



Faye Business Systems Group

SugarCRM – MAS90 Integration Application

Spec Sheet



Overview

Sugar CRM is the leading open source CRM software package in the world. Sage MAS 90 and MAS 200 are among the leading accounting and ERP software packages in the world. It only makes sense to integrate the software so that companies can use best in class software in each software category without missing out on critical integration components.

The **FBSG Sugar CRM – MAS 90 Integration Application** addresses this. It allows the two software packages to “talk with each other” by sending customers (accounts), inventory items (products), and sales history (account performance) from MAS 90 to Sugar and by sending quotes (sales orders) and new accounts (customers) from Sugar to MAS 90. The synchronization between the packages can be set on a scheduler or run manually.

Key Benefits

- Eliminates double entry of customers in both CRM and accounting
- Updates CRM with critical sales history information that can be used for marketing campaigns and salesperson inquiries
- Provides access to product lists in CRM without having to manually key in items
- Eliminates double entry of quotes and sales orders in both CRM and accounting

SugarCRM and Sage MAS 90 Integration



MAS90 Customers to Sugar Accounts

This takes MAS90 customer data (from the Customer Master file) and moves it to the SugarCRM Accounts Module. New customers will be created automatically in SugarCRM. Existing customers will have their data (name, address, etc.) overwritten each time the synchronization is run.

MAS90 Customer Sales History to Sugar Customer Sales History

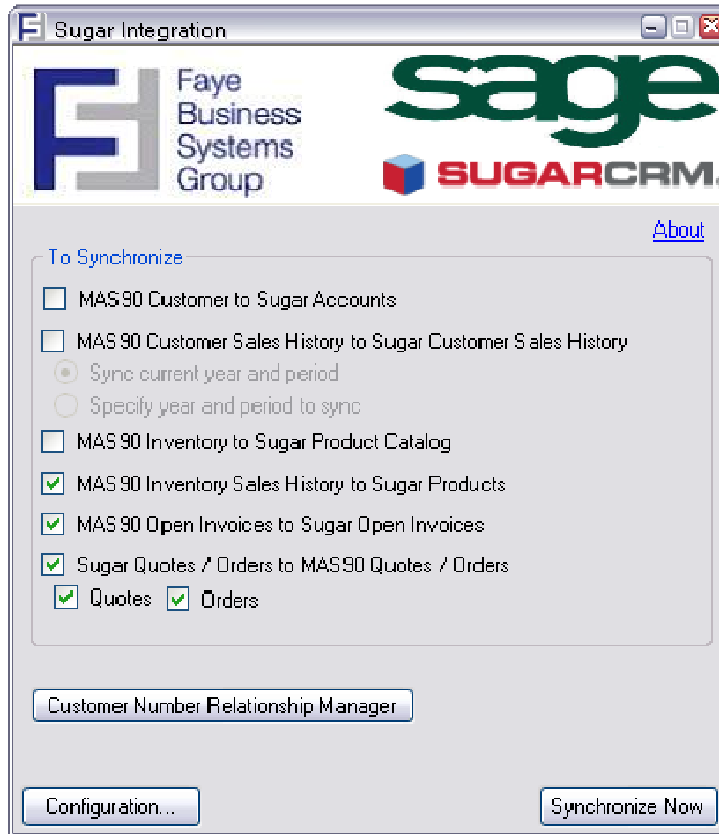
This function moves various MAS90 sales history values to the new custom “MAS90 Sales History” module in Sugar. No other Sugar data is overwritten during this synchronization.

NOTE - If you select to synchronize the MAS90 Customer Sales History to Sugar Customer Sales History, you will have the option to Sync current year and period only or specific year end period to sync. The integration allows you to maintain multiple years and periods of sales history. The default is to just sync the current year and period.

MAS90 Inventory to Sugar Product Catalog

This takes MAS90 master inventory data (from the Inventory Master file) and moves it to the SugarCRM Product Catalog Module. Records for the same item number in SugarCRM will be overwritten with the latest MAS90 data each time the synchronization is run.

SugarCRM and Sage MAS 90 Integration



MAS90 Inventory Sales History to Sugar Products

This takes MAS90 inventory sales history by customer and moves it into the SugarCRM Products Module for each account. Once this sync occurs, you can view sales history by product for any customer/account. Imagine the possibilities for marketing and for salesperson productivity!

MAS90 Open Invoices to Sugar Open Invoices

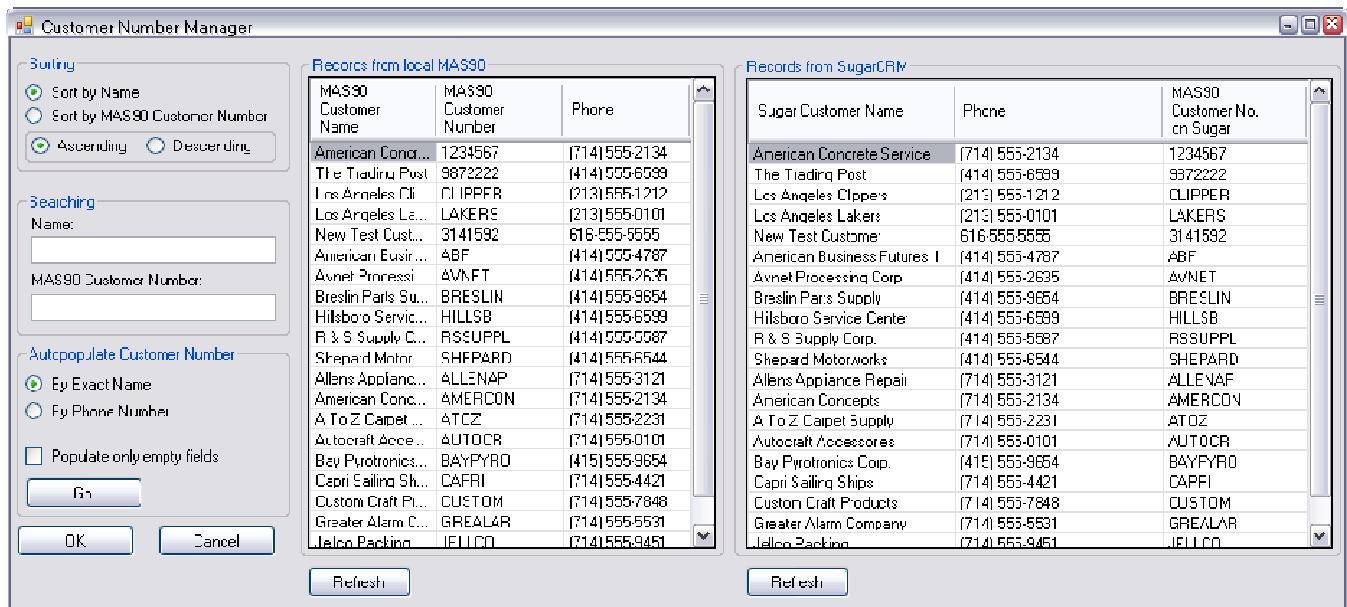
This function synchronizes currently open invoices in MAS90 to Sugar. When an invoice is *closed* in MAS90, it is automatically removed from Sugar.

