

sage



Sage CRM



Executive Summary

Sage is a global provider of business solutions to small and mid-sized businesses worldwide. With over 6.1 million customers, it is imperative that it leverages such an asset. With such a vast portfolio of business solutions, it is vital that Sage creates a holistic and connected experience for customers who deploy more than one Sage solution for their business. Customers' need for integration is becoming more sophisticated. Recent internal market research has indicated that as many as 30% of new customers have defined a seamless CRM-ERP integration as one of their major purchasing criteria, which also verifies the finding that integration with CRM ranks as 'very important' to the Sage ERP partner base. 45% of SMB customers surveyed by Yankee group confirmed that their top need is integration among their many applications¹.

The development of SData allows Sage to produce the best-of-breed integrations between CRM and ERP products or any Sage solutions. SData unlocks the potential of all Sage solutions by allowing them to integrate seamlessly and work as one cohesive Sage business solution. This not only benefits Sage and our customers but also creates opportunities and new markets for our extensive global partner channel.

The Business Imperative for Interoperability

Award-winning SageCRM is one of the global leading CRM solutions for the SMB market. The product's success is based on its breadth of functionality, ease of deployment, ease of use, and its compelling ERP integration story. SageCRM has been a market leader in the deployment of truly integrated CRM-to-ERP solutions dating back to its first Sage Accpac integration in 2004. Since then, SageCRM has successfully added integrated solutions across the globe including Ligne 100 in France, OfficeLine and ClassicLine in Germany, Sage MAS in the US, Sage 200 and Sage 1000 in the UK, and many more.

SageCRM has built a comprehensive package of innovative features based on SData in the v7 release.

- SageCRM supports a flexible and extensible SData provider interface to enable any third-party products to read SageCRM data.
- SageCRM supports an extensible and customizable implementation of the common CRM integration contract.
- SageCRM supports a dynamic and codeless SData Gadget in the interactive dashboard which has the ability to consume SData feeds from any application and display them in SageCRM.

The implementation of SData into SageCRM will ensure that SageCRM continues to lead the market for many years to come.

SData: Sage Data—or in short SData—is a newly launched simple, standard protocol for reading and writing data between Sage applications. It enables desktop, server, and web-based applications to communicate with each other, and also with third-party applications and the web.

ERP Products: Any Sage accounting product, such as Sage 1000, Sage 200, Sage 50, Accpac, Pro Series, MAS, Ligne 100, OfficeLine, ClassicLine, LogicClass, and X3.

Common CRM Contract: The Common CRM contract is a newly launched common interface built on SData between CRM products (ACT! by Sage, SageCRM and Sage SalesLogix) and Sage ERP products. The contract enables ERP teams to develop one integration solution which works with all three CRM products. The contract supports a sophisticated method of synchronization called Sage Synchronization which enables viewing data and pricing service for accurate pricing.

¹ Yankee Group – Eight Recommendations for Back Office VARs to help Businesses Focus on Their Customers, 2008.

