GREYTRIX

GUMU™

OUR **CHAMPION INTEGRATOR**

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Introduction

About Us

Greytrix is one of Sage's oldest and the largest Development and Integration Partners of Sage with 23+ years of association and has 350+ business partners worldwide. Greytrix's forte delivers high quality, quick turnaround and cost-effective services for Sage Partners, End users and Sage PSG. Greytrix has established itself as one of the Sage ecosystem's integration specialists, with an expert team of 250+ consultants, 500+ successful implementations, and 1100+ years of experience. In its enclave, we have gained worldwide recognition for our contributions to the SME ERP industry, including Sage Software Development Partner - 2004, 2006, 2008, 2009, 2011, 2013, and 2019.

Greytrix's Flagship products are:

Acumatica Integrations with

| Dynamics 365 CRM I Magento I
| Shopify |

Salesforce Integrations with

| Sage Intacct I Sage X3 | Sage 300 | Sage 100 | Sage 50 US |

Sage Intacct Integrations with

| CRM solutions | E-commerce | Payment solutions I AP Automation I Tax compliance | POS and other systems with API |

BPORTALY

BE A PORTAL OF PARTNER SUCCESS

| Customer Portal | Supplier Portal | Shipping App |
| Sales Commission App |

About GUMU™

Greytrix has been one of the leading Sage Partners providing Sage ERP and CRM needs worldwide for the past two decades. GUMU™ - the de facto integrator is well-crafted by Greytrix to ensure seamless integration between ERP with CRM, Third-Party apps and Cloud-based systems. We offer end-to-end support for your pre-sales technical consultations, product customizations, data migration, system integrations, third-party add-on development, and implementation expertise.

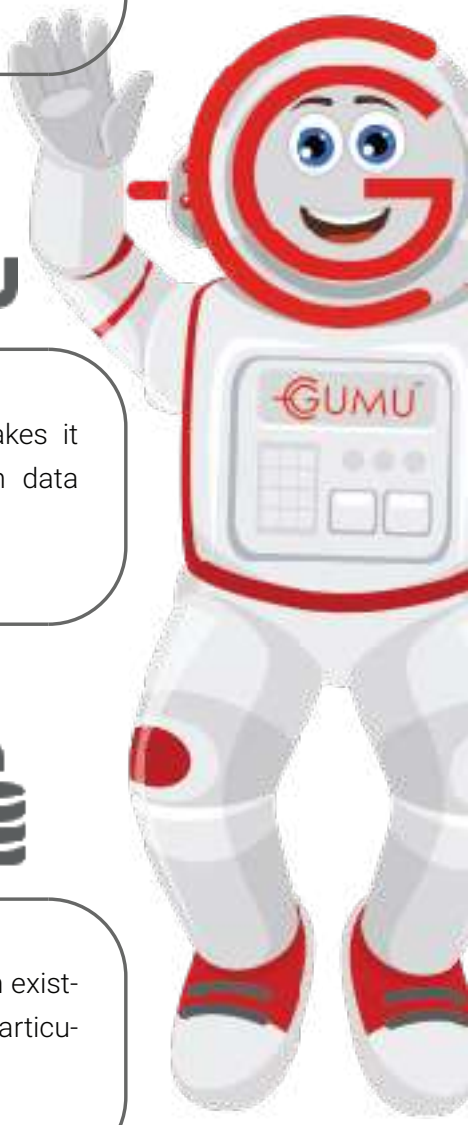
Working with simple plug-and-play applications with no manual mapping, coding or complex configurations required

Installation can be done in a few minutes and users require minimal training to deploy and use solutions

On-demand or scheduled synchronization makes it possible to move data quickly and maintain data consistency across applications

Connecting multiple databases and systems using a single framework to move data across the entire organization

Importing clean and organized data to maintain existing business logic and streamline workflows (particularly with data migration applications)



Growth
over the years

2004 — INTEGRATION
GUMU™ Integrations with Sage 100/ Sage 500/ Dynamics 365/ Great Plain