Sugar Quotes to MAS90 Sales Orders

This function synchronizes quotes entered and updated in Sugar with MAS90 sales orders. “Closed” quotes are updated as live or “standard” sales orders in MAS90. Other quotes are updated as “quotes” in MAS90. You can choose whether to update just quotes, just sales orders, or both.

Customer Number Relationship Manager

One of the key challenges in synchronizing any CRM Software with an Accounting or ERP Software is the linking of customers between the two systems. Our SugarCRM – Sage MAS 90 Integration Application solves this with an automated Customer Number Relationship Manager. The CNRM first attempts to match MAS 90 customers with SugarCRM accounts by an exact match of their name. If that fails, the user has an opportunity to manually link the records via the screen below or try to match customers by phone number. This is only performed one time, and then the Integration Application maintains the link on an ongoing basis.



The screenshot shows the 'Customer Number Manager' application window. It features a left sidebar with sorting and searching options, and two main data tables. The 'Records from local MAS90' table lists customer names, MAS90 customer numbers, and phone numbers. The 'Records from SugarCRM' table lists Sugar customer names, phone numbers, and MAS90 customer numbers for comparison.

Records from local MAS90

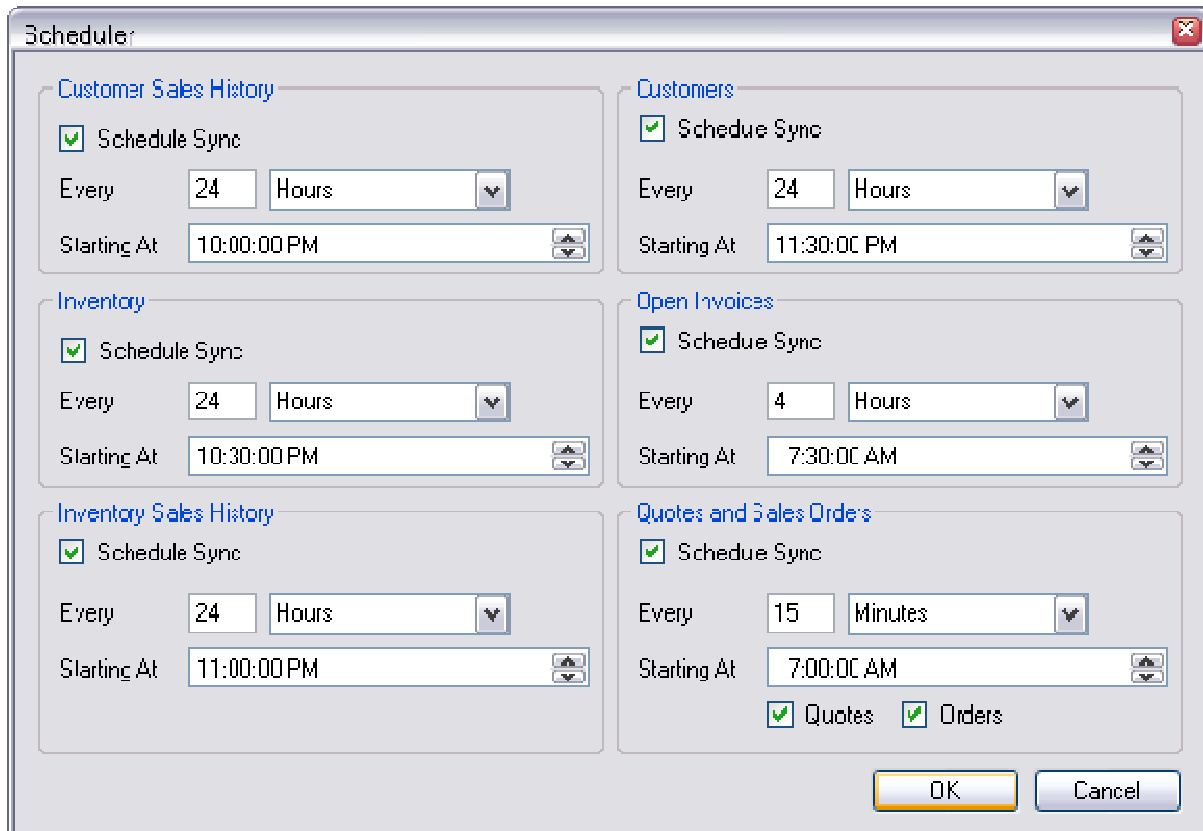
| MAS90 Customer Name | MAS90 Customer Number | Phone |
|---------------------|-----------------------|----------------|
| American Concr... | 1234567 | (714) 555-2134 |
| The Trading Post | 9872222 | (414) 555-6539 |
| Los Angeles Cl... | CLIPPER | (213) 555-1212 |
| Los Angeles Lak... | LAKERS | (213) 555-0101 |
| New Test Cust... | 3141592 | 616-555-5555 |
| American Busin... | ABF | (414) 555-4787 |
| Avnet Processi... | AVNET | (414) 555-2635 |
| Breslin Parts S... | BRESLIN | (414) 555-9654 |
| Hillsboro Servic... | HILLSB | (414) 555-6539 |
| R & S Supply C... | RSSUPPL | (414) 555-5587 |
| Shepard Motor... | SHEPARD | (414) 555-6544 |
| Allens Applanc... | ALLENAP | (714) 555-3121 |
| American Conc... | AMERCON | (714) 555-2134 |
| A To Z Carpet ... | ATCZ | (714) 555-2231 |
| Autocraft Acce... | AUTOOCR | (714) 555-0101 |
| Bay Pyrotechni... | BAYPYRO | (415) 555-9654 |
| Capri Sailing Sh... | CAPRI | (714) 555-4421 |
| Custom Craft Pr... | CUSTOM | (714) 555-7848 |
| Greater Alarm C... | GREALAR | (714) 555-5531 |
| Jelco Packin... | JELCO | (714) 555-9451 |

