21CRM ERP Connect for Sage
Version 3.0
Installation and Usage Guide

Publisher: 21CRM Systems Inc. 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 5.7i +
- MS SQL Server 2000 or 2005
- Experience implementing and customizing CRM

How this guide is organized

The process for installing 21CRM ERP Connect is the same regardless of whether you are upgrading or installing a new copy into a clean CRM system.

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of the 21CRM ERP Connect extension for Sage CRM.

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: Installing and Using the CRM Component

21CRM ERP Connect is a 2-part installation. There are components that install into CRM itself, and there is a new program icon to install into the Accpac System Manager. This part outlines the CRM installation.

Installation Instructions

Prerequisites

21CRM ERP Connect for Sage has several prerequisites that must be completed prior to attempting installation. Not completing any one of these steps may result in a failed installation.

- CRM 5.7i (or higher) Installed.
- MS SQL Server 2000SP3 or 2005 Installed
- CRM Configured, functioning properly.
- SQL Server tools installed on the CRM server
- Exclusive access to CRM and the SQL Server database. (no other users online)
- Sage Accpac ERP Integration (CRM Components) installed into Sage CRM, testing, and working correctly.
- If the Sage Accpac ERP integration components for CRM (ie, the component installed into Accpac itself that connects to CRM) is installed, it should be “disabled” by turning off AR Integration in the Workstation Setup icon in the “Accpac CRM” program group in System Manager.
- If Sage CRM was upgraded from a version prior to v5.8, see the final section in this document “Known issues & Troubleshooting”, item #1 for an important update you must make to CRM before installing ERP Connect.

You are now prepared to begin the installation process.

Getting Started

Installation of 21CRM ERP Connect for Sage is a simple procedure. You should follow the steps described in order. If for some reason your installation fails, you should restore your CRM database immediately, unless instructed otherwise by a 21CRM Systems support technician.

Before starting, ensure you

- Are logged onto the Windows server running CRM V5.7i+ with an account that has administrative rights
- Know the name of your CRM database. By default, this database is named “CRM”, but yours may be different.
- Have a MS SQL Server username/password combination that has administrative rights to the CRM database. The “sa” account is preferred.
- Know the location (path) to your CRM installation.
  - In CRM 5.7, by default, this is “c:\inetpub\wwwroot\CRM”
  - In CRM 5.8, by default this is “c:\program files\sage\crm\crm”
  - However, yours may be different.
- You have **BACKED UP YOUR CRM DATABASE**. In the event of an integration failure, or other problem, you will need this backup to return to your previous state of affairs. **DO NOT SKIP THIS!** To backup your database, right click on the database in Enterprise Manager, and select “All Tasks / Backup Database”.

Possible Errors

While in most cases your installation should go smoothly, it is possible you could encounter errors during the install process. However, it is possible your CRM configuration may be slightly different than the installer expects. This is due to the fact that you have the ability to customize CRM on your own. If you receive an error message please read it carefully. Any errors that occur should be accompanied by an appropriate message, and may possibly include instructions on how to proceed. Please follow them.

CRM Setup Factory

21CRM ERP Connect is packaged for distribution using an exciting new technology developed specifically for deployments of commercial 3rd Party extensions to Sage CRM.

CRM Setup Factory will automatically ask you if you want to backup your CRM database, and if you agree, it will backup the database to the location of your choice. While we don't suggest you rely on this capability, it is available if necessary, and does ease the process of creating your "safety net" should an installation error occur.

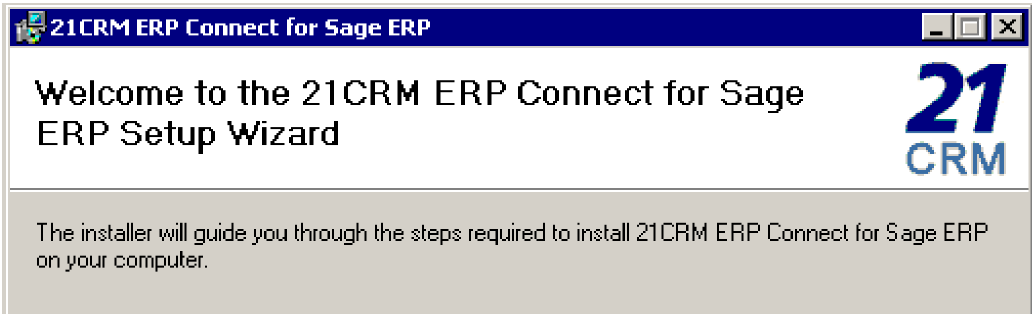
CRM Setup Factory maintains a log file during installation that can be used to troubleshoot any errors that occur. This file is located at:

- [windowspath]\system32\install_log.log

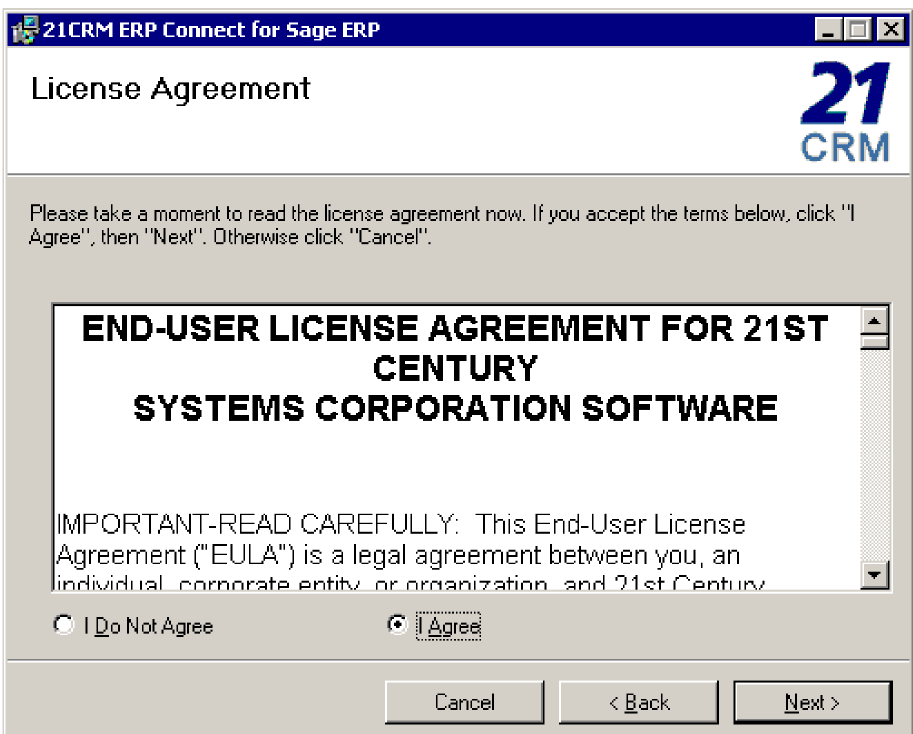
folder, and is available for review using any text editor, such as notepad. If you require support, it will be useful if you can send this log file along when you contact us.

Run Self-Extracting Zip File

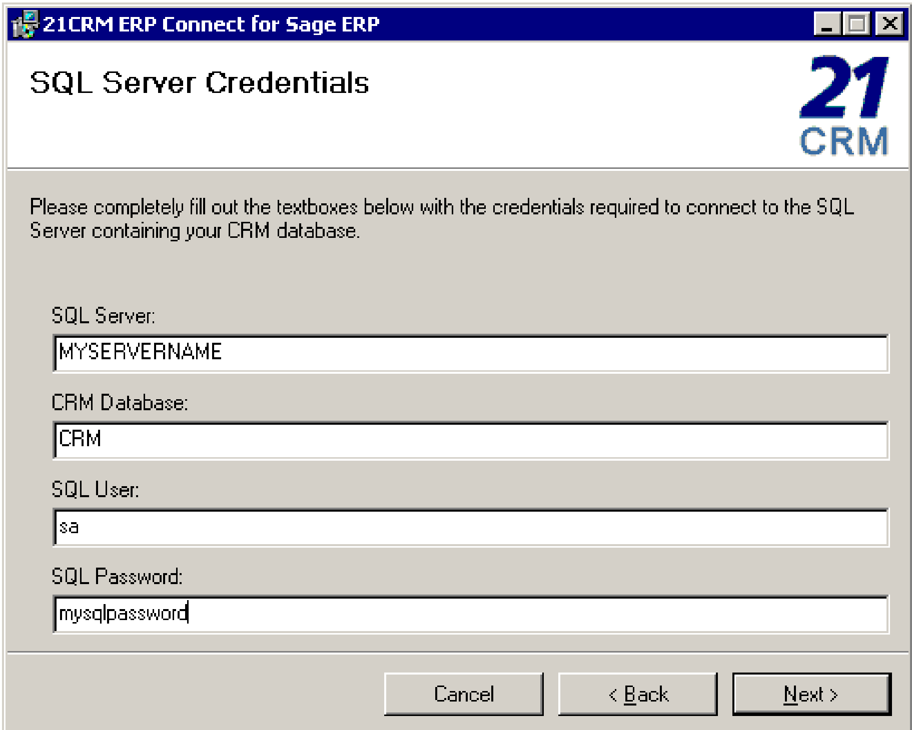
21CRM ERP Connect is delivered in a single, self-extracting ZIP file named “21CRMERPConnect30SageSetup.exe”. Locate and run this file. The Installation process will start.



You will be asked to review and accept the 21CRM Systems EULA.

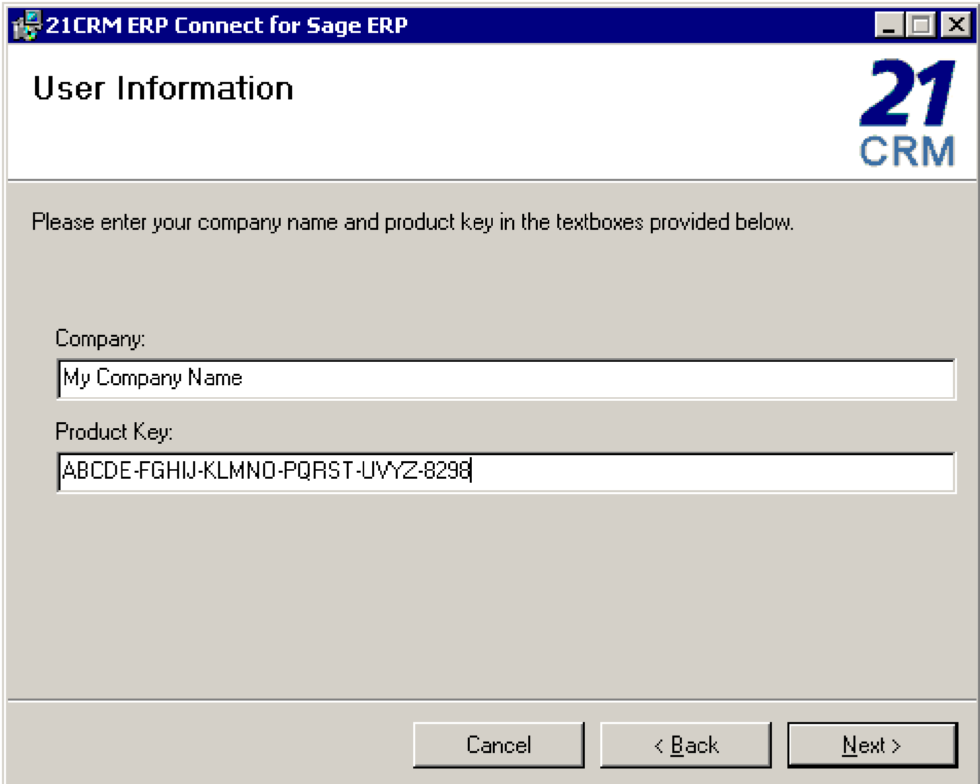


You will be asked for the credentials to connect to CRM's Microsoft SQL Server database. You should provide the SQL Server "sa" password if at all possible. This will prevent any object ownership problems with SQL Server security.



