setup, return to the CRMOE Administration menu. Select "Payment Terms" and the Payment Terms list will appear:



Click New to create a new Payment Terms configuration.



The CRMOE fields on this screen are described below:

- Payment Method - This matches the Payment Method entered on the quote, and represents the AAS AR Receipt Type

- Method Type:
  - Credit Card Electronic (Int) Authorization - Used if this payment method will utilize CRM's electronic CC authorization process
  - Credit Card Manual Authorization - Used if this payment method is a CC, but will be processed manually or otherwise offline from CRM.

    - Cash or Cash Equivalent - Used if this is any cash equivalent such as - Cash, Cheque, Money Order, Interac (Debit), etc.
    - On Account / Terms - Used only if no payment is accepted at time of order.
- Create Daily Receipt Batch - If enabled, a daily batch will be created using the “Daily AAS Batch Prefix” and date as the name, for use in recording payments of this type.

- Record Payments in Batch - If enabled, each payment (AAS receipt) received of this type will be recorded in AAS as an entry in this batch and as a prepayment against the order.

- AAS Bank - Which AAS bank account to record the receipt of funds. In the case of “On Account/Terms” there are clearly no funds received. This value must be specified, but it will not be used in this case.

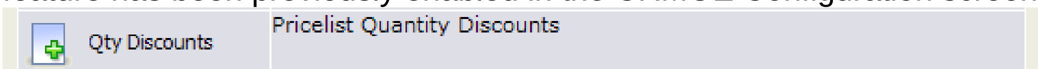
Ensure there is only one entry (configuration) for each Payment Method. CRMOE itself will not enforce this, but if you do not, the results may be unpredictable.

Reminder: To use CRMOE’s integrated credit card processing, the Exact UID and PW must be configured in the CRMOE Configuration screen, and appropriate arrangements should be made with the bank, and Exact. To use another payment provider, please contact the software provider and arrangements can be made to accommodate the request, in many cases.

Configuration of payment terms is complete.

Quantity Discounts

Quantity discounts is a feature of CRMOE that is similar to the Pricelist quantity discounts in ACCPAC Advantage Series. This option is only available if this feature has been previously enabled in the CRMOE Configuration screen.



However, where AAS allows for five levels of discounting (discount breaks), CRMOE allows for unlimited breaks. This means that instead of being limited to five discreet discount levels, as many as necessary can be configured.

CRMOE's quantity discounting can also be configured to discount based on

- Item
- Item Category
- Item Subcategory

This means that multiple items can be placed in a "category" or "subcategory" and then the quantities used for discounting can be aggregated across items on the order that share the same setup.

CRMOE can also be configured to use different discounting methods for each pricelist.

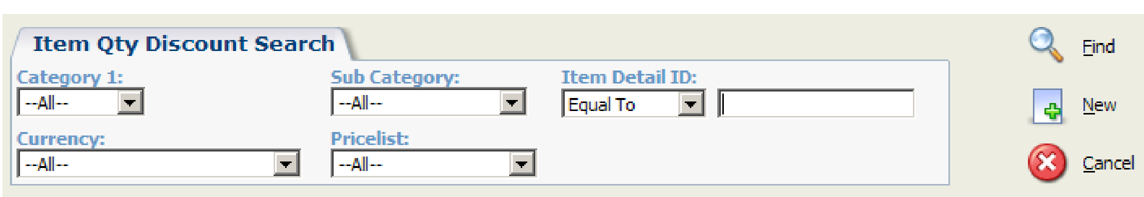
Reminder: Item inclusion in the aggregation, regardless of being in the same pool is based on the configuration of the Item itself. See "Item Configuration" earlier in this document.

The configuration of Item Quantity discounting is separated into twp parts:

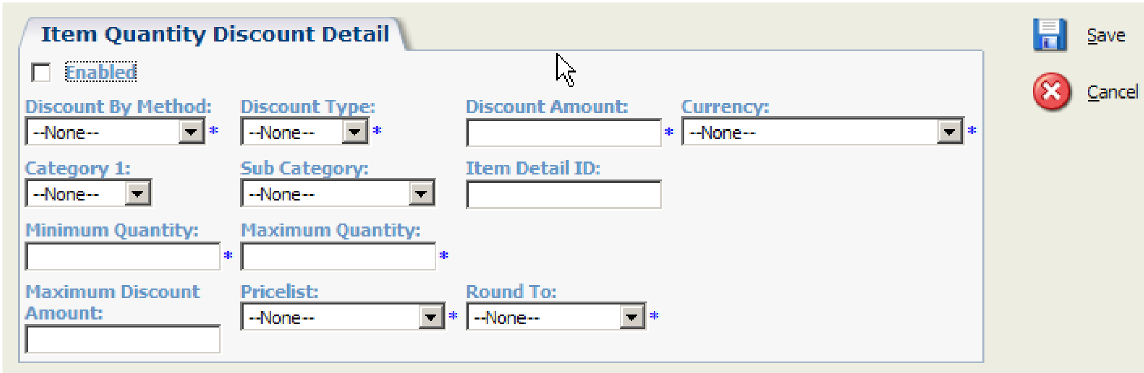
- The discounts themselves, and
- The items that can be discounted