Records from SugarCRM

| Sugar Customer Name | Phone | MAS90 Customer No. on Sugar |
|-----------------------------|----------------|-----------------------------|
| American Concrete Service | (714) 555-2134 | 1234567 |
| The Trading Post | (414) 555-6539 | 9872222 |
| Los Angeles Clippers | (213) 555-1212 | CLIPPER |
| Los Angeles Lakers | (213) 555-0101 | LAKERS |
| New Test Customer | 616-555-5555 | 3141592 |
| American Business Futures I | (414) 555-4787 | ABF |
| Avnet Processing Corp | (414) 555-2635 | AVNET |
| Breslin Parts Supply | (414) 555-9654 | BRESLIN |
| Hillsboro Service Center | (414) 555-6539 | HILLSB |
| R & S Supply Corp. | (414) 555-5587 | RSSUPPL |
| Shepard Motorworks | (414) 555-6544 | SHEPARD |
| Allens Appliance Repair | (714) 555-3121 | ALLENAP |
| American Concepts | (714) 555-2134 | AMERCON |
| A To Z Carpet Supply | (714) 555-2231 | ATCZ |
| Autocraft Accessories | (714) 555-0101 | AUTOOCR |
| Bay Pyrotechnics Corp. | (415) 555-9654 | BAYPYRO |
| Capri Sailing Ships | (714) 555-4421 | CAPRI |
| Custom Craft Products | (714) 555-7848 | CUSTOM |
| Greater Alarm Company | (714) 555-5531 | GREALAR |
| Jelco Packaging | (714) 555-9451 | JELCO |

Synchronization Scheduling

Our Integration Application allows you to launch the synchronization manually or configure it via a scheduler so that all of the integration is performed behind the scenes.



The Scheduler dialog box is titled "Scheduler" and contains six sections for configuring synchronization schedules:

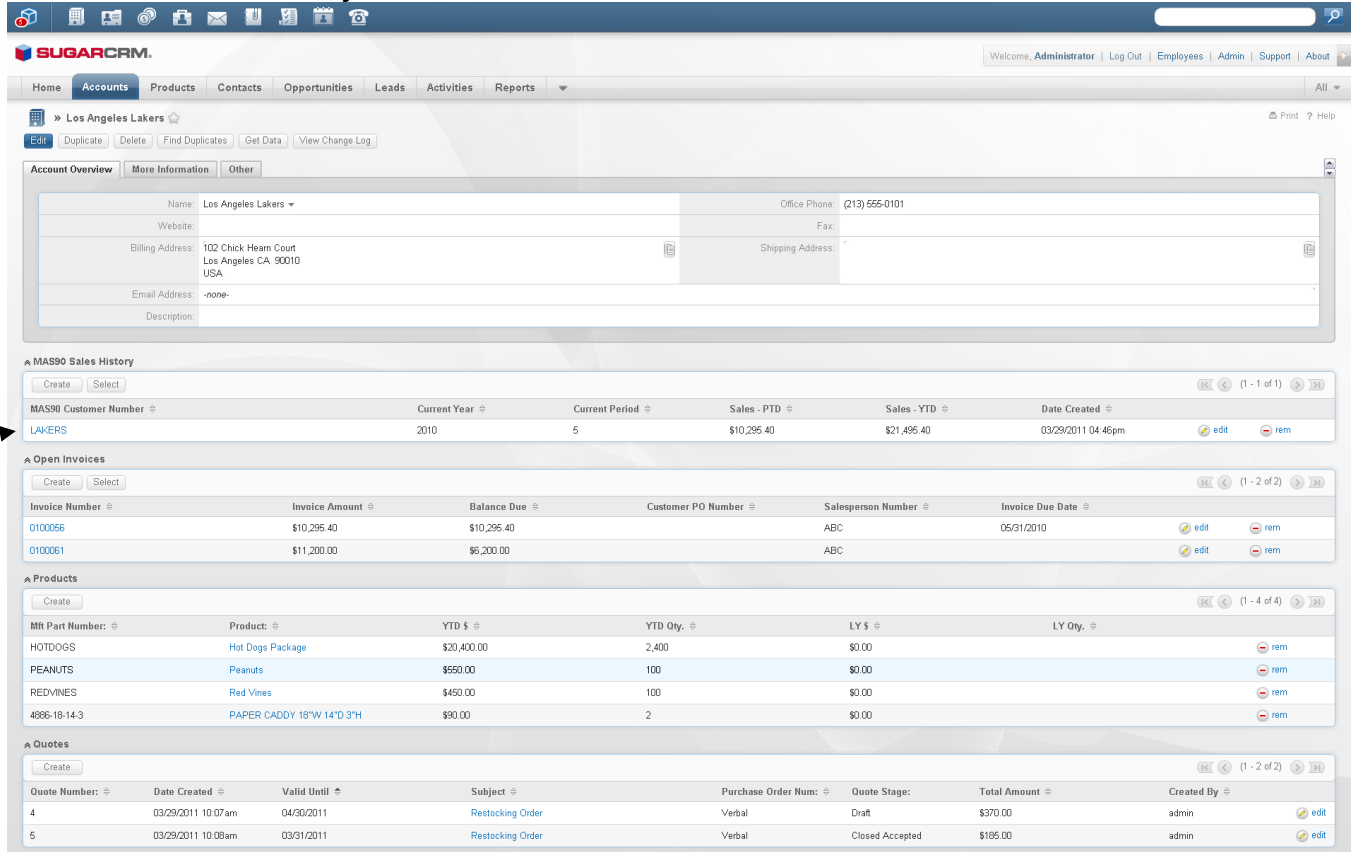
- Customer Sales History:** Schedule Sync. Every 24 Hours. Starting At 10:00:00 PM.
- Customers:** Schedule Sync. Every 24 Hours. Starting At 11:30:00 PM.
- Inventory:** Schedule Sync. Every 24 Hours. Starting At 10:30:00 PM.
- Open Invoices:** Schedule Sync. Every 4 Hours. Starting At 7:30:00 AM.
- Inventory Sales History:** Schedule Sync. Every 24 Hours. Starting At 11:00:00 PM.
- Quotes and Sales Orders:** Schedule Sync. Every 15 Minutes. Starting At 7:00:00 AM. Includes checkboxes for Quotes and Orders.

