Simple Sage (or other Back Office) Integration

This article shows a very simple way of making Back Office information available to the SalesLogix user environment.

The steps shown can also be used for any other SQL Database information.

I wrote this in the following environments:

SalesLogix v6.2.4 -> Windows 2000 server
Sage Line500 -> Windows 2000 Server

*These servers are set up as linked servers with 'sysdba' (SLX Standard user) & 'scheme' (Sage Standard User) permissions in both directions
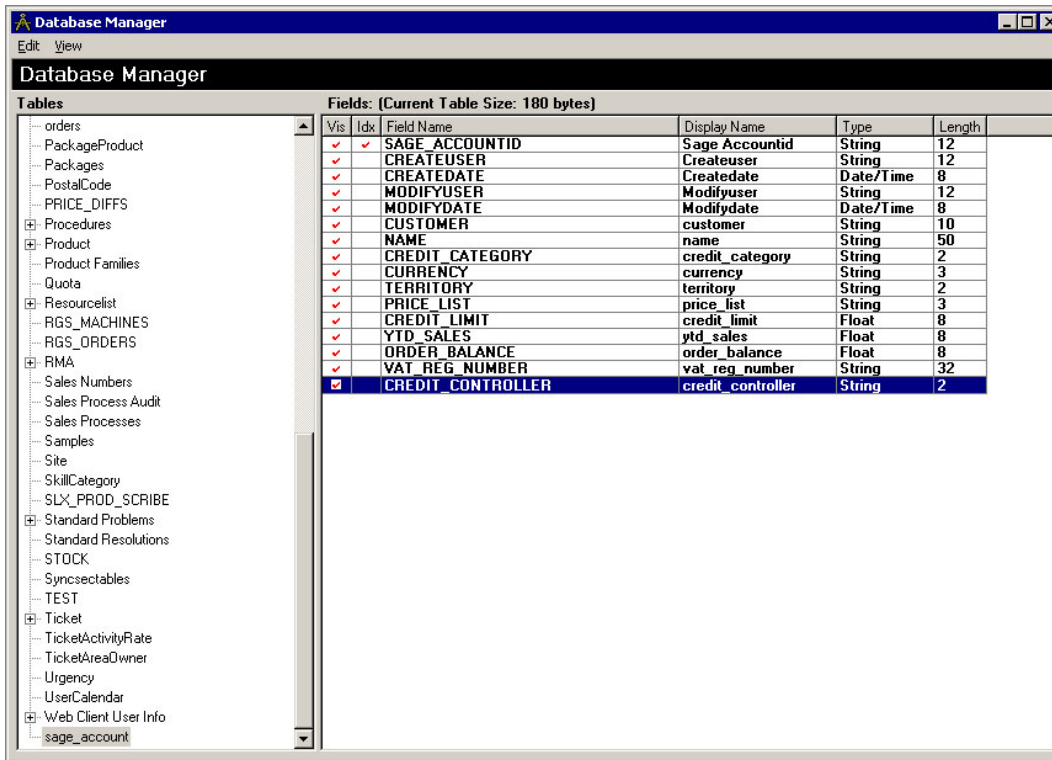
I have used an example to show some standard Sage Customer information from 'slcustm'

