gold-vision

CRM That Makes A Difference

Access Dimensions Integration Pack

Version 2.1.4

March 2017

Contents

1. Introduction

The Access Dimensions Integration tool allows you to link typical functions with Gold-Vision. The purpose of this document is to:

- Explain the scope of the standard integration package, what it can and can't do.
- Provide an overview of the implementation approach with typical time requirements.
- Provide a list of standard fields available for integration.
- Stipulate technical requirements of the integration.

It is important that if you are unclear about aspects of this integration, you speak with your pre-sales or project consultant.

Please ensure you complete and return the information form found at the end of this document.

2. Functionality Overview

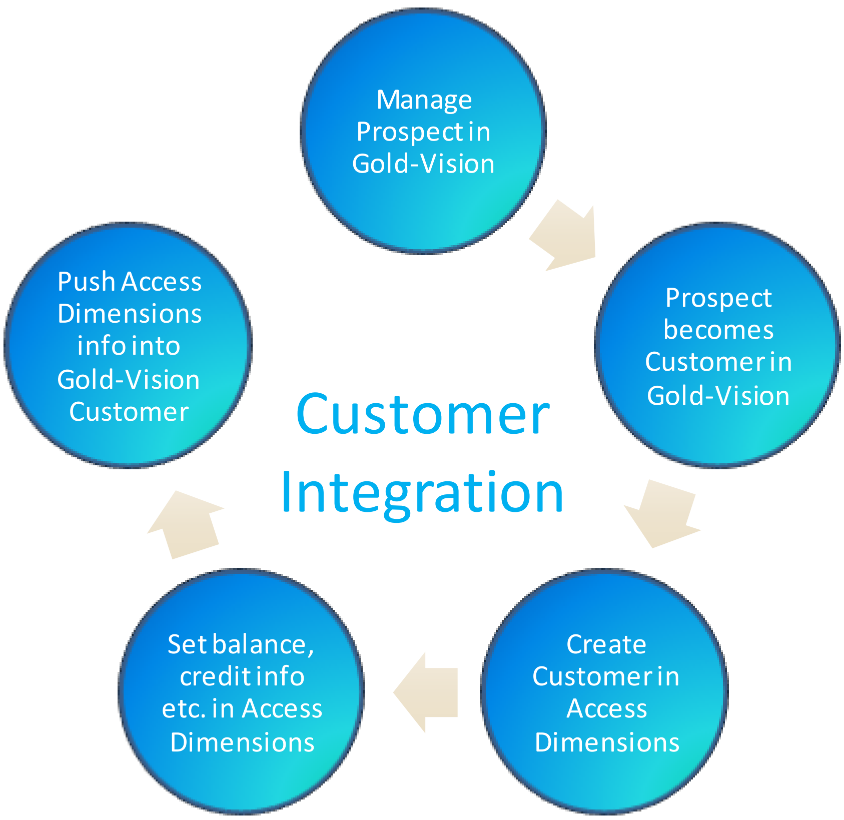
The integration between Gold-Vision and Access Dimensions is achieved via an automated integration tool. The tool runs regularly throughout the day to push data to Access Dimensions and typically once a day to transfer data from Access Dimensions to Gold-Vision.

Standard modules available:

- Create new Access Dimensions customer from Gold-Vision account.
- Access Dimensions customer updates corresponding Gold-Vision account (e.g. Balance).
- Import Access Dimensions product list to Gold-Vision.
- Create new Access Dimensions sales order from Gold-Vision quotes.

2.1. Account Integration

The minimum level of integration is to integrate Gold-Vision accounts with Access Dimensions customers. This involves creating a new customer in Access Dimensions when an account reaches a specific state in Gold-Vision (e.g. their type becomes "Customer") and regularly updating Gold-Vision with Access Dimensions data (e.g. credit limit, balance etc.).



On initial setup, existing Access Dimensions customers may be imported to Gold-Vision. We will establish a link between these Gold-Vision accounts and their Access Dimensions customer counterparts when implementing the integration.

