

An abstract graphic in the upper half of the page features several thin, curved green lines that sweep across the frame. Interspersed among these lines are various sized circles in shades of green, from light lime to dark forest green. The circles and lines create a sense of movement and interconnectedness.

SData in Sage CRM

Raising the Bar on Integration

Sage CRM



Executive Summary

Sage is a global provider of business solutions to small to medium 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 Sage CRM 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. Sage CRM has been a market leader in the deployment of truly integrated CRM-to-ERP solutions dating back to its first Accpac integration in 2004. Since then, Sage CRM has successfully added integrated solutions across the globe including Ligne 100 in France, OfficeLine and ClassicLine in Germany, MAS in the US, Sage 200 and Sage 1000 in the UK and many more.

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

- Sage CRM supports a flexible and extensible SData provider interface to enable any third-party products to read Sage CRM data.
- Sage CRM supports an extensible and customisable implementation of the common CRM integration contract.
- Sage CRM 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 Sage CRM.

The implementation of SData into Sage CRM will ensure that Sage CRM 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 World Wide Web

ERP Products: Any Sage accounting products 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, Sage CRM 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 synchronisation called Sage Synchronisation 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.

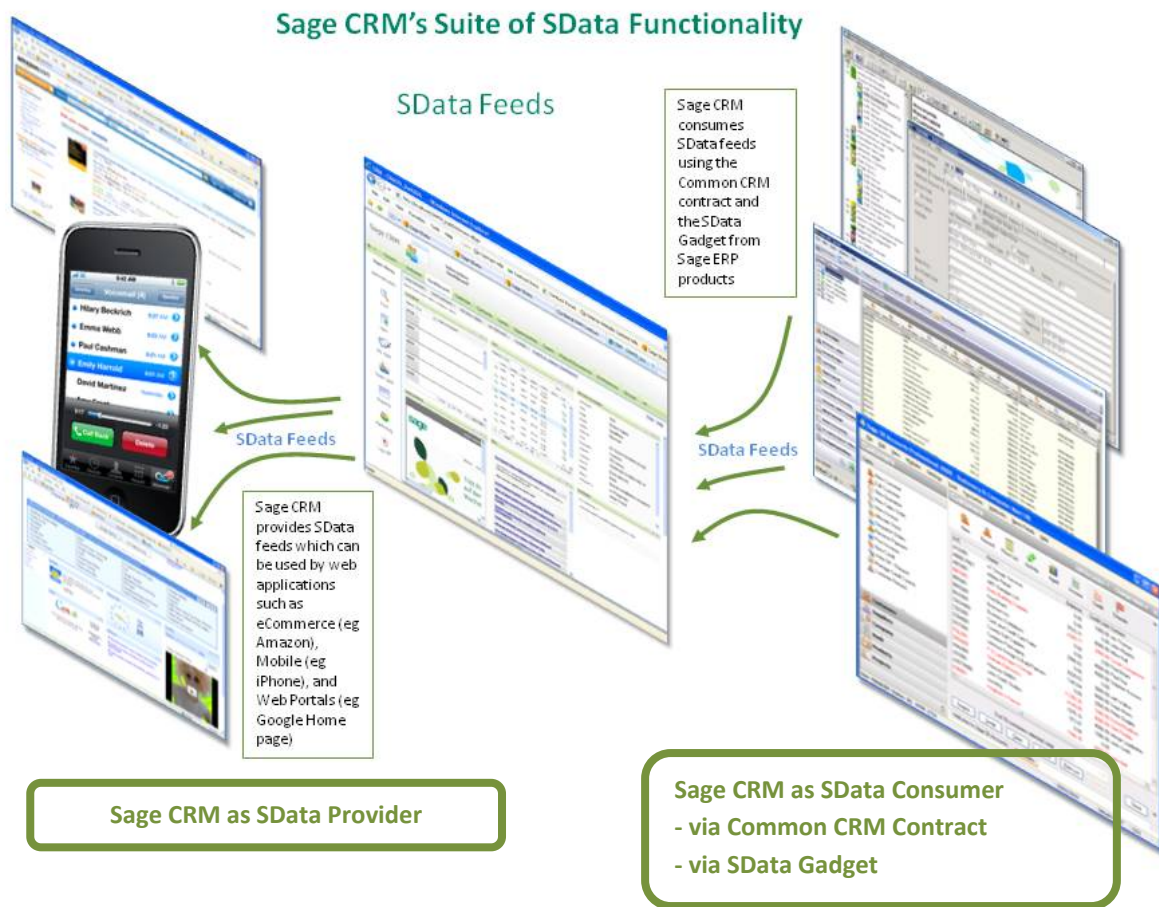


Figure 1. Overview of Sage CRM SData functionality

Sage CRM as an SData Provider

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

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

- ERP applications can display Sage CRM 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 Sage CRM customer, opportunity and other information in their own screens.
- Business partners can use Sage CRM data to build their own bespoke solutions and integrations for their customers.

Sage CRM's Extensible, Customisable Implementation of SData Provider Support

Sage CRM's implementation of SData provider support is powerful because it is extensible and customisable.

- SData feeds will be available from Sage CRM v7 and will be made available on the SageCRM.com hosted platform as well.
- SData feeds are read only in Sage CRM 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 Sage CRM.
- 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 Sage CRM. This allows business partners and integration teams to customise 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.

