

The Sage integration

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1. Goal of the integration

1.1 Simply manage your data

One of the many advantages of using the integration between Simple-Simon and Sage is that you can control your data in one spot. Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system. Customers and products and services should be added to Sage. Simple-Simon automatically updates according to the mutations that are done in Sage. Add your customers and products and services to Sage. Simon will copy these and you can start creating and planning your work orders!

1.2 Less mistakes, quicker billing

Controlling your data in spot ensures you make less mistakes while billing to your customers. Create a work order in Simon, schedule the work order for yourself or your co-worker and register products and hours. Once the work order is reported finished and archived, it is sent to Sage as a sales invoice within 5 minutes. Check, edit and confirm that the sales invoice is correct and send the bill to your customer. The integration between Simple-Simon and Sage creates less mistakes and makes your billing quicker.

1.3 Advantages of the integration

The integration between Sage and Simple-Simon comes with plenty of advantages, as you:

1. Can send your bill **quicker** and you make **less mistakes**.
2. Simon automatically acquires all **your customers and products and services** from Sage and this is immediately available in Simon.
3. Your work order is finished in Simple-Simon, the archived work order is sent back to **Sage** as a **sales invoice**.
4. Is your work order ready? Within **5 minutes** the bill can be send to your customer.
5. It makes processing work order effortless, directly save **time** and **money**!
6. The integration **can be easily created by yourself**, ready within 5 minutes.

2. Principles of the integration

2.1 Sage is the starting point for your customers, products and services

Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system for your products and services and customers. Simple-Simon automatically updates once mutations are done in Sage. Adding customers or products and services (products) and editing them, should be done in Sage. Customers or products added to Simon cannot be forwarded to Sage. In order to prevent incorrect billing, customers and products added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

2.2 Create and schedule a work order and register hours

You can start creating work orders once all your customer and products are transferred to Simple-Simon. Creating the work order is done in Simple-Simon. Create a work order, schedule the work order for yourself or your co-worker and register hours or products. You can also add own forms that ask specific questions about the job done.

2.3 Customer added to the work order should match the customer in Sage

Every customer that is added to a work order, should be a customer that is transferred from Sage to Simple-Simon. When you archive the work order in Simon, a sales invoice is created for that particular customer in Sage. Your customer database is available for your office and in the field employees. They can select the correct customer. It is not possible to send the work order to Sage if no customer is registered on the work order. The integration will send an error notification as it not possible to create a sales invoice in Sage without selecting a customer.

2.4 Archiving the work order in Simon creates a sales invoice in Sage

You can send your work order to Sage by archiving the work order in Simon. In order to do so, the work order needs to be reported as finished. Check the finished work order, edit if necessary and archive the work order. Within a few minutes the work order becomes a sales invoice in Sage. The sales invoice is added to the selected customer. That way it is easy to control your work orders and sales invoices. The integration logging allows you to precisely follow this process. For example, if no customer is added to the work order then no sales invoice can be created in Sage. The integration logging shows you what might be wrong and how you can fix this.

2.5 Removing customer should be done in Sage, Simon updates automatically

Removing or inactivating customers should be done in Sage. Sage is the main ERP system and Simon updates accordingly. A few times a week Simon checks and removes customers that are removed in Sage as well. You do not need to remove these customers yourself; Simon does this automatically.

3. Exchanges in the integration

3.1 Retrieving products and services from Sage

Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system for your products and services (products in Simon). Every time you add a product to Sage, the product is placed in Simon within minutes. Simple-Simon automatically updates once mutations are done in Sage. Your product database is available for your office and in the field employees. They can select the correct product. Adding products and services (products) and editing them, should be done in Sage. Products added to Simon cannot be forwarded to Sage. In order to prevent incorrect billing, products added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

3.2 Retrieving customers from Sage

Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system for your customers. Every time you add a customer to Sage, the customer is placed in Simon within minutes. Simple-Simon automatically updates once mutations are done in Sage. Your customer database is available for your office and in the field employees. They can select the correct customer. Adding customers and editing them, should be done in Sage. Customers added to Simon cannot be forwarded to Sage. In order to prevent incorrect billing, customers added to Simon will therefore be automatically removed from Simon. This is done a few times a week.

