CRMLinX, the premier accounting integration product specifically designed for Sage CRM SalesLogix and QuickBooks, offers a low cost of ownership, short implementation time and high return on investment. Flexible and easy to use, CRMLinX readily accommodates growth and changing business requirements.

What is CRMLinX?

Whether you are using a customized version of SalesLogix or "Out of the Box" functionality, CRMLinX integrates SalesLogix and QuickBooks using bi-directional synchronization of data at scheduled intervals. CRMLinX will eliminate the need for duplicate data entry, expedite timely billing, maintain like information in both systems, and improve employee awareness of customer profiles.

Does CRMLinX integrate with any other applications?

CRMLinX is specifically designed for Sage CRM SalesLogix and QuickBooks

Who uses CRMLinX?

Many organizations began using QuickBooks and a myriad of tools for tracking sales and customer information. The logical next step is to meet the growing need for a CRM solution like SalesLogix with the intent of upgrading the accounting solution at a later date when the need arises. CRMLinX satisfies the immediate need for integration for both existing SalesLogix customers and new prospective SalesLogix customers and provides a relationship for upgrade in the future.

Why do I need CRMLinX?

CRMLinX offers a number of measurable benefits to any organization that possesses the need to share information between the accounting department and the rest of the organization. CRMLinX eliminates the need for duplicate data entry. The integration provides customer financial summary information to users of SalesLogix thus enabling them to make intelligent business decisions when dealing with customers. For example Sales/Customer Service personnel can advise customers that they are past due or about to exceed their credit limit.

What version of SalesLogix will CRMLinX work with?

Users of CRMLinX X4 (version 4.0) must be upgraded to SalesLogix 6.2.0.

What version of QuickBooks will CRMLinX work with?

Users of CRMLinX X4 (version 4.0) must be upgraded to QuickBooks Pro, Premiere, or Enterprise 2005 edition or later. Additionally, a multi-user license is required.

Does CRMLinX require an External SalesLogix License?

Yes. It is the responsibility of the end user to ensure that the license is properly secured for SalesLogix. Some versions of SalesLogix include a single external license at no additional cost. However, it is the responsibility of the customer to guarantee compliance. Leatherberry Associates Incorporated and CRMLinX Software are not responsible for any non compliance of the SalesLogix External License Policy.

Do I have to install the Advanced Sales Bundle or any other solution bundles for SalesLogix?

No. CRMLinX X4 works with SalesLogix "out of the box".

Can CRMLinX read from my custom tables?

Yes. CRMLinX provides the means by which custom and standard tables can be mapped directly between SalesLogix and QuickBooks.

Is CRMLinX a bundled add-on solution?

No. CRMLinX is a stand alone application. Part of the installation and configuration process does include the installation of a bundle for SalesLogix users.

What does the Bundle for SalesLogix users include?

As a part of the installation of CRMLinX, a new "Accounting" tab is added to the account detail. This tab includes customer AR aging, credit limit and available credit, along with invoice, sales orders, credits, and payment history. As enhancements are added to CRMLinX, this tab will also be enhanced.

Is the information viewed via an embedded link?

No, CRMLinX synchronizes data between systems to allow remote users to gain access to the same information as local users.

Will CRMLinX work from my remote computer?

Yes providing CRMLinX has access to both the QuickBooks accounting file and SalesLogix CRM database. If the two are separated by a disconnected network or other form or remote connectivity, CRMLinX will not work on a remote computer.

Do I have to manually run the CRMLinX software?

If you like watching data scroll up the screen then you will want to run CRMLinX manually. Otherwise, any scheduling tool or application containing a scheduling tool such as Windows Task Scheduler, KnowledgeSync, or SalesLogix will suffice.

How often will CRMLinX synchronize data?

This depends solely upon the frequency of which the scheduling application is set to run.

What happens during the synchronization cycle?

CRMLinX reads data using conditions established during the setup process then inserts/updates each system using bi-directional synchronization. Changes to customer, product information, invoice, sales order, credit, and payment data are monitored to ensure accuracy of both systems.

Will my users have to wait while CRMLinX completes a synchronization cycle?

No. CRMLinX logs into both systems silently at its scheduled time and completes its task. It then disconnects as silently as it connected. Users may need to refresh their data if the record on the screen was on that was affected during the synchronization process.

What does CRMLinX do best?

Bi-directional synchronization of customer data, items, invoicing sales orders, credits, received payments, employee and employee timesheets are the major strengths.

What does CRMLinX not do?

Vendor and vendor related functions, receipt of bills, and direct journal entry. These and many more features are slated for future service releases.

How do I purchase CRMLinX?

CRMLinX products are sold and implemented through a network of Certified Business Partners. CRMLinX Business Partners understand that the livelihood of every organization depends upon the accuracy and reliability of its financial data. They are dedicated to providing the technical expertise and experience to successfully integrate CRMLinX with your CRM and accounting solutions. They understand how to leverage our products to solve your integration concerns.

How do I find a CRMLinX Business Partner?

Contact the CRMLinX Client Services Group at 770-291-2242.

Interested in becoming a reseller of CRMLinX products?

Contact our Channel Sales Manager at 770-291-2242 for more information.