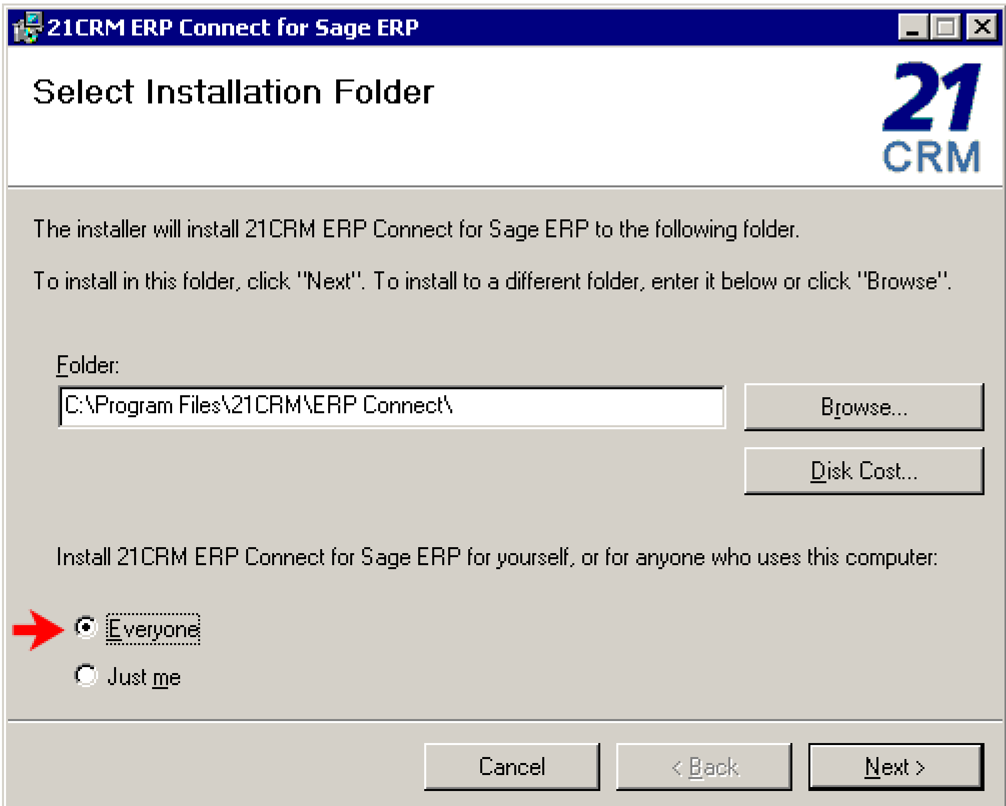
You will then be asked for your license key information. This information is provided to you by 21CRM Systems Inc. . If you do not have this information, cancel your installation now, and visit us online at http://www.21crmsystems.com/erpconnect

Enter your company name and license key

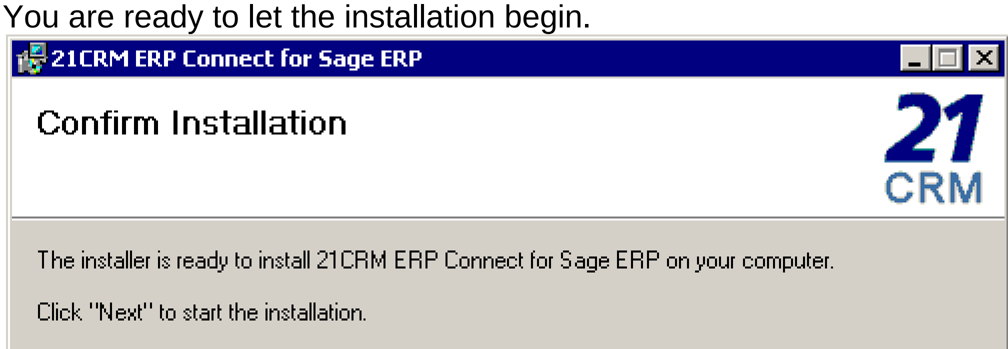


You will then be asked for your installation folder.

IMPORTANT: You must be sure to select “Everyone” as the option for the installation scope. This value should be selected by default, but you should make sure, or your installation will not operate properly when complete.

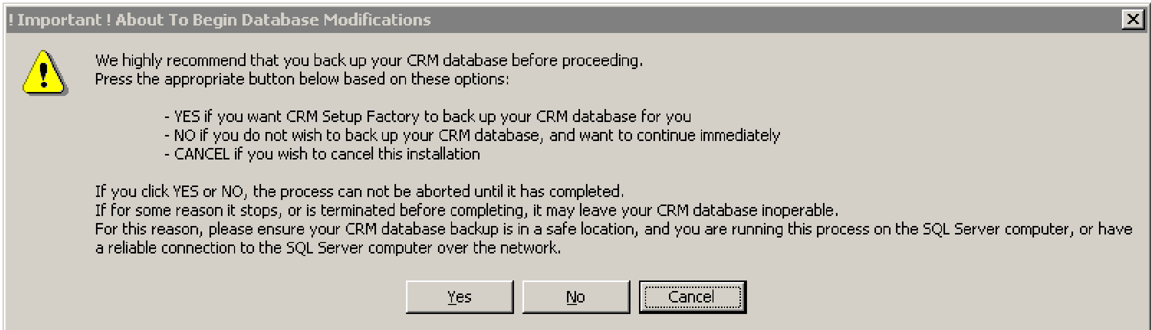


You are ready to let the installation begin.



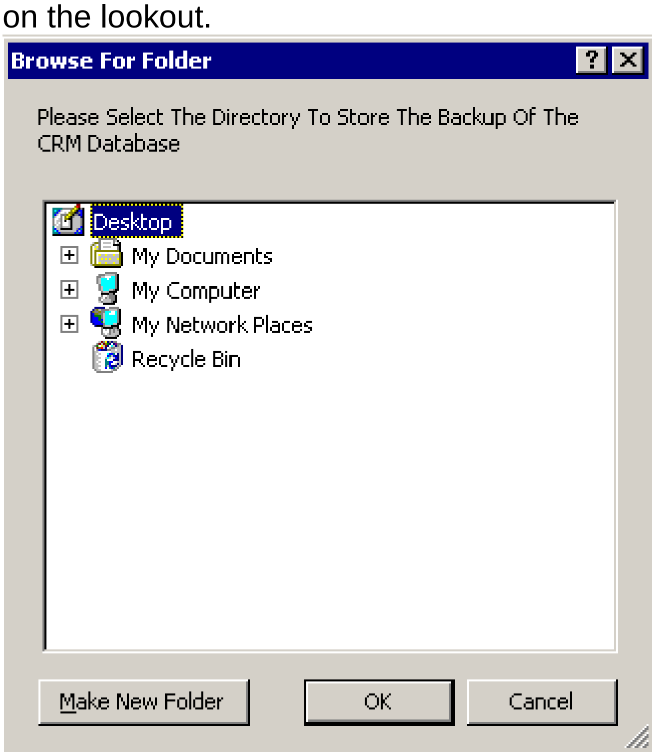
The next window of significance you should see is a CRM Setup Factory notice about backing up your database.

CRM Setup Factory

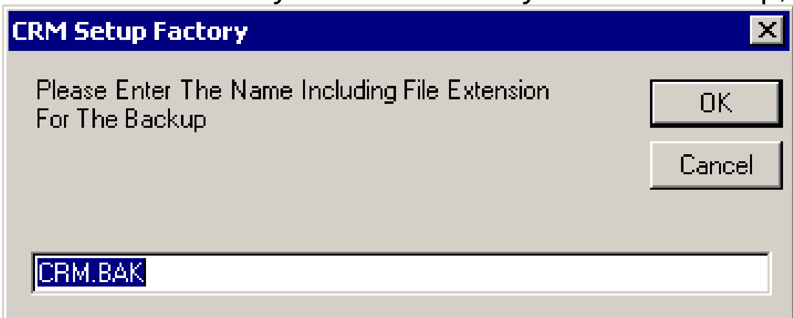


Choose the appropriate option:
Yes – Click this if you want CRM Setup Factory to back up your CRM database. You will be asked for a backup location, and setup factory will complete the backup and then continue.
No – Click this if you want to skip backing up the database. Only do this if you have already manually backed up the database and wish to continue.
Cancel – Click this if you want to cancel the installation. At this point, no changes have been made to your system and cancelling will have no effects on the system.

If you were to click “Yes” you would be presented with the folder browse window. It is possible this window could pop up behind the Setup Factory window, so be on the lookout.



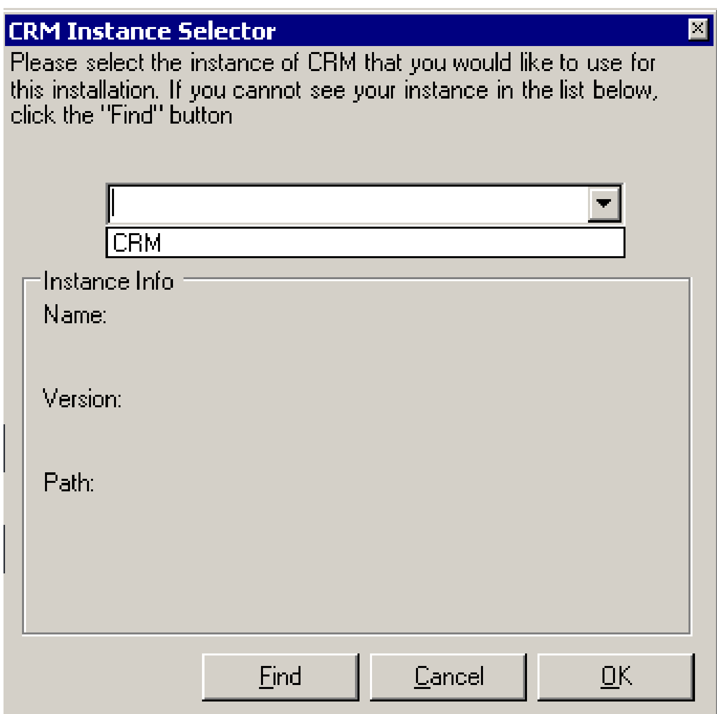
Select the location you wish to store your CRM backup, and click OK.



Enter the name you wish to give your backup file. SQL backups use the extension ".bak". We suggest you do as well. Click OK. Setup Factory will then back up your database, and continue the installation procedure.

