



Sage CRM

Sage ERP Integration Comparison Guide

Will Ivy
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1.0 Document Objectives

This document is for Sage North American channel partners, internal sales and marketing professionals who wish to designate the variety Sage 100 and 300 ERP integrations with Sage CRM editions to position best-fit solutions for customers and prospects.

Please use this guide as an appendix to the Sage CRM Messaging Guide.

	Sage 100 ERP to Sage CRM On-Premise	Sage 300 ERP to Sage CRM On-Premise	Sage 100 and 300 ERP to Sage CRM Cloud
Ideal for:	Sage 100 ERP prospect or customer looking for advanced integration and customization options.	Sage 300 ERP prospect or customer looking for advanced integration and customization options.	Sage 100 or 300 ERP prospect or customer looking for quick, simple, and affordable CRM integration. Supports a single customer database for the time being.
Data Synchronized	Customer, contact and order information from Sage 300 ERP.* Real-time bi-directional synchronization to and from Sage 100 ERP. Data edited in Sage CRM synchronizes with Sage 100 ERP.	Customer, vendor, contact and order history information from Sage 300 ERP.* Real-time bi-directional synchronization to and from Sage 300 ERP.	Customer, contact and 2 years of invoice information from Sage 100 or Sage 300 ERP One-way synchronization from Sage 100 and 300 ERP to Sage CRM. Accounting information not editable in Sage CRM.
Additional integration	New quotes and orders can be entered “on-the-fly” in Sage CRM and this information are synchronizes with Sage 100 ERP. Sage 100 ERP inquiries are available directly from Sage CRM. Maintain relationship stores marketing information from Sage CRM in	New quotes and orders entered in Sage CRM updates Sage 300 ERP. Lookup inventory from Sage 300 ERP Run Sage 300 ERP inquiries (accounts receivable, return authorization, project management, order entry, customer statistics and optional Sage 300 ERP fields)	Suggested Call List Sales Person Performance dashboard Sales Manager Performance dashboard Additional Dashboards <ul style="list-style-type: none"> • My Top 5 customers this month • My Top Products this Month

	Sage 100 ERP.	directly from Sage CRM. Promote relationship stores marketing information from Sage CRM in Sage 300 ERP.	<ul style="list-style-type: none"> • Customers >10K last Quarter • At Risk Customers • My Top 5 Customers this Year
Customization	Integration code is customizable with admin access. Additional customization using the ODBC driver on the Sage 100 ERP server.	Integration code is customizable with admin access.	None
System Requirements	Sage 100 ERP v 2014 or v 2015 An application server running one of the following: Microsoft Windows 2012 Server R2 Microsoft Windows 2012 Server Microsoft Windows 2012 R2 Server Essentials* Microsoft Windows 2012 Server Essentials* Microsoft Windows 2008 Server R2	Sage 300 ERP v2012 or v2014 An application server running one of the following: Microsoft Windows 2012 Server R2 Microsoft Windows 2012 Server Microsoft Windows 2012 R2 Server Essentials* Microsoft Windows 2012 Server Essentials* Microsoft Windows 2008 Server R2	Current or prior release of Sage 100 or 300 on premise ERP [Versions: Sage 300 V2012, v2014 and v2016] Currently not using on premise Sage CRM or Sage CRM Cloud Sage Data Connector must be installed / configured on server

*In order to use real time ERP data in CRM dashboards, reports, and from mobile devices, additional views are required to be created during implementation.