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

You can select a different schedule for each integration. For example, many users find that they want orders frequently downloaded from Sugar into MAS90. Accordingly, you can sync orders every 15 minutes, while syncing all of the other items just once a night.

MAS90 Customer Sales History in SugarCRM

MAS90 Sales History List View:



Account Overview

Name: Los Angeles Lakers
Office Phone: (213) 555-0101
Website:
Fax:
Billing Address: 102 Chick Heam Court
Los Angeles CA 90010 USA
Shipping Address:
Email Address: -none-
Description:

MAS90 Sales History

| MAS90 Customer Number | Current Year | Current Period | Sales - PTD | Sales - YTD | Date Created | |
|-----------------------|--------------|----------------|-------------|-------------|--------------------|----------|
| LAKERS | 2010 | 5 | \$10,295.40 | \$21,495.40 | 03/29/2011 04:46pm | edit rem |

Open Invoices

| Invoice Number | Invoice Amount | Balance Due | Customer PO Number | Salesperson Number | Invoice Due Date | |
|----------------|----------------|-------------|--------------------|--------------------|------------------|----------|
| 0100056 | \$10,295.40 | \$10,295.40 | | ABC | 05/31/2010 | edit rem |
| 0100061 | \$11,200.00 | \$6,200.00 | | ABC | | edit rem |

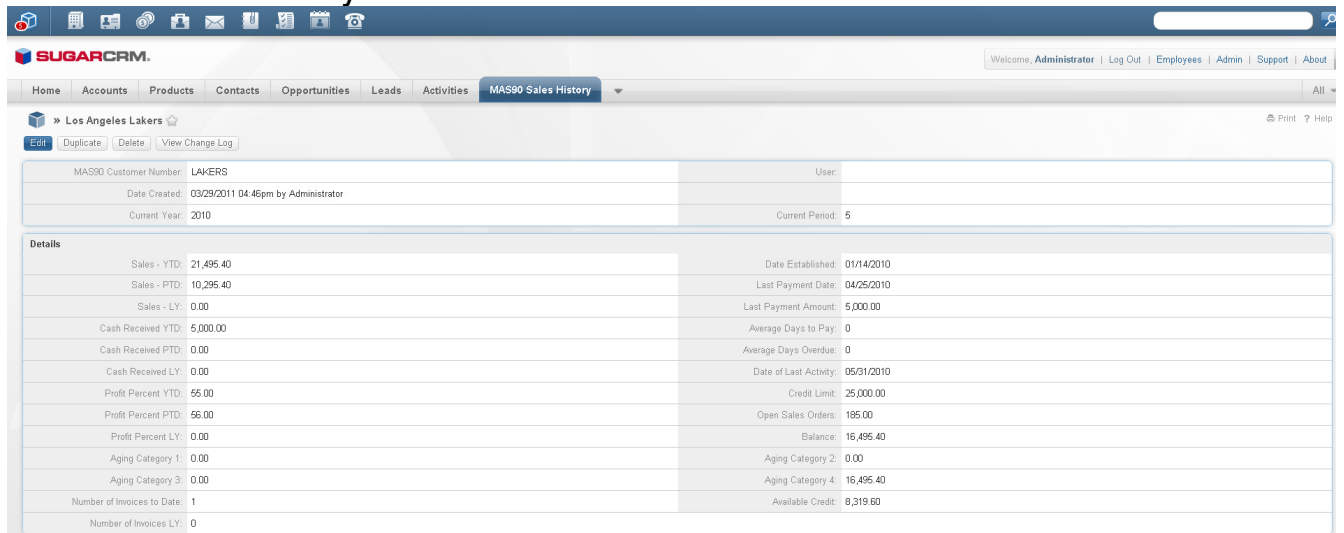
Products

| MR Part Number | Product | YTD \$ | YTD Qty | LY \$ | LY Qty | |
|----------------|---------------------------|-------------|---------|--------|--------|-----|
| HOTDOGS | Hot Dogs Package | \$20,400.00 | 2,400 | \$0.00 | | rem |
| PEANUTS | Peanuts | \$550.00 | 100 | \$0.00 | | rem |
| REDVINES | Red Vines | \$450.00 | 100 | \$0.00 | | rem |
| 4896-18-14-3 | PAPER CADDY 18"W 14"D 3"H | \$90.00 | 2 | \$0.00 | | rem |

