



Faye Business Systems Group

SugarCRM – MAS90 Integration Application

Spec Sheet



Overview

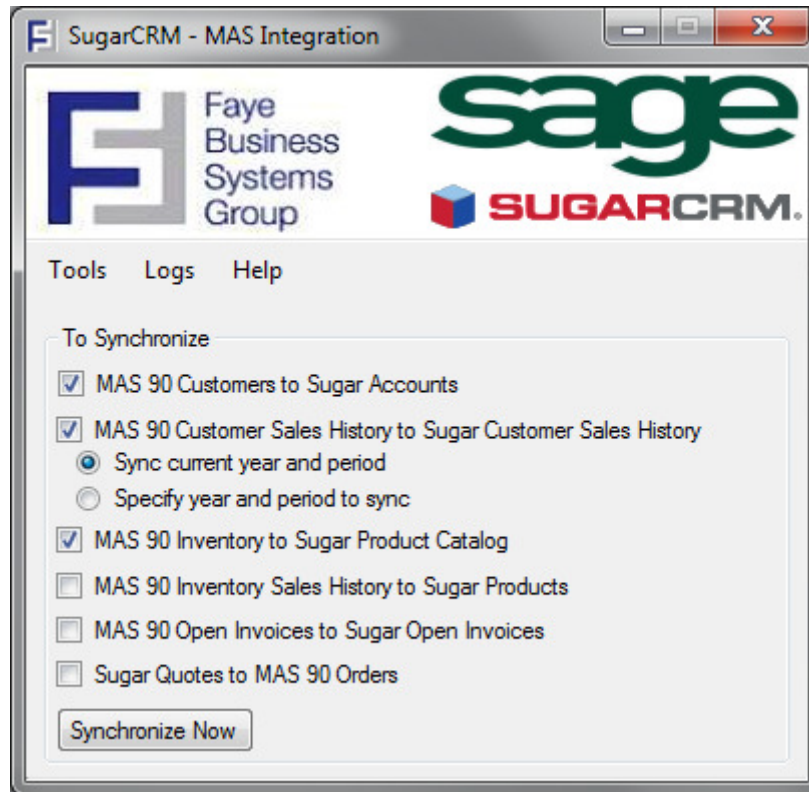
Sugar CRM is the leading open source CRM software package in the world. Sage MAS 90 and MAS 200 are among the leading accounting and ERP software packages in the world. It only makes sense to integrate the software so that companies can use best in class software in each software category without missing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

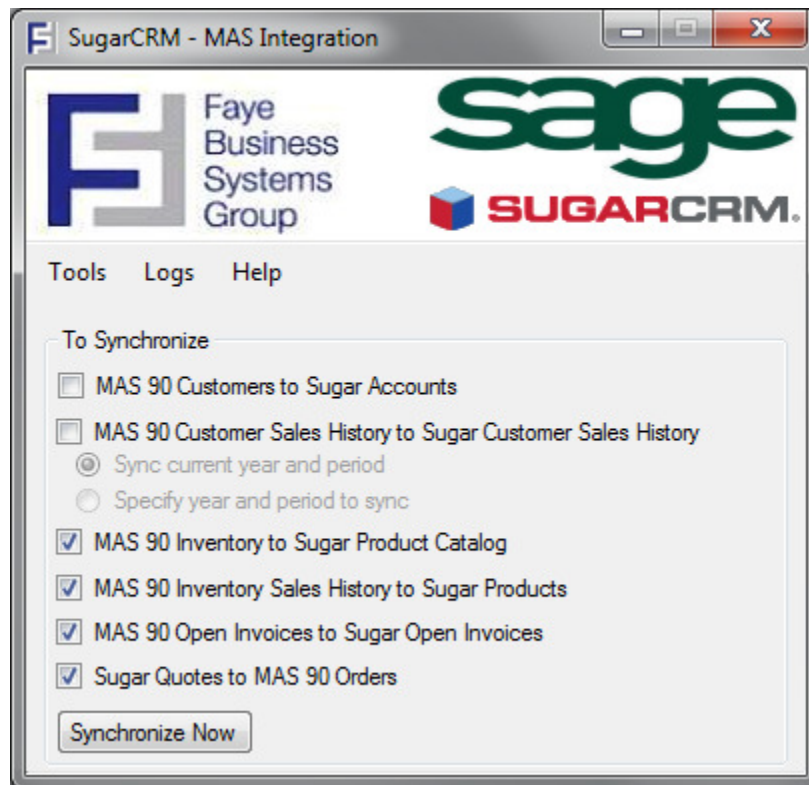
This function moves various MAS90 sales history values to the new custom “MAS90 Sales History” module in Sugar. No other Sugar data is overwritten during this synchronization.

