





Goldcrest solutions have developed an easy to install functional connector to link one of the leading CRM solutions, Microsoft Dynamics CRM, to the leading accounts package, Sage Line 50.

Benefits

The key benefits of the solution are as follows:

-  **Fully functional** – can transfer Quotes, Orders and Invoices from CRM to Sage Line 50
-  **Simple to install** – 10 minute automated installation
-  **Easy to maintain** – automatically generated log files and alerts
-  **Flexible deployment** – can automatically update records or update them manually

The power of any CRM system is its ability to link to other applications thus providing a 360 degree view of the customer. Just by storing customer details in a database does not mean that you know your customers better and are able to increase customer service and revenue as a result, rather an up-to-date and comprehensive customer database is an excellent platform to link to other databases to increase your knowledge of the customer.

The 360 degree customer view



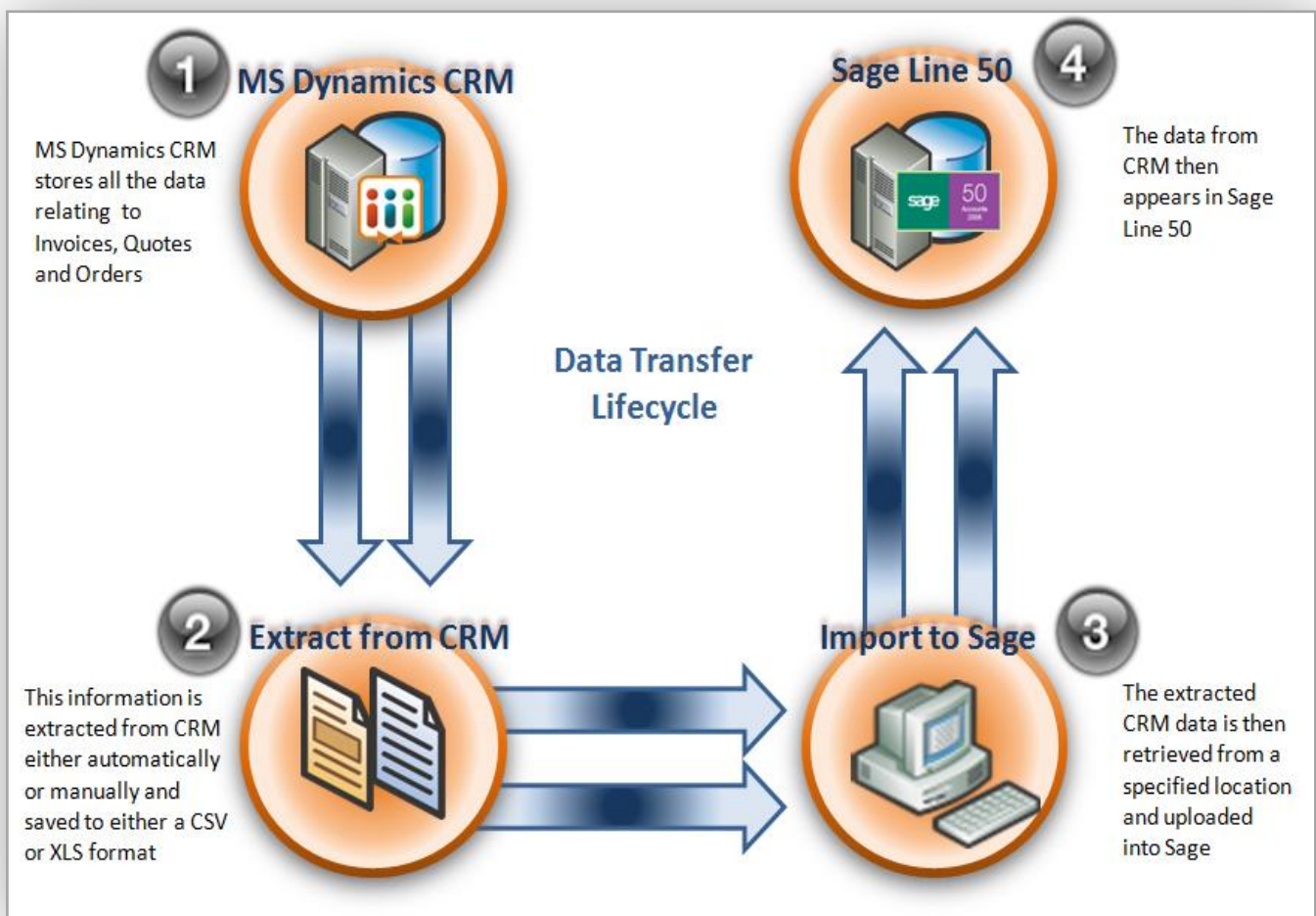
Consider this scenario, a customer contacts your customer service department after retrieving their record from your CRM system you may know when they last spent money with you, how many times they have contacted the you and all correspondence that has been sent, it may, therefore, be possible to conclude that because the customer is calling you they are actively engaged with your company and are therefore likely to spend more money with you.