Once the integration is live, accounts should be created in Gold-Vision and pushed to Access Dimensions by the integration (automatically throughout the day). The trigger for flagging when an account is ready to be pushed to Access Dimensions is customizable via standard Gold-Vision alerts.

Once a link exists between a Gold-Vision account and Access Dimensions customer, Access Dimensions specific data can be pulled into Gold-Vision via the integration (typically once a day).

For fields which are common between the two systems, such as Billing Address, Access Dimensions becomes the master for that data. Updates made to these fields in Access Dimensions can update corresponding Gold-Vision details when the integration runs.

2.2. Sales Order Integration

The next level of integration is to integrate Gold-Vision quotes with Access Dimensions sales orders. This involves creating a new sales order in Access Dimensions when a Gold-Vision quote is closed "Won".

Products are created and maintained in Access Dimensions. The integration imports those products to Gold-Vision (typically once a day). Once in Gold-Vision, additional detail can be added (such as product images) and price lists can be created.

When a user creates a quote in Gold-Vision, the products they see will be those sourced from Access Dimensions. Prices will be in line with the Access Dimensions base price or based on a selected Gold-Vision price list.

A key benefit of using Gold-Vision for quoting is the ability to create more flexible proposal or quote formats using Microsoft Word.

When the Opportunity or Quote is "closed-won", associated quotes are exported to Access Dimension's Sales Order Processing functionality, allowing final review by the accounts team and easy conversion to an invoice without re-keying.

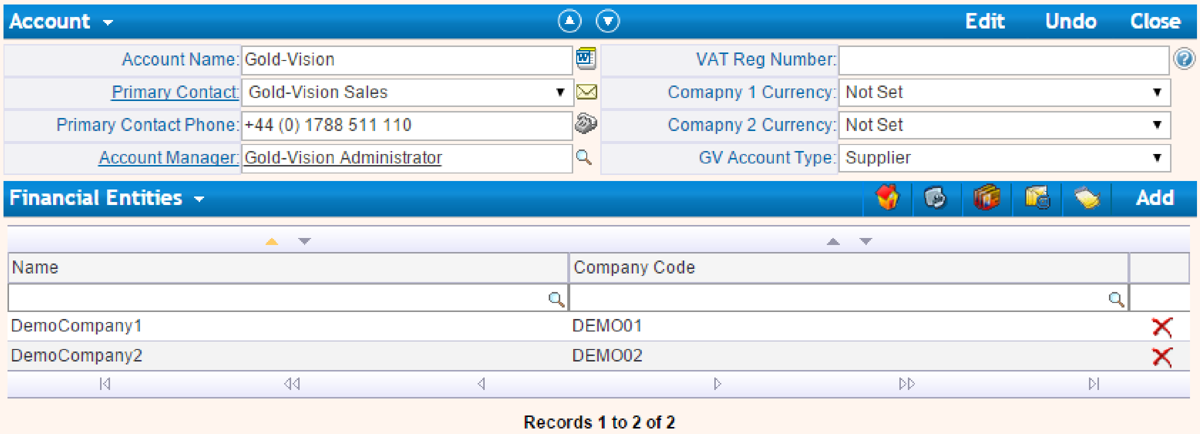
2.3. Multi-Company Compatibility

All of the standard modules described previously are multi-company compatible. This means a single instance of Gold-Vision can integrate with multiple Access Dimensions companies / datasets. For example, a single Gold-Vision account can exist in multiple Access Dimensions companies. Access Dimensions details for that customer can be pushed back and collated against the single Gold-Vision account.