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

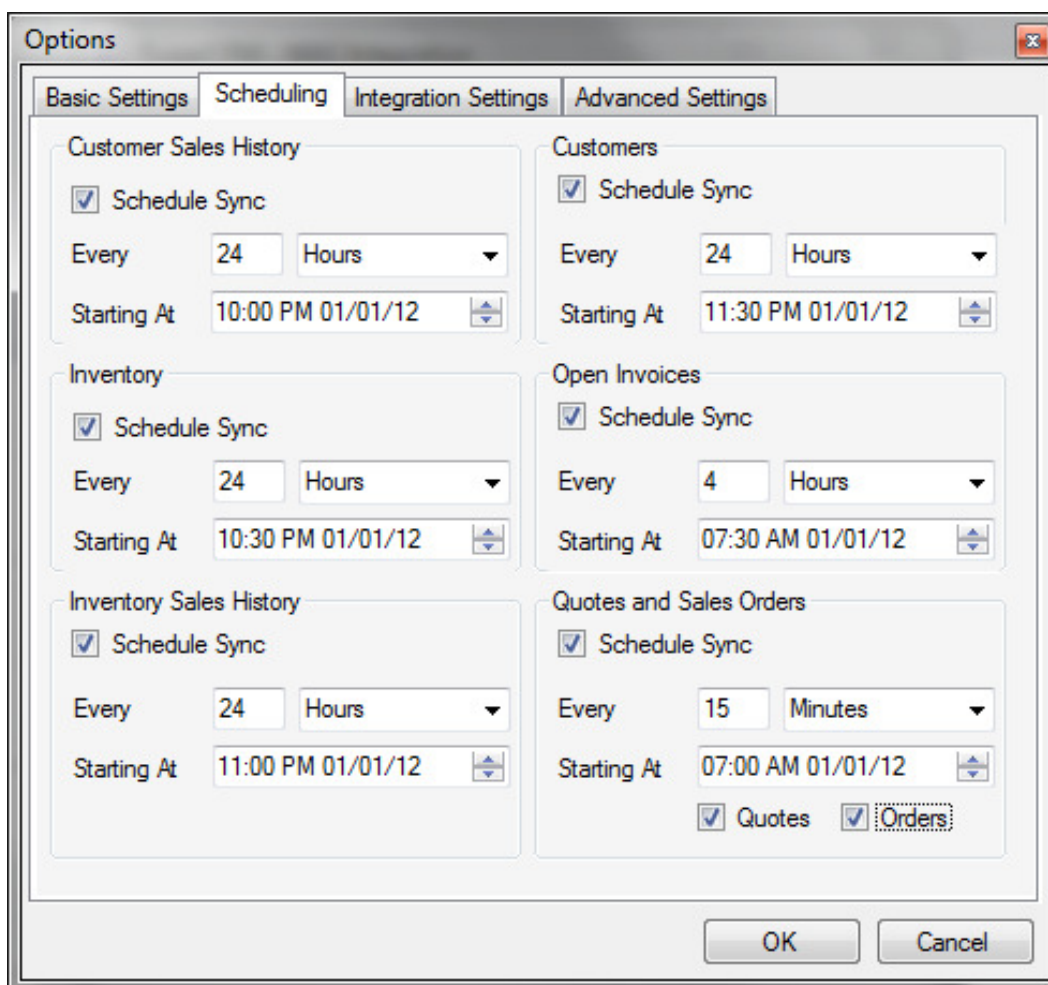
This function synchronizes currently open invoices in MAS90 to Sugar. When an invoice is *closed* in MAS90, it is automatically removed from Sugar.

