# Sage SalesLogix | ERP Link

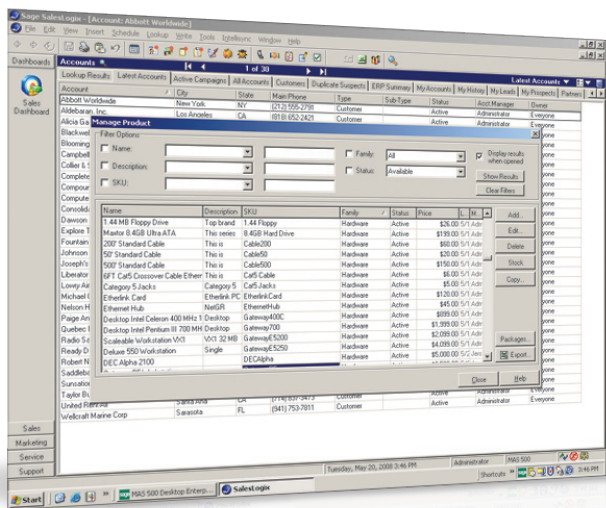## Your relationships. Your information. Your CRM.

### Get a Complete View of Your Customers

Sage SalesLogix ERP Link is a business management solution that provides your organization with cross-departmental visibility into your prospects and customers by leveraging integration between Sage SalesLogix and Sage MAS 500 ERP. It drives organizational efficiencies and ensures that your business is operating with a complete view of critical customer interactions. Sage SalesLogix ERP Link enables everyone in your organization—from sales and marketing to accounting and finance to support, manufacturing, and distribution—to work together efficiently to build profitable customer relationships.

### Eliminate Duplicate Data Entry and Inconsistencies

Sage SalesLogix ERP Link ensures front and back office data consistency within customer records, whether it originated in Sage SalesLogix or Sage MAS 500—eliminating duplicate data entry and/or data inaccuracies. Vital back office customer information such as order history, payments, open invoices, inventory, and shipping information can be viewed within Sage SalesLogix, along with contacts, notes, activities, history, and other account information.

Customer records found in both applications are seamlessly associated with each other so contacts and addresses remain consistent across systems. Multiple addresses can even be associated to each account, so if you need to send product updates to one address and invoices to another, for instance, you can do so. New customers can be added in one easy step—enabling Sage SalesLogix users to convert an account into a Sage MAS 500 customer, complete with Sage SalesLogix information.



● Products associated with an account are available in both Sage SalesLogix and Sage MAS 500 systems so users have accurate product information, eliminating errors.

**Try Sage SalesLogix Now!**

trial.sagesaleslogix.com

For More Information
Call 800-643-6400

## Provide Accurate, Timely Information to Front Office Users

Sage SalesLogix ERP Link provides your front office users with access to the most current product information, specialized pricing, promotional discounts, and visibility into real-time inventory status when creating sales orders. In addition, without having to leave Sage SalesLogix and prior to placing an order, users can benefit from a complete view of customer account data such as credit status, terms, and account balance. Marketing teams can calculate "real-world" return-on-investment (ROI) based on actual revenue directly correlated to their marketing programs. And, customer service representatives can address customer queries effectively and with confidence by providing them with shipping, invoicing, and returns information that they need.

## Reduce Inquiries and Save Time for Back Office Users

Sage SalesLogix ERP Link reduces the time and resources required of accounting, manufacturing, and distribution to support your front office teams. Since Sage SalesLogix ERP Link eliminates duplicate data and order entry, customer orders are more accurate. And, with the ability to view current order status, pricing discount schedules, and service and maintenance contracts from within Sage SalesLogix, the number of inquiries from sales, marketing, and customer service regarding product, pricing, order, invoices, outstanding balances, and product availability will be reduced.

## Provide an Exceptional Customer Experience

Since your entire organization has a complete view of the customer and improved organizational workflow and efficiencies, your customers will experience enhanced customer service levels. Sales representatives have access to complete product and customer information when handling inquiries and placing orders. And, because processes between Sage SalesLogix and Sage MAS 500 are synchronized, accurate orders move to accounting more quickly and customers receive product sooner, which will raise your organization's customer satisfaction levels.

## Increase Productivity Across the Entire Organization

The process of moving from sales opportunity, to order, to revenue recognition is much more seamless when employees are utilizing a system without borders. Using information from Sage MAS 500, such as sales pricing, customer discounts, and sales tax calculation, sales teams can create accurate orders which appear "on hold" in Sage MAS 500 pending approval from accounting. And, since Sage SalesLogix users can select their inventory items and look up current quantities available in the warehouse, customers experience little-to-no backorders and receive their orders in a timely manner. The faster an order is placed, shipped, and invoiced, the faster payment will be received, which enables your organization to improve cash flow and accelerate revenue recognition.

From Sage SalesLogix, customer service employees may create a back office invoice directly from a service contract, to efficiently go from contract to invoice. This will accumulate and track all ticket activity related to the contract residing in Sage SalesLogix, allow editing of details, and then submit the total amount due as an invoice within Sage MAS 500. The service contract invoice will be treated as a regular invoice and the contract will continue to be associated to the invoice in Sage MAS 500, for a comprehensive view of the transaction details in both applications.

