

SageLink Integration



open CRM

Bridging the gap between Sales and Accounts.

Does it ever feel like the communication lines between your sales team and your accounts department are non-existent? Your sales team lives in your CRM system and your accounts team spend most of their day sitting in Sage 50 Accounts. Ensuring that the two systems (and the two teams) keep each other updated can be difficult.

A steady flow of information

With SageLink and Sage Uploader for OpenCRM, you can be sure that the information in the two systems match, down to the product nominal codes, and that both of your teams have the information they need to stay on track. You can choose to either create your Sales Orders in OpenCRM, send these across to Sage 50 Accounts to carry out your invoicing from Sage or create your Invoices in OpenCRM and then send these to Sage 50 Accounts. You choose which method best suits your business model. You can even keep your product database updated in both systems.

If you are interested in knowing more about specific settings in these two integration tools, we have FAQs that explore these in more detail.

When you create an Invoice in OpenCRM, it gets sent to your Sage 50 Accounts system via SageLink and replicates that Invoice on your Sales Ledger. If that invoice is linked to a Product or Company that does not exist in your Sage 50 Accounts, SageLink will create them.

Once the Invoice is updated in Sage 50 Accounts, the information is sent back to your OpenCRM using the Sage Uploader. The Invoice is updated with any new information, including recording any payment. If you have created or updated any Products in Sage 50 Accounts, the Sage Uploader will ensure that the two systems match. It can also update the outstanding balances on your company records in OpenCRM.

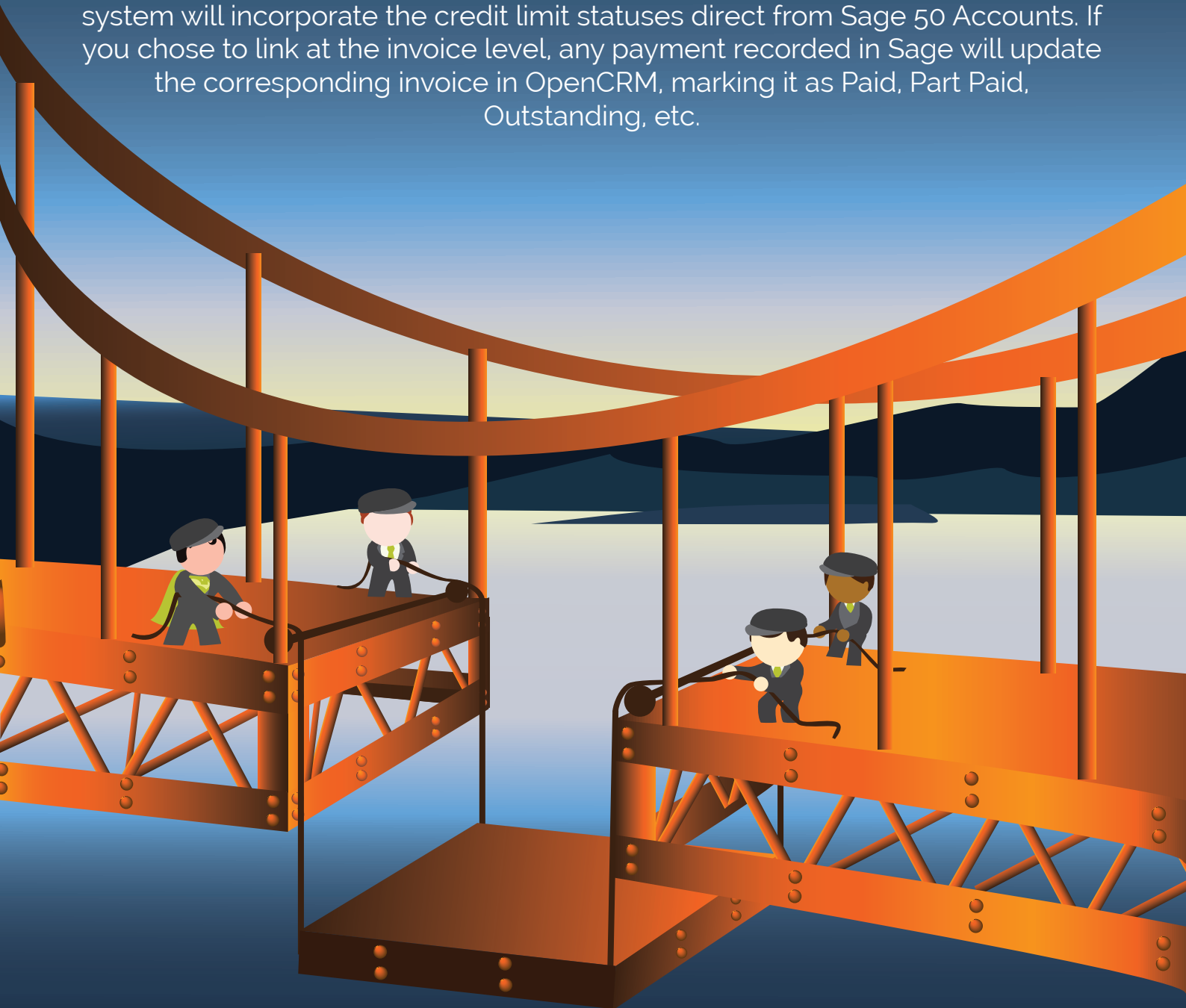


A place to meet in the middle

Your accounts team won't have to request any information from sales, all invoices (or sales orders) are sent over to Sage 50 Accounts, you choose whether this should be fully automatic or manually managed by your team. Once they arrive into Sage, your accounts team can approve and post them to the Sales Ledger. If you prefer to use departments when transferring invoices, these can be set up in OpenCRM.

Your sales team won't have to remember to send anything, they'll know that when they view a customer's record, the invoice status and outstanding balances are accurate and up-to-date. They can even take a peek at the linked Sage activity at the company level, using the Sage subtab on a company record in OpenCRM.

Never again will someone accidentally raise a new sales order against a customer in breach of your credit control processes, because your OpenCRM system will incorporate the credit limit statuses direct from Sage 50 Accounts. If you chose to link at the invoice level, any payment recorded in Sage will update the corresponding invoice in OpenCRM, marking it as Paid, Part Paid, Outstanding, etc.



The nuts and bolts

All of this information is at your fingertips, visible from any browser window, rather than hidden away in a restricted system. SageLink will poll your OpenCRM system and Sage Uploader will poll your Sage 50 Accounts, using your approved processes, at a period defined by you (i.e. every 15min, once an hour, every morning at 5am, etc), so you know the information is always up to date.

The annual cost of the SageLink integration is £499.00 (ex. VAT), which includes SageLink, the Sage Uploader, as well as support and upgrades. The component does also require a Sage 50 Accounts user licence. The installation and configuration of the integration component has an associated cost of £400.00 (ex. VAT), which includes a short training session on the use of SageLink and Sage Uploader.



No more shouting from shore to shore

Stop worrying about trying to work out who has paid, who still owes, or whether or not it is safe to send out a new sales order. With the SageLink integration, you can be sure that your OpenCRM system and Sage 50 Accounts are always in sync. Bridging that gap between sales and accounts will give you a foundation upon which to grow your business.



Most of our customers (80%) use the default field mapping. However, the remaining 20% may require some minor adjustments when mapping fields from OpenCRM to Sage. Let's chat about any specific requirements to ensure seamless integration that meets your needs.

Keeping information
flowing between Sales
and Accounts.

open crm

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