3.3 Work addresses are retrieved from Sage, but may be added in Simon

The standard invoice address is automatically retrieved from Sage and becomes the customer address in Simon. Additionally, a work address is created based on the invoice address. A work address is the location where the job should be done. Sales, delivery, accounts and purchasing addresses created in Sage are also added to Simon as work addresses. You are also allowed to add work addresses in Simon. Just make sure you match the work address to the correct customer (which is retrieved from Sage). You can create as many work addresses in Simon as you wish, if they are matched to a customer.

3.4 Archived work orders are sent to Sage

Sending work orders to Sage is done by archiving them in Simple-Simon. Only a work order that is marked as finished can be archived. Once you archive the work order, it is placed in Sage as a sales invoice within minutes. You can archive the work order by selecting 'Archive' in the work order overview. This button is only available if the work order is **reported as finished**. The work order is sent to Sage as a sales invoice and placed at the correct customer. Your co-workers in the office can check the work order before sending it to Sage. That is how you easily manage and control your work orders and bills.

3.4.1 How are the registered travel times in the work order sent to Sage?

The registered travel times in the work order can be sent to Sage as an invoice line. You can determine which product should be used to book the times in Sage. You can determine this by changing the settings of the integration. More information about the integration's settings can be found in chapter 5.2 "How do I make sure Simon sends my registered travel time to Sage?". An example let's say you registered 15 minutes of travel time on the work order in Simon. In Sage the travel time is registered as 0,25 x "your chosen product". In Sage you can edit the quantity, price or product before you send the bill to your customer. It is also possible to not register the travel time in Sage. For more information about this, look at the settings in chapter 5.2.

3.4.2 How are the registered work times in the work order sent to Sage?

The registered work times in the work order can be sent to Sage as an invoice line. You can determine which product should be used to book the times in Sage. You can determine this by changing the settings of the integration. More information about the integration's settings can be found in chapter 5.3 "How do I make sure Simon sends my registered work time to Sage?". An example let's say you registered 15 minutes of work time on the work order in Simon. In Sage the work time is registered as 0,25 x "your chosen product". In Sage you can edit the quantity, price or product before you send the bill to your customer. It is also possible to not register the work time in Sage. For more information about this, look at the settings in chapter 5.2.

3.4.3 How are the registered products transferred to Sage's sales invoice?

The registered products in the work order are transferred to Sage as a sales invoice line. Here you can edit the price, quantity of product before you send the bill to your customer. Simon automatically selects the correct product in Sage, as the product database is based upon Sage's products and services.

4. Activating the integration

There are several options available to make sure the integration works as you wish. Change the settings so that the integration matches perfectly with your workflow. In order to activate the integration, Sage and Simon should be connected. This chapter explains how creating the connection works.

4.1 Where should I start when creating the integration?

Make sure you are logged into Simple-Simon and head over to 'Integrations'. Select 'Activate integration' and select 'Usable'.



sage

Integration: Sage

Working:

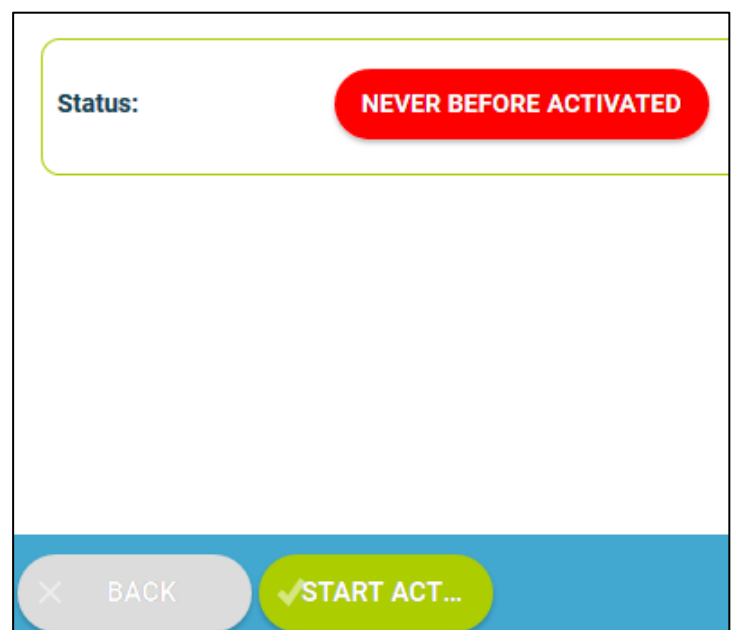
1. Articles, Customers addresses go from Sage to Simon
2. An **archived** work order in Simon becomes a **sales invoice** in Sage
3. The work order-pdf and own forms (pdf) are synced to Sage, but Sage currently does not support retrieving them in their software

Please look at this document to view the working in detail:
[Integration Sage with Simple-Simon \(PDF\)](#).