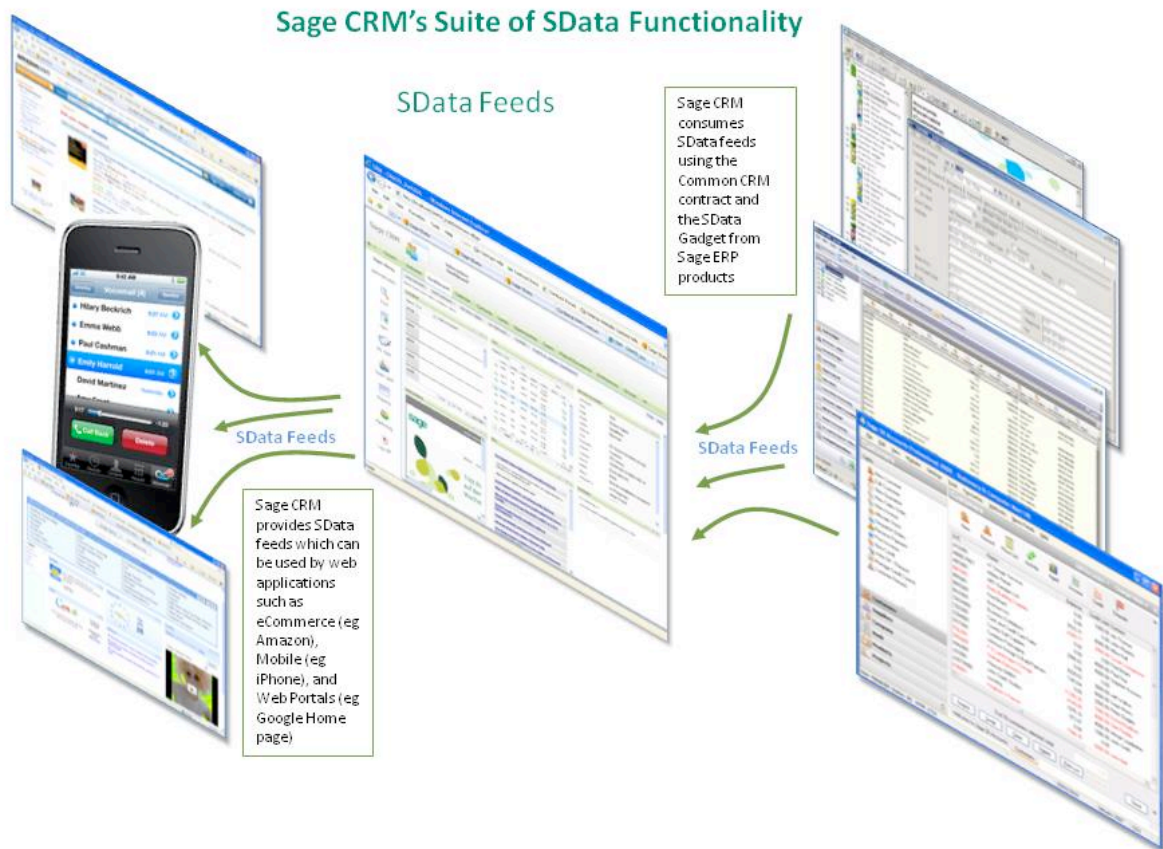


Figure 1. Overview of SageCRM SData functionality

SageCRM as an SData Provider

As an SData provider, SageCRM makes all of its internal data available to other applications using the SData protocol. For example, all SageCRM core entities such as companies, opportunities, cases, custom entities, and database views can be made available as SData feeds.

Applications can make use of SageCRM as an SData provider by surfacing SageCRM data in their own solutions. There are many potential uses for this:

- ERP applications can display SageCRM customer, opportunity, and other information in their own workspaces, reports, portals and any other parts of their user interfaces.
- Other third-party applications such as mobile, self-service, ecommerce or any other solutions can be modified to display SageCRM customer, opportunity, and other information in their own screens.
- Business partners can use SageCRM data to build their own bespoke solutions and integrations for their customers.

Extensible, Customizable Implementation of SData Provider Support

The implementation of SData provider support in SageCRM is powerful because it is extensible and customizable.

- SData feeds will be available from SageCRM v7.0 and will be made available on the SageCRM.com hosted platform as well.
- SData feeds are read only in SageCRM 7.0 and will support full CRUD actions (create, update and delete) in future versions.
- SData feeds are available on all out-of-the-box entities in SageCRM.
- SData feeds are available for all custom fields and custom entities such as those created by business partners or customers. All updates are immediately available as SData feeds without the need for any recompilation of the application.
- SData feeds are available from all database views in SageCRM. This allows business partners and integration teams to customize SData feeds to easily match their business needs. All updates are immediately available as SData feeds without the need for any recompilation of the application.

