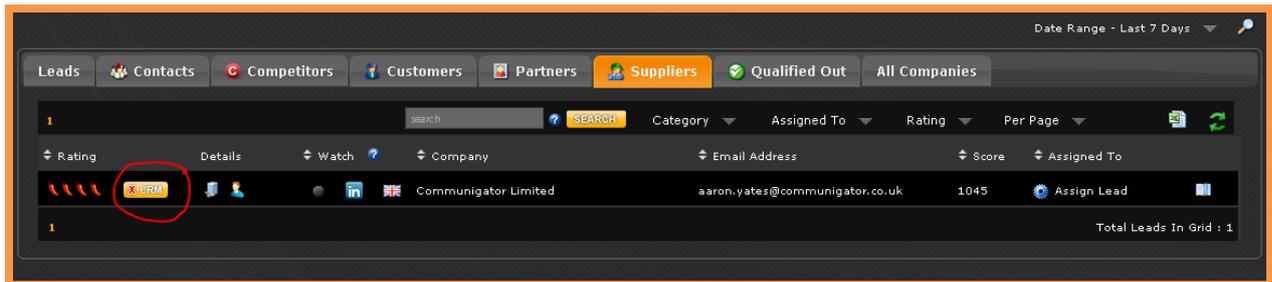# Sage Saleslogix OR Sage CRM Integration

Background

Your WOW account can be activated to have a CRM button next to each company lead as in the diagram below.

This button goes to your CRM account to find if the company lead already exists as one of your CRM accounts. This is done through the standard Sage SDATA API available through your Sage Business Partner. The button has 3 states dependant on the actions you take for each company lead.

  This company lead has NOT been checked against CRM.

  This company lead has been assigned as a new LEAD in CRM.

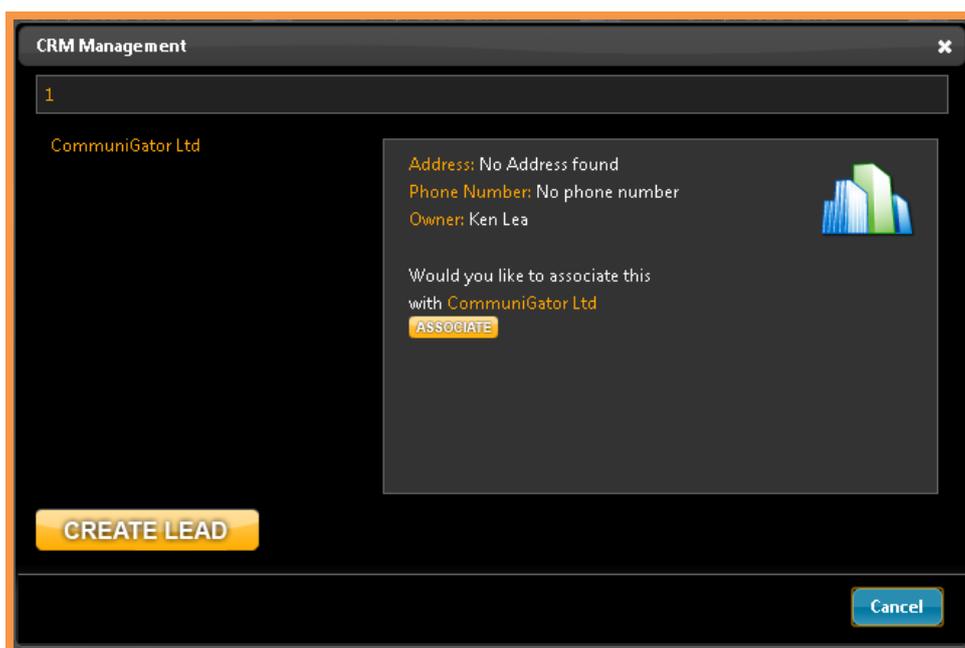 This company lead has not be actioned against CRM yet.

Once the button is clicked there are 2 actions available dependant on whether the company lead exists in CRM or not.

1) If the company lead does not match to an existing CRM account, WOW will offer the below screen for you to create a CRM lead like below.

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WOW Analytics

The CRM lead will be created with the Company name, a lead source value of 'Wow Analytics' and a permalink will be added. The perma link is a url that when clicked will bring up a browser window of the Company lead full details in WOW so you can see the historical clicks of the this company.

2) If the company lead does match to one or many existing CRM accounts (the matching uses a like/fuzzy match so any similar accounts will come back), then you will see address phone and owner details and have the ability to either:

   a. Associate this company lead in WOW to a CRM account – no further action is taken except the CRM button changes to let any users know this account has already been matched. You will be able to choose if many company matches available on which to associate.

   b. Create yourself a new lead as the companies match are not correct.

Setup

To set up your WOW account to integrate with either Saleslogix or Sage CRM, you will require the following pre-quisites:

1) SDATA web service URL details. SDATA is the Sage integration layer for all the products, so this needs to be installed as a public facing website. If you do not already have SDATA available then please speak to your Sage business partner.

2) A single CRM account with

   a. Username

   b. Password

For security your public facing CRM can be locked down by the WOW public IP address.

Please speak to your Sage business partner for any of the above to be set up, WOW are not Sage consultants that can do this for you.

When the pre-requisites are available they can be sent to the WOW support team and they will set up your WOW account to work against your CRM.

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