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.

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.



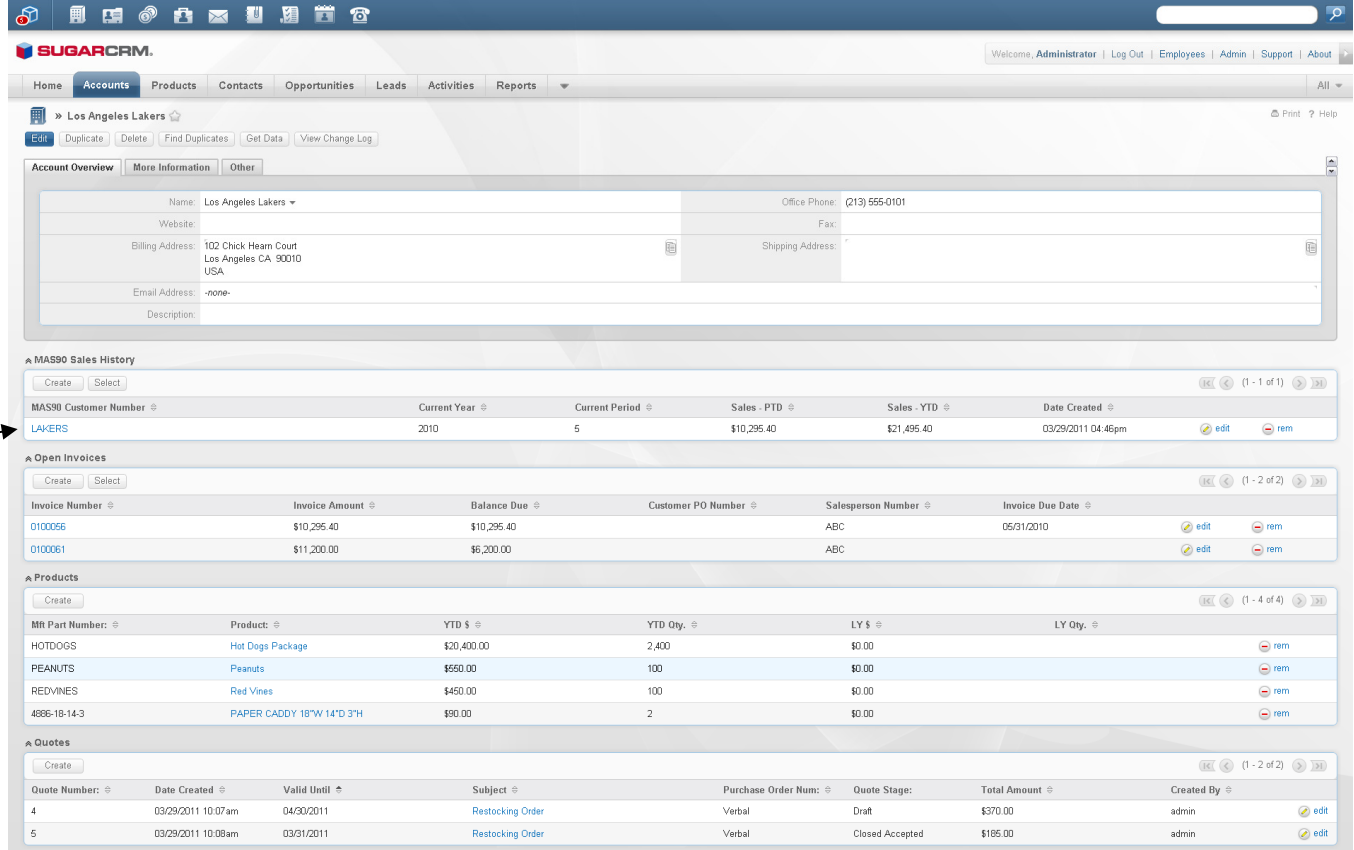
Integration Category	Schedule Sync	Frequency	Unit	Starting At
Customer Sales History	<input checked="" type="checkbox"/>	Every 24	Hours	10:00 PM 01/01/12
Customers	<input checked="" type="checkbox"/>	Every 24	Hours	11:30 PM 01/01/12
Inventory	<input checked="" type="checkbox"/>	Every 24	Hours	10:30 PM 01/01/12
Open Invoices	<input checked="" type="checkbox"/>	Every 4	Hours	07:30 AM 01/01/12
Inventory Sales History	<input checked="" type="checkbox"/>	Every 24	Hours	11:00 PM 01/01/12
Quotes and Sales Orders	<input checked="" type="checkbox"/>	Every 15	Minutes	07:00 AM 01/01/12