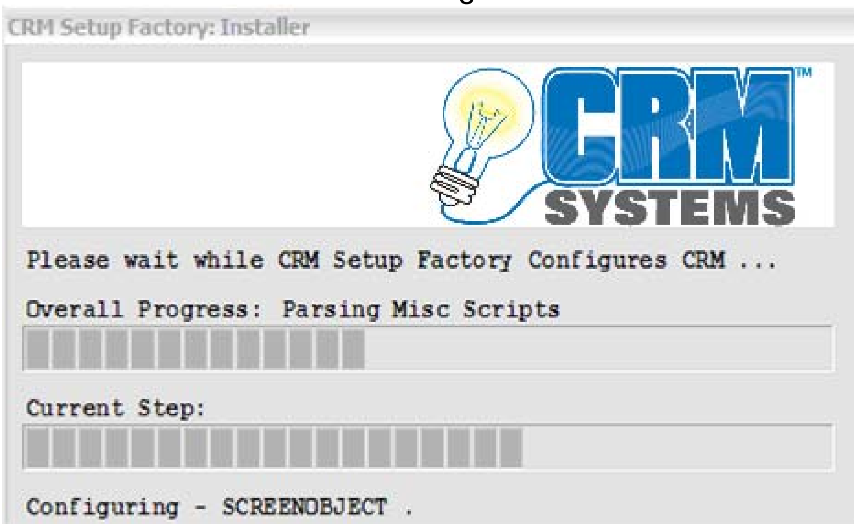
CRM Instance Selection

You will then need to tell CRM Setup Factory which instance of CRM you wish to install into. This is how Setup Factory knows where your CRM files are.



Select the proper CRM instance. If multiple copies of CRM are installed on this server, then you will see several options to choose from.

The installation into CRM will begin:

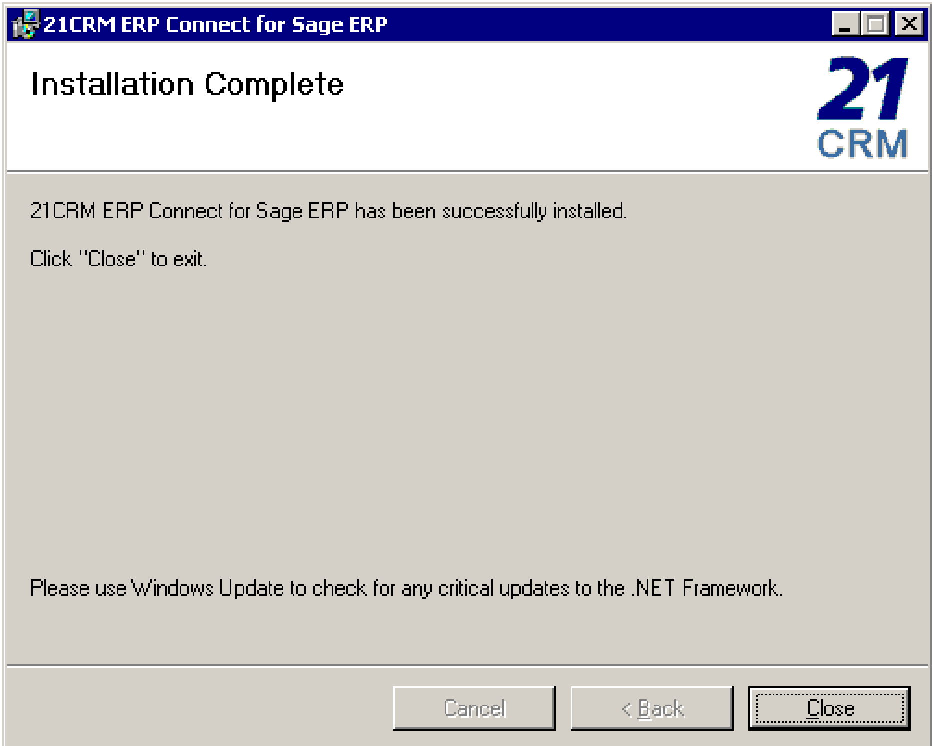


<u>Note:</u> Installing 21CRM ERP Connect over a Terminal Services Session may result in graphical displays not refreshing correctly or displaying properly. This does not indicate an installation problem, you just won't see the progress bars (above) while the installation is occurring.

Once complete you will see this screen that shows the Installer is finalizing the installation.

Installation Complete

Your installation is now complete.



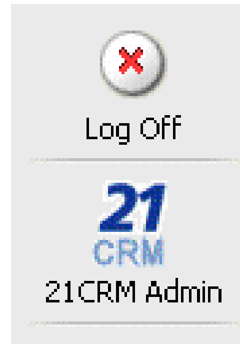
Reset the web server at this time, by issuing the “IISRESET” command at a command prompt. This will ensure that all of CRM’s metadata is refreshed.

You have completed this activity

Configuration

The 21CRM Admin Common Control Panel

All 21CRM Systems CRM Extensions utilize the “21CRM Admin Common Control Panel”. This control panel provides you with a single location to manage your license keys, and configure each of our products.



Log into CRM, and click on the “Administration” menu button in the CRM menu bar. You should see the 21CRM Admin button.

Click the button, and you will be taken to the 21CRM Systems Extension Products Menu

It is possible that your menu may have additional options. If you have other 21CRM Systems extensions installed such as:

- CRM Order Entry
- CRM Time & Billing,
- others

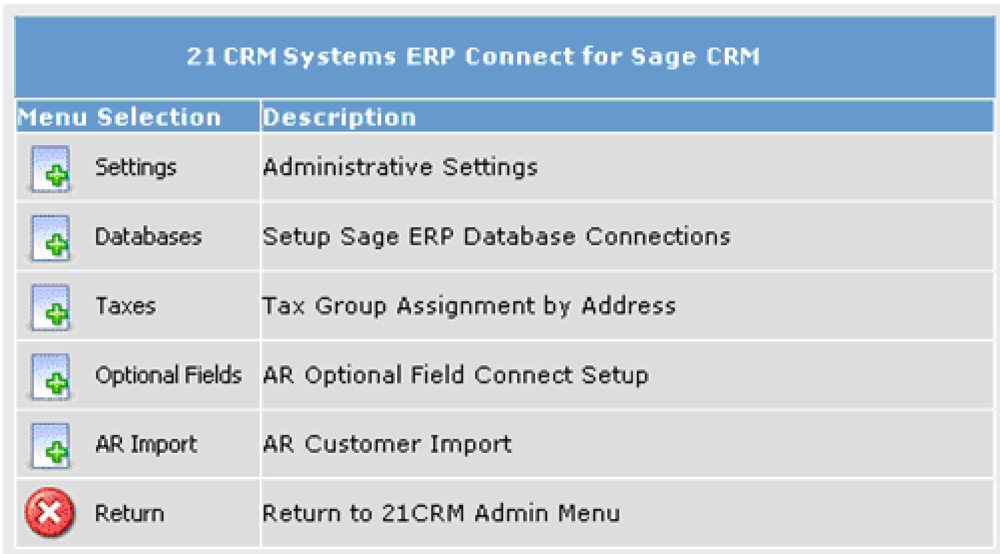
Icons for those products may also appear.

ERP Connect – used to administer ERP Connect Specifically
Settings – used to view, and manage 21CRM Systems license keys and some product specific settings. There are no product specific settings for ERP Connect, but an entry will have been made here with your license key and related information.

Click the ‘ERP Connect’ button to access the ERP Connect Menu.

The 21CRM ERP Connect for Sage Menu

The menu appears as follows:



21 CRM Systems ERP Connect for Sage CRM

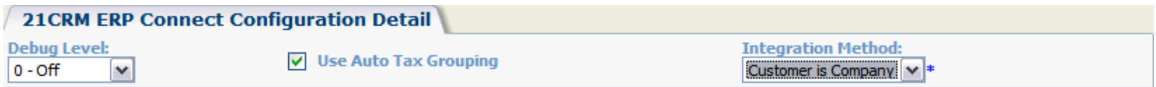
Menu Selection	Description
Settings	Administrative Settings
Databases	Setup Sage ERP Database Connections
Taxes	Tax Group Assignment by Address
Optional Fields	AR Optional Field Connect Setup
AR Import	AR Customer Import
Return	Return to 21CRM Admin Menu

The menu items are described below:

- Settings – general software settings
- Databases – lists and allows you to manage the Sage Accpac ERP databases integrated to CRM
- Taxes – allows you to configure auto tax-group assignment during promotion of companies to Sage Accpac ERP
- Optional Fields – allows you to manage the integration between CRM and Sage Accpac ERP related to 5.3 optional fields. You can define which optional fields to use during promote to customer, and during synchronization.
- AR Import – replaces the “out of the box” AR Customer import, and fully supports the dynamic integration capabilities of 21CRM ERP Connect

Configure Settings

To get to the configuration settings for ERP Connect; select the "Settings" menu item from the "ERP Connect" menu. This will display the following page.



The settings on this page are as follows:

- Debug Level:
  This setting indicates the level of debugging or audits that are written to the ERP Connect pages when they are visited. This setting is set to "0 – Off" by default and it is recommended that you keep this setting unless you are experiencing problems with the software or are instructed to do so by a 21CRM Systems support technician. The possible options are as follows:

  - 0 – Off : Nothing is written out
  - 1 – Minimal: Very basic audits written out
  - 2 – Expanded: Mostly all audits are written out
  - 3 – Verbose: Every audit is written out

- Use Auto Tax Grouping:
  This setting indicates that you would like to automatically use the Tax groupings you have set up for the system (covered later)

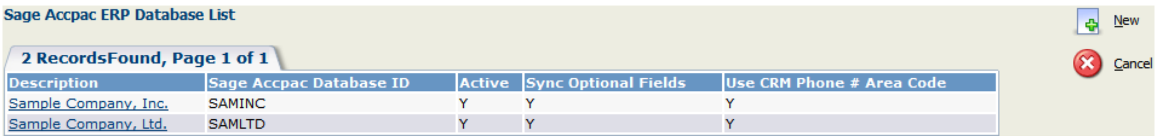
- Integration Method:
  this setting indicated which type of integration you would like to use. The possibilities are as follows:

  - Customer is Company
    while integrating with "SAGE ERP" only company entities will be looked at as potential customers.
  - Customer is Person
    while integrating with "SAGE ERP" only person entities will be looked at as potential customers.
  - None
    this is not a valid selection and you will be prompted by CRM to make an appropriate selection.

Finalize Database Integration

You must complete this step for the system to run properly.