Step-by-Step Procedures

1. Launch Architect -> DB Manager and create a new table, in the example, I have named the new table 'SAGE_ACCOUNT' and have chosen not to have any association.
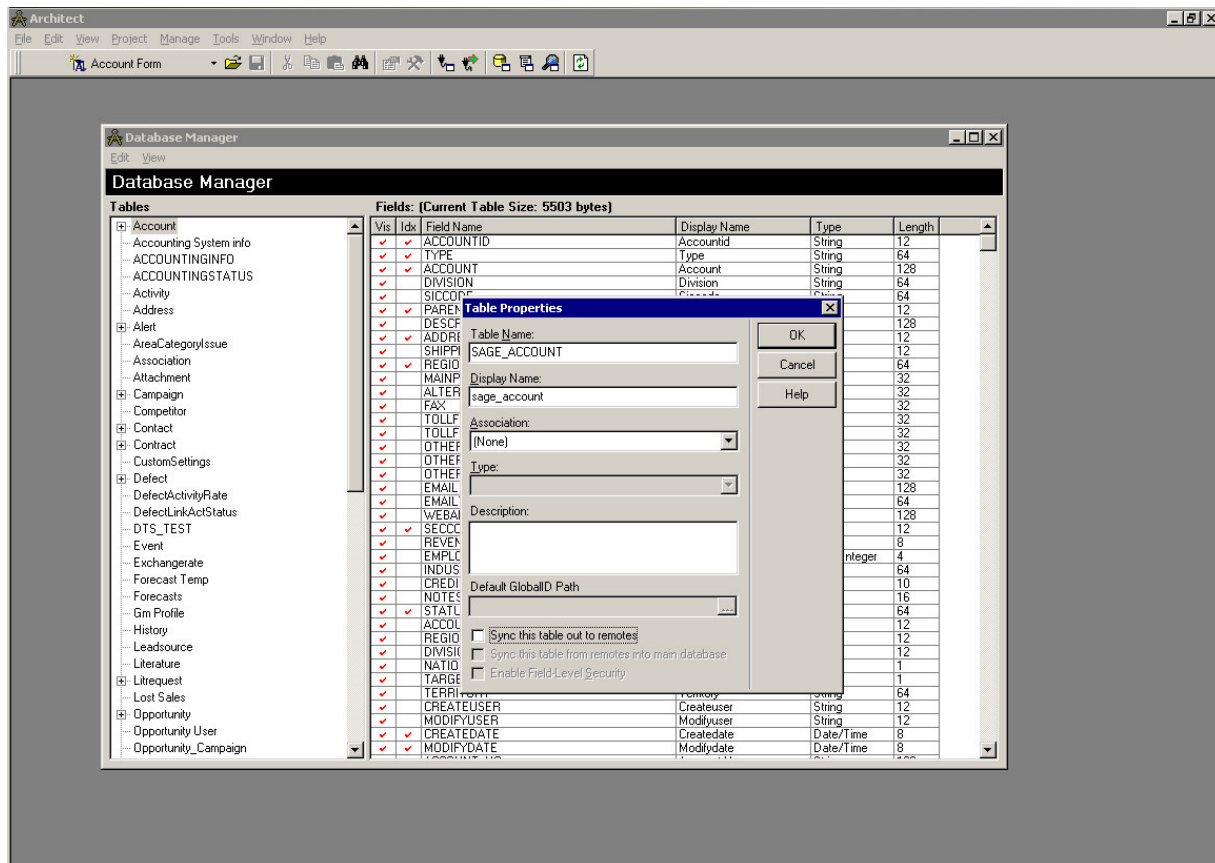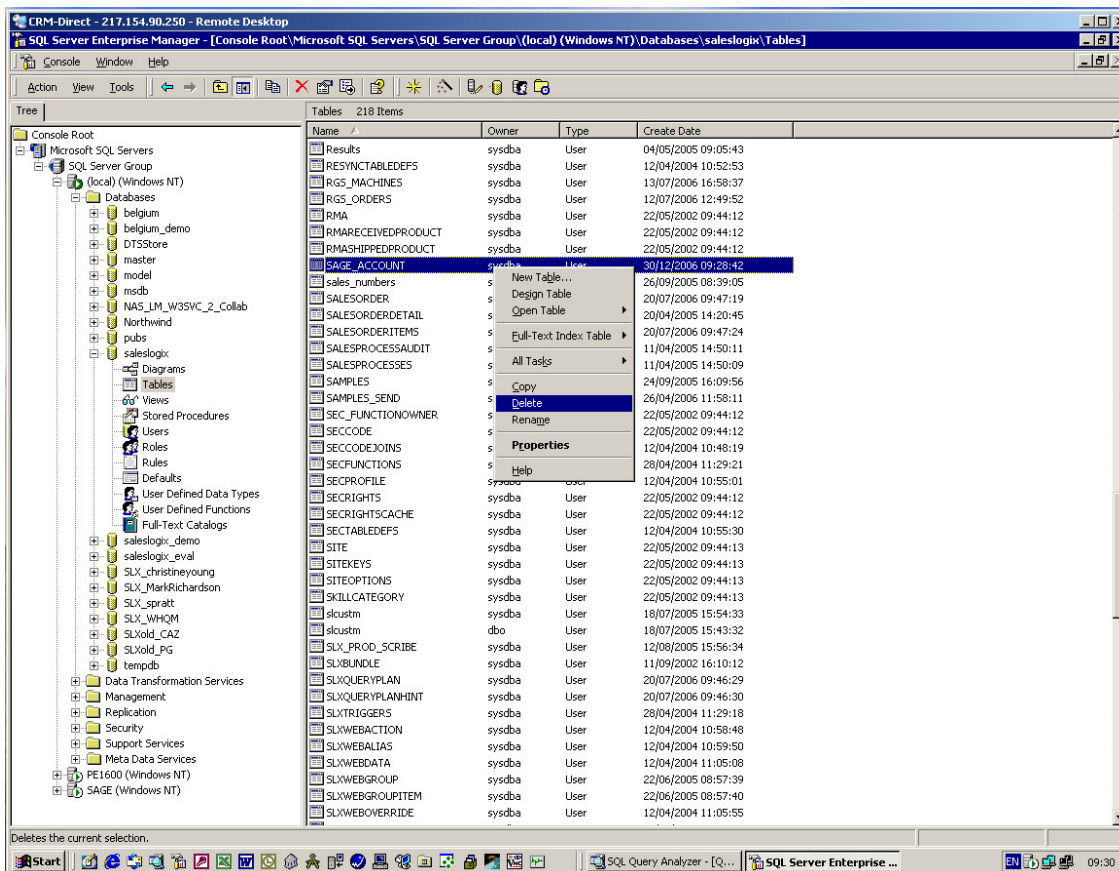
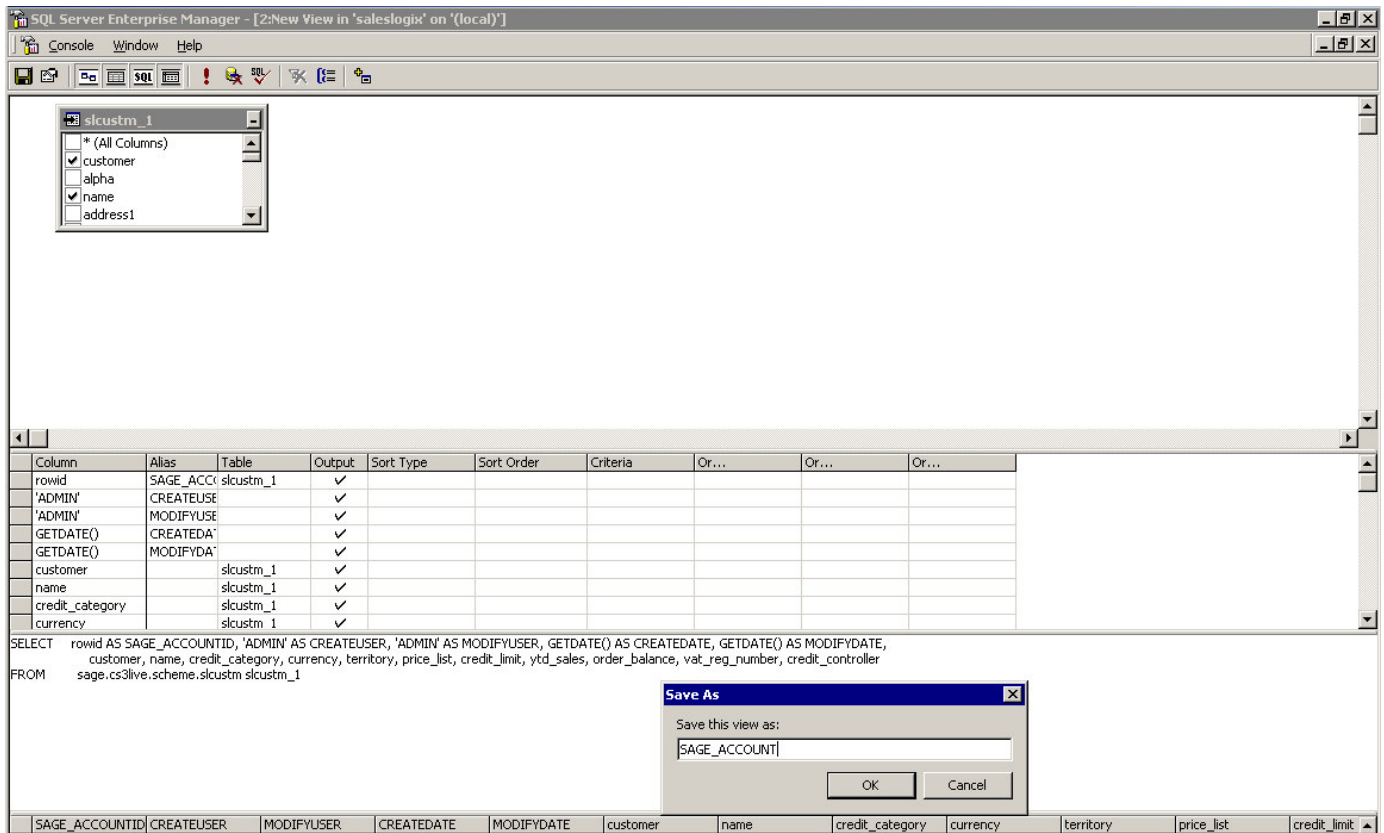2. In the example, I have created some basic accounting information fields as shown in the shot below:

Apply the changes and exit Architect.

3. As soon as you have come out of Architect, go into SQL Enterprise Manager, find the new table and DELETE it !

4. Still in Enterprise Manager, create a new View as shown below:

The SQL statement used is as follows:

```
SELECT    rowid AS SAGE_ACCOUNTID, 'ADMIN' AS CREATEUSER, 'ADMIN' AS MODIFYUSER, GETDATE() AS CREATEDATE, GETDATE() AS MODIFYDATE,
          customer, name, credit_category, currency, territory, price_list, credit_limit, ytd_sales, order_balance, vat_reg_number, credit_controller
FROM      sage.cs3live.scheme.slcustm
```
… obviously replace 'sage.cs3live' with your own server & database reference

Ensure you save the view with exactly the same name as the table you created in step 1 and subsequently dropped in step 3.

Select the Properties of the View and change the owner to 'sysbda'
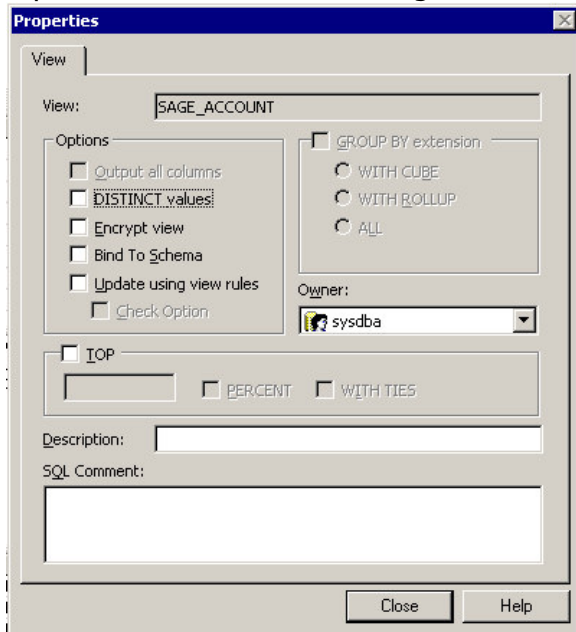
…..That's it !

That is all the background work that is needed to now include the information in your SalesLogix environment.

As shown in the examples below, the table and data can now be used to create Groups etc, and to include on Forms