Additional settings for Quotes and Sales Orders:
☒ Quotes ☒ Orders

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:



SUGARCRM. Welcome, Administrator | Log Out | Employees | Admin | Support | About

Home Accounts Products Contacts Opportunities Leads Activities Reports

» Los Angeles Lakers

Edit Duplicate Delete Find Duplicates Get Data View Change Log

Account Overview More Information Other

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

MAS90 Sales History

Create Select

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

Create Select

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

Create

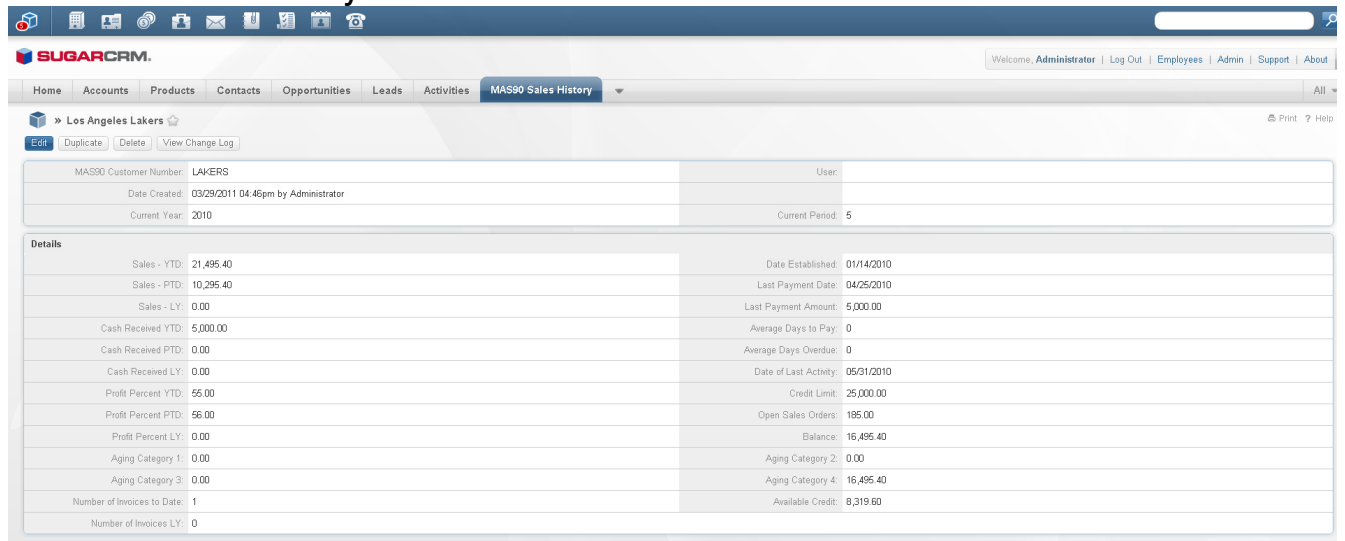
MR Part Number	Product	YTD \$	YTD Qty	LY \$	LY Qty	
HOTDOGS	Hot Dogs Package	\$20,400.00	2,400	\$0.00		rem
PEANUTS	Peanuts	\$560.00	100	\$0.00		rem
REDVINES	Red Vines	\$460.00	100	\$0.00		rem
4886-18-14-3	PAPER CADDY 18"W 14"D 3"H	\$90.00	2	\$0.00		rem

