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Sage 200 Standard Integration

Introduction

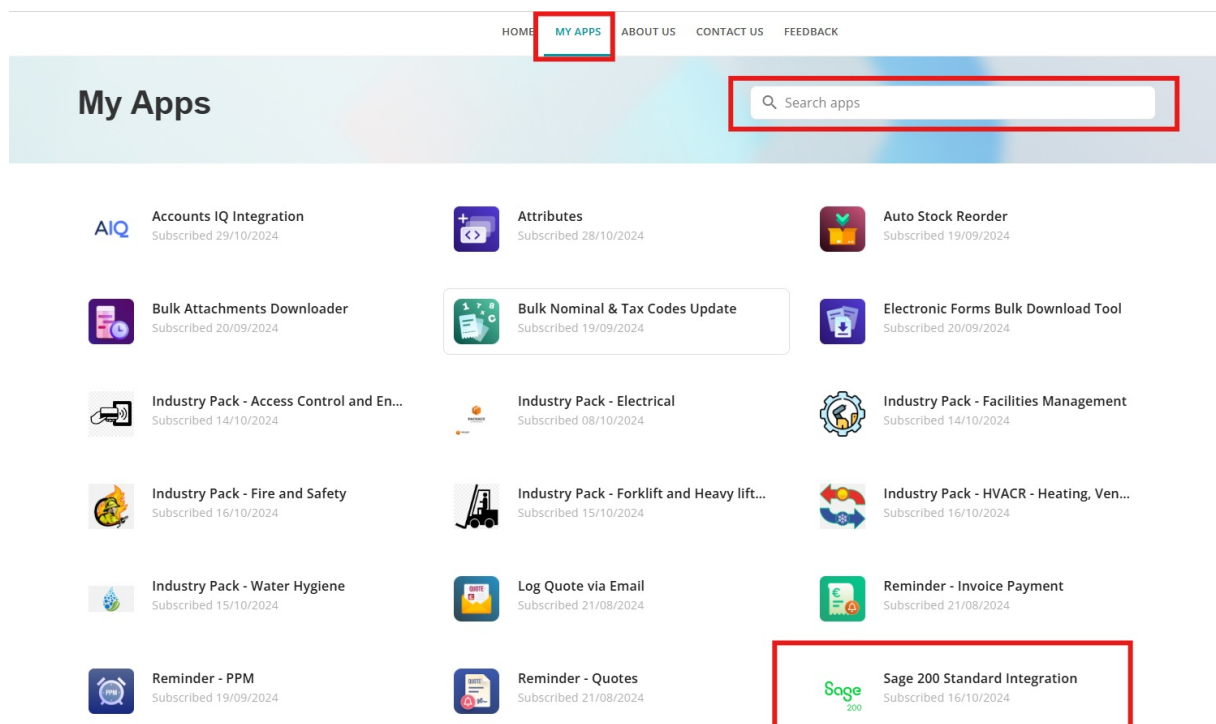
The Sage 200 Standard Integration (version 29 & 30) with Joblogic simplifies financial data management by syncing key entities between the two systems. This integration ensures that customer, supplier, tax, and nominal codes remain consistent, while also enabling seamless sales and purchase invoice synchronisation.

This guide will walk you through accessing, setting up, and managing the Sage 200 integration to streamline your workflows.

Accessing the Sage200 Integration

Click into My Apps on your Marketplace page

Either Search for 'Sage 200', or simply click the relevant button.

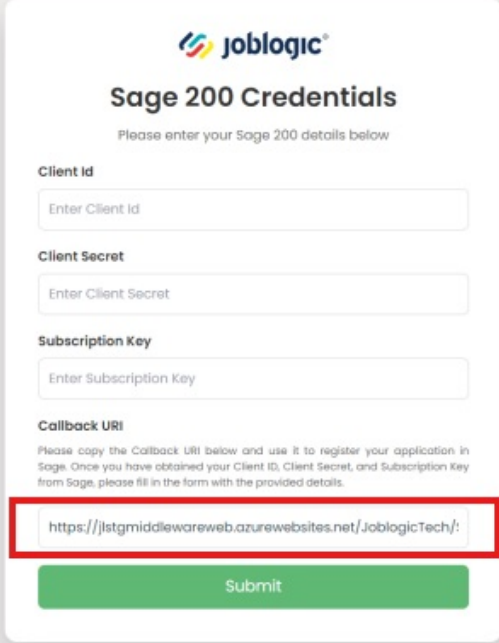


Initial Setup

First time login

When you click on the app for the first time, you will be prompted to log in with your Sage200 credentials.

