



Microsoft  
**Dynamics 365**

**CRM**

**Integrations**

*Designed to provide your business with better opportunities, higher efficiency, and enhanced productivity, GUMU™ powered Dynamics 365 CRM integrations offered by Greytrix cover all the major business needs.*

*GUMU™ is a framework built on modern technology that facilitates integration between two systems on a plug-and-play principle.*

**Easy to Use**

**Plug and Play**

**Highly Configurable**

**One-click, Cloud Integrator**



**Seamless and Secure Integrations**

**Automated Workflows**

**Reduced Data Redundancy**

**Better Business Insights**

**Higher Productivity & Efficiency**

Transform the way your  
**BUSINESS OPERATES**  
with

## Powerful Integrations

Powered by GUMU™



The GUMU™ for Dynamics 365 CRM – Sage Intacct integration is an ultimate business management solution that facilitates multi-dimensional data analysis to help improve productivity, ensure timely decisions, and drive business growth.



### Cloud Integration

The integration is powered by GUMU™ - our champion and a cloud-based integration platform that facilitates easy and seamless integrations.



### One-Click Import

The data recorded in Sage Intacct ERP is imported into Dynamics 365 CRM using GUMU™, and that too with one click.



### Authorization Control

Ensure authorization control with GUMU™, which has a robust security Matrix allowing the administrator to restrict data access.



### Multi-Company Support

You can integrate multiple companies and get a holistic view of entities in a single environment.



Get a 360-degree view of the business to streamline the processes and increase productivity with GUMU™ for Dynamics 365 CRM – Sage X3 integration



### Bi-Directional Integration

Get a comprehensive view of customer, sales, finance, and accounting to understand customers' buying habits, order history, and preferences.



### Simplified Data and Reporting

With updated data, you get a complete overview of critical processes, enhancing efficiency throughout the organization.



### Easy Data Flow

The data flows seamlessly from CRM to ERP, which means sales data from CRM is also available in ERP as well.



### Updated Customer Sales Information

Crucial information on sales and services can be viewed on Dynamics 365 CRM. This provides insight into key business metrics.



### Multi-Company Support

Configure multiple Sage X3 companies with Dynamics 365 CRM in a single environment.



GUMU™ for Dynamics 365 CRM and Sage 100 delivers exemplary integration benefits, including data redundancy, automated business process, and better business insights.



#### **Bi-directional Integration**

Ensure a consistent real-time data view with the two-way sync between both systems.



#### **Proactive Decision-Making Ability**

The integration provides comprehensive reporting tools that help users get the latest customer information, make swift decisions, and forecast sales.



#### **Multi-Company Integration**

The integration unites systems under a single platform that is easy to manage and monitor.



#### **Updated Customer and Sales Data**

Access all the crucial data related to sales and service on the UI-friendly MS Dynamics CRM dashboard.



Easily track leads, manage customer relationships, maintain the marketing pipeline, and get comprehensive business insights with GUMU™ for Dynamics 365 CRM – Sage 300 integration.



#### **Multi-Device Approach**

The integration allows users to access crucial information on different devices from anywhere.



#### **Bi-Directional Data**

The data in the integration flows in two ways, which means entities from Sage 300 ERP can also be viewed in Dynamics 365 CRM.



#### **Updated Data**

Gain detailed visibility into critical business metrics and allow teams to effectively understand customers and their needs/preferences.



Eliminate errors through data duplication and improves collaborations between business processes with GUMU™ for Dynamics 365 CRM – Acumatica integrations.



#### **Better Decision-Making Ability**

Make informed decisions through data synchronization, which also allows to identify business opportunities.



#### **Cloud Integration**

The integration is supported by GUMU™, which is a cloud-based, one-click integration platform.



#### **Cross-Device Integration**

Customer needs can be addressed in real-time with cross-device integration.



Automate your business operations and enable growth by integrating *Dynamics 365 with any other ERP systems.*



### Contact

Just like the customer module, data transfer of Contact also happens bi-directionally between the ERP and Dynamics 365.



### Addresses

Addresses of customers are synch in both CRM and ERP systems.



### Customer

The integrations support bi-directional data transfer of Customers and Accounts.



### Salesperson

Data related to Salesperson are synched in both systems to get a single view.

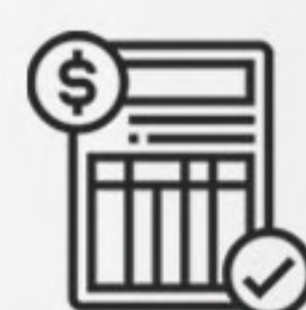


**Sales Order & Invoices**  
Easily view and manage Sales Orders, Invoices, and Promoted Quotes in both systems.



### Product

Products are created in the ERP and then transferred to Dynamics 365 CRM.



### Quote

Customer Quotations are entered in Dynamics 365 by the Salesperson and are transferred to the ERP system.



### Product Category

Product Category or product Family are integrated from the ERP to Dynamics 365 CRM.

## About Greytrix

Greytrix is a global leader with 23+ years of expertise as a Sage partner and a long practice delivering top-notch ERP and CRM solutions.

Its unique GUMU™ connector has been integrating ERP systems with CRM, third-party apps, and cloud storage systems.

One such seamless integration is the Dynamics 365 CRM with Acumatica that is best suited for tackling modern business processes. So, take the easy route to decoding complex processes with Greytrix!

For more information, contact us on [gumucloud@greytrix.com](mailto:gumucloud@greytrix.com)

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