Quotes

Create

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	edit
5	03/29/2011 10:08am	03/31/2011	Restocking Order	Verbal	Closed Accepted	\$185.00	admin	edit

MAS90 Sales History Detail Screen View:



SUGARCRM. Welcome, Administrator | Log Out | Employees | Admin | Support | About

Home Accounts Products Contacts Opportunities Leads Activities MAS90 Sales History

» Los Angeles Lakers

Edit Duplicate Delete View Change Log

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

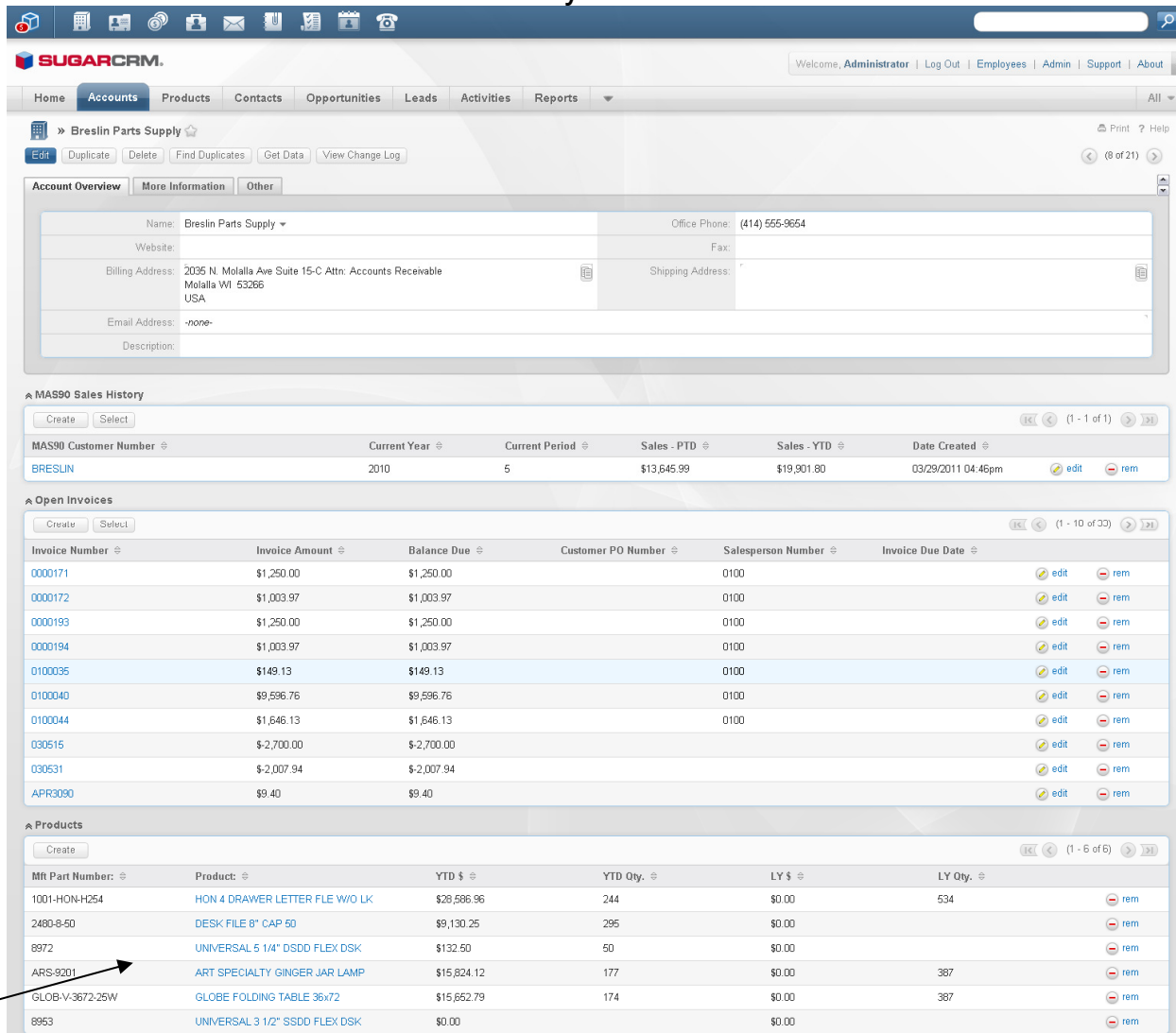
Details

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 MAS90 Customer Item Sales History. The top navigation bar includes links for Home, Accounts, Products, Contacts, Opportunities, Leads, Activities, and Reports. The main content area shows the account overview for Breslin Parts Supply, including contact information and a list of sales history items.