Quotes

| Quote Number | Date Created | Valid Until | Subject | Purchase Order Num | Quote Stage | Total Amount | Created By |
|--------------|--------------------|-------------|------------------|--------------------|-----------------|--------------|------------|
| 4 | 03/29/2011 10:07am | 04/30/2011 | Restocking Order | Verbal | Draft | \$370.00 | admin |
| 5 | 03/29/2011 10:08am | 03/31/2011 | Restocking Order | Verbal | Closed Accepted | \$185.00 | admin |

MAS90 Sales History Detail Screen View:



MAS90 Customer Number: LAKERS
Date Created: 03/29/2011 04:46pm by Administrator
Current Year: 2010
User:
Current Period: 5

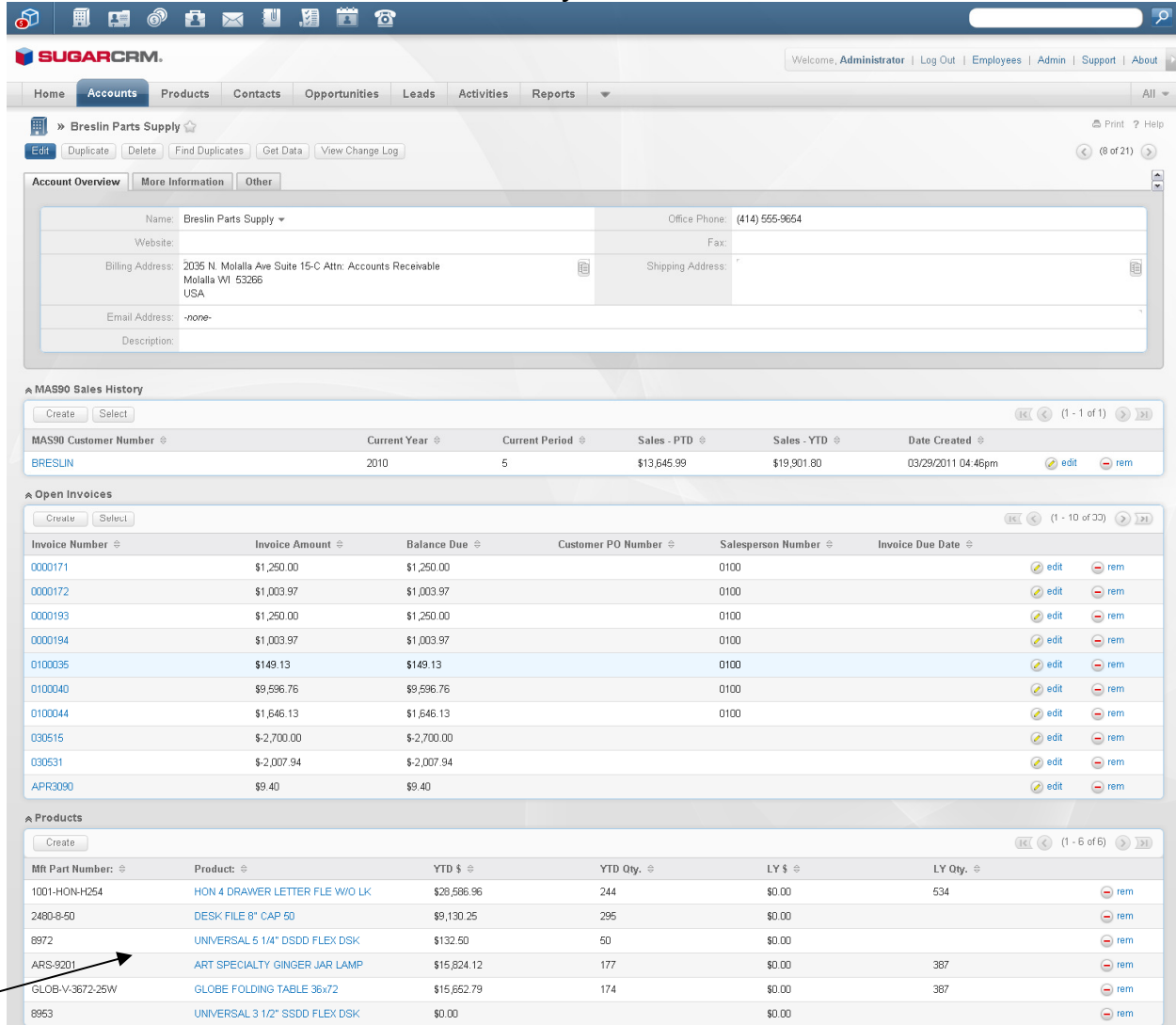
Details

| | | | |
|-----------------------------|-----------|------------------------|------------|
| Sales - YTD: | 21,495.40 | Date Established: | 01/14/2010 |
| Sales - PTD: | 10,295.40 | Last Payment Date: | 04/25/2010 |
| Sales - LY: | 0.00 | Last Payment Amount: | 5,000.00 |
| Cash Received YTD: | 5,000.00 | Average Days to Pay: | 0 |
| Cash Received PTD: | 0.00 | Average Days Overdue: | 0 |
| Cash Received LY: | 0.00 | Date of Last Activity: | 05/31/2010 |
| Profit Percent YTD: | 55.00 | Credit Limit: | 25,000.00 |
| Profit Percent PTD: | 56.00 | Open Sales Orders: | 185.00 |
| Profit Percent LY: | 0.00 | Balance: | 16,495.40 |
| Aging Category 1: | 0.00 | Aging Category 2: | 0.00 |
| Aging Category 3: | 0.00 | Aging Category 4: | 16,495.40 |
| Number of Invoices to Date: | 1 | Available Credit: | 8,319.60 |
| Number of Invoices LY: | 0 | | |

Check out all the great MAS90 data on this screen!