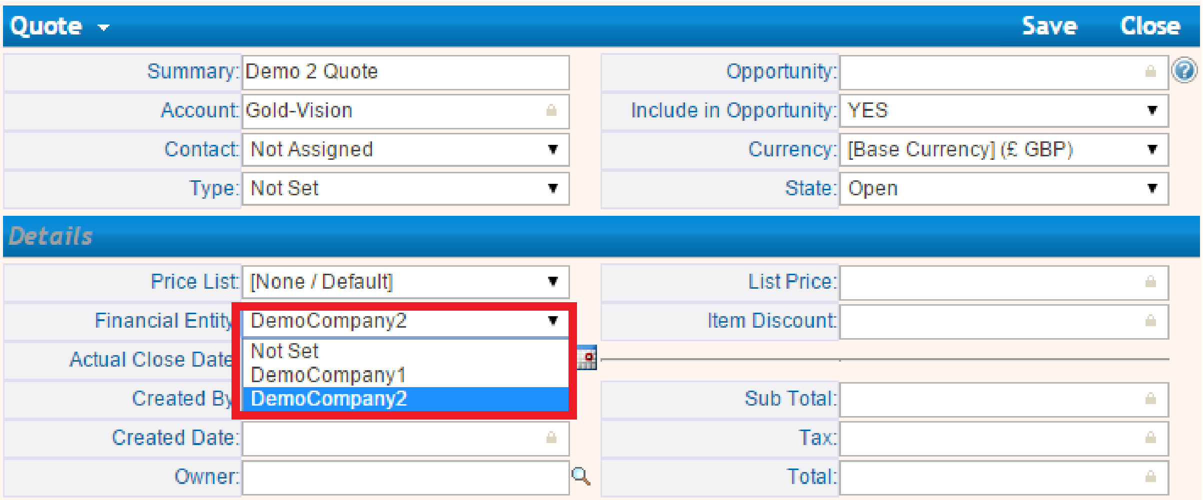
Products can be imported from all Access Dimensions Companies into Gold-Vision's single product catalogue but they remain associated with the Access Dimensions Company from which they were imported.

When quoting, the user will select the Access Dimensions company to which the quote will eventually be pushed as a sales order. This also restricts the products available when building the quote to those sourced from the corresponding Access Dimensions company.

The account below exists in two Access Dimensions Companies.



When building a quote, it is associated with one of the Access Dimensions Companies.



When selecting products, only those imported from the company dataset targeted above will be available for selection.

3. Administration Process

The Gold-Vision to Access Dimensions integration is designed to run automatically and therefore the integration itself has little administrative overhead.

The configuration of Gold-Vision alerts and frequency of jobs processing, which control the integration, are discussed with the implementation team when the integration is being configured.

In the event of a query or error regarding the integration, there are several views available in the Gold-Vision Administration Console to assist with trouble shooting. The implementation team will talk you through these screens during the integration training.

Please note that the management of credit notes (plus associated potential stock returns etc.) are beyond the scope of the Gold-Vision integration. The adjustments would therefore be made in Access Dimensions.

4. Implementation Approach and Timings

Gold-Vision to Access Dimensions integration requires installing and configuring. During this process, key users are trained. This is typically an accounts user and a Gold-Vision Administrator. The configuration process essentially involves the mapping of fields between the systems, and configuring how these are viewed in Gold-Vision.

Typically, accurate customer details are available from your Access Dimensions and so represent a useful source of data for initial load into Gold-Vision, especially since this load also includes the Access Dimensions Customer ID which is then used for on-going synchronisation.

For new prospects or customers, we work with you to agree the right process and triggers for new customers to be initiated from Gold-Vision, as described in section 2. These are defined using standard Gold-Vision alerts.

There are 2 main levels of integration as follows:

Level 1 – Account Synchronisation

- On initial setup, existing Access Dimensions customers may be imported to Gold-Vision as accounts.
- The Gold-Vision Account may be updated with Access Dimensions information fields (e.g. Credit Limit).

Level 2 – Order and Invoice Processing

- Level 1 plus…
- The Access Dimensions product list may be imported into Gold-Vision. Where additional Gold-Vision descriptions, images etc. have been added, these are not overwritten.
- Gold-Vision "won" quotes may be exported to sales order processing for easy invoicing.