Account Overview:

- Name: Breslin Parts Supply
- Office Phone: (414) 555-9654
- Website:
- Billing Address: 2035 N. Molalla Ave Suite 15-C Attn: Accounts Receivable, Molalla WI 53266 USA
- Shipping Address:
- Email Address: -none-
- Description:

MAS90 Sales History:

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

Open Invoices:

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			

Products:

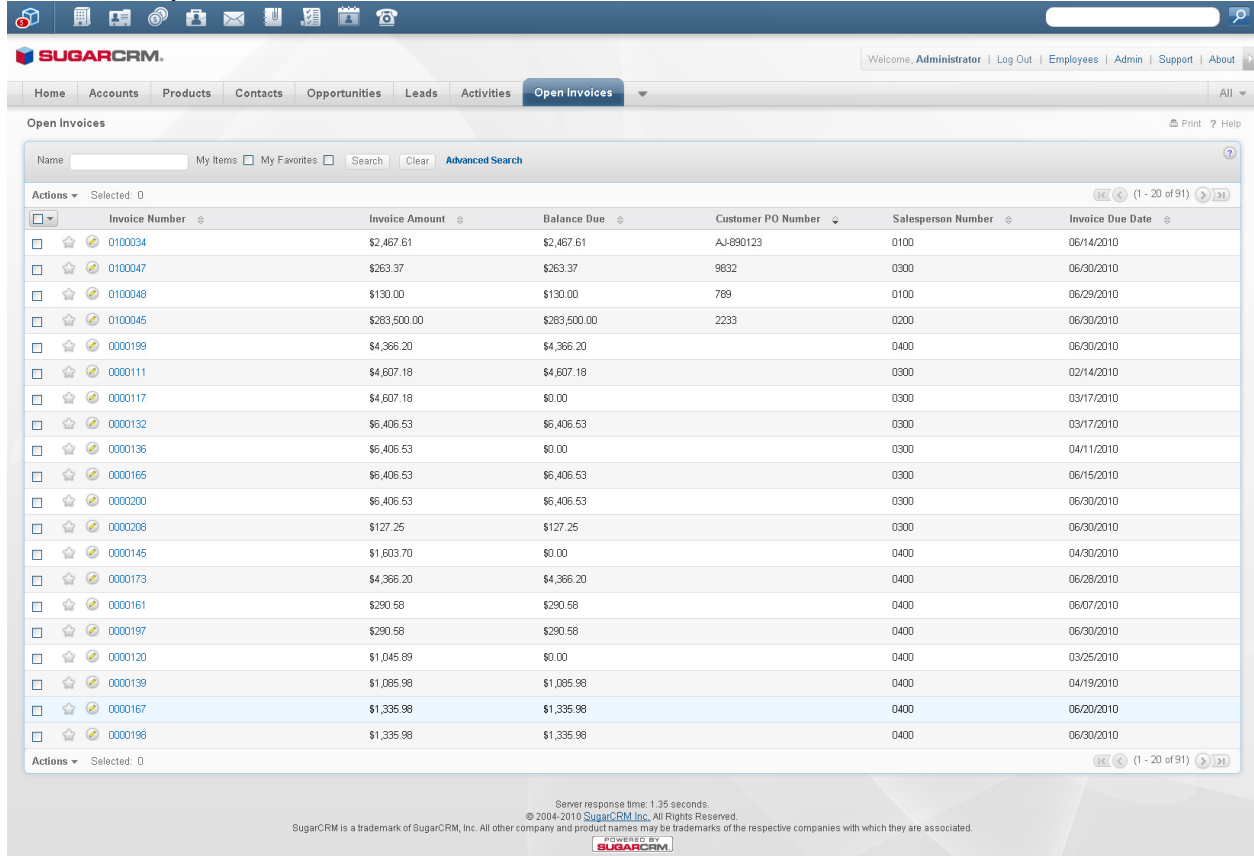
Mfr Part Number	Product	YTD \$	YTD Qty	LY \$	LY Qty
1001-HON-H254	HON 4 DRAWER LETTER FILE W/O LK	\$28,586.96	244	\$0.00	534
2480-8-50	DESK FILE 8" CAP 50	\$9,130.25	295	\$0.00	
8972	UNIVERSAL 5 1/4" DSDO FLEX DSK	\$132.50	50	\$0.00	
ARS-9201	ART SPECIALTY GINGER JAR LAMP	\$15,824.12	177	\$0.00	387
GLOB-V-3672-25W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