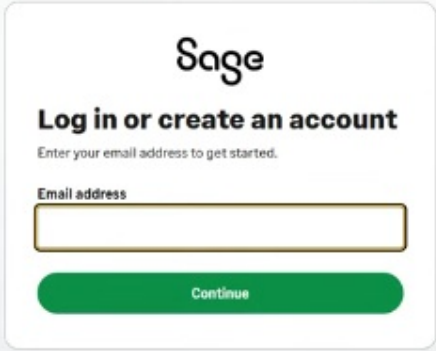
This form contains a Joblogic generated URL, which you will need to copy and paste into your web browser



The image shows a 'Sage 200 Credentials' form from Joblogic. The form is white with a green 'Submit' button at the bottom. It contains four input fields: 'Client Id', 'Client Secret', 'Subscription Key', and 'Callback URI'. The 'Callback URI' field is highlighted with a red rectangle and contains the URL 'https://lstgmiddllewareweb.azurewebsites.net/JoblogicTech/'. Below the 'Callback URI' field, there is a small text block that reads: 'Please copy the Callback URI below and use it to register your application in Sage. Once you have obtained your Client ID, Client Secret, and Subscription Key from Sage, please fill in the form with the provided details.'

Here, you can obtain the Client ID, Client Secret and Subscription Key to fill out the Sage 200 Credentials form.

Once you have done this, you'll be able to enter your Sage log in details.

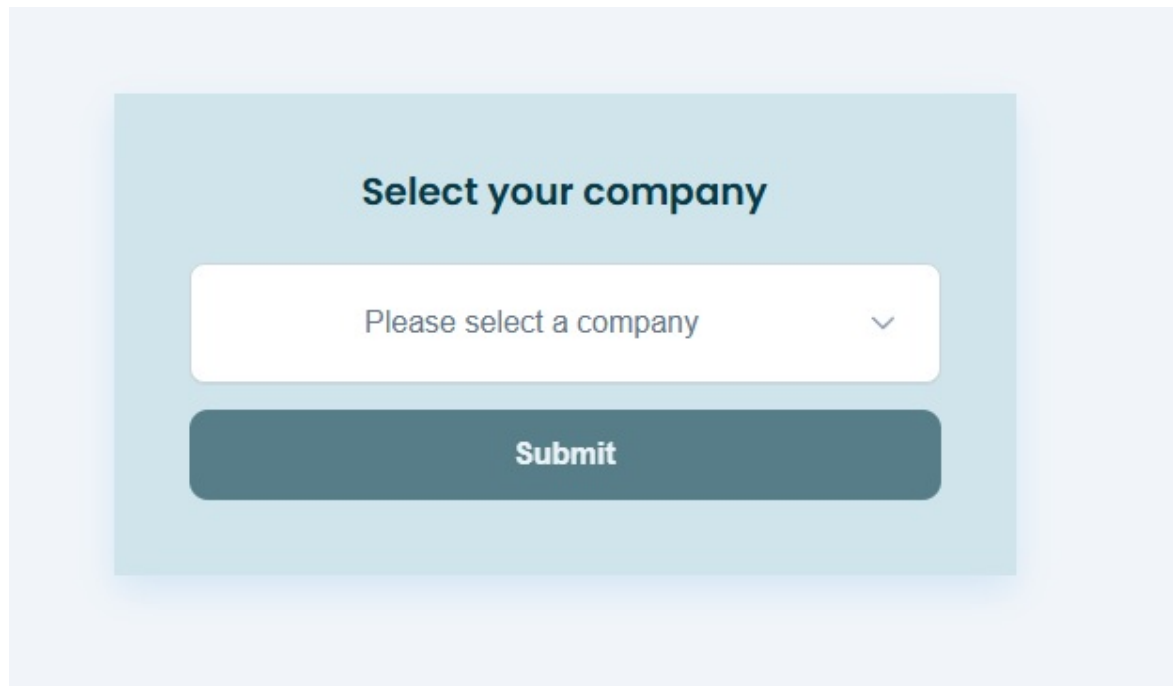


The image shows a 'Sage Log in or create an account' form. The form is white with a green 'Continue' button at the bottom. It contains a single input field labeled 'Email address'. Above the input field, the text 'Enter your email address to get started.' is displayed.