It is also important to consider which system becomes the master at different stages of the process. Our approach is that once a Gold-Vision account has been set up in Access Dimensions and synchronised, then the Access Dimensions record becomes the master for key information. The billing address is controlled and changed in Access Dimensions – this is a basic fraud prevention control. Therefore, billing address changes made in Gold-Vision could trigger an automatic e-mail to the accounts users to update the Access Dimensions address.

The integration tool is a standard solution, with configuration options. If your Access Dimensions integration requirement is not covered by the functionality described in this document, then please feel free to discuss your requirement with us.

4.1. Implementation Process

Typically, the following steps are taken when implementing a new integration:

1. Customer returns the Return Form found in this integration pack and grants appropriate access to various servers as applicable (please see section 5).

2. Customer / Project consultant imports Access Dimensions customer codes to Gold-Vision ready for linking with Access Dimensions.

3. Technical consultant installs a basic integration with a Access Dimensions test company (ideally the test company will be a copy of your live company). Links are created between Gold-Vision accounts and Access Dimensions customers.

4. Technical and project consultant will walk the customer through the integration process.

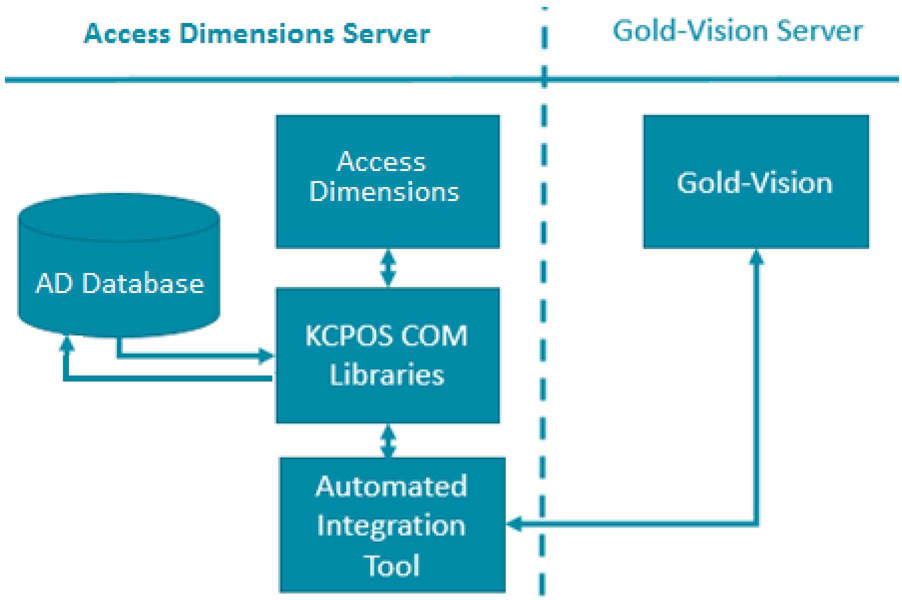
5. Customer takes some time to test the integration and determine any required adjustments. Adjustments are fed back to the technical consultant.

6. Technical consultant completes implementation of the integration and connects to the live Access Dimensions company.

5. Technical Considerations

5.1. Architecture

The integration tool utilises KCPOS Libraries for communication with Access Dimensions. These are third party libraries which allow us to integrate with a number of accounting systems. The KCPOS Libraries are installed on the Access Dimensions server as part of the installation process.



5.2. Minimum Requirements

- Access Dimensions.
- User access to Access Dimensions.
- Access to the Access Dimensions database.
- .Net 4.0 installed on the server hosting Access Dimensions.

5.3. Gold-Vision Configuration

- The latest version of Gold-Vision is recommended.
- Access to Gold-Link (the Gold-Vision API).
- Custom procedures and screens will be added to the Gold-Vision database and file structure. None of the Gold-Vision standard components will be modified.

5.4. KCPOS Library

- Responsible for communication with Access Dimensions.
- These libraries must be registered on the Access Dimensions server.

5.5. Integration Tool

- Handles all interaction between Gold-Vision and KCPOS library (must be able to access Gold-Link).
- Installed on Access Dimensions server.

