

Sage 100 ERP Tips and Tricks:

Add CRM Prospect as Customer in Sage100 (MAS 90/200)

Prepared by:

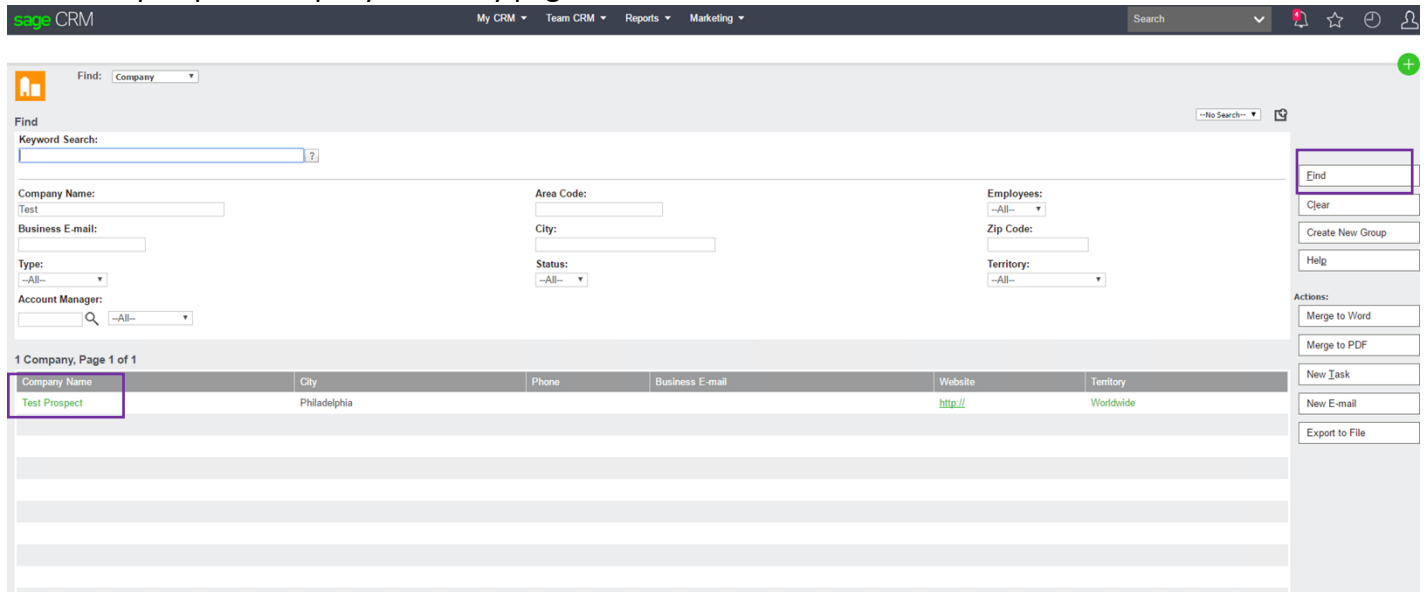
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Add CRM Prospect as Customer in Sage100

Sage CRM allows you to enter key information, track communications, and even quotes for companies who have yet to purchase from you. Once these companies, or **prospects**, decide to place orders, Sage CRM gives you the ability to copy their contact information into Sage100 with the click of a button.

Go to the prospect company summary page.