Company selection

After entering your credentials, select a company from the Company Selection page, and click Submit.

The chosen company determines where the data syncing will occur.

A screenshot of a web form titled "Select your company". The form is centered on a light blue background. It features a white dropdown menu with the placeholder text "Please select a company" and a small downward arrow on the right. Below the dropdown is a dark teal button with the word "Submit" in white text.

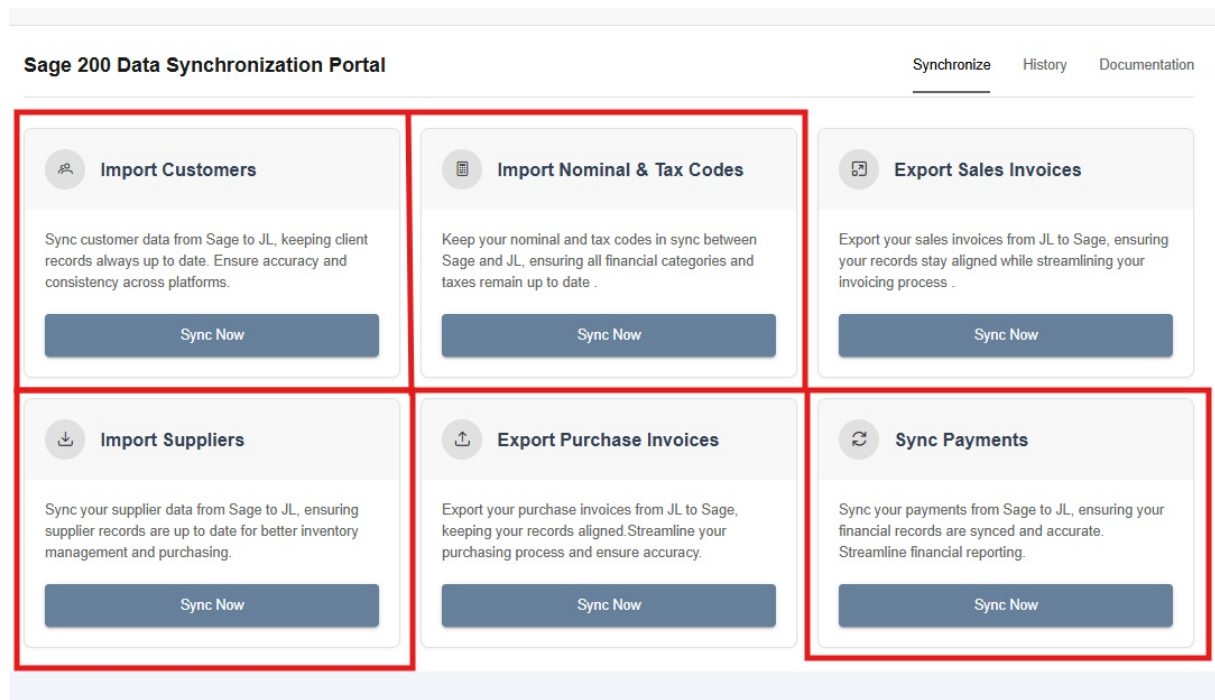
Syncing options

After selecting a company, you can sync the following entities between Joblogic and Sage200:

From Sage200 to Joblogic:

- Customers
- Suppliers
- Tax Codes
- Nominal Codes
- Payments

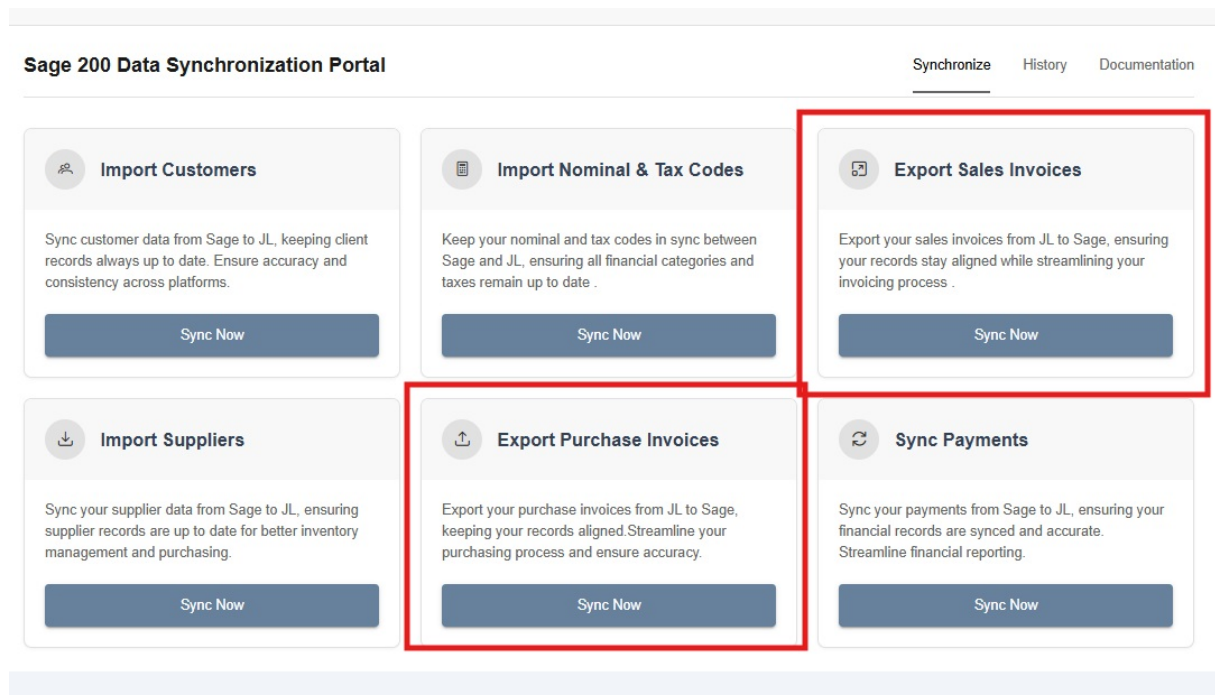
Note: Only newly created entries in Sage will sync to Joblogic; modifications to existing entities require manual updates in Joblogic.



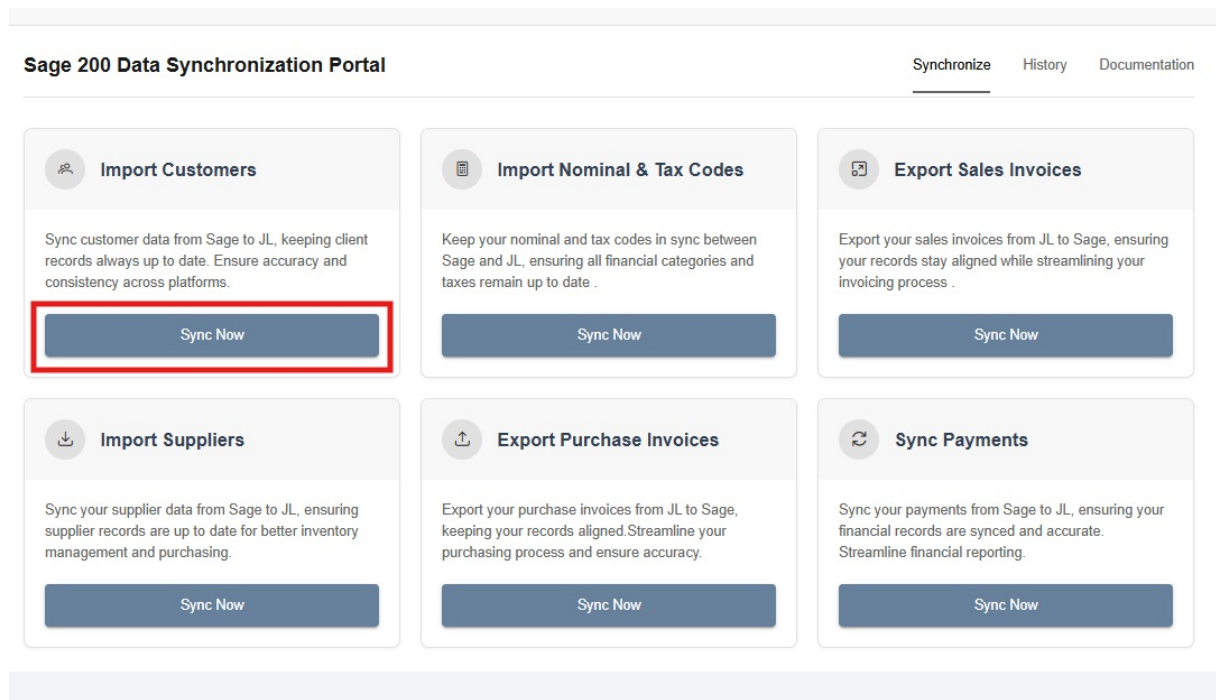
From Joblogic to Sage200:

- Sales Invoices
- Purchase Invoices

Note: If a new customer or supplier is detected during an invoice sync, they will be automatically created in Sage200 before continuing with the sync.

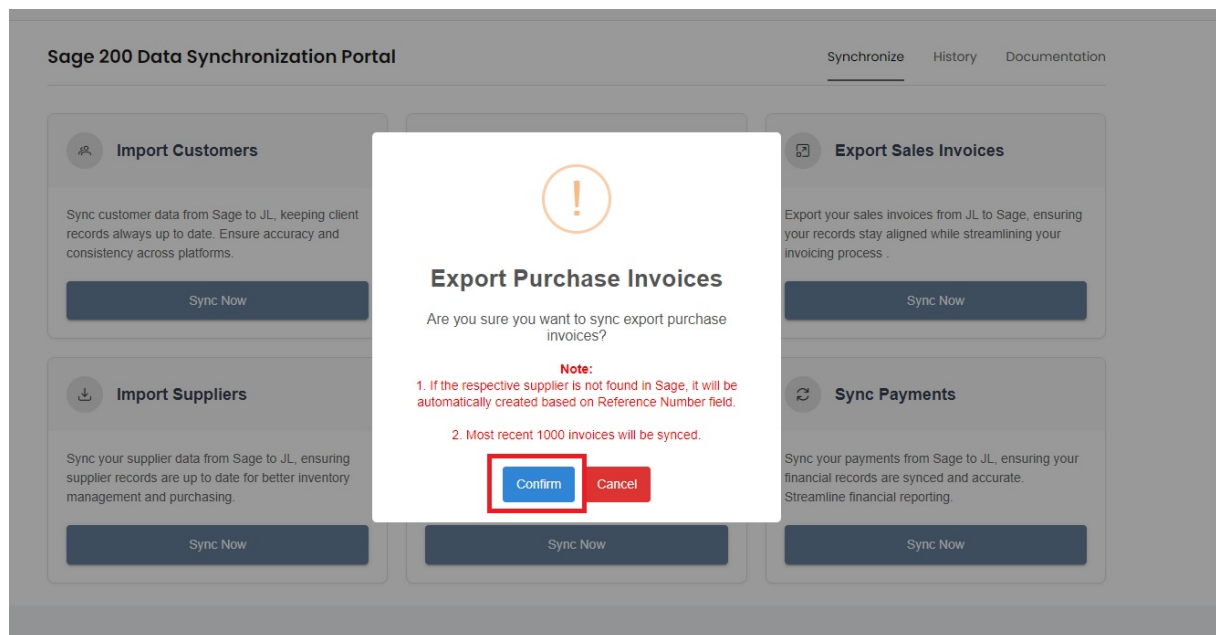


To begin, click "Sync Now" next to the items you'd like to update.