USABLE

4.2 How do I activate the integration?

Select the green button 'Start activation'. We then shortly explain how the integration works. Creating the integration starts by erasing existing Simon data. Chapter 4.3 "Why should I erase my database before I can activate the integration?" explains why and how this can be done.




Status: **NEVER BEFORE ACTIVATED**

BACK **START ACT...**

4.3 Why should I erase my database before I can activate the integration?

It is mandatory to erase your database in Simple-Simon if you want to start the integration with Sage. Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system. Customers and products and services should be added to Sage. Simple-Simon automatically updates according to the mutations that are done in Sage. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

If you are restarting the integration (after de-activating it), you can choose which parts of the database should be erased. Select which parts of the database you want to remove and which should remain.



Integration: Sage

Working:

1. Articles, Customers addresses go from Sage to Simon
2. An **archived** work order in Simon becomes a **sales invoice** in Sage
3. The work order-pdf and own forms (pdf) are synced to Sage, but Sage currently does not support retrieving them in their software

Please look at this document to view the working in detail: [Integration Sage with Simple-Simon \(PDF\)](#).

FOLLOW THE STEPS BELOW

<input type="checkbox"/> Mandatory clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input type="checkbox"/> Make Connection with Simon	
<input type="checkbox"/> Settings	

Below the **Simon-tables** which will be emptied before starting the integration.

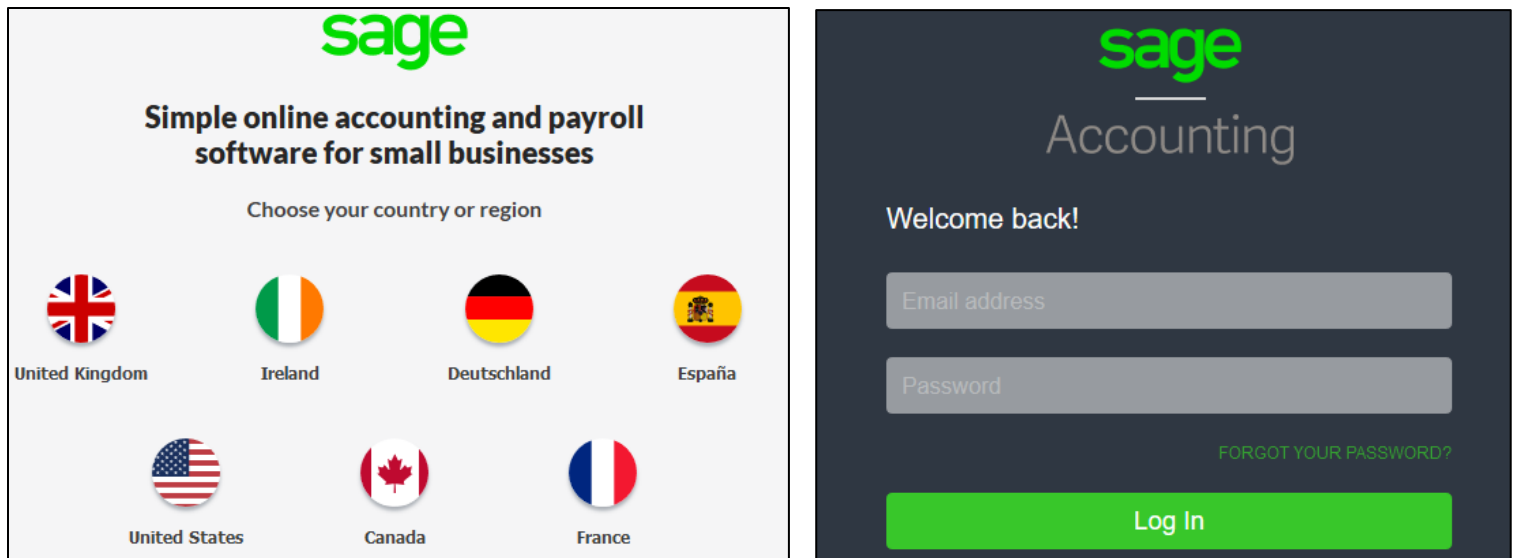
	Table	Number	Last Update
<input checked="" type="checkbox"/>	Article Group	3	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Article	12	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Work Order	31	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Work Address	16	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Customer	5	2019-09-10 11:24 AM
<input checked="" type="checkbox"/>	Equipment	0	-
<input checked="" type="checkbox"/>	Contact Persons	10	2019-09-10 11:24 AM

It is possible to start the integration as soon as you have erased the Simon database. You can do so by selecting 'Connect!'.