To configure the databases to use for your integration, select “Databases” from the ERP Connect menu. The following screen will be displayed:

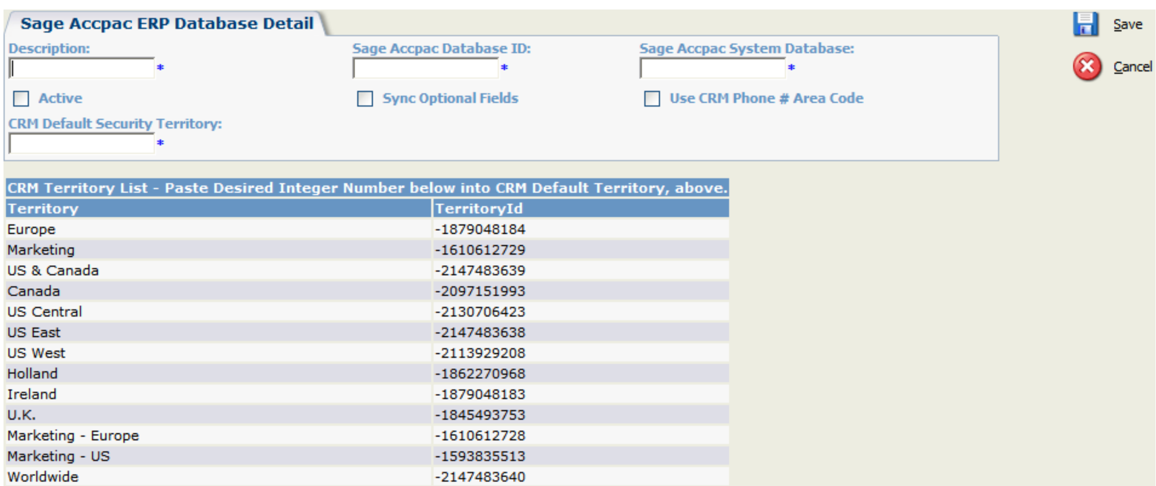


Description	Sage Accpac Database ID	Active	Sync Optional Fields	Use CRM Phone # Area Code
Sample Company, Inc.	SAMINC	Y	Y	Y
Sample Company, Ltd.	SAMLTD	Y	Y	Y

The number of active databases allowed in the system is determined by the product key entered into the system. If you have exceeded the maximum amount of databases permitted you will receive an error message indicating that you will need to deactivate 1 on more databases in order to restore functionality. To add a new database follow the steps outlined below.

Select “New” from the “SAGE Accpac ERP Database List” screen

The following screen will be displayed:



Territory	TerritoryId
Europe	-1879048184
Marketing	-1610612729
US & Canada	-2147483639
Canada	-2097151993
US Central	-2130706423
US East	-2147483638
US West	-2113929208
Holland	-1862270968
Ireland	-1879048183
U.K.	-1845493753
Marketing - Europe	-1610612728
Marketing - US	-1593835513
Worldwide	-2147483640

The fields on this screen are as follows:

- Description: This is the description that is displayed for this database.
- Sage Accpac Database ID: This is the name of the database in SAGE Accpac
- Sage Accpac System Database: This is the name of the SAGE Accpac system database
- Active: This checkbox indicates whether the database is active or not. This is where you can deactivate databases if you need to.

- Sync Optional Fields: This check box indicates that you would like to synchronize optional fields during your integration.
- Use CRM Phone # Area Code:This checkbox indicates that you would like to synchronize area codes along with phone numbers
- CRM Default Security Territory: This is the territory that is used for this database. You will see a list of possible territories below this field. Simply copy and paste the desired territory's "Territory ID" into this field

After you have filled out all the fields click "Save" to add the database to the list of databases used for integration.

To deactivate a database follow the steps outlined below:

1) Select the database from "SAGE Accpac ERP Database List" screen by clicking its description.

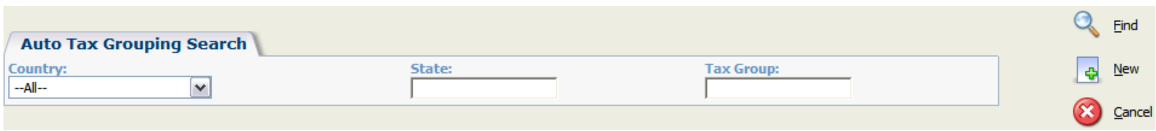
2) Click the "Change" button on the summary screen

3) Deselect the "Active" checkbox and click the "Save" button.

Configure Auto TaxGroup Assignment

Auto tax groups are used when importing customers to automatically determine the appropriate tax group for the customer based on their location. In order for auto tax groups to work you must have it enabled on the ERP Connect settings screen.

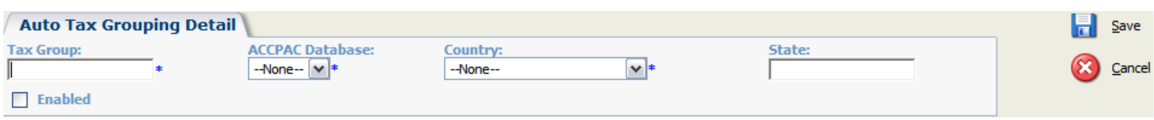
To define your tax groups, from the ERP Connect menu select “Taxes”. This will display the following screen:



You can search for tax groups by entering your search criteria in the textboxes provided and clicking the “Search” button. A list of tax groups matching your search criteria will be displayed.

To add a new tax group, follow the steps outlined below:

Select “New” from the “Auto Tax Grouping Search” screen and the following screen will be displayed:



The fields on this screen are as follows:

Tax Group: This field indicates the name of the tax group.
Accpac Database: This field indicates which SAGE Accpac database to use this tax group for. Simply select the database from the list provided, if you cannot find the database you wish to use, ensure that that database is marked as “Active”
Country: This is the country that this tax group applies to. Simply select the country from the list provided.
State: This is the state that tax group applies to. This is not required, however it is recommended.
Enabled: This checkbox simply indicates that active status of this particular tax group.

Click the “Save” button to add the tax group to the list used for integration

To deactivate a tax group follow the steps outlined below;

1) Search for the tax group from the “Auto Tax Grouping Search” screen by entering your search criteria in the textboxes provided and click “Find”.

2) Select the desired tax group from the list returned

3) Click the “Change” button

4) Deselect the “Active” checkbox and click “Save”

To delete a tax group follow the steps outlined below:

1) Search for the tax group from the “Auto Tax Grouping Search” screen by entering your search criteria in the textboxes provided and click “Find”.

2) Select the tax group that you would like to remove from the system by clicking its description.

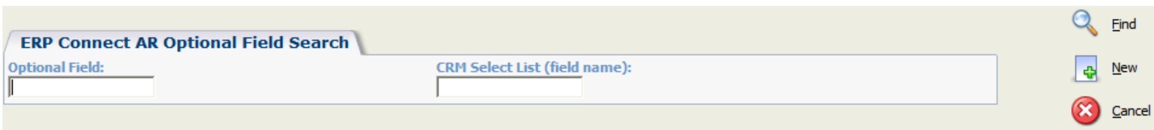
3) Click the “Delete” button and confirm the deletion by clicking “Confirm Delete”

Configure AR Optional Field Integration

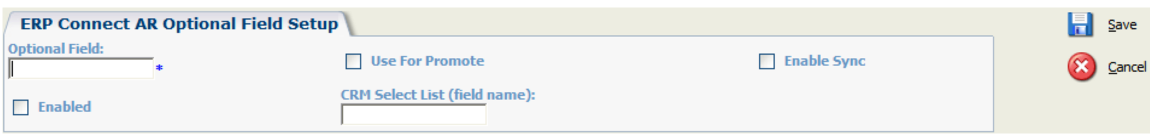
ERP Connect can utilize the optional fields from AR during its Synchronization / Integration process. However it is worth mentioning that ERP Connect does not support date fields.

To add optional fields to the integration process follow the steps outlined below:

From the ERP Connect menu select “Optional Fields” and the following screen is displayed.



Click the “New” button to take you to the following screen.



The fields in this screen are as follows:

Optional Field: This is the name of the field from your AR optional filed
Use For Promote: Selecting this option will send all of the optional fields in CRM to SAGE Accpac, when you click the “Promote To Customer” tab in the company context.
Enable Sync: Selecting this option will keep the options fields in CRM synchronized with their equivalents in SAGE Accpac.
Enabled: This checkbox indicates whether or not this optional field is enabled. If this checkbox is not selected the optional field will not used.
CRM Select List (field name): This is the name of the field in CRM that you want to map the field in SAGE Accpac

After you have entered all the required data, simply click the “Save” button to add the optional field to the list.

To disable an optional field follow the steps outlined below:

5. From the “ERP Connect AR Optional Field Search” screen enter your search criteria to find the optional field you want to disable.

6. Select the optional field by click its name which will bring you the summary screen for that field.

7. Click the “Change” button.

8. Deselect the “Enabled” checkbox and Click the “Save” button .

To delete an optional field follow the steps outlined below:

1) From the “ERP Connect AR Optional Field Search” screen enter your search criteria to find the optional field you want to disable.

2) Select the optional field by click its name which will bring you the summary screen for that field.

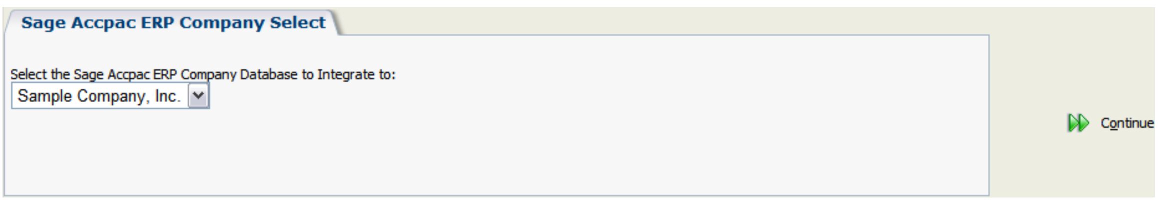
3) Click the “Delete” button then confirm the deletion by clicking “Confirm Delete”

Import Customers

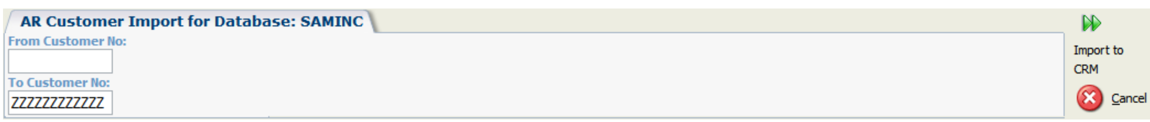
ERP Connect also allows you to import existing customers from SAGE Accpac. It is recommended that you completely configure ERP Connect i.e. Databases, Tax Groups and Optional Fields prior to attempting an AR Import.

To import customers from SAGE Accpac follow the steps outlined below:

From the ERP Connect menu click the “AR Import” button and the following screen is displayed.



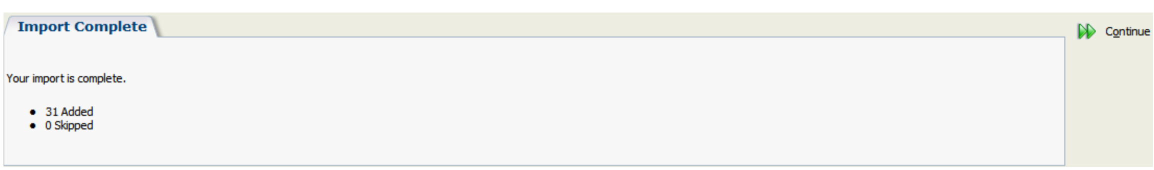
Select the active database that you would like to use from the dropdown list and click the “Continue” button to display the following screen:



This is where you enter the desired range of customers to import based on their customer number. The default will import every customer from SAGE Accpac into CRM. If you would like to import a specific range simply fill out the “From” and “To” fields.

When you are ready to begin the import click the “Import to CRM” button.

It may take several minutes depending on how many customers you import, but eventually a dialog box will display informing you that this process is complete.