Discount Configuration

To access Discount Configuration, return to the CRMOE Administration Menu, and select "Qty Discounts" from the menu. The Item Qty Discount Search will appear.



Click New to create a new discount price-break configuration



The CRMOE fields on this screen are described below:

- Enabled - This entry currently enabled

- Discount By Method:
    - Item - This entry will discount only a specific item
    - Category 1 - This entry will discount a level 1 category
    - Category 2 - This entry will discount a level 2 category (subcategory)
    - Category 3 - This entry will discount a level 3 category. **Note** - by default Level 3 categories are not placed on the Item Configuration screen, only Category/Subcategory are. To use level 3 categories, modify the Item Detail screen, as well as this screen, and add this field onto the screen from the database.
    - Note - There is an order of preference in applying a discount if a particular item matches multiple entries in this table, it is: Level 3, Level 2, Level 1, Item. This means if a category match and an item match were both found, the Item match would be used to actually discount the item.

- Discount Type:
    - Amount - The PER UNIT discount should be a fixed amount
    - Percentage - The PER UNIT discount should be a percentage of the AAS Calculated Price

- Discount Amount - If Amount was selected in “Discount Type” this is a dollar amount. If Percentage was selected, this is a decimal percentage (ie, 0.15 = 15%)

- Currency - Configure a set of entries for each currency in use. Only entries matching the currency of the order will be used.

- Category 1 - If using the “Category 1” Discount by Method, this is the Item Category that will be matched

- Category 2 - If using the “Category 2” Discount by Method, this is the Item subcategory that will be matched.

- Item Detail ID – If using Item matching, this is the CRMOE Item ID (see the Item search to find this value) that this discount will be applied to.

- Minimum Qty - The minimum aggregate quantity of this discount pool that this entry applies to.

- Maximum Qty - The maximum aggregate quantity of this discount pool that this entry applies to.

- Minimum Qty Historical - This entry only applies if using the additional CRM License Management System module. In this case, enter the minimum historical purchase quantity.

- Maximum Qty Historical - This entry only applies if using the additional CRM License Management System module. In this case, enter the Maximum historical purchase quantity.

- Maximum Discount Amount - If using the percentage based discount, the discount may be capped at some amount (for example 10% off up to 1$ / unit). If so, enter the dollar amount here.

- Pricelist - The AAS Pricelist that this discount entry applies to.

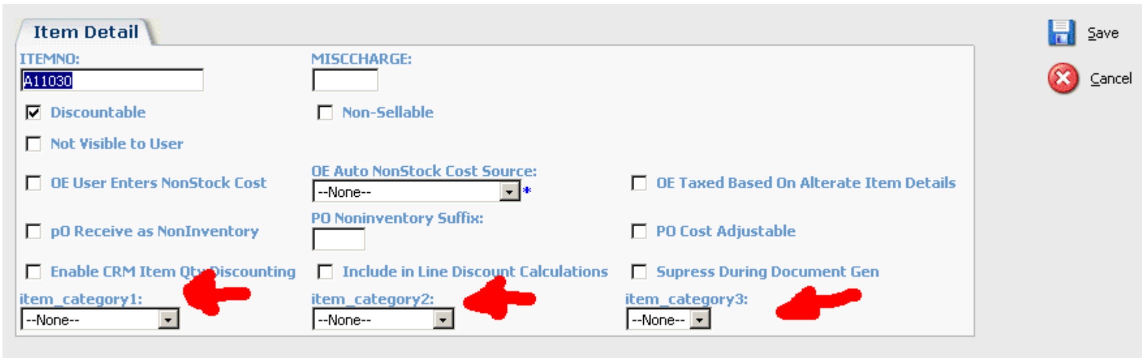
Click Save.