MAS90 Customer Item Sales History in SugarCRM

MAS90 Customer Item Sales History List View:



The screenshot displays the SugarCRM interface for the account 'Breslin Parts Supply'. The account overview shows contact information including office phone (414) 555-9654, website, and billing/shipping addresses. Below this, the 'MAS90 Sales History' section shows a table of sales data for the current year (2010), sorted by sales volume. The 'Open Invoices' section lists various invoices with their amounts and due dates. The 'Products' section shows a list of items purchased, sorted by YTD sales volume in descending order.

| MAS90 Customer Number | Current Year | Current Period | Sales - PTD | Sales - YTD | Date Created |
|-----------------------|--------------|----------------|-------------|-------------|--------------------|
| BRESLIN | 2010 | 5 | \$13,645.99 | \$19,901.80 | 03/29/2011 04:46pm |

| Invoice Number | Invoice Amount | Balance Due | Customer PO Number | Salesperson Number | Invoice Due Date |
|----------------|----------------|-------------|--------------------|--------------------|------------------|
| 0000171 | \$1,250.00 | \$1,250.00 | | 0100 | |
| 0000172 | \$1,003.97 | \$1,003.97 | | 0100 | |
| 0000193 | \$1,250.00 | \$1,250.00 | | 0100 | |
| 0000194 | \$1,003.97 | \$1,003.97 | | 0100 | |
| 0100035 | \$149.13 | \$149.13 | | 0100 | |
| 0100040 | \$9,596.76 | \$9,596.76 | | 0100 | |
| 0100044 | \$1,646.13 | \$1,646.13 | | 0100 | |
| 030515 | \$-2,700.00 | \$-2,700.00 | | | |
| 030531 | \$-2,007.94 | \$-2,007.94 | | | |
| APR3090 | \$9.40 | \$9.40 | | | |

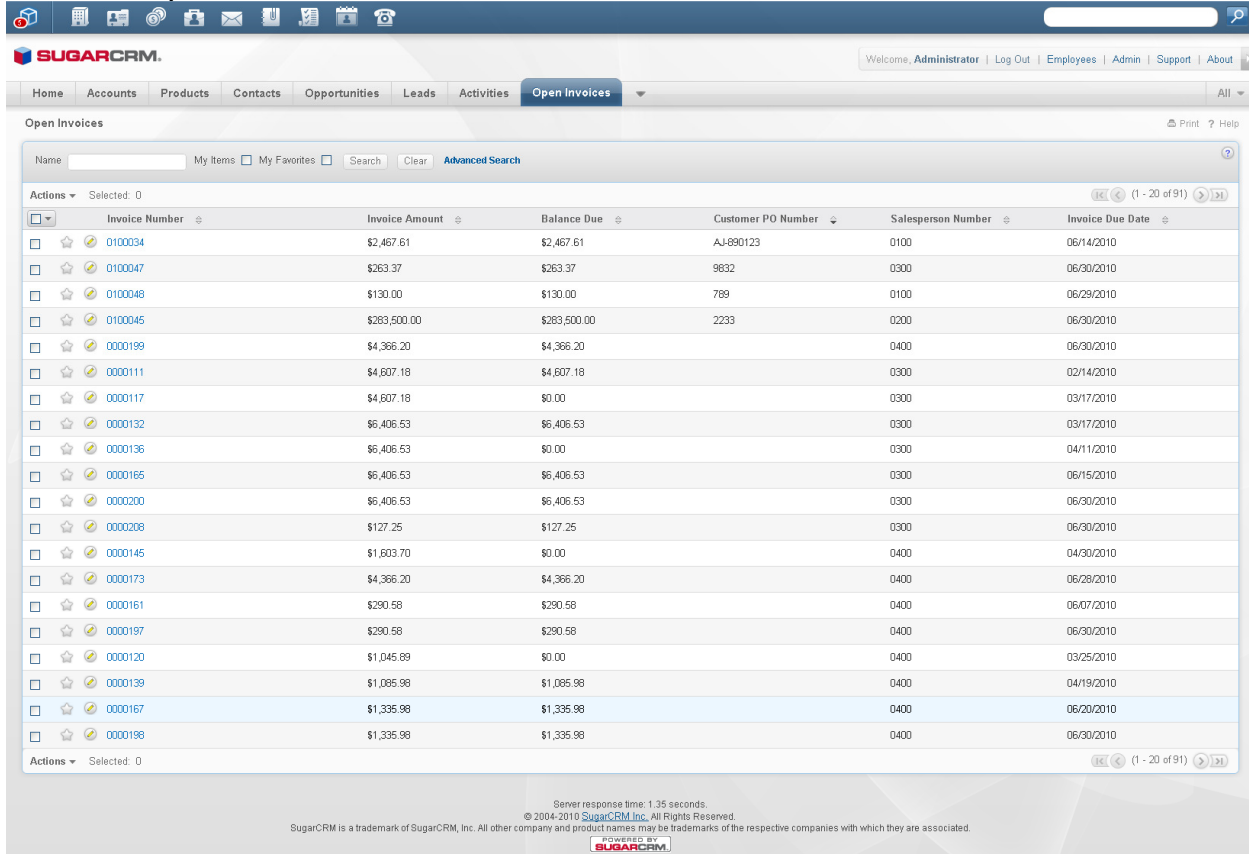
| Mft Part Number | Product | YTD \$ | YTD Qty | LY \$ | LY Qty |
|-----------------|---------------------------------|-------------|---------|--------|--------|
| 1001-HON-H254 | HON 4 DRAWER LETTER FILE W/O LK | \$28,586.96 | 244 | \$0.00 | 534 |
| 2480-8-50 | DESK FILE 8" CAP 50 | \$9,130.25 | 295 | \$0.00 | |
| 8972 | UNIVERSAL 5 1/4" DSSD FLEX DSK | \$132.50 | 50 | \$0.00 | |
| ARS-9201 | ART SPECIALTY GINGER JAR LAMP | \$15,824.12 | 177 | \$0.00 | 387 |
| GLOB-V-3672-25W | GLOBE FOLDING TABLE 36x72 | \$15,652.79 | 174 | \$0.00 | 387 |
| 8953 | UNIVERSAL 3 1/2" SSSD FLEX DSK | \$0.00 | | \$0.00 | |

Note that this view shows all of the items purchased by the customer for the year in descending order by Year to Date Sales Volume.