There are to things you should take note of here and they are as follows:

a. The first item in the bulleted list is indicating exactly how many customers where added to the CRM database during the import process

b. The second is exactly how many customers where skipped during the import to CRM. Customers are skipped if they already exist in the CRM database. Skipped customer records are “Updated” with current Sage Accpac ERP data.

If there is an error during the import an error message will be displayed in the usual red bar at the top of the screen. This process will not complete if you have either an invalid product key or too many active databases on your system, instead you will receive an error message explaining to you exactly what the problem was and possibly the steps required to correct the error.

Customizing ERP Connect

A lot of the power of ERP Connect comes from the fact that the integration between Sage CRM and Sage Accpac ERP is customizable. You have two main options to customization your integration, beyond the previously discussed ability to integrate AR Optional Fields through the user interface.

Adding Additional ARCUS Fields to the Synchronization

You can integrate almost any field from the ARCUS table in Sage Accpac ERP to CRM. The process is simple: all you need to do is add an equivalent field to CRM, and ERP Connect will automatically begin synchronizing it!

ERP Connect will synchronize fields based on an exact name match. So, for example, you could add a field named:

- Comp_PRICLIST

ERP Connect will automatically begin synchronizing that field to the ARCUS field named:

- PRICLIST

In fact, ERP Connect is intelligent enough to understand what this field is, and, if you add the field to the ERP Connect tab in the company context, ERP Connect will automatically populate it with a dropdown list of available price list codes from Accpac.   You should create the field in CRM as a “Selection” list.. if you want it to be displayed as one in CRM.

You can do this with most of the fields on the ARCUS table, for example all of these (and many more!) are valid “connections” between CRM and Accpac ERP:

Sage Accpac ERP Field (ARCUS)	Sage CRM Field
CODESLSP2	Comp_CODESLSP2
PCTSASPLT3	Comp_PCTSASPLT3
CUSTTYPE	Comp_CUSTTYPE
BILLMETHOD	Comp_BILLMETHOD
FOB	Comp_FOB

If you find a field that is not supported, please let us know and we’ll be happy to include it in a future release.

Programmatic Customization

ERP Connect for Sage is designed so that if the previously mentioned customization capabilities are not sufficient for your needs, there is an infinitely powerful means of customizing it further – the development interface.

There are two programmatic files involved in the integration:

- /custompages/Accpac/entity_common.js - used for CRM to Accpac integration. Written in javascript
- /custompages/21crm/aasconnect/AAS_CRM_Sync.asp – used for Accpac to CRM integration. Written in VBScript
- /custompages/21crm/Company_AAS_Promote_Confirm.asp – used during promotion of a company to Accpac. Written in VBScript.

Entity_common.js

This javascript file has been modified from its original form as part of the Sage Accpac CRM integration "out of the box". You will find a new function added, Update AR Customer. This function is called any time a customer is modified in CRM.

```
function UpdateARCustomer(CompanyId) {

        var aasconnect

        aasconnect = OpenAASConnect("CRM");
        UpdateOK = aasconnect.ARCustomerUpdate(True, CompanyId)

        if (!UpdateOK) {
                ErrorStr = aasconnect.Err
        }

        if (aasconnect.DebugLevel > 0) {
                ErrorStr = ErrorStr + "<br>Audit:<br>" + aasconnect.Audit
        }

        CloseAASConnect();
}
```

You can modify this function any way you would like, include custom actions, new methods, etc.

AAS_CRM_Sync.asp

This file is executed each time a new customer is entered into Accpac, or an existing customer is modified. You can modify it any way you wish, and alter the Accpac to CRM integration.

Company_AAS_Promote_Confirm.asp

This file is executed during promote to customer in CRM. You can modify it any way you wish, and alter the CRM Promote to Customer logic.

For more information on modifying integration, please visit us online at http://www.21crm.ca/erpconnect or contact us.

Using 21CRM ERP Connect for Sage

End User Use of ERP Connect

From an end user perspective, there is very little involved in using 21CRM ERP Connect.

The main difference between our integration and the “out of the box” integration is that Sage Accpac ERP related fields are centralized on the “ERP Connect” tab.

Note: It is possible for you to put some, but not all of the ERP Integration fields on other screens. The determining factor is: is the field a select list of some kind? If it is, it cannot be used on any screen except the ERP Connect Tab.

The ERP Connect tab contains all of the fields integrated to Sage Accpac ERP. You can view and use this screen just as you could any other screen in CRM.

If you have customized this screen, and added additional fields to the CRM / Accpac integration you should also place them on this screen. This will help to keep everything tidy, and easy to use.

ERP Connect provides much more feedback to the user in the event of an error during synchronization. Whether you are in the Summary tab, the ERP Connect tab, or any other are of CRM that might trigger an update, if an error occurs you will be immediately notified by way of the normal “red box” CRM provides for such errors. In many cases the error will include an explanation as to why the problem occurred.

For example. Lets say that you decided to synchronize 3 Salespeople (1, 2 and 3) and 3 sales splits (each salesperson must have a split!). What if you entered the 3 salespeople, and splits, but they did not add up to 100%? Sage Accpac ERP will return a message that will be displayed to you that would read “Sales splits must total 100%”. You would then know that you must alter your data before synchronization will properly execute.

UnLinking or ReLinking Customers

ERP Connect allows you to unlink and relink CRM companies from their Accpac counterparts in much the same way the out of the box integration does, except however that it fully supports ERP Connect's multi-database capabilities.

To "unlink" or "relink" a CRM Company, click the "Promote to Customer" tab in the company context. You will be taken to the "ERP Connect" screen, but two additional buttons will be visible:

- Delete Link
- Edit Link

Choose the appropriate item, and make the changes as you desire.

PART 2: Installing and Using the ERP Component

Installation Instructions

Prerequisites

21CRM ERP Connect for Sage has several prerequisites that must be completed prior to attempting installation. Not completing any one of these steps may result in a failed installation.

- Sage Accpac ERP 5.3b or higher
- Sage Accpac ERP running on any supported Accpac database platform
- Sage CRM 5.7+ running on MS SQL Server
- Port 80, open and accessible between the computer running Sage Accpac ERP, and the CRM web server.
- Each ERP User account MUST have a corresponding CRM user account. “Corresponding” means a CRM user account that has the ERP username and password configured in the user’s profile. The CRM user may be a “resource”, as not to use up a user license.
- The computer running Sage Accpac ERP must have opened and run the standard “Customers” icon in the A/R module of ERP. Running this once installs the AR1300 OCX file onto the local system. This file is required for ERP Connect to run. You should log into Accpac, open the AR module, and double click on “Customers” prior to installing the ERP Connect Accpac ERP Component to ensure this OCX is installed on the local workstation. Not doing this may result in an error such as “Application has Generated an exception that could not be handled” occurring when the “AR Customers” icon, which you will install while following this documentation, is run.

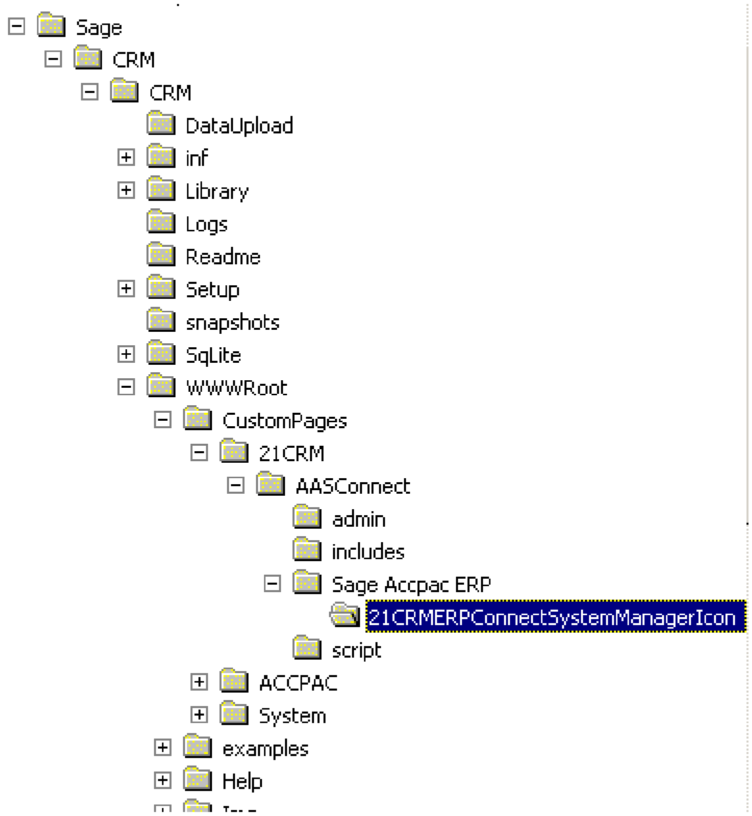
You are now prepared to begin the installation process.

Installing into System Manager

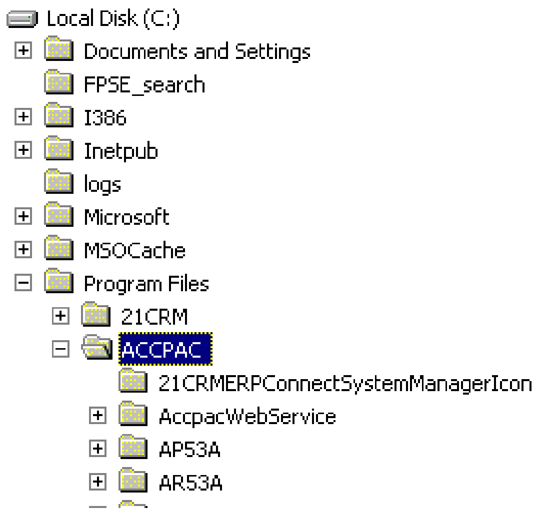
Installation of the Customers system manager icon is simple.