We require RDP access to the Access Dimensions and Gold-Vision servers to complete implementation. We cannot implement the integration via applications such as Go-To-Assist and Team Viewer.

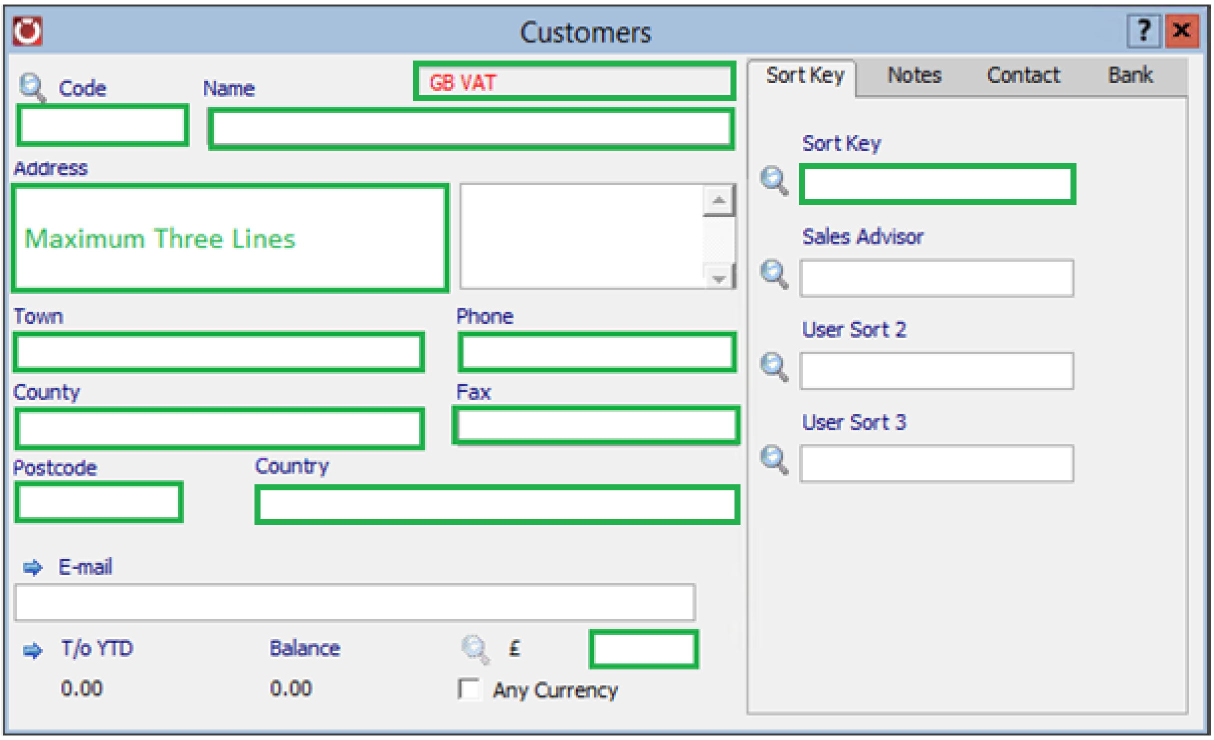
6. Return Form

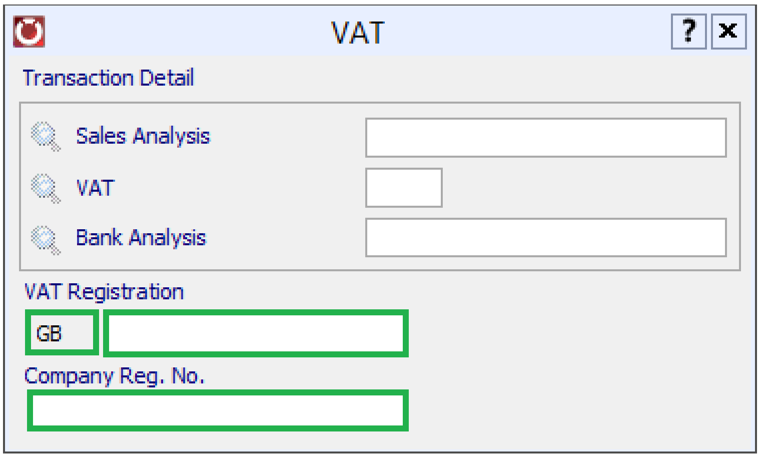
Access Dimensions key user(s): (Users will be contacted throughout the implementation process)	
Gold-Vision key user(s): (Users will be contacted throughout the implementation process)	