● Customer Service teams have access to accurate invoicing and account management details to effectively address customers' needs.
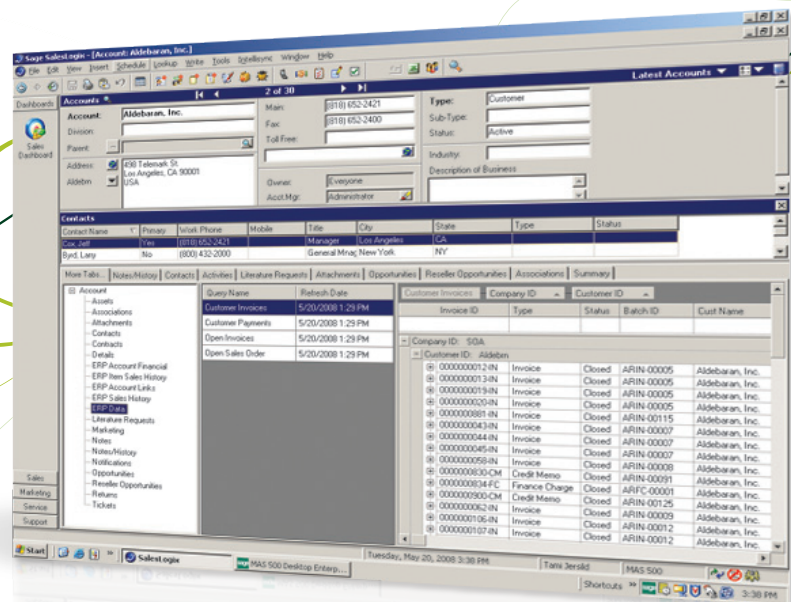
**FEATURES**

## Accounting Information
- View credit limit, current balance, and aging Accounts Receivable.
- Access account type, status, regional tax, billing, and terms.
- View last activity, sales Year-to-Date, and average days to pay.

## Historical Invoices and Orders
- View invoice number, date, type, and vendor.
- Reference Purchase Order numbers, amounts, tax discount, and freight information.
- Evaluate open invoice due dates, balance, and status.
- View order date, number, type, and ship-to information.

## Payments/Receipts
- View method of payment, invoice number, check number, transaction amount, and status.

## Product Information and Inventory
- View product name, part number, family, group, and type.
- Access pricing, discount schedules, substitute products, units, inventory, and costs.
- View real-time product inventory on-hand, available at multiple warehouse sites, allocated, and on backorder.

## Sales Orders
- Instantly create customers in Sage MAS 500 from Sage SalesLogix accounts, without entering a sales order.
- Generate accurate sales orders associated with a customer record based upon current inventory and pricing models.
- Set realistic customer expectations on receipt of materials by providing real-time shipping quotes.
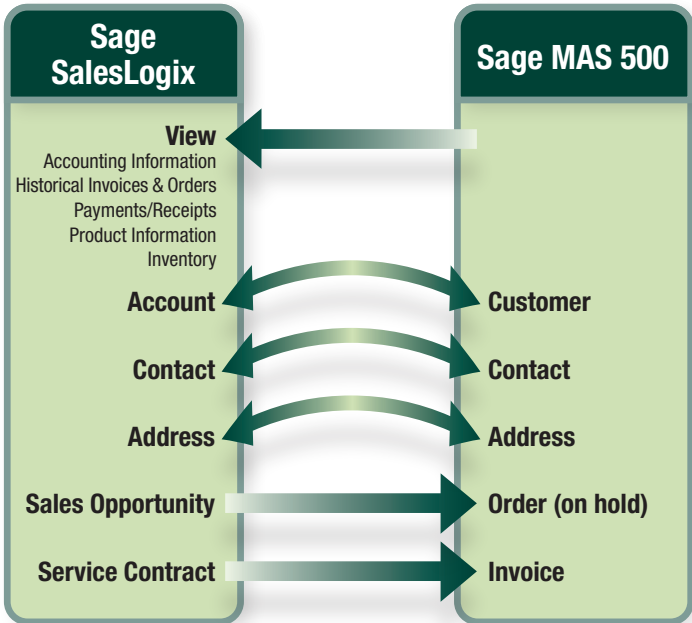
## Queries and Reports
- Customize ad-hoc queries for powerful drill-down capability and custom reporting.
- Tailor bi-directional synchronization of query data, scheduled or on demand.
- Eliminate duplication with query validation of customer and account records.

## Configuration and Customization Options
- Utilize the out-of-the box Customer, Contact, Address, Sales Order, and Invoice templates to ensure you are collecting the required information, regardless of the application in which the data is originated.
- Assign different templates to employees, based on access rights.
- Use field mapping for each template, including applying conditions to specify when data should move.
- Define Sites within Sage SalesLogix to associate to Sage MAS 500 Warehouses for stock status.
- Associate Sage MAS 500 Items to Sage SalesLogix Products to allow for accurate orders.

## Synchronization
- Perform batch synchronization or force a sync on demand with the Sage MAS 500 integration. Active syncs can either be scheduled or issued as an immediate refresh.

**Sage SalesLogix**

**Sage MAS 500**

View
Accounting Information
Historical Invoices & Orders
Payments/Receipts
Product Information
Inventory

Account → Customer

Contact → Contact

Address → Address

Sales Opportunity → Order (on hold)

Service Contract → Invoice

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**About Sage MAS**

Sage MAS 500 ERP is a highly reliable, robust and integrated series of business applications that provides comprehensive functionality based on Microsoft® SQL Server technology. Designed for companies with 20 to more than 1,000 employees, Sage MAS 500 includes modules that handle financials, distribution, manufacturing, human resources, payroll, project accounting, and e-commerce. Sage MAS 500 has earned numerous industry awards for leading-edge technology and superior customer service. Additionally, Sage and its business partners offer professional application training and implementation services to provide a smooth and effective transition to Sage MAS 500.

**About Sage SalesLogix**

Sage SalesLogix provides a complete view of customer interactions across departments—providing information and insights for better planning, managing, and forecasting. Your teams will have the tools to increase sales, reach more profitable customers, enhance the customer experience, and anticipate customer needs. Sage SalesLogix offers flexible access, deployment, and payment options to address business requirements.

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