FOLLOW THE STEPS BELOW

<input checked="" type="checkbox"/> Mandatory clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input type="checkbox"/> Make Connection with Simon	<input checked="" type="checkbox"/> CONNECT!
<input type="checkbox"/> Settings	

The next step is to choose the correct country and log into Sage. If the credentials are correct, you are sent back to the 'Settings' page in Simon.



4.4 Where can I deactivate my integration?

If wanted, you can immediately deactivate your integration. Once you deactivate the integration, it will stop automatically. You do not need to contact Simple-Simon to deactivate your integration. The moment you deactivate your integration, Sage will no longer transfer customers and products to Simon and you cannot send work orders to Sage either. Of course, you can restart the integration at any moment. The moment you restart the integration Simon will start updating the customer and products again and it is possible to send work orders to Sage as well.

5. Settings integration

5.1 What should I do with the settings of the integration?

You can use the settings to determine how the integration should work. The settings can be selected after you have erased the Simon data and created a connection between Simon and Sage. Select 'Settings' to manage the settings. When using the integration you agree with the terms and conditions of the integration.

FOLLOW THE STEPS BELOW	
<input checked="" type="checkbox"/> Mandatory clearing of Simon Data!	<input checked="" type="checkbox"/> CLEAR SIMON DATA
<input checked="" type="checkbox"/> Make Connection with Simon	
<input type="checkbox"/> Settings	<input checked="" type="checkbox"/> SETTINGS

TERMS OF USAGE

In order to use this integration, please agree to the corresponding terms.


Please read the terms to use this integration (PDF).


I agree to the terms to use this integration

5.2 How do I send my registered travel time to Sage?

If wanted, you can send the, in Simon registered, travel time to Sage. The product you choose here is the product which is selected in Sage when sending the travel time to Sage. For example, if you register two hours of travel time in Simon, two times the products is registered in Sage. Select 'Check' to validate the product in Sage.

 	Code	Description
<input type="checkbox"/>	50	Travel time



On which Article in your accounting software you want to register Simons travel time? 


50 


Travel time

5.3 How do I send my registered work time to Sage?

If wanted, you can send the, in Simon registered, work time to Sage. The product you choose here is the product which is selected in Sage when sending the work time to Sage. For example, if you register two hours of work time in Simon, two times the products is registered in Sage. Select 'Check' to validate the product in Sage.

 	Code	Description
<input type="checkbox"/>	60	Work time

On which Article in your accounting software you want to register Simons work time? 


60 


Work time


5.4 Can I add a default product to my sales invoice in Sage?


If wanted, you can automatically add a default product to your sales invoice in Sage. This product is automatically placed on your sales invoice once you send the work order from Simon to Sage. An example of a default product is a 'Call-out fee'. If you want the call-out fee to be automatically added to your sales invoice, set it as a default product here. Select 'check' to verify the product.

 	Code	Description
<input type="checkbox"/>	80	Call-out fee

Automatically add a Default Article? 

Yes 

Article number in your accounting software 

80 

Call-out fee

5.5 How do I make sure that the description of the work done is placed in the sales invoice?

If you want the description of the work done to be placed in the sales invoice, you can select to do so here. This might be convenient as the invoice then shows which work has specifically been done during the job. The description of the work done is then placed on the first line of the sales invoice.

Item
Yearly maintenance of the airco! <i>Sales - Products (4000)</i>

Do you want to send as first line, Simons Work description to your accounting software? ⓘ

Yes ▼

5.6 Can I prevent work orders from being send to Sage?

When you archive the finished work order, it is sent to Sage as a sales invoice. If you do not want all work orders to be send to Sage, you can prevent this by entering a filter word. For example, if you do not want the guarantee jobs to be billed, you can add 'Guarantee' as a filter word. All work orders which have 'Guarantee' in the description of the work order, will not be send to Sage. If you leave this setting empty, all work orders will be sent to Sage.