Customer Synchronisation (including Pushback):	☐
Sales Order Creation from Gold-Vision Quote:	☐
Product import:	☐
Access Dimensions companies to integrate: (Please include details of a test company)	
Technical considerations understood? (See section 5 regarding appropriate access and user permissions.)	☐

7. Appendix

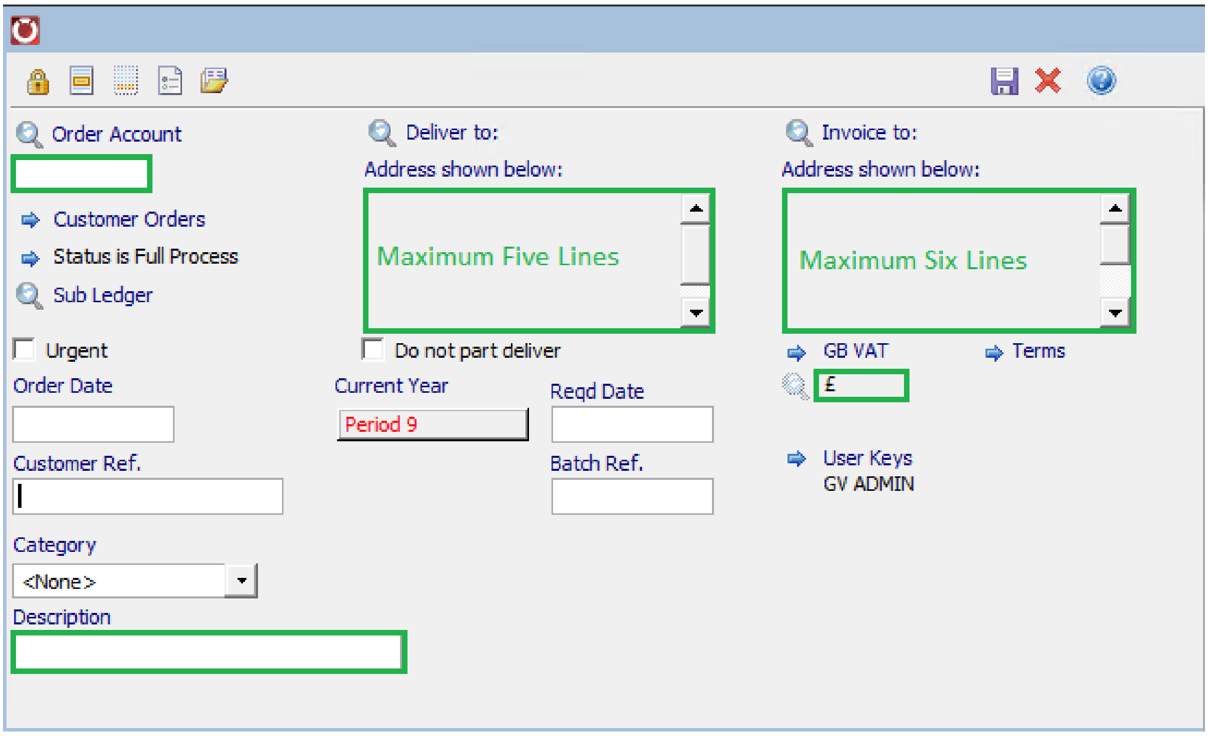
Green fields can be mapped between systems.

