

SAGE 300 CRE

INTEGRATION OVERVIEW v2.3

- Integrate easily with minimal setup time
- Sync orders, jobs, vendors, and cost codes
- Accurate reporting and accounting for every transaction

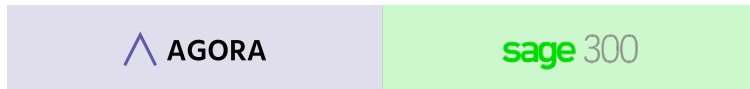


2 Hours
to get setup

1-2 Weeks
(or less) to implement

Overview of Fields Being Synced

Agora syncs a variety of information from your ERP on a regular basis. Here is a quick breakdown of what Agora syncs.



Ingested Fields UPDATED HOURLY*

Agora ingests these fields from Sage300 CRE in a single direction.

Vendor	←	Vendor
Job	←	Job
Phase Code	←	Phase Code
Cost Category	←	Cost Category
Tax Code	←	Tax Code
GL Code	←	GL Code

*In 5 min increments per-field

Uploaded Fields UPDATED INSTANTLY

Agora sends these fields to Sage 300 CRE in a single direction.

Purchase Order	→	Commitment
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Missing Fields in Sage 300 CRE NOT UPDATED

Fields that Agora produces that have no equivalent in Sage 300 CRE to sync to.

HFR/Buyout	///	No Sage 300 CRE Equivalent
RFQ	///	
Deliveries	///	
Requisitions	///	

Missing Fields in Agora NOT UPDATED

Common fields that exist in Sage 300 CRE but not in Agora.

No Agora Equivalent	///	Invoices
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Shared But Not-Synced Fields NOT UPDATED

Fields that exist in both Agora and Sage 300 CRE but aren't synced.

Attachments	///	Attachments
Vendor Contacts	///	Vendor Contacts

Getting Setup

An overview of what you can expect from Agora's streamlined implementation process.

STEP 1

Initial Scoping & Consultation 1-2 HOURS

Agora will discuss with you everything from how you use tax codes to how your jobs are setup during this step.

Some key points we will discuss:

1. How you use the "Ingested Fields" (detailed to the left)
2. Your IT setup (on premises or off premises)
3. Remote access capabilities to diagnose issues

STEP 2

Establish Integration 1 WEEK

Agora will work with you to setup the integration with Sage 300 CRE. This usually involves setting up a call with Agora, our integration partner and somebody at your company with access to Sage 300 CRE to install the necessary software. Agora does the rest!



STEP 3

Integration Testing 1 HOUR

Agora will work with you to make sure everything is working before you start using Agora to receive and process real materials requests. This will usually be handled through your customer service rep.

Some common things we test:

1. Ability to create a PO and sync it to your system
2. Ensuring jobs, vendors and any other associated fields are being properly imported

INTEGRATION POWERED BY