Provide an optional filterword, for Simons Work orders you DO NOT want to send to your accounting software. ⓘ

Guarantee

5.7 Can I add information from Simon to the notes in Sage?

If wanted, you can send the work address, description of the work done or both to the sales invoice notes in Sage. The work address is the location where the job is done. If you have multiple locations where work needs to be done, you can add them to the correct customer in Simon. Regardless of the choice made, the information is shown in the notes of the sales invoice. That way you can quickly see where the job was done or what kind of job was done.

What do you want in the Memo/Note field?

- Simons Work Address
- Simons Work Address and Simons work description
- Simons Work Description
- Nothing

Notes
Bart Jacobs - Bart Johnsen
910 Fifth Avenue
M1R 0E9 Toronto

5.8 Can I add information from Simon to the customer reference in Sage?

If wanted, you can send the work order number, Simon's customer reference or both to the sales invoice reference in Sage. Regardless of the choice made, the information is shown in the reference of the sales invoice. That way you can quickly view the work order number or Simon's customer reference.

What do you want as Customer-reference in your accounting software?

Simons Work Order number

Simons Customer reference

Simons Work Order number AND Simons Customer reference


Nothing

Reference
00004

5.9 Can I send quotes from Sage to Simon?

It is possible to send a quote from Sage to Simon. Once you send the quote to Simon, a work order is created for that quote. If you want to send quotes to Simon, select 'Yes' in this setting.

Do you want a quote from your accounting software to become a work order in Simon?

Yes 

5.9.1 Can I determine which quotes I send from Sage to Simon?

This setting allows you to only retrieve quotes containing a filter word in the quote description. For example, you could use 'WO' (short for work order) to determine which quotes may be sent to Simon. Any quote description which contains 'WO' is sent to Simon. If you leave this setting empty, all quotes will be sent to Simon.

Optionally provide a filterword:

WO

5.9.2 Can I add my products and service from the quote to my work order in Simon?

If you want, you can automatically add the products and service from your quote to your work order in Simon. The products and services will be placed in the work order as used products. If you want to this to be done, select 'Yes' at this setting.

Take quote rows and turn them into used articles on Simon's work order?

Yes ▼

5.9.3 Can I determine what the work order description will be?

You can choose what description the work order should get, once the quote is sent from Sage to Simon. You can choose between the quote's first line, the notes or both.

What do you want as Simons work order work description?

Description first Quote line

Memo/Note

Quote First Line Description and Memo

5.9.4 Can I add the terms and conditions to my work order?

If you want, you may add the terms and conditions from your quote to your work order in Simon. The terms and conditions are added to the work description in the work order. If you want the terms and conditions to be added, then select 'Yes' at this setting.

Add terms and conditions to Simons work order work description?

Yes ▼

5.10 Can I send estimates from Sage to Simon?

It is possible to send an estimate from Sage to Simon. Once you send the estimate to Simon, a work order is created for that estimate. If you want to send estimates to Simon, select 'Yes' in this setting.

Get Estimates from your accounting software to Simon?

Yes ▼

5.10.1 Can I determine which estimates I send from Sage to Simon?

This setting allows you to only retrieve estimates containing a filter word in the estimate description. For example, you could use 'WO' (short for work order) to determine which estimates may be sent to Simon. Any estimate description which contains 'WO' is sent to Simon. If you leave this setting empty, all estimates will be sent to Simon.

Optionally provide a filterword:

5.10.2 Can I add my products and service from the estimate to my work order in Simon?

If you want, you can automatically add the products and service from your estimate to your work order in Simon. The products and services will be placed in the work order as used products. If you want to this to be done, select 'Yes' at this setting.

Synchronize Estimate-lines as Used-Articles to Simon?

5.10.3 Can I determine what the work order description will be?

You can choose what description the work order should get, once the estimate is sent from Sage to Simon. You can choose between the estimate's first line, the notes or both.

What do you want as Simons work order work description?