Click Confirm to proceed with the synchronization.

Note: For Sales & Purchase invoices it will only sync the most recent 1000 invoices.




Once an invoice has been synced to Sage, it will be marked as "Pass to Account" in Joblogic to prevent the same invoice from syncing again.

While a sync is in progress, all sync options will be greyed out until this sync is completed.

Sync in progress...


Sage 200 Data Synchronization Portal

Synchronize History Documentation

**Import Customers**


Sync customer data from Sage to JL, keeping client records always up to date. Ensure accuracy and consistency across platforms.

Sync Now

**Import Nominal & Tax Codes**


Keep your nominal and tax codes in sync between Sage and JL, ensuring all financial categories and taxes remain up to date.

Sync Now

**Export Sales Invoices**


Export your sales invoices from JL to Sage, ensuring your records stay aligned while streamlining your invoicing process.

Sync Now

**Import Suppliers**


Sync your supplier data from Sage to JL, ensuring supplier records are up to date for better inventory management and purchasing.

Sync Now

**Export Purchase Invoices**

Export your purchase invoices from JL to Sage, keeping your records aligned. Streamline your purchasing process and ensure accuracy.

Sync Now

**Sync Payments**

Sync your payments from Sage to JL, ensuring your financial records are synced and accurate. Streamline financial reporting.

Sync Now

Auditing

You can see an audit of what you have synced via the History tab.

This list will provide you with a list of what has been synced, when and whether it was successful or not. Any failures will include a reason.

Click Export to Excel to download this list for your records, if required.

Sage 200 Data Synchronization Portal

Synchronize

History

Documentation

Clear

Start Date

End Date

Export to Excel

Keyword Search

Entity Type	Entity Reference	Description	Date Time	Status	Failure Reason
Purchase Invoice	dfsdf	Invoice dfsdf for supplier account	19/11/2024 07:29	Fail	Failed to create supplier 'Subcontractor3' with account number `.`.
Purchase Invoice	23w4re	Invoice 23w4re for supplier account 1231415345	19/11/2024 07:29	Fail	Failed to create supplier 'Subcontractor 4' with account number '1231415345'.
Purchase Invoice	12365489	Invoice 12365489 for supplier account	19/11/2024 07:29	Fail	Failed to create supplier 'Mesum' with account number `.`.
Purchase Invoice	753951	Invoice 753951 for supplier account Account Number sub2	19/11/2024 07:29	Fail	time data '06/03/20' does not match format '%d/%m/%Y'
Purchase Invoice	sdfrwr	Invoice sdfrwr for supplier account AccountNumber	19/11/2024 07:29	Fail	time data '29/04/20' does not match format '%d/%m/%Y'
Purchase Invoice	12332434343	Invoice 12332434343 for supplier account	19/11/2024 07:29	Fail	Failed to create supplier 'Subcontractor3' with account number `.`.
Purchase Invoice	MESUM_SCitest	Invoice MESUM_SCitest for supplier account A1B001	19/11/2024 07:29	Fail	Failed to create supplier 'A1 Flue Systems' with account number 'A1B001'.
Purchase Invoice	867TYH	Invoice 867TYH for supplier account ACWILLIA	19/11/2024 07:29	Fail	time data '01/03/20' does not match format '%d/%m/%Y'
Purchase Invoice	74523698	Invoice 74523698 for supplier account	19/11/2024 07:29	Fail	Failed to create supplier 'Mesum' with account number `.`.
Purchase Invoice	CPO0005	Invoice CPO0005 for supplier account 142523636	19/11/2024 07:29	Fail	time data '17/04/20' does not match format '%d/%m/%Y'

<< < 1 2 3 4 5 > >>

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Further Support

For further information or assistance with the above, contact our Support Team on 0800 326 5561 or email support@joblogic.com. Alternatively, our Customer Success Management team can be reached by emailing customersuccess@joblogic.com

Publishing Details

This document was written and produced by Joblogic's Technical Writing team and was last updated on the date specified above. Be aware that the information provided may be subject to change following further updates on the matter becoming available. Additionally, details within the guide may vary depending on your Joblogic account's user permissions.