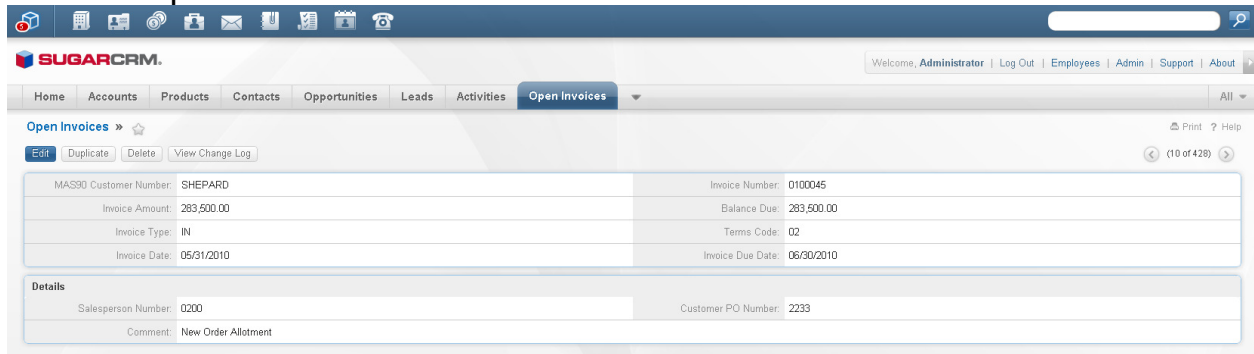
MAS90 Open Invoices List View:



The screenshot shows the SugarCRM 'Open Invoices' list view. The interface includes a top navigation bar with icons and a search bar, a secondary navigation bar with tabs (Home, Accounts, Products, Contacts, Opportunities, Leads, Activities, Open Invoices), and a main content area. The 'Open Invoices' tab is active, displaying a table of open invoices. The table has 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 first row highlighted. Below the table, there is a footer section 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	9832	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	\$1,045.89	\$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:

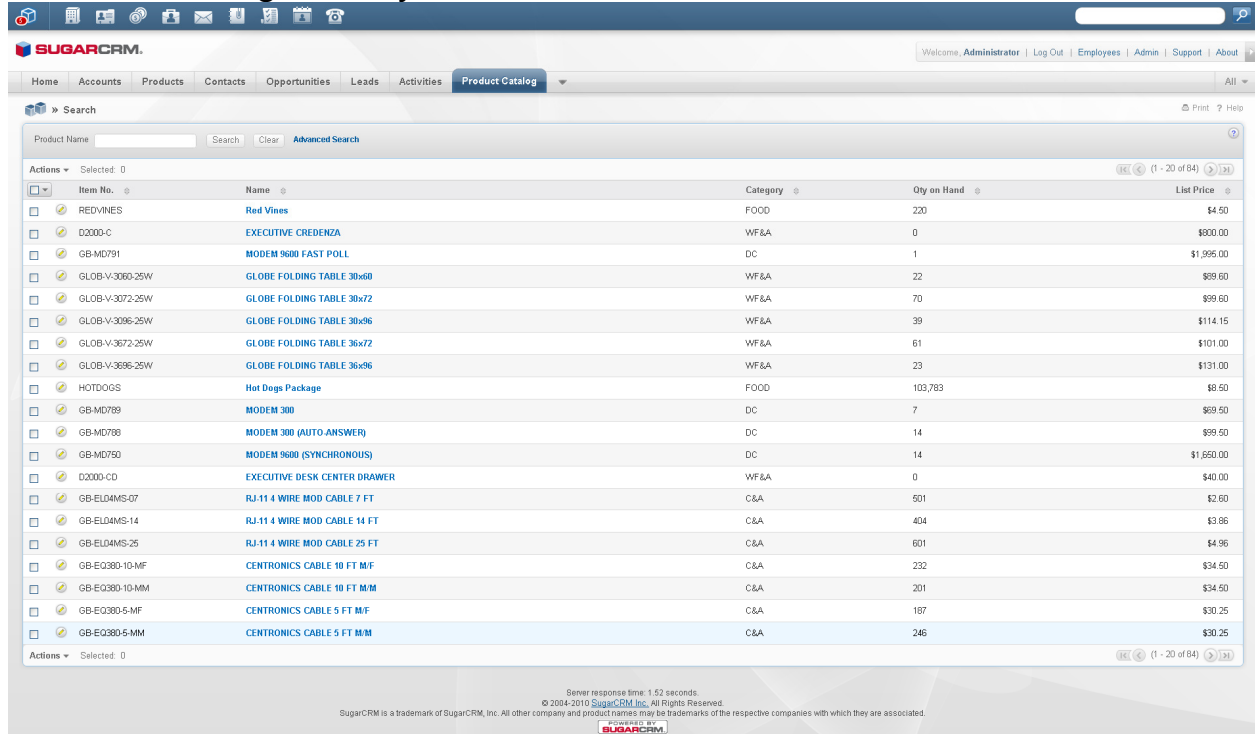


The screenshot shows the SugarCRM 'Open Invoices' detail view for invoice 0100045. The interface includes a top navigation bar with icons and a search bar, a secondary navigation bar with tabs (Home, Accounts, Products, Contacts, Opportunities, Leads, Activities, Open Invoices), and a main content area. The 'Open Invoices' tab is active, displaying a detailed view of the selected invoice. The view is divided into two sections: 'Invoice Information' and 'Details'. The 'Invoice Information' section contains fields for MAS90 Customer Number, Invoice Number, Invoice Amount, Invoice Type, Invoice Date, Invoice Due Date, Balance Due, and Terms Code. The 'Details' section contains fields for Salesperson Number and Customer PO Number.

Field	Value
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 (selected). 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, MODERN 9600 FAST POLL, GLOBE FOLDING TABLE 30x60, and various cables. The bottom of the page shows a footer with copyright information and a small SugarCRM logo.

Item No.	Name	Category	Qty on Hand	List Price
REDVINES	Red Vines	FOOD	220	\$4.50
D2000-C	EXECUTIVE CREDENZA	WF&A	0	\$900.00
GB-MD791	MODERN 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	MODERN 300	DC	7	\$69.50
GB-MD788	MODERN 300 (AUTO ANSWER)	DC	14	\$99.50
GB-MD750	MODERN 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	\$3.86
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, 4.4, 4.5
SugarCRM v6.0, 6.1, 6.2, 6.3, 6.4, 6.5

Contact Us

Email: info@fayebsg.com
Web: www.fayebsg.com
Voice: 818-227-5130
Fax: 818-227-5099
Snail: 6320 Canoga Avenue, 15th Floor
Woodland Hills, CA 91367