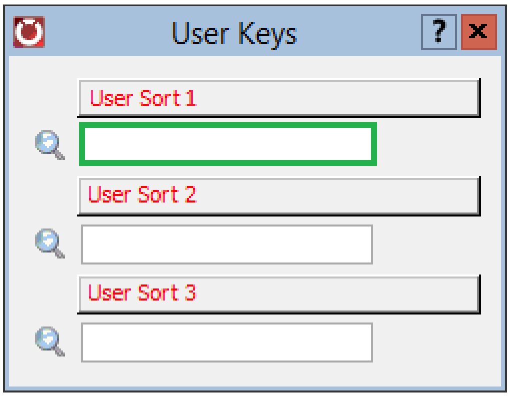
7.1. Customer Creation and Pushback



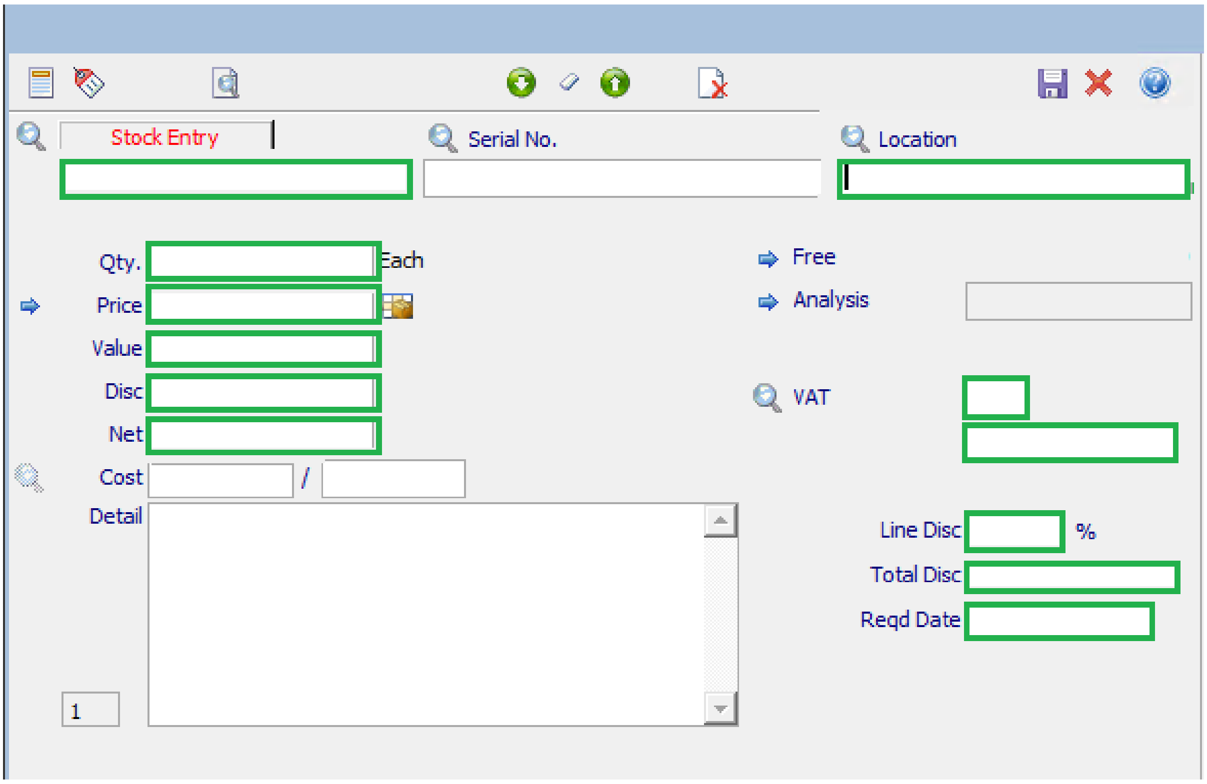


7.2. Sales Order Creation





7.3. Sales Order Line Creation



7.4. Product Import