What a great tool for salespeople!!!!

MAS90 Customer Item Sales History in SugarCRM

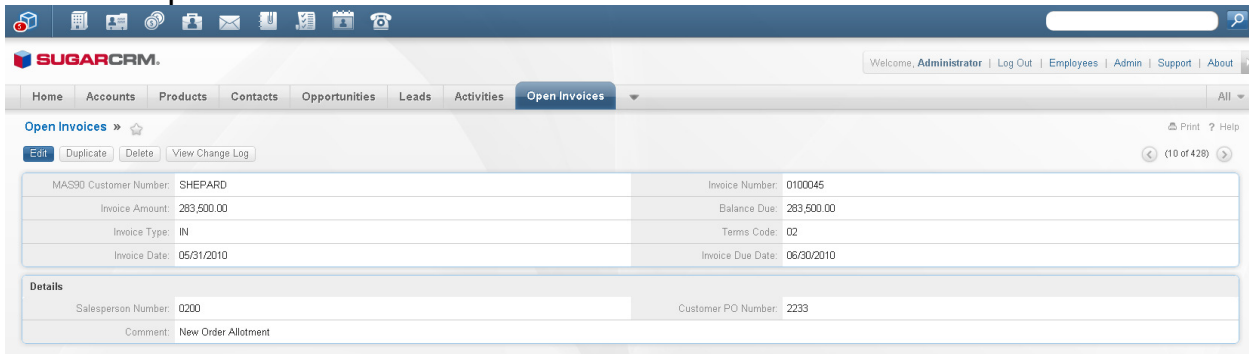
MAS90 Open Invoices List View:



The screenshot shows the SugarCRM interface for the 'Open Invoices' list view. The top navigation bar includes 'Home', 'Accounts', 'Products', 'Contacts', 'Opportunities', 'Leads', 'Activities', and 'Open Invoices'. The main content area displays a table of open invoices with columns for Invoice Number, Invoice Amount, Balance Due, Customer PO Number, Salesperson Number, and Invoice Due Date. The table contains 20 rows of data, with the 17th row (Invoice Number 0000167) highlighted in blue. Below the table, there is a footer with server response time and copyright information.

| Invoice Number | Invoice Amount | Balance Due | Customer PO Number | Salesperson Number | Invoice Due Date |
|----------------|----------------|--------------|--------------------|--------------------|------------------|
| 0100034 | \$2,467.61 | \$2,467.61 | AJ-890123 | 0100 | 06/14/2010 |
| 0100047 | \$263.37 | \$263.37 | 9632 | 0300 | 06/30/2010 |
| 0100048 | \$130.00 | \$130.00 | 789 | 0100 | 06/29/2010 |
| 0100045 | \$283,500.00 | \$283,500.00 | 2233 | 0200 | 06/30/2010 |
| 0000199 | \$4,366.20 | \$4,366.20 | | 0400 | 06/30/2010 |
| 0000111 | \$4,607.18 | \$4,607.18 | | 0300 | 02/14/2010 |
| 0000117 | \$4,607.18 | \$0.00 | | 0300 | 03/17/2010 |
| 0000132 | \$6,406.53 | \$6,406.53 | | 0300 | 03/17/2010 |
| 0000136 | \$6,406.53 | \$0.00 | | 0300 | 04/11/2010 |
| 0000165 | \$6,406.53 | \$6,406.53 | | 0300 | 06/15/2010 |
| 0000200 | \$6,406.53 | \$6,406.53 | | 0300 | 06/30/2010 |
| 0000208 | \$127.25 | \$127.25 | | 0300 | 06/30/2010 |
| 0000145 | \$1,603.70 | \$0.00 | | 0400 | 04/30/2010 |
| 0000173 | \$4,366.20 | \$4,366.20 | | 0400 | 06/28/2010 |
| 0000161 | \$290.58 | \$290.58 | | 0400 | 06/07/2010 |
| 0000197 | \$290.58 | \$290.58 | | 0400 | 06/30/2010 |
| 0000120 | \$1,045.69 | \$0.00 | | 0400 | 03/25/2010 |
| 0000139 | \$1,085.98 | \$1,085.98 | | 0400 | 04/19/2010 |
| 0000167 | \$1,335.98 | \$1,335.98 | | 0400 | 06/20/2010 |
| 0000198 | \$1,335.98 | \$1,335.98 | | 0400 | 06/30/2010 |

MAS90 Open Invoices Detail View:



