

Sage Integration

Using ZYNK connector, a link between Sage and Creatio is established that will initially deal with Accounts and Contacts 2-Way synchronisation.

Synchronisation Table:

Account and Contact Sections

Creatio Field	Creatio Section	Sage	Sync	Notes
Name	Account	Company Name	2 - Way	
Sage Ref	Account	Customer A/C	Sage > Creatio	New Creatio Field. Account Code auto generated in Sage.
Balance	Account	Balance	Sage > Creatio	New Creatio Field
On Hold	Account	On Hold	Sage > Creatio	New Creatio Field
Primary Phone	Account	Telephone	2 - Way	
Credit Limit	Account	Credit Limit	2 - Way	
Id	Account	Website	1-Way	This is the unique Creatio ID for the account and should not be deleted.
Invoice Address (Registered Address in Sage)				
Invoice Contact (Name and Email)	Contact	Contact Name	Creatio > Sage	New Creatio Field
	Contact	Email1	Creatio > Sage	
Address Type	Account Address	-	Creatio > Sage	"Actual" in Creatio = Registered/Invoice address in Sage
Address	Account Address	Address 1	Creatio > Sage	
City	Account Address	Town	Creatio > Sage	
State/Province	Account Address	County	Creatio > Sage	
Country	Account Address	Country	Creatio > Sage	
Zip/Postal Code	Account Address	Post Code	Creatio > Sage	
Shipping Address (Delivery Address in Sage)				
Delivery Contact (Name and Email)	Contact	Contact Name	Creatio > Sage	New Creatio Field
	Contact	Email	Creatio > Sage	
Address Type	Account Address	-	Creatio > Sage	"Shipping" in Creatio = Delivery address in Sage

Address	Account Address	Address 1	Creatio > Sage	
City	Account Address	Town	Creatio > Sage	
State/Province	Account Address	County	Creatio > Sage	
Country	Account Address	Country	Creatio > Sage	
Zip/Postal Code	Account Address	Post Code	Creatio > Sage	

Products Section

Creatio Field	Creatio Section	Sage	Sync	Notes
Name	Product	Description	Creatio > Sage	
Code	Product	Product Code	Creatio > Sage	
Price	Product	Sales Price	Creatio > Sage	
Inactive	Product	Inactive	Creatio > Sage	
Unit Of Measure	Product	Unit Of Sale	Creatio > Sage	
Type (Sage Item Type)	Product	Item Type	Creatio > Sage	Creatio "Sage Item Type" is configured in the Creatio "Product Types" Lookup. If Type is blank, NonStock is chosen by default.
Nominal Code	Product	Nominal Code	Creatio > Sage	The Nominal code must exist in sage. If it does not exist, the sage record will not be Created/Updated. In the Product Type Lookup, you can set Default Nominal codes.

Invoice Section

Invoices are sent to Sage from Creatio once the user clicks the "Send to Sage" button, initiating the sync process. When the invoice is posted and paid in full in sage, the Creatio invoice record is updated with the payment paid and the invoice status is updated

Any sage Sales Receipts (SR) will be added to the account/Invoice sections in the “Account Sale Receipts” Detail.