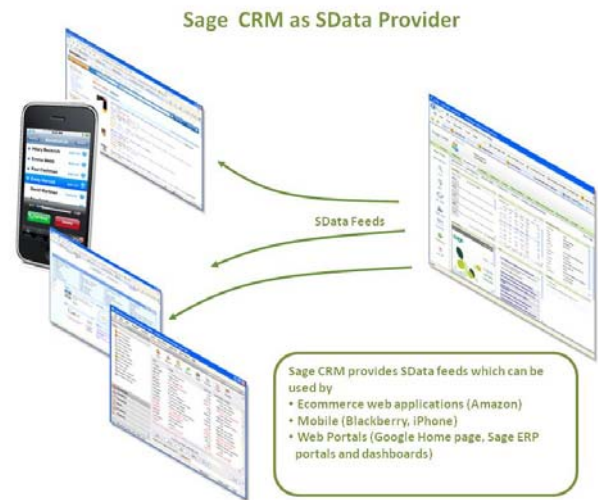


Figure 2. Sage CRM's SData provider feeds can deliver a wide variety of rich customer experiences

Sage CRM 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. Sage CRM is able to take this information and either store the data in the CRM system or display it in the Sage CRM user interface. Sage CRM 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, Sage CRM synchronises account, quote, order, and product information from ERP applications and displays it in the Sage CRM product. Sage CRM also consumes other information provided by the ERP product and displays it in read-only screens.

The following cross application business processes are supported:

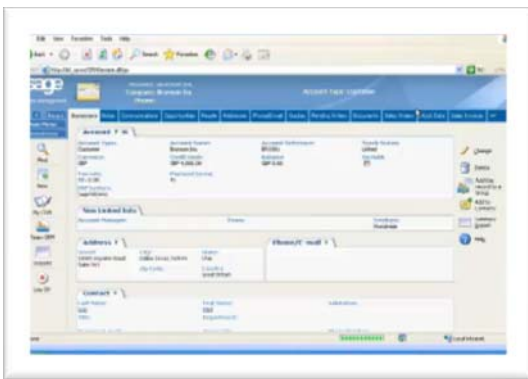


Figure 3. Short 30 sec demo of an integration with Sage CRM using the Common CRM contract.
Ctrl + Click on the picture to navigate to the YouTube video.

- 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 Sage CRM 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 Sage CRM 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, Customisable Common CRM Contract Support

Sage CRM's implementation of the common CRM contract is powerful because it is extensible and customisable.

- Sage CRM supports extensibility of the common CRM contract. Sage CRM 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 synchronise or display them in Sage CRM.
- Sage CRM 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 Sage CRM v7 which enables users to view and act on data displayed in a collection of 'gadgets'. These gadgets are customisable and configurable so that users can create their own collection in order to satisfy their specific daily needs. This feature delivers a rich and personalised user experience that boosts productivity and helps drive user adoption across the business.

The SData gadget is one of many gadgets in the new Sage CRM interactive dashboard. It consumes SData feeds. Sage CRM 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 customisations which consume SData feeds and display them in the interactive dashboard. Information such as purchase orders, invoices, aged debt information can be easily displayed. As Sage CRM itself is an SData provider, the gadget can also display native Sage CRM SData feeds such as companies, opportunities, cases or any custom entity added to the system.

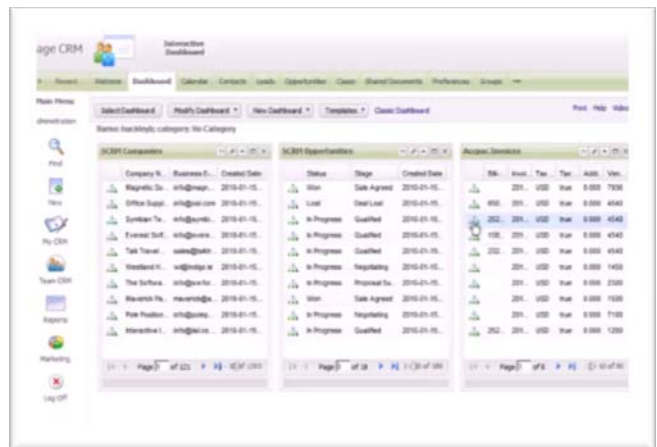



Figure 4. Sage CRM's interactive dashboard is a productivity tool for Sage CRM users. **Ctrl + Click** on the picture to go to a short YouTube video of the SData Gadget in action.

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 Sage CRM, any third party application or 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.



- Sage CRM 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 Sage CRM and the other could come from ERP or vice versa.

Conclusion

Sage CRM has always used the most suitable technologies available to develop leading integration solutions and customisation 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.

Sage CRM has adopted SData to provide an innovative, flexible and relevant set of integration functionality and customisation solutions in its v7 release.

- Sage CRM provides SData feeds of its core entities but it also has the ability to provide SData feeds of customised fields, entities and database views. Due to the dynamic nature of Sage CRM, business partners and customers can amend or add database views, core entities and custom entities providing real-time SData feeds.
- Sage CRM supports the common CRM contract which provides the ability to synchronise and consume SData feeds specified in the common CRM contract. Due to the dynamic nature of Sage CRM, it can also consume any other SData feeds even if they are not specified in the common CRM contract.
- Sage CRM provides an SData Gadget in the interactive dashboard which has the ability to consume not only Sage CRM 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.

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

Further Information

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|-------------------------------------------------|------------------------------------------------------------------------|
| ● SData Synchronisation website | ● Video demo of Sage CRM 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, Sage CRM, 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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