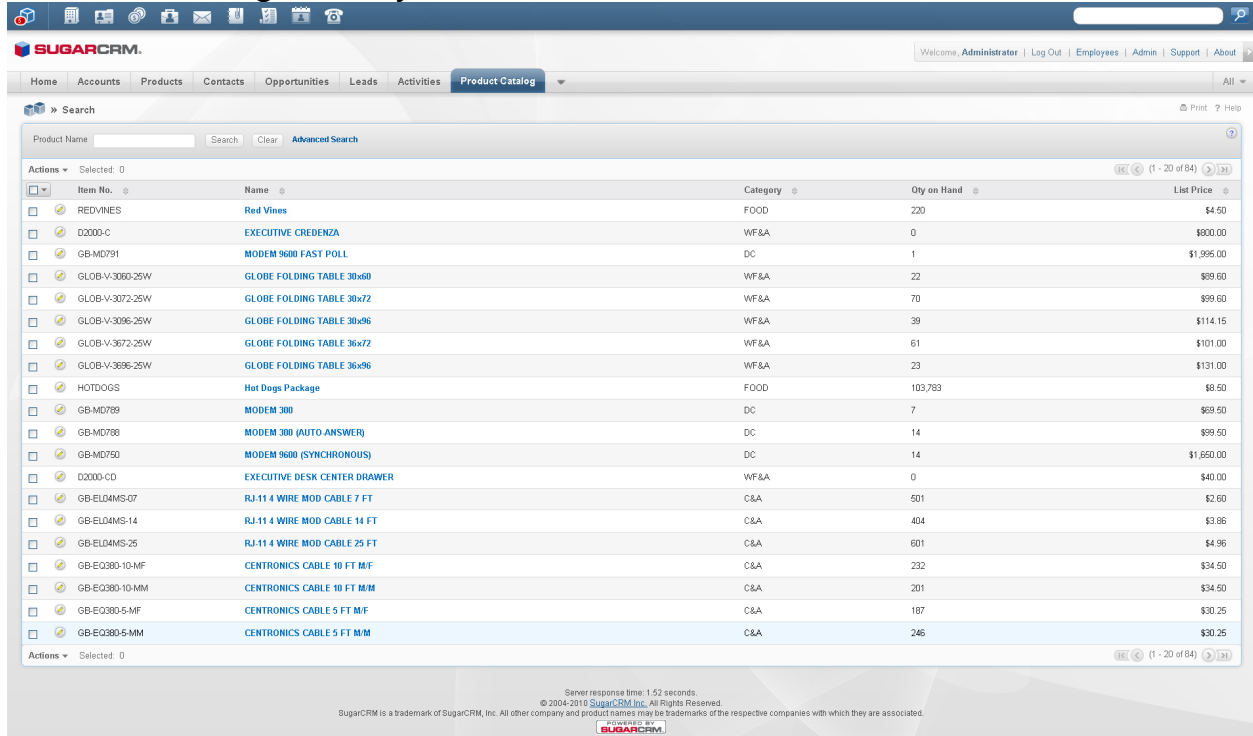
The screenshot shows the SugarCRM interface for the 'Open Invoices' detail view. The top navigation bar is the same as the list view. The main content area displays the details for a specific invoice (Invoice Number: 0100045). The details are organized into two sections: 'Invoice Information' and 'Details'.

| | |
|--------------------------------|------------------------------|
| MAS90 Customer Number: SHEPARD | Invoice Number: 0100045 |
| Invoice Amount: 283,500.00 | Balance Due: 283,500.00 |
| Invoice Type: IN | Terms Code: 02 |
| Invoice Date: 05/31/2010 | Invoice Due Date: 06/30/2010 |

| | |
|------------------------------|--------------------------|
| Salesperson Number: 0200 | Customer PO Number: 2233 |
| Comment: New Order Allotment | |

SugarCRM Product Catalog

Product Catalog after Sync:



The screenshot displays the SugarCRM Product Catalog interface. At the top, there is a navigation bar with tabs for Home, Accounts, Products, Contacts, Opportunities, Leads, Activities, and Product Catalog. Below the navigation bar is a search bar with the text "Product Name" and a search button. The main content area shows a table of products with the following columns: Item No., Name, Category, Qty on Hand, and List Price. The table contains 20 rows of product data, including items like REDVINES, EXECUTIVE CREDENZA, and various folding tables. At the bottom of the interface, there is a footer with server response time and copyright information.

| Item No. | Name | Category | Qty on Hand | List Price |
|-----------------|------------------------------|----------|-------------|------------|
| REDVINES | Red Vines | FOOD | 220 | \$4.50 |
| D2000-C | EXECUTIVE CREDENZA | WF&A | 0 | \$800.00 |
| GB-MD791 | MODEM 9600 FAST POLL | DC | 1 | \$1,995.00 |
| GLOB-V-3060-25W | GLOBE FOLDING TABLE 30x60 | WF&A | 22 | \$89.60 |
| GLOB-V-3072-25W | GLOBE FOLDING TABLE 30x72 | WF&A | 70 | \$99.60 |
| GLOB-V-3086-25W | GLOBE FOLDING TABLE 30x86 | WF&A | 39 | \$114.15 |
| GLOB-V-3672-25W | GLOBE FOLDING TABLE 36x72 | WF&A | 61 | \$101.00 |
| GLOB-V-3686-25W | GLOBE FOLDING TABLE 36x86 | WF&A | 23 | \$131.00 |
| HOTDOGS | Hot Dogs Package | FOOD | 103,783 | \$8.50 |
| GB-MD789 | MODEM 300 | DC | 7 | \$69.50 |
| GB-MD788 | MODEM 300 (AUTO ANSWER) | DC | 14 | \$99.50 |
| GB-MD750 | MODEM 9600 (SYNCHRONOUS) | DC | 14 | \$1,650.00 |
| D2000-CD | EXECUTIVE DESK CENTER DRAWER | WF&A | 0 | \$40.00 |
| GB-ELD4MS-07 | RJ-11 4 WIRE MOD CABLE 7 FT | C&A | 501 | \$2.60 |
| GB-ELD4MS-14 | RJ-11 4 WIRE MOD CABLE 14 FT | C&A | 404 | \$3.06 |
| GB-ELD4MS-25 | RJ-11 4 WIRE MOD CABLE 25 FT | C&A | 601 | \$4.96 |
| GB-EQ380-10-MF | CENTRONICS CABLE 10 FT M/F | C&A | 232 | \$34.50 |
| GB-EQ380-10-MM | CENTRONICS CABLE 10 FT M/M | C&A | 201 | \$34.50 |
| GB-EQ380-5-MF | CENTRONICS CABLE 5 FT M/F | C&A | 187 | \$30.25 |
| GB-EQ380-5-MM | CENTRONICS CABLE 5 FT M/M | C&A | 246 | \$30.25 |

The Sugar-MAS90 Inventory Item / Product sync brings in all MAS90 finished goods into SugarCRM. They are now available for Sugar inquiries as well use on quotes and sales orders entered through Sugar.

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Compatibilities

This software is currently compatible with:

Sage MAS 90 and MAS 200 v4.3

Sage MAS 90 and MAS 200 v4.4

SugarCRM v6.0

SugarCRM v6.1

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