Locate your “21CRMERPConnectSystemManagerIcon” folder, located in:

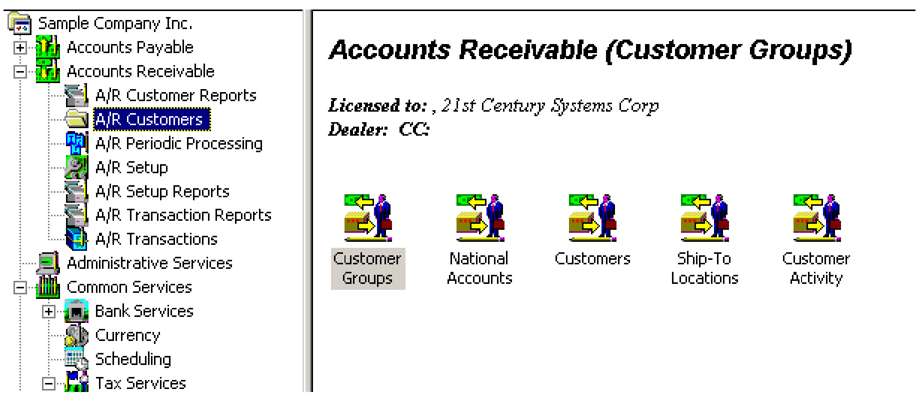
/crm/custompages/aasconnect/Sage Accpac ERP/



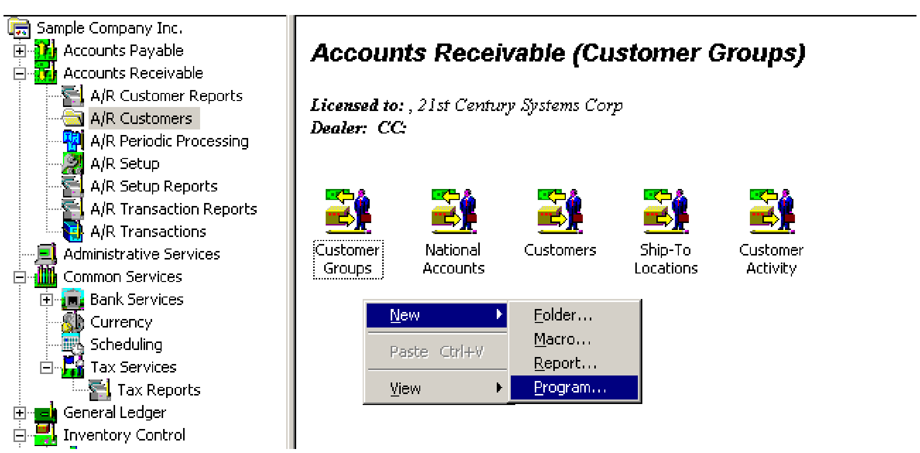
Copy this folder onto the target Sage Accpac ERP computer. While it is not important where you place it, you should perhaps place it in the Accpac program files folder, or somewhere that you will remember where it is.



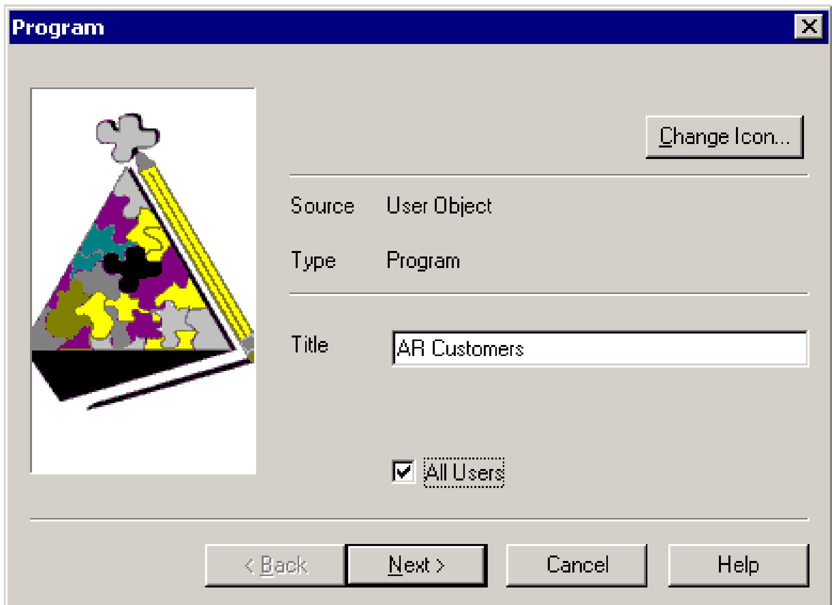
Open System Manager, and log into one of your Accpac companies. Navigate to the “Accounts Receivable” module, and to the “AR Customers” menu group.



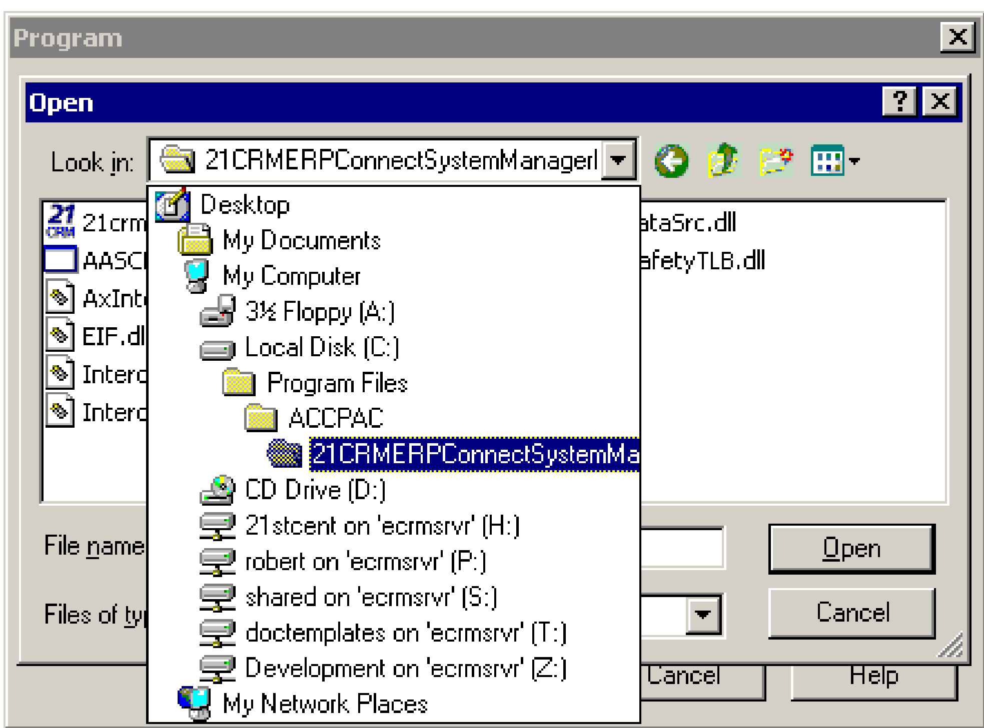
Right click in the icon window and choose “New”, and “Program”



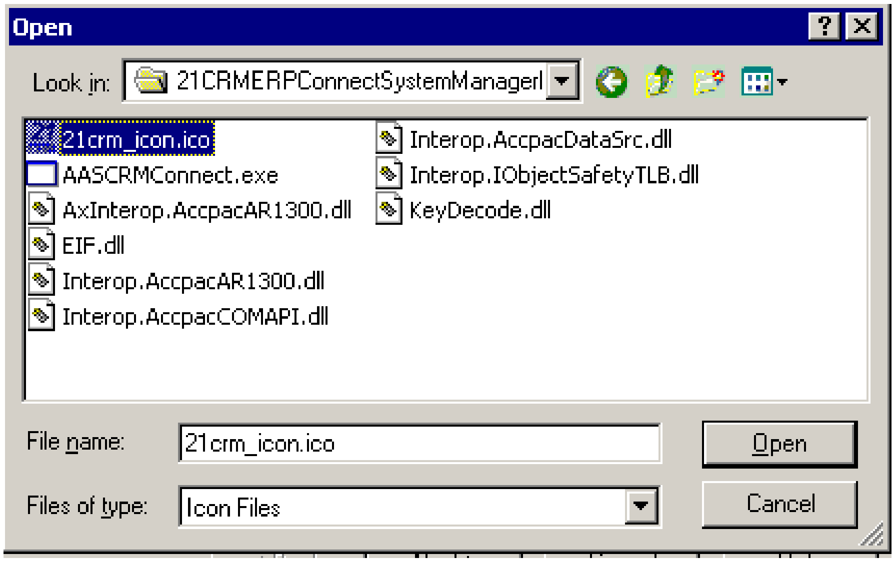
Give your new program a name, we suggest “AR Customers”. Click the “All Users” checkbox if you want this change to affect all users who log into Accpac on this computer.



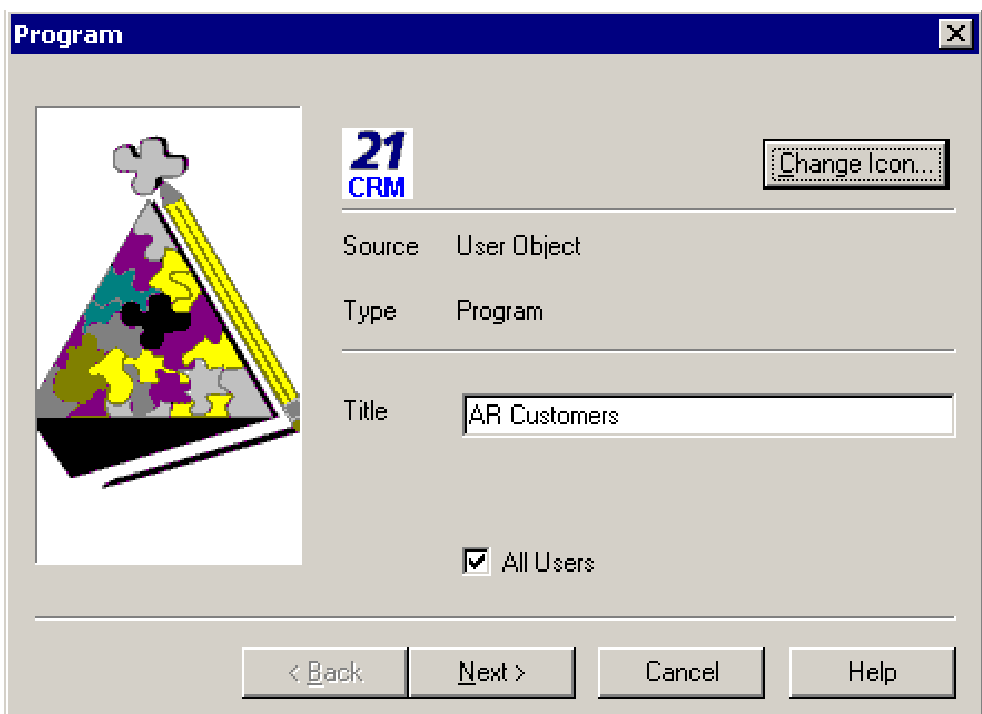
If you want to use the 21CRM icon for your program, you can also click “Change Icon” , and press “Browse”



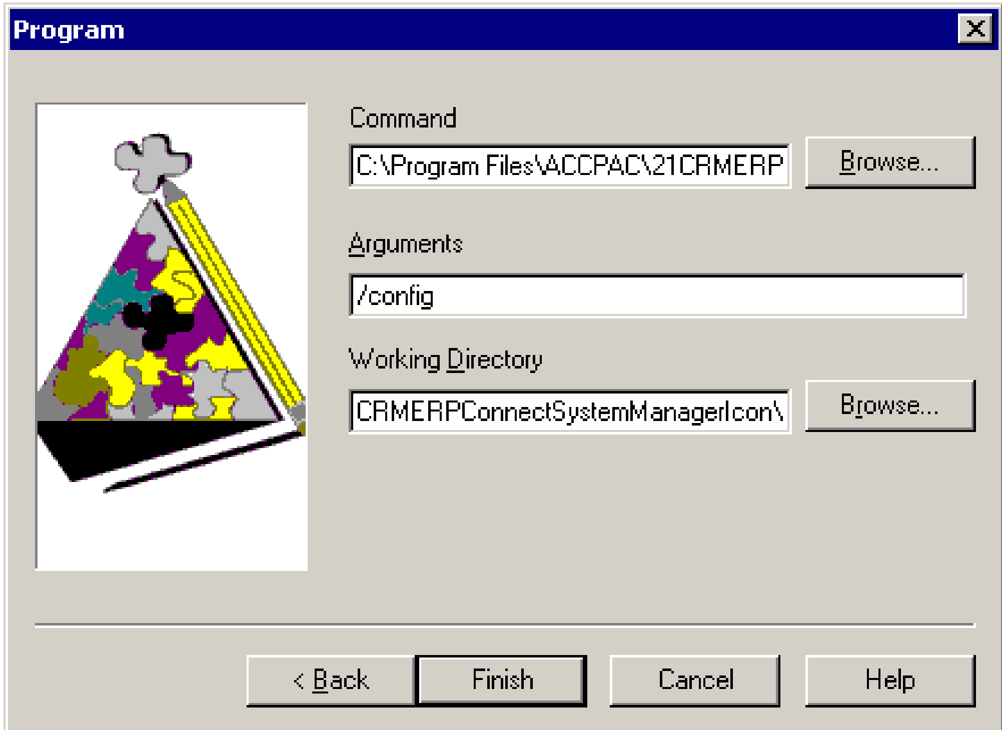
Locate the 21CRMERPConnectSystemManagerIcon folder. Select the "21crm_icon.ico" file, and click "Open", then "Ok".



