

2008

MIM50 Functionality

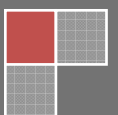
Linking Microsoft Dynamics 4.0 to Sage 50

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Microsoft Integration Module - MIM 50

Features Overview

Live Bi-directional copy

- Account information
 - Name
 - Full address
 - Phone
 - Fax
 - Website
- Primary contact
 - Name
 - Phone

Batch Copy

- Sage Line 50 > Microsoft Dynamics CRM
 - Customer information
 - Supplier information
 - Product information
 - Name
 - Unit price
 - Stock level
 - "Sage Line 50 Price List"
 - Units of measure
 - Categories (to subjects)
- **Order Quote Processing from opportunities created within CRM**
 - Promote/ignore to line 50
 - Orders
 - Invoices
 - Quotes
 - Confirmation record of transaction
 - Item processed / ignored into Sage 50
- **'Write in' products (Special Product) – from quick quote screen or standard opportunities**
 - Add in special products and services not included in Sage 50 price list
 - Taxable product
 - Non-Taxable product
 - Taxable service
 - Enter detail
 - Description
 - Quantity
 - Tax
 - Price
 - Comments

MIM50 Screen

- Account information (as bi-directional)
- Account balance
- Account credit limit
- Account terms
- Account settlement days
- Account credits
- Account invoice summary
 - Invoice reference
 - Invoice type
 - Invoice date
 - Customer order number
 - Consignment number
 - Payment reference
 - Posted indicator
 - Printed indicator
- Account invoice detail
 - Total value
 - Net value
 - Tax value
 - Carriage net
 - Carriage tax
 - Gross net value
 - Gross tax value
 - Invoice line detail
 - Product code
 - Product description
 - Unit
 - Quantity
 - Unit price
 - Discount percentage
 - Discount amount
 - Net value
 - Gross value
 - Receipt detail
 - Paid flag
 - Transaction number
 - Reference
 - Date
 - Bank code
 - Details
 - Due date
 - Received amount

- **Quick quote**
 - Select product by product code or by category
 - Product detail
 - Product code
 - Category
 - Description
 - Base price
 - Unit
 - Live stock level
 - Volume discount grid (percentage and amount)
 - Get price function – gets a live price against client and product discount grid plus gets a supplier or customer price based on account type
 - Quote builder
 - Select client contact
 - Assign to
 - Quote description
 - Opportunity probability percentage
 - Quote total calculator
 - Quote discount calculator
 - Gross price calculator
 - Invoice item line detail
 - Product code
 - Category
 - Description
 - Comments
 - Unit
 - Quantity
 - Price after client discount
 - Total price of item line
 - Promote built quote to quote on CRM and Line 50 and CRM opportunity
 - Promote built quote to sales order
 - Promote built quote to invoice
 - Promote to PO for suppliers

MIM50 Admin Screen

- Manage access to MIM50 screen per user
- Test Sage Line 50 connection
- Batch copy customers/suppliers Sage Line 50 > CRM
- Batch copy products Sage Line 50 > CRM
- License Manager
- Test CRM Connection