If, however, you link the CRM system to the accounts system, such as Sage Line 50, it is possible to see that the customer has outstanding unpaid invoices, poor payment history and have exceeded their credit limit.

This may therefore affect the way you deal with that customer and crucially it may mean you are able to pinpoint other customers that are likely to spend money with your company.

GoldCrest Solutions have developed a flexible solution to allow the transfer of data from quotes, orders and invoices to be transferred from CRM Sage Line 50 in a flexible, cost effective way.

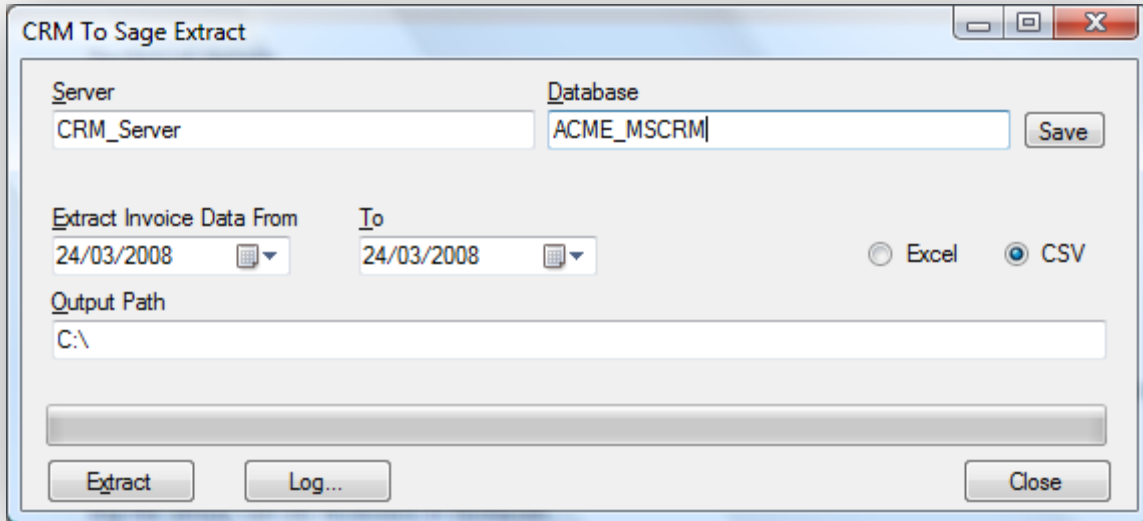
Overview of how MS Dynamics CRM integrates to Sage Line 50



Technical details

Our solution operates simply by exporting CSV or XLS files from CRM based on a date range (which can be manually or automatically configured) after this stage it is possible to review the CSV or XLS file and make any manual amendments deemed necessary.

Export Screen



The screenshot shows a Windows-style dialog box titled "CRM To Sage Extract". It contains the following fields and controls:

- Server:** Text box containing "CRM_Server".
- Database:** Text box containing "ACME_MSCRM|".
- Save:** Button to the right of the Database field.
- Extract Invoice Data From:** Date picker showing "24/03/2008".
- To:** Date picker showing "24/03/2008".
- Format:** Radio buttons for "Excel" and "CSV", with "CSV" selected.
- Output Path:** Text box containing "C:\".
- Buttons:** "Extract", "Log...", and "Close" at the bottom.

The next stage of the operation is to check that the exported records are valid, this includes checking for duplicates or other problems, such as incorrect product name, and importing the checked records into Sage Line 50 against the appropriate customer record.

The imported files are then archived for future reference, and any anomalies are recorded in a log file which can be reviewed in Notepad.

For more information regarding our integration from CRM to Sage Line 50 or if you have any other questions regarding Microsoft Dynamics CRM contact us today.

Goldcrest Solutions

Bloxham Mill, Barford Road,
Bloxham, Banbury
OX15 4FF

+44 (0) 8700 610100
sales@goldcrest.co.uk