You will be returned to the first window you opened:



Click Next.



Use the “Command” browse button, and select the “AASCRMConnect.exe” file from the folder.

Enter “/config” into the arguments box. This is temporary – and is used to configure the icon the first time it is run.

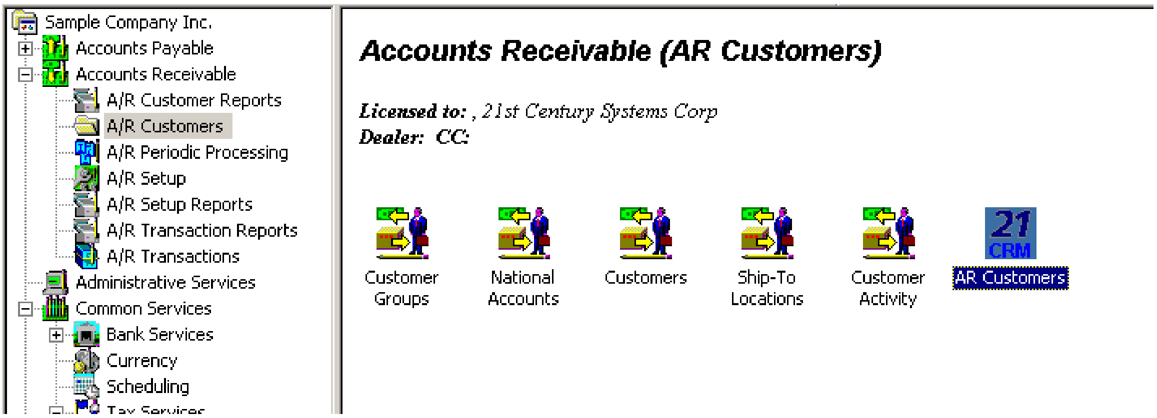
In the working directory field, enter the full path name to the .EXE file you selected in the “Command” window, excluding the program name. For example, here the value for “Command” is:

C:\Program Files\ACCPAC\21CRMERPConnectSystemManagerIcon\AASCRMConnect.exe

And the value for “Working Directory” is:

C:\Program Files\ACCPAC\21CRMERPConnectSystemManagerIcon\

Click Finish. You will now have a proper icon in System Manager.

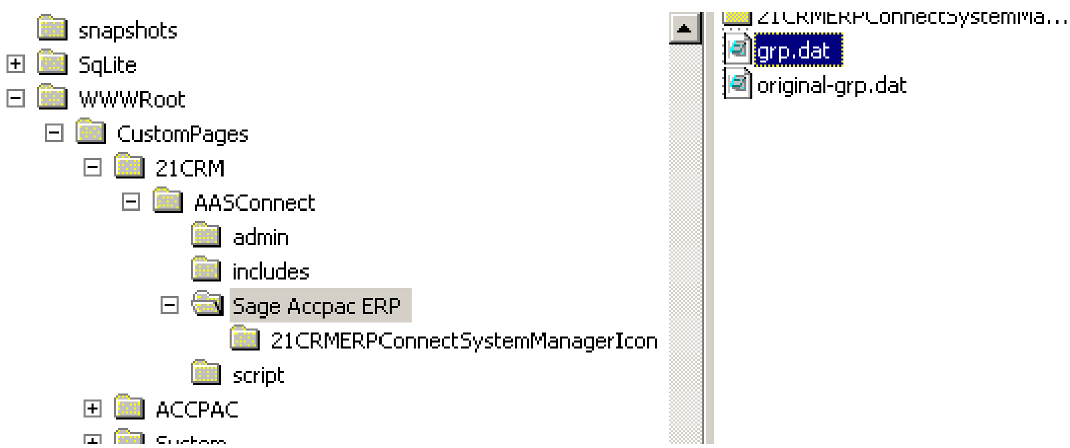


You have completed this activity.

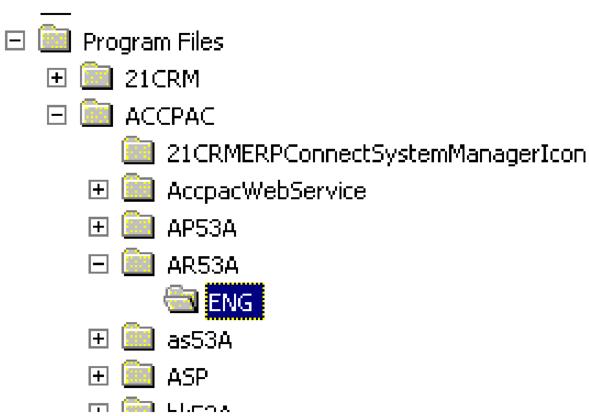
Removing the Original "Customers" Icon

You may want to remove the original "Customers" icon so your users don't get confused and use it, instead of the new icon. If they were to do so, their changes would not be synchronized to CRM.

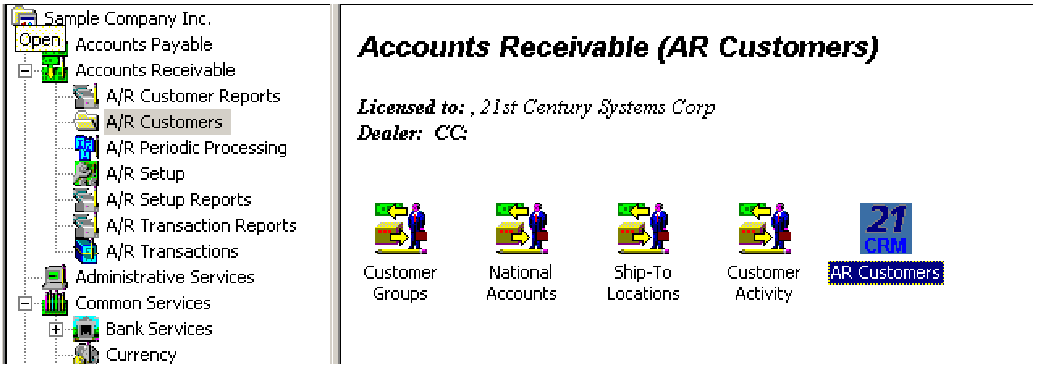
To update Accpac to not display the original icon, locate the "grp.dat" file in the "Sage Accpac ERP" folder of your AASConnect custompages directory.



Copy this file, and paste it into the Accpac program files\AR53A\ENG folder. You may want to back up your old "grp.dat" file before you do this.



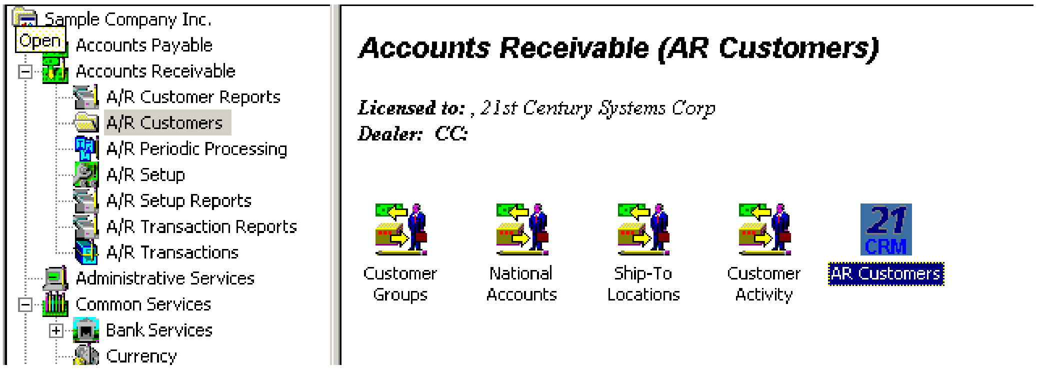
Log out of Accpac, and log back in. The original icon will be gone.



You have completed this activity.

Configuring ERP Connect AR Customer Icon

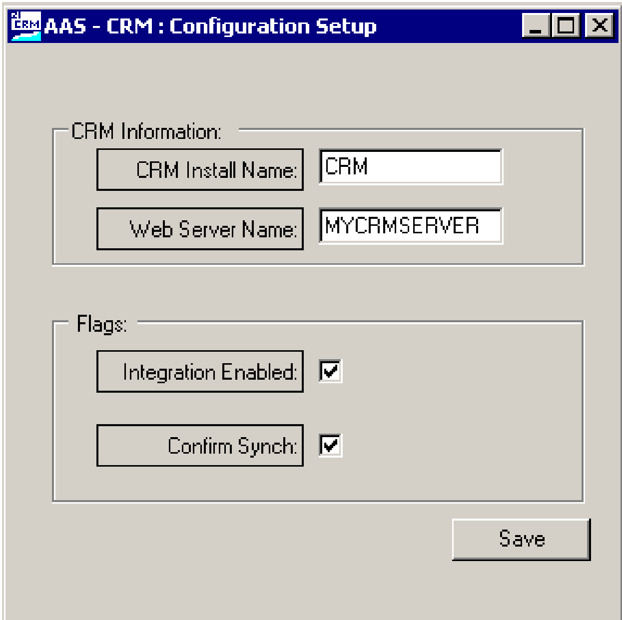
When you installed the “AR Customers” icon, you placed the “/config” argument on it. This argument causes the application to start in config mode.



Double click the “AR Customers” icon in System Manager.

If you have never configured the icon before, you will see the following popup. If you see this window, just click OK:

If you have configured the icon before, then this will be skipped and you will go directly to the following screen.



CRM Install Name: Enter the CRM instance name of the CRM system you want to integrate to.

Web Server Name: Enter the web server name you use to connect to CRM. You can specify the computer name, or a url, for example, each of these is valid:

- WEBSERVER
- 192.168.1.200
- www.mydomain.com

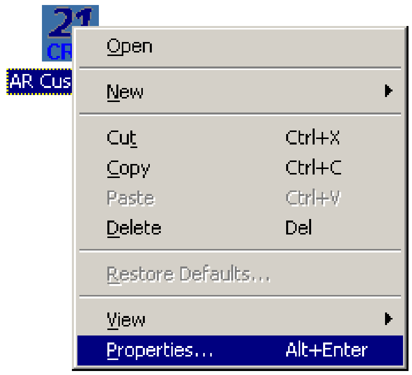
Do NOT include the "/CRM" that you would normally use to access CRM.