Creatio Field	Creatio Section	Sage	Sync	Notes
Sage Ref	Account	Customer A/C	Creatio > Sage	Fetches from Creatio Account Record
Order	Invoice	Customer Order No.	Creatio > Sage	Available in Order Tab in Sage invoice
Primary Phone	Account	Customer Telephone No	Creatio > Sage	Available in Order Tab in Sage invoice
		Inv. No.		Auto Generated in Sage
Date	Invoice	Date	Creatio > Sage	
		Total GBP £		Auto Generated in Sage
		Total GBP £ (Vat)		Auto Generated in Sage
		Amount Due		Auto Generated in Sage
Payment Amount	Invoice	Transaction Amount	Sage > Creatio	Updated when invoice is paid in full in Sage.
Payment Paid	Invoice	Transaction Date	Sage > Creatio	Updated when invoice is paid in full in Sage.
Payment Status	Invoice		Sage > Creatio	Updated when invoice is paid in full in Sage. Status = Paid.
Sales Receipts (Account Sale Receipts Detail)				
Payment Amount	Invoice/Account	Amount	Sage > Creatio	
Payment Reference	Invoice/Account	Reference	Sage > Creatio	
Payment Date	Invoice/Account	Date	Sage > Creatio	
Invoice Products/Services (Invoice items in Sage)				
Code	Product	Product Code	Creatio > Sage	
Name	Product	Description	Creatio > Sage	
Quantity	Invoice Product Detail	Quantity	Creatio > Sage	
Price	Invoice Product Detail	Price	Creatio > Sage	Fetches from Creatio Account Record
		Net £		Auto Generated in Sage
		Vat £		Auto Generated in Sage

Discount Percent		Discount Percentage	Creatio > Sage	
Nominal Code	Product	Nominal Code	Creatio > Sage	<p>Fetches from the Product Catalogue in Creatio.</p> <p>The Nominal code must exist in sage. If it does not exist, the sage record will not be Created/Updated.</p>
		Tax Code		Auto Generated in Sage
		Department		Set to 4
Invoice Address (Registered Address in Sage Invoice)				
Address	Account Address	Address 1	Creatio > Sage	Fetches from Creatio Account Record
City	Account Address	Town	Creatio > Sage	Fetches from Creatio Account Record
State/Province	Account Address	County	Creatio > Sage	Fetches from Creatio Account Record
Country	Account Address	Country	Creatio > Sage	Fetches from Creatio Account Record
Zip/Postal Code	Account Address	Post Code	Creatio > Sage	Fetches from Creatio Account Record
Shipping Address (Delivery Address in Sage Invoice– Order Tab)				
Address	Account Address	Address 1	Creatio > Sage	Fetches from Creatio Account Record
City	Account Address	Town	Creatio > Sage	Fetches from Creatio Account Record
State/Province	Account Address	County	Creatio > Sage	Fetches from Creatio Account Record
Country	Account Address	Country	Creatio > Sage	Fetches from Creatio Account Record
Zip/Postal Code	Account Address	Post Code	Creatio > Sage	Fetches from Creatio Account Record

Scheduling Synchronisation

The Scheduler that is setup on ZYNK is linked to Windows Scheduler. This means you can setup scheduling in any interval if its more than every 15 minutes.

How Synchronisation Works

New/Modified Account in Creatio

Checks if Account name matches with Sage Customer Name.

If match is not found,

1. Sage Customer is created with an automatic account reference generate (3 letters, 3 numbers)
2. Sage website field is updated with the Creatio Account ID
3. Fields are synchronised from Creatio to Sage (See Sync table)

If match found,

1. Fields are synchronised from Creatio to Sage (See Sync table)

New/Modified Customer in Sage

Checks if Sage Website (Creatio Account ID) is filled in

If Sage Website field is empty,

1. Creatio Account is created
2. Fields are synchronised from Sage to Creatio(See Sync table)

If Website field is filled in,

1. Fields are synchronised from Sage to Creatio (See Sync table) with matching account.

Please note: If Account name is changed in Creatio, and is not manually updated in Sage, it will create a new customer in sage

Licensing

- Zynk License with Sage 50 UK must be purchased
- Agovo will charged addition costs for Integration License, installation and training

Installation and setup

On Customer Creatio,

1. Install Sage Package

On Customer Server (Where Sage is installed)

1. Install Zynk software
2. Setup Sage Connection in Zynk using new sage User (To avoid user conflicts).
3. Copy the "Creatio Sage Integration" folder to C drive on server
4. Import the Zynk Config file (File > Import in Zynk)
5. Enter Creatio URL/Username/Password into Zynk workflow
6. Setup Scheduler in Zynk (Windows scheduler)