



How to show a message within SageCRM when a customer is ON HOLD within Sage Accpac ERP

Scenario:

When a sales person logs into SageCRM they need to know when a customer is ON Hold within the Accounting System.

Here is the SageCRM company Gatecom, Inc. showing a red alert that this "Customer is on hold".

The screenshot displays the SageCRM interface for the company Gatecom, Inc. A prominent red alert banner at the top of the main content area reads "Customer is on hold". The interface includes a navigation menu at the top with various options like Dashboard, Marketing, and Communications. A sidebar on the left contains icons for Find, New, My CRM, Team CRM, Reports, Marketing, and Log Off. The main content area is divided into sections for Company, Address, and Phone/E-mail, each with a dropdown arrow. The Company section shows details such as Company Name, Website, Status, and Accpac Customer Number. The Address section shows Street, City, State, Zip Code, and Country. The Phone/E-mail section shows Business, Fax, and Info. A "Request Credit Increase" button is visible in the bottom right corner of the main content area.



Here is the corresponding setting within Sage Accpac ERP that the same Customer is set to "On Hold" within Sage Accpac ERP.

The screenshot shows the 'SAMINC - A/R Customers' window. The 'Customer Number' is GATE01 and the 'Customer Name' is Gatecom, Inc. The 'On Hold' checkbox is checked and highlighted in yellow. An arrow points from the 'Short Name' field to the 'On Hold' checkbox. Other fields include National Account No., Group Code (RTL), Last Maintained (08/04/2008), Short Name (Gatecom, I), Start Date (03/25/2008), Address (8800 N. Gainey Centre, Suite 200), City (Scottsdale), Country (United States), State/Prov. (AZ), Telephone ((480) 544-7944), Zip/Postal Code (85258), E-mail (info@gatecom.com), and Web Site (http://www.gatecom.com). Buttons for Save, Delete, and Close are at the bottom.

Solution Assumptions:

This solution **assumes** that both SageCRM and Sage Accpac ERP are using **SQL Server**.

Solution:

To make this possible several steps need to be performed within SageCRM.

Step 1:

We need to connect directly to the Sage Accpac ERP Database. Within SageCRM Navigate to "**Administration | Advanced Customization | Tables and Databases**" and select the "**New Database Connection**" button.



Once the button is selected you will see a “Database Details” screen as shown below.

You will need to match the values in the print screen below to your actual production environment

Database Driver: Microsoft SQL Server

Server Name: “your SQL Server Instance Name”

Database name: Your Sage Accpac ERP Database Name, mine is “SAMINC”.

Database Description: The same as the Database Name above.

User Name: Your SQL Server User ID

Database Password: The above user’s Password.



Step 2:

Now we need to connect to the table in the Database we just connected to. In order to do this navigate to "**Administration | Advanced Customization | Tables and Databases**" and select the "**New Table Connection**" button.

Now you need to make your values match my values in the print screen below:

The screenshot shows the Sage CRM interface with the navigation path: Administration -> Advanced Customization -> Tables and Databases. The 'Table Details' form is displayed with the following fields:

- Table Name:** ARCUS
- Table Caption:** ARCUS
- Database:** SAMINC
- ID Field Name:** (empty)

Buttons for Save, Cancel, and Help are visible on the right side of the form.

Table Name: ARCUS

Table Caption: ARCUS

Database: SAMINC (This is the database you created in Step 1 above.)

After saving the above information you should see the Database Connection and the Table connection listed as shown in the print screen below:

The screenshot shows the Sage CRM interface with the navigation path: Administration -> Advanced Customization -> Tables and Databases. A table is displayed with the following columns and data:

SAMINC	Change	Delete
ARCUS		



Step 3:

Now we need to place some code on the Company Entry Screen. So navigate to Administration | Customization | Company | Screens Tab and select the customize button next to the "Company Entry Screen".

At this point select from the list of screen fields on the left the "Company Name" field, as shown in the print screen below.

The screenshot shows the SageCRM Administration interface. The breadcrumb navigation is Administration > Customization > Company. The main window title is 'Maintain Screen Definition Company Entry Screen (ASP: CompanyBoxLong)'. On the left, there is a navigation menu with options like Users, Customization, and Data Management. The main area is split into two panes: 'Desktop HTML Screen Contents' and 'Properties'. In the 'Desktop HTML Screen Contents' pane, a list of fields is shown, with 'Company : Company Name' highlighted. In the 'Properties' pane, the 'Field' is set to 'Company : Company Name'. The 'CreateScript' area contains the following JavaScript code:

```
var recAccpacCust = eWare.FindRecord("ARCUS", "IDCUST=" + Values('comp_idcust') + "");
var bOnHold = recAccpacCust('SWHOLD');
if (bOnHold == 1)
{
Valid = false;
ErrorStr = 'Customer is on hold';
}
```

Copy the code in the table below and paste it into the "CreateScript" screen area for the Company Name field. After posting the below code in the above Create Script area click on the Update button. Finally, click on the Save button.

Beginning of Code

```
var recAccpacCust = eWare.FindRecord("ARCUS", "IDCUST=" + Values('comp_idcust')
+ "");
var bOnHold = recAccpacCust('SWHOLD');
if (bOnHold == 1)

{
Valid = false;
ErrorStr = 'Customer is on hold';
}
```

End of Code



Now you should be able to set a Sage Accpac ERP Customer on HOLD. And if that Customer has been synced over to SageCRM as a Company then when you navigate to that company you should see the red alert that the "Customer is on hold", as shown in the print screen below.

The screenshot shows the Sage CRM interface for a company record. At the top, a red banner displays the alert: "Customer is on hold". The company details are as follows:

Company Name: Gatecom, Inc.	Type: Customer	SLA: Customer Service
Website: http://www.gatecom.com	Status: Active	Accpac Customer Number: GATE01
Segment: Agriculture	Employees: < 20	Revenue: \$5M - \$10M
Territory: Worldwide	Account Manager: System Administrator	Mail Restriction:

Accpac Customer Information:

Group Code: Retail Sales Group	Tax Group: California State Tax Group	Terms Code: 2% - 10 days, Net 30	Credit Limit: 10000
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Address:

Street: 8800 N. Gainey Centre Suite 200	City: Scottsdale	State: AZ
	Zip Code: 85258	Country: United States

Phone/E-mail:

Business: 480 544.7944
Fax:
Info: info@gatecom.com

Special Thanks to Lisa and Stuart for the code that got me started.

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