- Estimate First Line Description
- Memo/Note
- Estimate First Line Description and Memo

5.10.4 Can I add the terms and conditions to my work order?

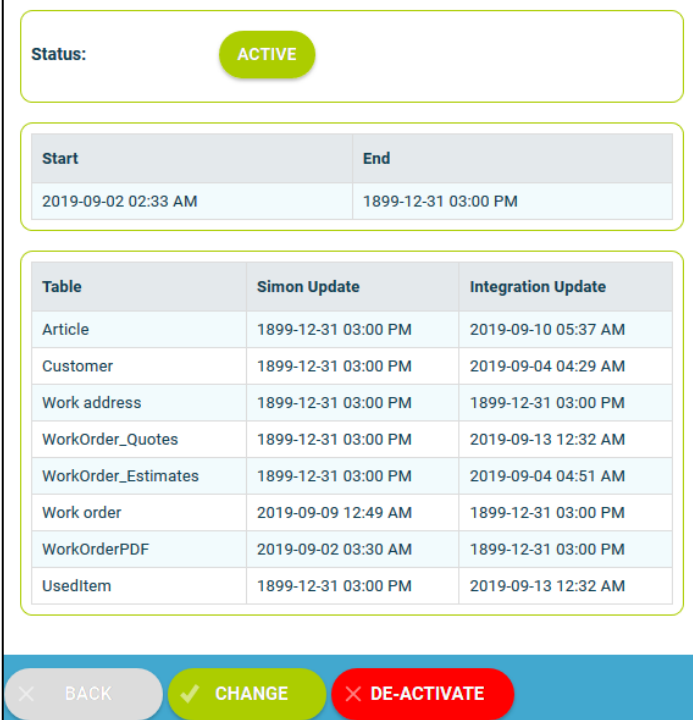
If you want, you may add the terms and conditions from your estimate to your work order in Simon. The terms and conditions are added to the work description in the work order. If you want the terms and conditions to be added, then select 'Yes' at this setting.

Add terms and conditions to Simons work order work description?

6. Edit settings integration

6.1 How can I edit the settings of my integration?

Once you have set the integration with Sage, you can edit the settings of the integration. The status of the integration shows you whether it is active or not. By selecting 'Change' you can edit the settings of the integration. The next page will show you the settings button. Here you can edit the integration according to your own wishes. If you edit one setting, all other settings need to be checked as well. Press 'Check' to check each setting. Save the settings and the integration has been edited. The changes in the integration will be applicable from the moment you have edited the integration. This will not be done in retrospective.



The screenshot displays the integration settings interface. At the top, the status is 'ACTIVE' in a green button. Below this, there are two columns for 'Start' and 'End' dates. The 'Start' date is 2019-09-02 02:33 AM and the 'End' date is 1899-12-31 03:00 PM. A table below shows the last update times for various data tables. At the bottom, there are three buttons: 'BACK' (grey), 'CHANGE' (green with a checkmark), and 'DE-ACTIVATE' (red with an X).

Table	Simon Update	Integration Update
Article	1899-12-31 03:00 PM	2019-09-10 05:37 AM
Customer	1899-12-31 03:00 PM	2019-09-04 04:29 AM
Work address	1899-12-31 03:00 PM	1899-12-31 03:00 PM
WorkOrder_Quotes	1899-12-31 03:00 PM	2019-09-13 12:32 AM
WorkOrder_Estimates	1899-12-31 03:00 PM	2019-09-04 04:51 AM
Work order	2019-09-09 12:49 AM	1899-12-31 03:00 PM
WorkOrderPDF	2019-09-02 03:30 AM	1899-12-31 03:00 PM
UsedItem	1899-12-31 03:00 PM	2019-09-13 12:32 AM

6.2 Are there any consequences if I edit the interface?

The integration works according to the choices you make in the settings page. It is only possible to edit the integration's settings if this is in line with information from Sage. For example, if a product does not exist in Sage, Simon will send an error notification stating this. It is your own responsibility that the integration information is correct.

6.3 When are changes to the integration activated?

The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective.

6.4 Can I undo my settings?

You can edit the settings of the integration at any given moment. The moment you alter the integration, the changes are saved and activated. This will not be done in retrospective. If needed, you can also completely deactivate the integration. The moment you stop the integration, it will be deactivated completely. You do not need to contact Simple-Simon to do so. The moment you deactivate the integration, Sage will no longer send customer and products to Simon and it also not possible to send a work order to Sage. Of course, you can activate your integration again.