Repeat this process for every combination of Pricelist / Currency / Discount Pool / Min-Max range.

The discount configuration is complete, but the items in the system must be configured so they match the configuration just made.

Item Discount Configuration

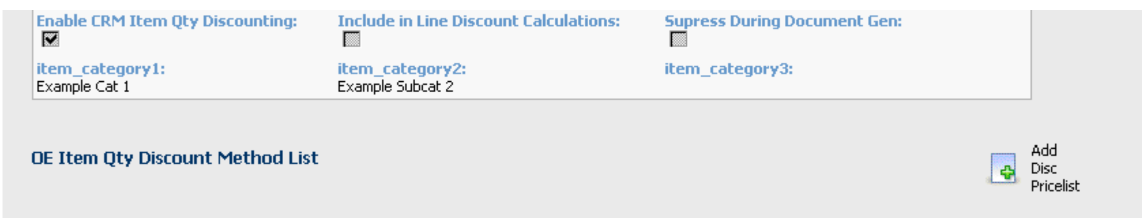
First find the item to configure in the CRMOE Item Configuration. See “Item Configuration” previously in this document. Recall that the item may have been slotted into a category or subcategory:



To use category discounting, and these are not defined, define them now. Also check the “Enable CRM Item Qty Discounting” option.

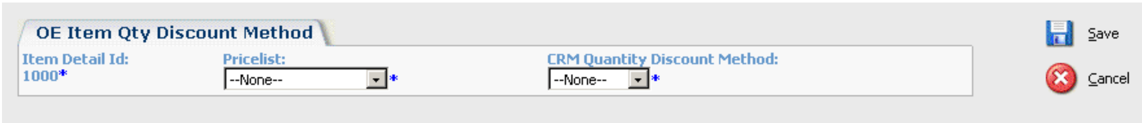
Click Save.

When accessing the item again from the search screen, a new option will be on the screen:



This is how to define, for this item, which discounting method it will use on each pricelist. CRMOE will allow a different discounting method to be defined for each pricelist.

Click “Add Disc Pricelist”



The CRMOE fields on this screen are described below:

- Pricelist - The pricelist this discount method applies to

- CRM Quantity Discount Method – The discount method to use for the selected pricelist. This will be used to select the appropriate, corresponding entry from the Item Qty discount configuration made previously. Options are:
  - Item
  - Category 1
  - Category 2
  - Category 3

Click Save. Repeat this once for each pricelist to enable discounting.

Repeat this step for each item in the database to configure item discounting.

Item configuration is now complete.

Line Discounts

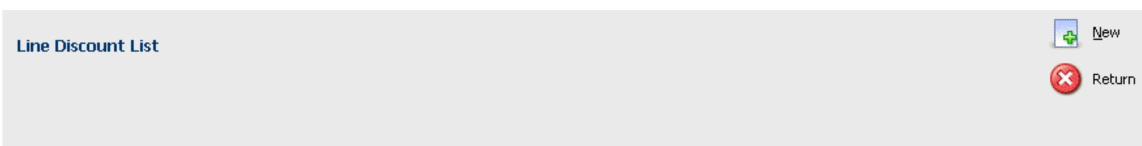
Line discounts can be thought of as a set of predefined “coupons”, or predefined line-item based discounts, in that the discount is applied as a line item on the order (as a negative dollar miscellaneous charge).

In the CRMOE admin menu

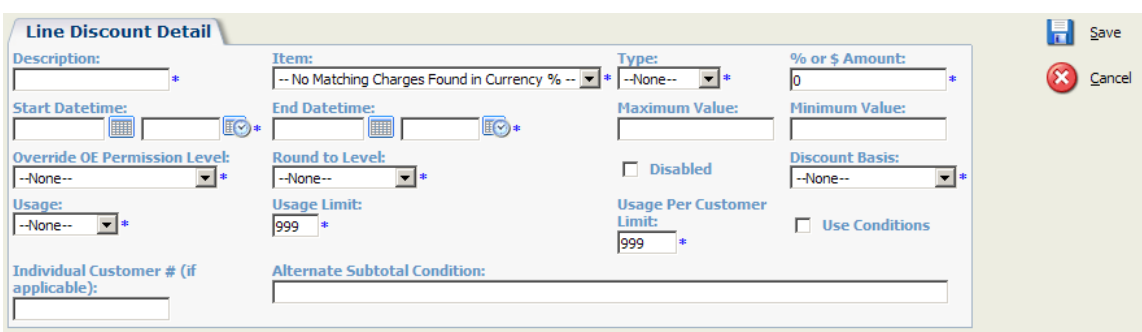
This option is only available if this feature was previously enabled in the CRMOE Configuration screen.

