



Talk to Me: Sharing Data Between Multiple Systems

Integration Options for Sage 300

CLIENT SUCCESS STORY



AYERS GROUP
HOTELS Owning and operating 19 boutique hotels throughout Southern California, **Ayres Group** is a multi-faceted company with primary operations in the hotel management industry.

Download the case study and learn how Equation Technologies helped Ayres Group streamline their accounting process through systems integration.

Most companies we work with are running more than one application that is critical to their business. For example, a company could be using manufacturing, time entry software, or even spreadsheets to track important information along with **Sage 300** (formerly "Sage Accpac").

Often, there are times when it's necessary for the same data to be made available in both systems ("real time" sharing). Initially companies print the data that needs to be shared from one system and **manually rekey** that information into the other system. For some companies, this approach might work fine. If there are few transactions and available personnel who have the time to re-enter the information and double check it for errors, it may not be too burdensome. But in most cases, companies will get to a point where the extra work is putting a strain on business operations. For example:

- Keystroke errors occur and data becomes inaccurate and unreliable.
- The information takes so long to go between systems that work is delayed. This can result in making decisions on information that is not up to date.
- The amount of data that needs to be shared is tremendous and personnel are spending an inordinate amount of time re-keying data.

There are several options available to integrate Sage 300 with just about any other type of file. This depends on the type of data that needs to be shared, the data format, and the degree of automation desired will determine the type of integration required.

Most integrations our customers request will typically fall into one of three types.

Type 1: Supported File Import/Export

Within Sage 300, there is the ability to import (bring in) or export (send out) data with predefined templates. The templates are very structured in terms of how data can be pulled into the transaction fields. File types that are supported include txt, Excel, CSV, ODBC and XML. For example, sometimes the file is available to be exported into an Excel file, which then can be saved and then imported into Sage 300.

In this type of integration, it is necessary for the customer to physically import/export the file between the systems. This is an opportunity to double check data manually before the integration is completed.

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Type 2: Non-Supported File Import/Export

There are many different file types that you might want to bring into Sage 300. For example, your bank may have a unique file type that it uses. Or you may want to bring in data only available as a PDF file. With a minimal amount of programming, Equation Technologies can take the file and map it to Sage 300. While there is an investment in programming, the data is able to move from one system to the other without any duplicate entry.

This type of integration does require that someone initiate the export/import process; however reminders can be built in. Rules can be part of the integration to help with business conditions that may trigger an exception.

Type 3: Integration & Automation in Real-Time

For those types of critical transactions where it is necessary for the information to be available in two systems almost simultaneously, there is the ability to integrate and automate the process. For example, if you operate a web store and want the orders placed on line to be immediately moved into Sage 300 for invoicing, credit card authorization, relief of inventory and shipping purposes, this type of automated integration is possible.

There is no need to manually pull data from one system and import into Sage 300. This type of integration is highly customized and dynamic, and business rules can be set up to handle exceptions.

Integration Pitfalls

While there are numerous benefits to integrating systems and sharing data, there are some situations to be careful of when deciding to integrate and selecting a provider to help you. You may want to get a second opinion if you are being told any of the following:

1. Involving a third-party software that would need to be purchased in order to complete the integration.
2. Your internal processes will need to change.
3. Yes, the integration can be done, but you cannot own the source code.

Integration is Possible

Clients are often amazed at how beneficial an integration can be to their organization. From saving time to accurate data, the benefits are numerous. Integration extends the flexibility of your Sage 300 system.

Equation Technologies has helped our clients run more effectively with integrations of all types based on their needs. [Contact us](#) and we would be happy to **talk about your needs and give you some options.**

CHALLENGE

"We originally had three different applications that we used to run our business. We also had two sets of books and had to manually rekey data into Excel to create the monthly summary reports our partners needed."

SOLUTION

"Equation Technologies integrated our hotel management system with Sage 300, eliminating duplicate data entry, shaving 4 days of our month end closing cycle, streamlined AP invoice entry, and enabled us to grow without adding staff."

- Greg
Kleminsky
Ayers Group