7. How does the integration work?

7.1 Why should I empty my database before starting the integration?

It is mandatory to erase your database in Simple-Simon if you want to start the integration with Sage. Once the integration between Simple-Simon and Sage is set, Sage becomes the main ERP system. Customers and products and services should be added to Sage. Simple-Simon automatically updates according to the mutations that are done in Sage. Your database in Simon therefore should be emptied first, so that you can begin with a fresh start. Select 'Clear Simon data' to erase the data. Simon then shows you which parts should be erased.

If you are restarting the integration (after de-activating it), you can choose which parts of the database should be erased. Select which parts of the database you want to delete and which should remain.

7.2 How long does it take for Sage and Simon to synchronize?

The synchronization between Sage and Simon is done around every 5 minutes. This might be a bit more or a bit less, depending on how many people are using the integration. You can also view the highest mutation date. This shows the latest mutation you did in Sage (or Simon), that influences Simon (or vice versa). If you want to view the mutation date, go to 'Integrations', 'Logging' and look at the green icon.

7.3 How often is a clean-up done in Simon?

Products or customers removed in Sage, are automatically removed in Simon as well. Simon runs a clean-up, a few times a week, in which these customers and products are automatically removed. You do not need to remove customers or products yourself; Simon does this for you.

7.4 Why does it take a while (the first time) to retrieve the data from Sage?

It might take a while to set the integration between Simple-Simon and Sage. The first time Simon must import all customers and products from Sage. How long this takes exactly is depended on the size of your database in Sage.

8. Logging – notifications integration

8.1 My integration with Sage does not work, what should I do?

If (a part of) your integration does not work, a notification is created. You can view these notifications at 'Integrations' and then 'Logging'. Here you can find all notifications regarding your integration. Each column tells you a bit about the notification. For example, the 'Table' column tells you whether the notification is about a work order, customer, work address or product. Furthermore, the column 'Message' shows you the exact notification. If something needs to be done about the notification, you can view what you should do in 'Action to take'. An example of a notification is when no customer is attached to the customer. You cannot send a work order to Sage without attaching a customer to the work order, as Sage needs to know for which customer the sales invoice can be created.

TABLE		MESSAGE	ACTION TO TAKE
<input type="radio"/>			
<input checked="" type="radio"/>	135		
<input type="radio"/>	UsedItem	New UsedItem Inserted to Simon Successfully	No Action Needed
<input type="radio"/>	Work order	New WorkOrder Insered to Simon Successfully	No Action Needed
<input type="radio"/>	None		
<input type="radio"/>	Work address		
<input type="radio"/>	Customer		

8.2 What is the meaning of the various notifications?

Depending on the type of notification, Simon will either show an info, warning or error message. Regardless of the type of notification, Simon will show the message in the 'Message' column. You can choose to only show warning or errors. If you want to view all notifications that require a solution, select errors. If a solution is required, this is shown in the column 'Action to take'.

MESSAGE
New UsedItem Inserted to Simon Successfully
New WorkOrder Insered to Simon Successfully

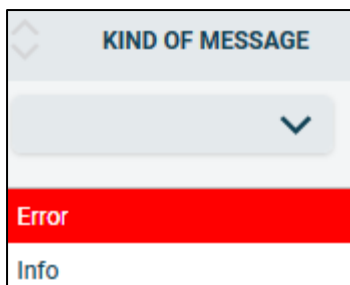
8.3 Notification is shown in my Sage integration, what should I do?

If you receive a notification that requires a solution, this will be shown in the column 'Action to take'. This column also explains what the solution should be.



8.4 What is the meaning of the various colours in the notifications?

The colour changes depending on the type of the message. An 'info' notification is shown in white or blue. 'Warnings' are shown in yellow and 'errors' are shown in red. That way it is easy to view what is going on in the integration and if a solution is required.



9. Stop the integration

9.1 Where can I stop the integration with Sage?

You can stop the integration with Sage by going to 'Integrations' → 'Activate integration' → 'Sage' → 'Active' → 'Deactivate'. Simon will then ask whether you really want to deactivate the integration. The integration can only be used later by reactivating it.

9.2 Are there any consequences if I stop my integration with Sage?

No more customers and products will be transferred from Sage and no work orders will be send to Sage, from the moment you deactivate the integration. Of course, you can always reactivate the integration. The customers and products will be transferred to Simon and work orders will be send to Sage from that moment on.

9.3 Should I contact Simon to stop my integration with Sage?

You can deactivate the integration whenever you want. Once you deactivate the integration, it stops automatically. You do not need to contact Simon to do this.