Line Discounts, when added, will be added to the order as a new line item, and will be of type “miscellaneous charge”. The amount will generally appear as negative dollar miscellaneous charges. However, if the discount is not entered as a negative amount, the value would be a positive number. This means this could be used as more than discounts it could be predefined charges as well.

To access the Line Discounts feature, return to the CRMOE Administration menu, and select “Line Discounts”. The line discount list will appear:



Click “New” to create a new line discount configuration



The CRMOE fields on this screen are described below:

- Description - A text description that will be displayed to the user in their select list.

- Item - This is a select list of the miscellaneous charges currently loaded into CRMOE. If it does not appear, refer to “Miscellaneous Charge Import” previously in this document.

- Type:
    - Percentage - Select for this discount to be a percentage of the "Discount Based On" value.
    - Amount - Select for this discount to be a fixed dollar amount.
    - **Note** - The value entered here should be a NEGATIVE number (ie, -5.25 or -0.20 for a 20% discount). If a POSITIVE number is entered, this amount will be ADDED to the order.

- % or Amount - If this is a percentage discount; this is a decimal percent (ie, 0.065 = 6.5%). If this is an amount discount this is a dollar amount.

- Start Datetime - The date and time that this discount will become available to users for use on orders.

- End Datetime - The date and time that this discount will cease being available to users for use on orders.

- Maximum Value - If there should be a maximum value on this discount (only applies if this is a "percentage" based discount), enter that amount here. If the calculated amount exceeds this amount, then this amount will be used instead.

- Minimum Value - If there should be a minimum value on this discount (only applies if this is a "percentage" based discount), enter that amount here. If the calculated amount is less than this amount, then this amount will be used instead.

- Override OE Permission Level - Define which user OE Permission level (and higher) is permitted to override the calculated amount of the discount. Any user with a security level less than this will not be permitted to adjust the amount of the discount.

- Round to Level - Determines what number of significant digits the discount will be rounded to
    - Nearest Full Dollar: round to the nearest dollar
    - Nearest $1/10^{th}$ round to the nearest dime
    - Nearest $1/100^{th}$ round to the nearest penny

- Discount based on:
  - o Discountable subtotal - if selected, the discount will be based on the discountable subtotal. In this case, only items that are currently on the order, and that have been configured to be enabled for Line discounting are “subtotaled”. See “Item Configuration” previously in this document on this topic.
  - o Last Item - if selected, the discount is calculated based on the last item currently on the order. If that item has not been configured for line discounting, then the discount will be calculated as 0.

Click Save. Repeat for each discount configured.

The line discounts configuration is now complete.