Integration Enabled: Check this box if you want Accpac to sync with CRM. You can use this to temporarily turn off integration at a later time if you want.

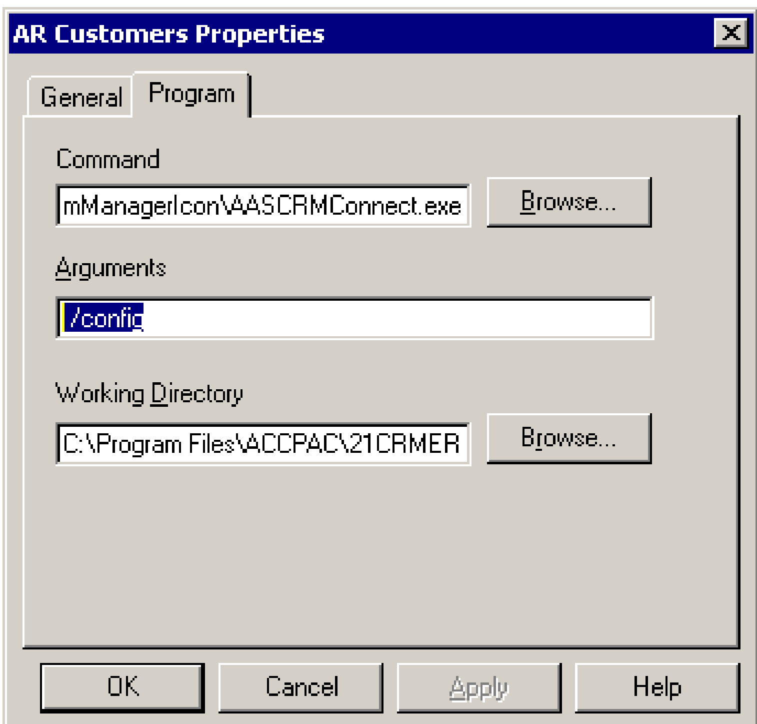
Confirm Sync: Check this box if you want to see a confirmation "Popup" after each sync, or when errors occur during sync. If this is disabled, you will not receive feedback from 21CRM ERP Connect that synchronization has occurred.

Click save. You have completed configuration.

You will now want to remove the "/config" argument from the icon configuration. Right click the "AR Customers" icon, and choose "Properties"



Select the "Program" tab, and remove the "/config" from the Arguments box.



Click "Ok".

You have completed 21CRM ERP Connect configuration in Sage Accpac ERP. You are now ready to use the system.

Using

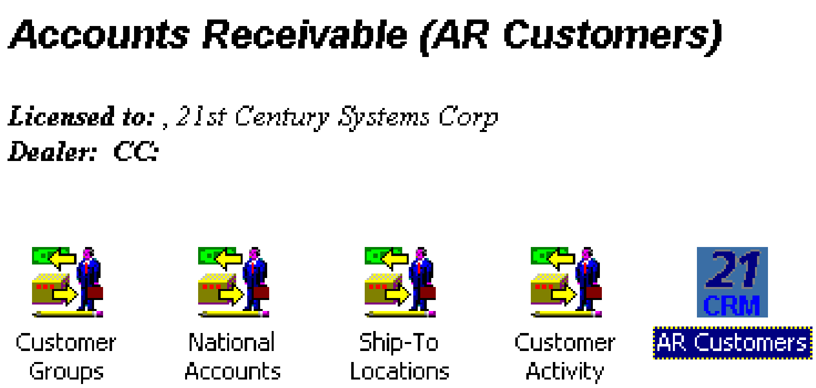
Using ERP Connect AR Customer Icon

Using the ERP Connect AR Customer Icon is exactly the same as using the standard “Customers” icon in Accounts Receivable.

The only difference is that when you click “Add” or “Save”, you may see a confirmation popup appear. (depending on how the system has been configured). This popup will inform you if the synchronization was successful, or if there were any errors you need to know about.

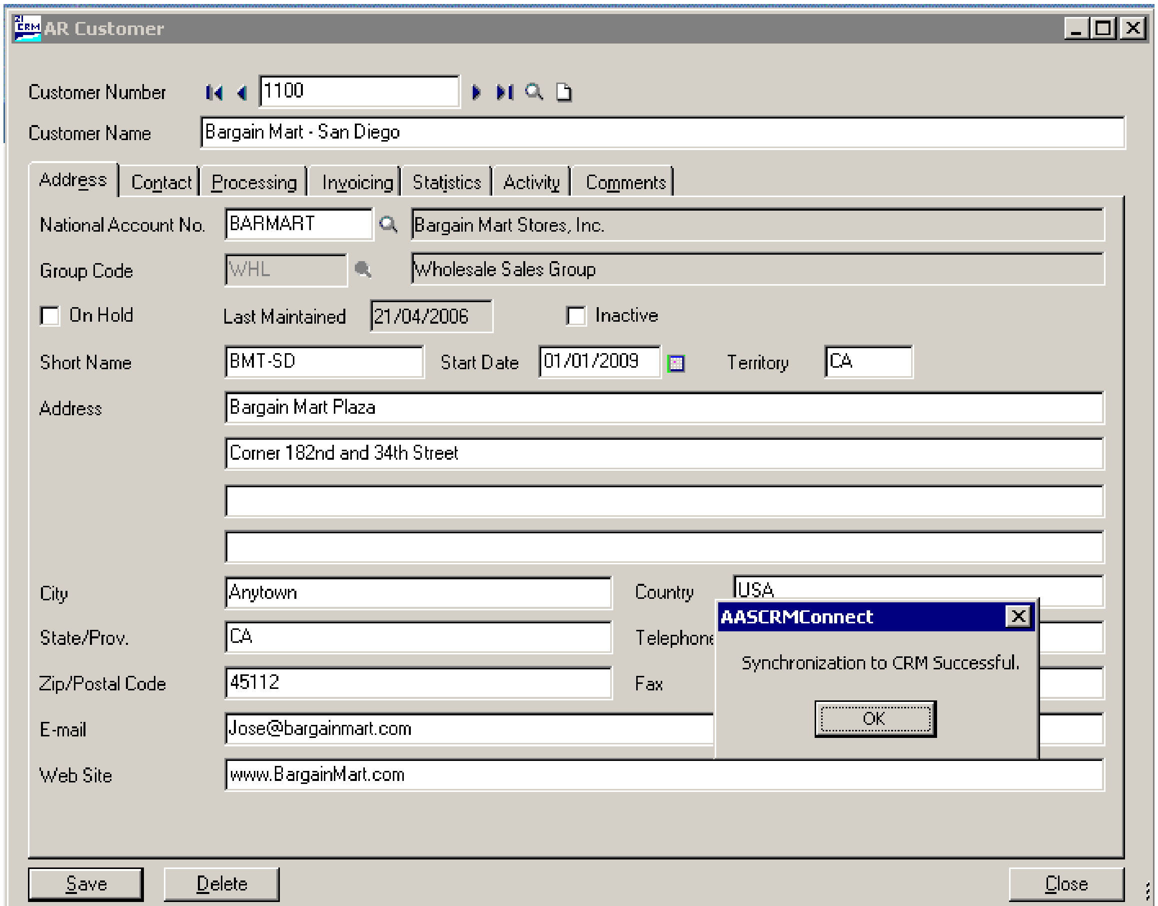
Otherwise, there is no different using Sage Accpac ERP when using ERP Connect for Sage.

To use the software, double click the 21CRM “AR Customers” icon in System Manager.

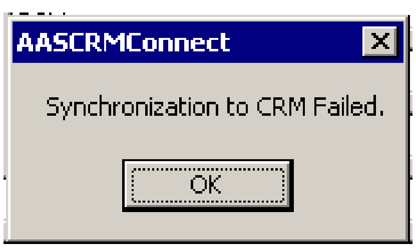


You’ll see the same AR Customer window you are used to. Look up a customer, make any changes you wish, and click save.

If your administrator has configured the system to confirm sync, you will see a window like the following:



It is also possible you could see a failure:



If you experience a failure, contact the system administrator.

If your system administrator has enabled Debugging (auditing) you may see a much larger, more specific message explaining the failure.

That's all there is to it. You have completed this operation.

ERP Connect and CRM User Configuration

In order for ERP Connect to connect to CRM and successfully synchronize your AR information, it is necessary that **EACH** ERP User have a corresponding CRM user.

This one to one relationship maintains the transparent auditability of record creations and changes between the two systems.

For each ERP user, create a CRM user account. Enter the ERP username and password into the user account, as you normally would.

Note: ERP connect usernames and passwords should be entered into CRM in all CAPITAL LETTERS, and ERP connect passwords should NOT contain numeric digits. Ensure that the password in Accpac ERP matches exactly the password on the CRM user profile. This may mean changing your Accpac ERP password to be all in capital letters, and not to have numbers.

Save your CRM user account with the ERP credentials entered. You may create this CRM user account as a “resource”, so it will not use a CRM seat license.

This configuration ensures that you always know who made any record updates, and when.

Known Issues & Troubleshooting

At this time there are no known issues with the ERP Connect for Sage software, although there are a few common configuration issues that have been reported:

1. Error installing regarding “cuvi_secterr”

If you upgraded CRM from a version prior to v5.8 (ie, if this is an upgrade an not an install) the upgrade application does NOT properly upgrade the entire system, and in particular misses the addition of this field to the “Custom_Views” table. Prior to installing ERP Connect, you must manually edit the table in enterprise manager, add the “cuvi_secterr” field as an INTEGER, and save the table. Refresh all of your meta-data in CRM (to rebuild views), and you are then safe to install ERP Connect.

2. AR Customer accounts created in ERP are “inactive”

ERP connect will sync and promote your customers exactly as you tell it to. By default, the SWACTV field is NOT part of the promote process, and does not exist in CRM. Add this field to CRM (comp_SWACTV) as a select list with 2 options: 0 – Inactive, 1 – Active. Add this field to your promote screen, or set a default value of “1”. Then, when customers are promoted, they will be “Active” as opposed to the Accpac ERP default of “inactive”

3. Secondary ERP databases do not appear in the comp_accpacdb select list.

ERP Connect does not automatically add additional database names into this select list. Even though you configure them in the Multi-Database setup, you must also edit this select list and add the database into it. Make sure the code is equal to the database name in Accpac Database setup, the description can be anything you would like.

4. “Customers” has not previously been run in Sage Accpac ERP AR Module.

If the “Customers” function has not been run in Sage Accpac ERP prior to ERP Connect being installed, the new “AR Customers” icon will fail with an error regarding an application exception. To resolve this, double click the standard “Customers” icon in the ERP AR module, look up/view any customer in the database, and then “Close”. This will install the proper OCX files onto the workstation. The new “AR Customers” icon will now work properly.

If you experience any issues, please report them to us contacting your software provider, or, if you are a 21CRM Systems partner, by logging into our online self-service support portal at http://www.21crmsystems.com and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

For further assistance you can contact us:

21CRM Systems Inc.
201 – 1335 Erin Street
Winnipeg, MB, Canada,
R3E 2S7.
Phone: 1.204.480.9772
Email: support@21crmsystems.com

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

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