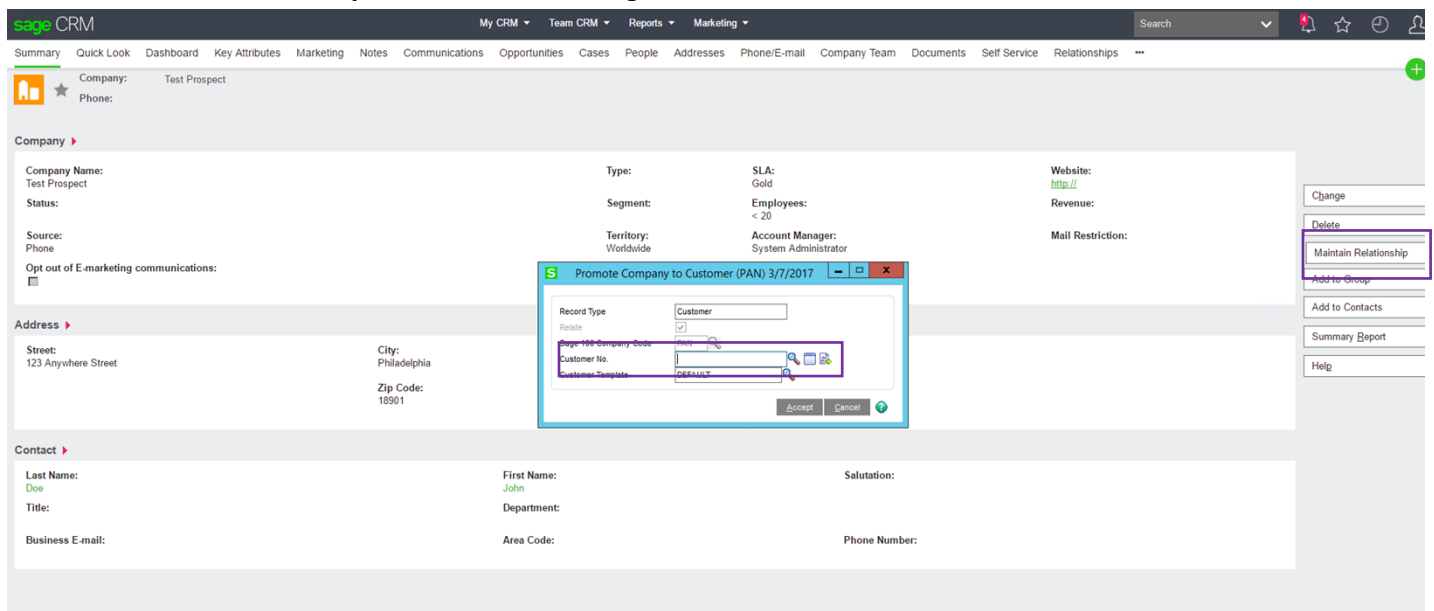


The screenshot shows the Sage CRM search interface. The search results table contains one entry:

Company Name	City	Phone	Business E-mail	Website	Territory
Test Prospect	Philadelphia			http://	Worldwide

On the right-hand side, there is an 'Actions' menu with the following options: Merge to Word, Merge to PDF, New Task, New E-mail, and Export to File. The 'Find' button in the search bar is highlighted with a purple box.

Click **Maintain Relationship** and enter a new Sage100 customer number.



The screenshot shows the 'Test Prospect' company summary page. The 'Company' section contains the following details:

- Company Name: Test Prospect
- Status: [Blank]
- Source: Phone
- Opt out of E-marketing communications:
- Type: [Blank]
- Segment: [Blank]
- Territory: Worldwide
- SLA: Gold
- Employees: < 20
- Account Manager: System Administrator
- Website: http://
- Revenue: [Blank]
- Mail Restriction: [Blank]

The 'Address' section shows:

- Street: 123 Anywhere Street
- City: Philadelphia
- Zip Code: 18901

The 'Contact' section shows:

- Last Name: Doe
- First Name: John
- Title: [Blank]
- Department: [Blank]
- Business E-mail: [Blank]
- Area Code: [Blank]
- Salutation: [Blank]
- Phone Number: [Blank]

A modal dialog titled 'Promote Company to Customer (PAN) 3/7/2017' is open in the center. It contains the following fields:

- Record Type: Customer
- Relate:
- Copy Company Code:
- Customer No.: [Blank]
- Customer Complete:

The 'Maintain Relationship' button in the right-hand 'Actions' menu is highlighted with a purple box.

Click on the **Summary** tab to refresh the page. You should now see the **Customer Maintenance** option available on the left-hand side. Launch **Customer Maintenance** and make sure Salesperson, Tax Schedule, etc. are entered correctly.

The screenshot displays the Sage CRM interface. At the top, there is a navigation bar with tabs for Summary, Quick Look, Dashboard, Key Attributes, Marketing, Notes, Communications, Opportunities, Cases, People, Addresses, Phone/E-mail, Company Team, Documents, Self Service, Inquiries, and Relationships. The main content area shows the 'Company' section for 'Test Prospect'. A modal window titled 'Customer Maintenance (PAN) 3/7/2017' is open, displaying fields for Customer No. (0301204), Name (TEST PROSPECT), Address (123 Anywhere Street, Philadelphia, PA 18901), Telephone, Fax, E-mail Address, and URL Address. The window also includes sections for Terms Code (00 - No Terms), Primary Contact (DOE JOHN - John Doe), Ship Code, Primary Ship To, Tax Schedule, Exemptions, Credit Hold, and Credit Limit. On the right side of the main interface, there is a sidebar with buttons for Change, Maintain Relationship, RMA Entry, Customer Maintenance (highlighted with a red box), Add to Group, Add to Contacts, Summary Report, and Help.

The prospect has now been entered into Sage100 as a customer. Changes made to the customer's information will be reflected in both Sage100 and SageCRM.

For more information or for assistance with Sage 100 ERP (MAS 90/200), contact us now at info@llbgroup.com or **267.457.4700**.

About the LLB Group, LLC

In business since 1984, The LLB Group is a Technology Company serving businesses in the Greater Philadelphia area.

The LLB Group supports businesses in the following:

- ◆ Software - Sage 100 ERP & CRM (formally MAS 90 & 200), Acumatica
- ◆ IT Managed Services – Proactive infrastructure support and service desk
- ◆ Cloud Services – From Software as a Service (SaaS) to Infrastructure as a Service (IaaS)
- ◆ Telecommunication Solutions – Carrier services (voice and internet) and hosted VoIP
- ◆ Energy Procurement – Single source for choosing energy suppliers in deregulated states

Our mission statement: To establish and maintain mutually beneficial, long-term relationships with our clients by delivering the latest technology, consulting, services, maintenance and support as a highly cost-effective IT solution in order to maximize our clients' productivity and profitability.

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