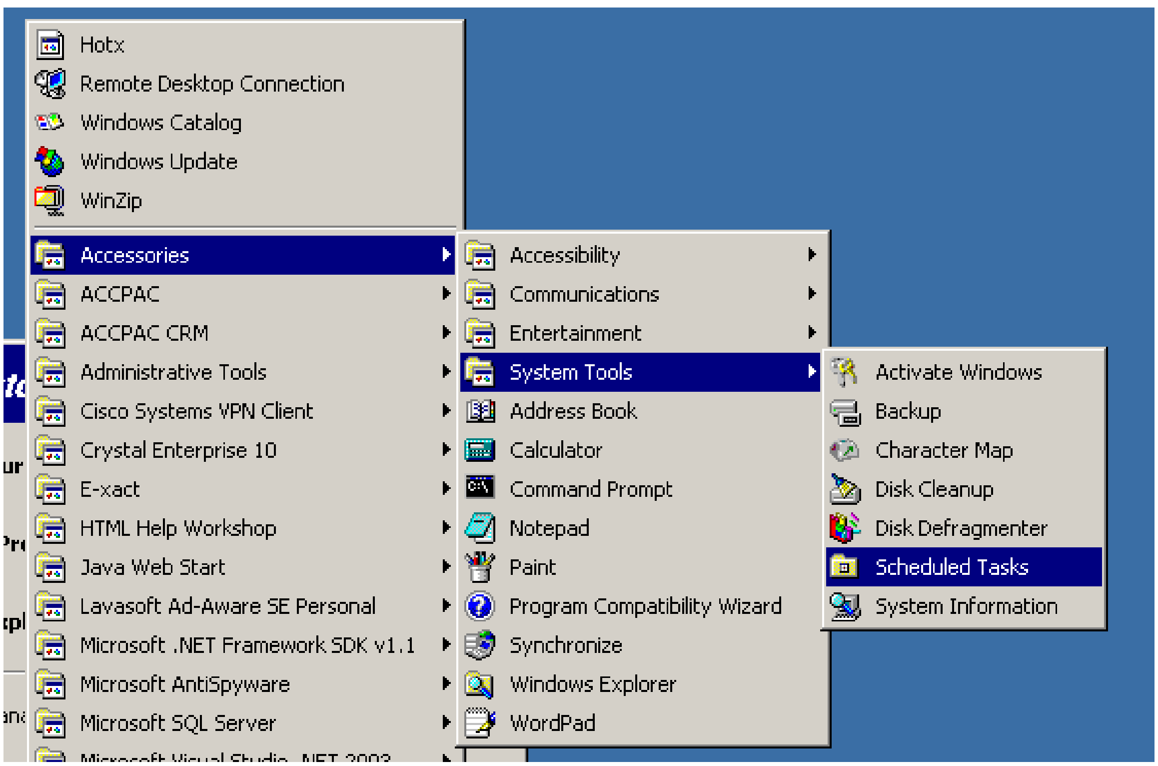
Run AAS Sync

Ideally, the AAS Sync should be scheduled to run daily on the CRM server. The CRMOE configuration does NOT do this automatically. To configure this, perform the following Windows maintenance tasks. **Note:** This must be done on the server where CRMOE was installed.

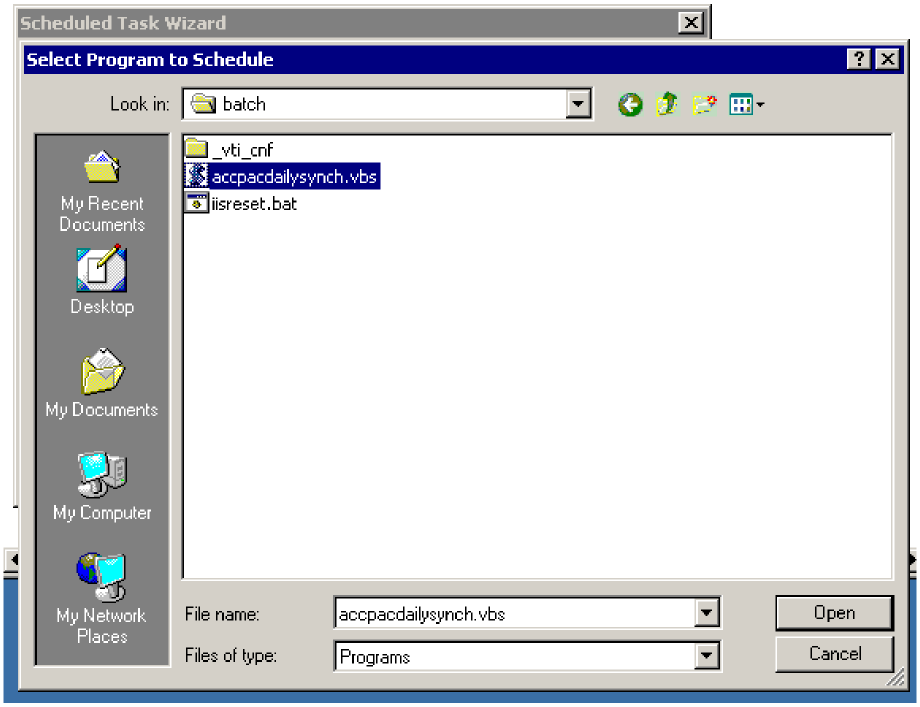
1. Determine the CRMOE installation path. By default this is "c:\inetpub\wwwroot\crm\custompages\crmoe"

2. Find the file "\batch\accpacdailysynch.vbs" inside your CRMOE installation folder. This file was automatically created during the CRMOE installation, and contains sensitive usernames and passwords.