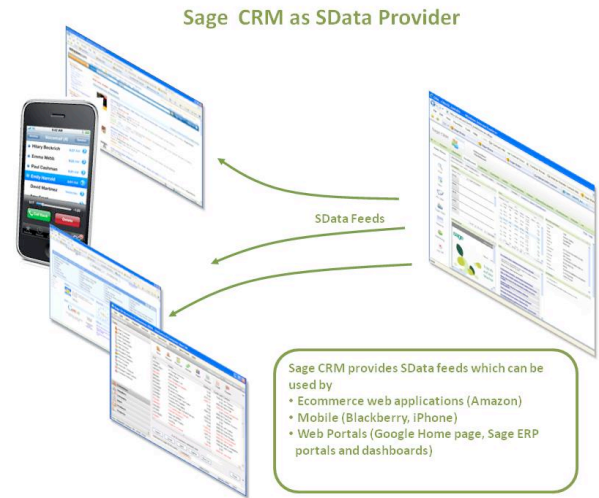


Figure 2. The SageCRM SData provider feeds can deliver a wide variety of rich customer experiences

SageCRM as an SData Consumer

As part of the Sage corporate technical strategy, applications across Sage are being updated to become SData providers. As a result, all Sage applications are making their internal data available using the SData protocol. SageCRM is able to take this information and either store the data in the CRM system or display it in the SageCRM user interface. SageCRM consumes SData in two different ways: via the Common CRM contract and the SData Gadget.

Common CRM Contract

Using SData feeds from the common CRM contract, SageCRM synchronizes account, quote, order, and product information from ERP applications and displays it in the SageCRM product. SageCRM also consumes other information provided by the ERP product and displays it in read-only screens.

The following cross-application business processes are supported:

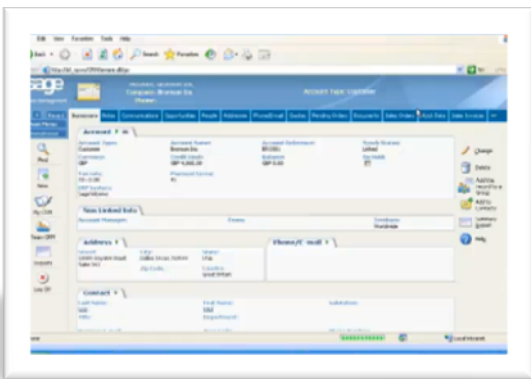


Figure 3. Short 30 sec demo of an integration with SageCRM using the Common CRM contract.
Ctrl + Click on the picture to navigate to the YouTube video.

- Linking of customers, which allows users to quickly and easily share customer information between CRM and ERP without having to type data in twice, and ensures data is accurate and up to date.
- Linking of quotes and orders, product, and price list information which allows CRM users to quickly and accurately create quotes and orders in CRM and link them to ERP without having to manually enter data twice.
- Real-time pricing of quotes and orders in SageCRM which empowers CRM users to make use of the complex ERP pricing rules for quotes and orders while continuing to work in the CRM environment.
- Real-time viewing of ERP data in SageCRM such as financial information, inventory,

purchase orders, invoices, aged debt information, and any other information which gives a 360° view of the customer information.

Extensible, Customizable Common CRM Contract Support

The implementation of the common CRM contract in SageCRM is powerful because it is extensible and customizable.

- SageCRM supports extensibility of the common CRM contract. SageCRM is dynamically configured at integration setup time by consuming the SData schema. As the configuration is dynamic, it can consume any SData feeds that are provided and synchronize or display them in SageCRM.
- SageCRM supports an extensible pricing service so that it is possible for ERP teams to update or amend the pricing service to show additional price details.

SData Gadget

The interactive dashboard is a new productivity tool in SageCRM v7.0 which enables users to view and act on data displayed in a collection of “gadgets”. These gadgets are customizable and configurable so that users can create their own collection in order to satisfy their specific daily needs. This feature delivers a rich and personalized user experience that boosts productivity and helps drive user adoption across the business.

The SData gadget is one of many gadgets in the new SageCRM interactive dashboard. It consumes SData feeds. SageCRM can therefore display any information that is made available as SData feeds in the new interactive dashboard.