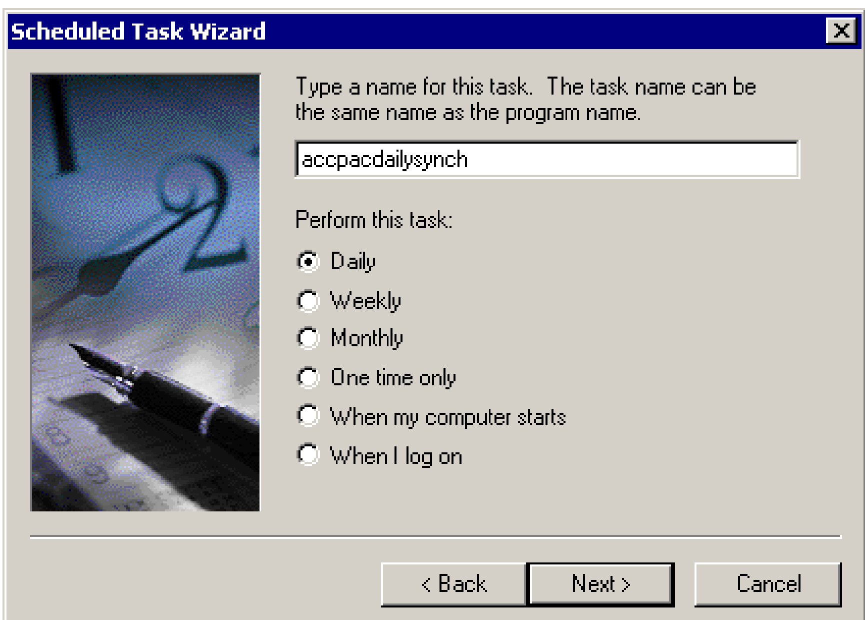
3. Open the windows scheduler, found in the Start / All Program Files / Accessories / System Tools menu in windows



4. Add a scheduled task. Navigate and find the accpacdailysynch.vbs file, and select it.



5. Schedule this item daily



6. Choose an appropriate time. Reset IIS after running this process. We normally recommend sometime in the early morning, like 1:00am

7. Click next, and specify some valid user credentials (Windows) that will be used to run the script. Finish the setup.

8. Repeat this process, but select the “other” file in the folder, “iisreset.bat”. Schedule this process for 5 or 10 minutes later than the AAS sync. This process will reset IIS, and serves two purposes:
    a. Forces a refresh of the CRM meta data, making the new data loaded from AAS take effect
    b. As a side effect, this will also clear any memory problems away that CRM has been experiencing. It is common for CRM (unrelated to CRMOE) to experience such problems, and this, in many cases will prevent such errors from occurring (eWare violations, etc)

The setup of the daily AAS Sync is now complete.

Customization Notes

If planning to customize CRMOE or the CRMOE interface, there are several things to be aware of:

- The crmoe\includes folder contains an ASP file: “custom.asp”, which remains unencrypted and is specifically there for use in customizing events, buttons, security, etc that occurs during the order entry process

- Most of the functional actions (buttons) are managed by the “Quote Workflow” and “Opportunity Workflow” and are available for customization

- There are numerous fields on the Quote and Quote detail screens that cannot be removed, hidden, or otherwise adjusted.
    - Quote Screen
        - All fields that have been labeled as “required”
        - QuoteID, Company, Person, Order
    - Quote Detail Screen
        - All Required Fields
        - Standard Cost

The CRMOE application itself is a developer’s application programming interface, and can be instantiated from ASP pages, Visual studio objects, Cold Fusion pages, etc. The API contains dozens of useful methods and properties that are easy to use and powerful. Many of these API methods wrap the ACCPAC Advantage Series object in an easier to use format as well.

If you have inquiries about customization of this, or any of CRM Systems CRM extension products, please contact your software provider.

Known Issues & Troubleshooting

At this time there are no known issues with the CRMOE Installation process.

The following issues and restrictions are known in regards to the general functioning of CRMOE 4.0:

- If you are using CRM 6.1, and a service pack of less than 6.1k is installed, you may experience errors accessing various screens. Upgrade to 6.1k or higher.
- Date fields cannot be placed on the Order Detail popup window. At this time, CRM 6.1 and 6.2's date selector is not compatible with popup windows, and is therefore not supported.
- Deletion of CRMOE Quotes may result in a CRM error, but the quote itself is deleted. e

If you experience any issues, please report them to us contacting your software provider, or, if you are a CRM Systems partner, by logging into our online self-service support portal at http://www.CRM Systems.ca and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly. If your issue is with the installation process itself, please include Debug_Log.txt from the (i.e. C:\Program Files\21CRM\CRMOE\Setup Factory) if you have issues during installation.

For further assistance you can contact us:

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R3E 2S7
Phone: 1.204.480.9772
Email: support@21crmsystems.com

Online: http://www.21crmsystems.com/support

Electronically submitted support requests generally will be responded to the fastest. Please consider using that option.