The SData gadget enables business partners to build customizations which consume SData feeds and display them in the interactive dashboard. Information such as purchase orders, invoices, and aged debt information can be easily displayed. As SageCRM itself is an SData provider, the gadget can also display native SageCRM SData feeds such as companies, opportunities, cases, or any custom entity added to the system.

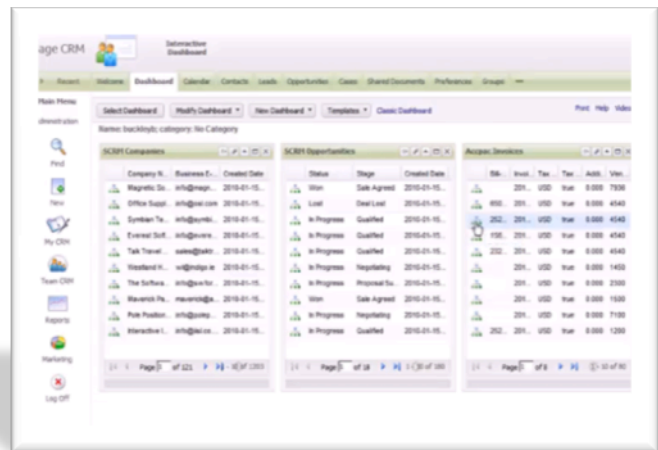
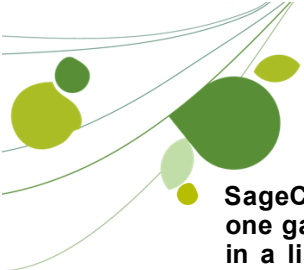


Figure 4. The SageCRM interactive dashboard is a productivity tool for SageCRM users. **Ctrl + Click** on the picture to go to a short YouTube video of the SData Gadget in action.

SData Gadget as a Codeless, Flexible, and Powerful Productivity Tool

The SData Gadget can be configured in a codeless manner to run on SData feeds from any application:

- The SData gadget is dynamically configured at runtime by consuming the SData schema. This means that the SData gadget can display any authenticated SData feeds in the interactive dashboard without the need for any coding. The feeds can be from SageCRM, any third-party application, or any integrated application which provides SData feeds.
- The SData gadget supports drilldown so that it is possible to, for example, add a gadget to display invoices and drill down from invoices to invoice line items without any coding.



SageCRM supports the ability to link SData gadgets together and to filter the contents of one gadget by the contents of another gadget. For example, when you highlight a customer in a list of companies, a linked gadget could display a list of invoices for that customer. The feeds can come from different sources so that one SData feed could come from SageCRM and the other could come from ERP or vice versa.

Conclusion

SageCRM has always used the most suitable technologies available to develop leading integration solutions and customization interfaces for its customers and business partners.

The new SData protocol is the unique technical strategy used by Sage to solve the business imperative of seamless interoperability between software applications.

SageCRM has adopted SData to provide an innovative, flexible, and relevant set of integration functionality and customization solutions in its v7.0 release.

- SageCRM provides SData feeds of its core entities but it also has the ability to provide SData feeds of customized fields, entities, and database views. Due to the dynamic nature of SageCRM, business partners and customers can amend or add database views, core entities, and custom entities providing real-time SData feeds.
- SageCRM supports the common CRM contract which provides the ability to synchronize and consume SData feeds specified in the common CRM contract. Due to the dynamic nature of SageCRM, it can also consume any other SData feeds even if they are not specified in the common CRM contract.
- SageCRM provides an SData Gadget in the interactive dashboard which has the ability to consume not only SageCRM SData feeds, but any SData feeds from any application. SData Gadgets can be linked so that the contents of one SData gadget can be filtered based on the contents of another SData gadget.

SageCRM is at the forefront of SData implementation in Sage. This allows SageCRM to continue to be a leader in providing integrated solutions for Sage customers over the coming years.

Further Information

∞ [SData Synchronization website](#)

∞ [Video demo of SageCRM using the Common CRM contract](#)

∞ [SData Specification website](#)

∞ [Video demo of the SData Gadget](#)

∞ [Common CRM Contract website](#)

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About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 68,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Insert BP contact details where appropriate

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