2006 — MIGRATION
Migrator of QB to Sage 300

2010 — FRAMEWORK
New GUMU™ Framework Microsoft Certified

2012 — INTEGRATION
GUMU™ Integration for Sage X3

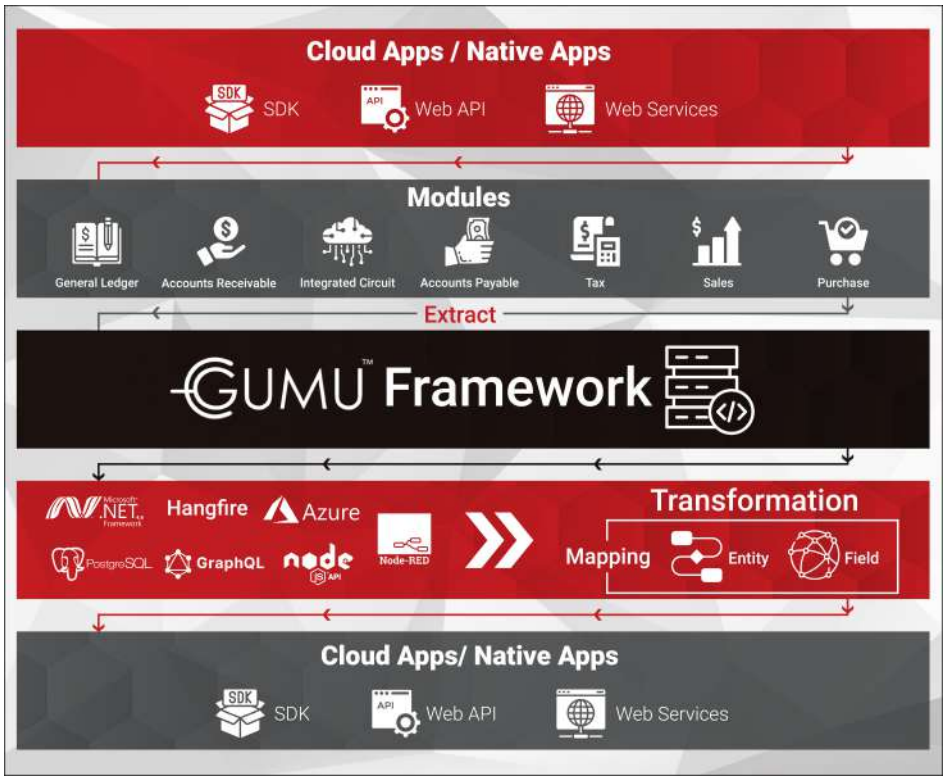
2016 — WEB PLATFORM
GUMU™ Web Platform

2017 — CERTIFICATION
GUMU™ Rockstar certification

2019 — CERTIFICATION
GUMU™ Champion Certification

2020 — CLOUD
New GUMU™ Cloud based Framework

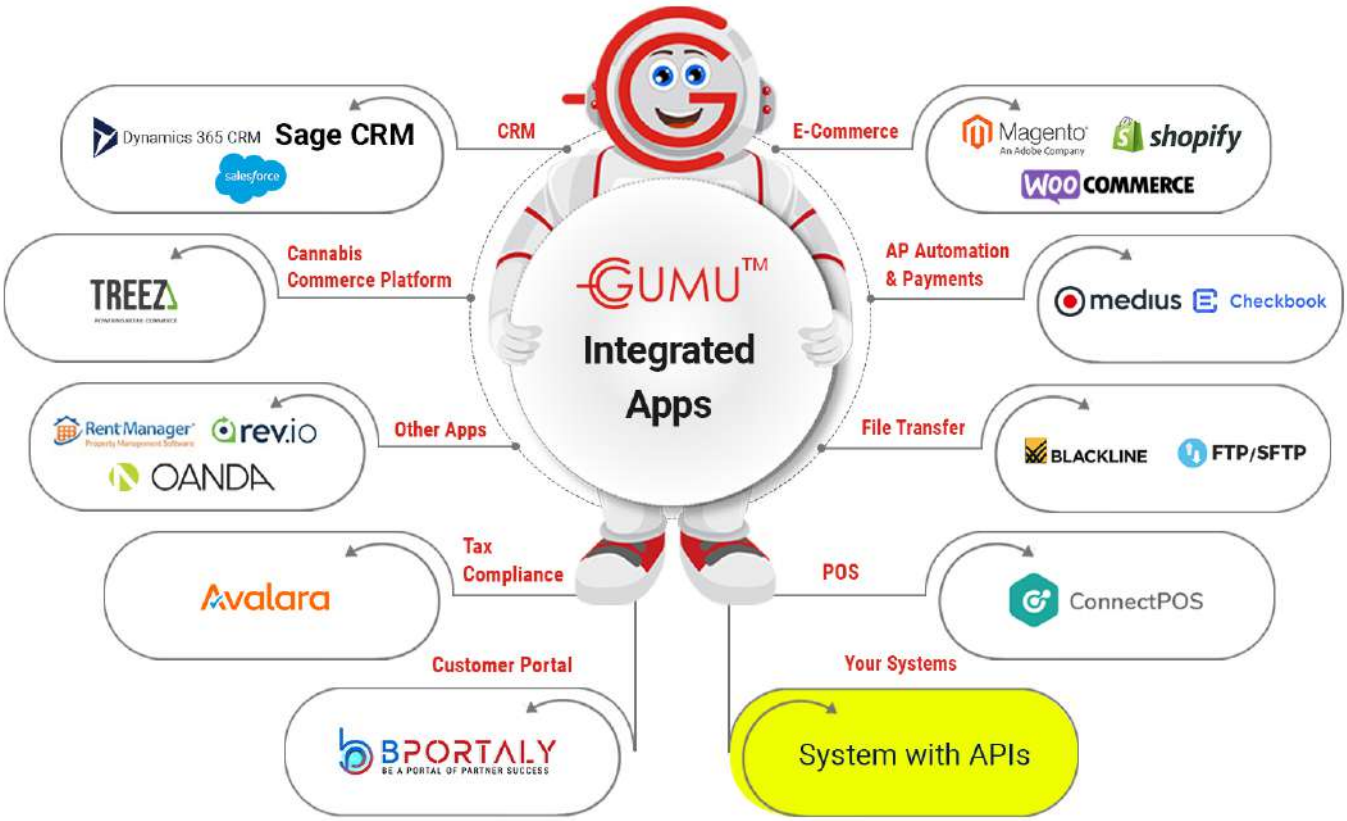
GUMU™
Architecture



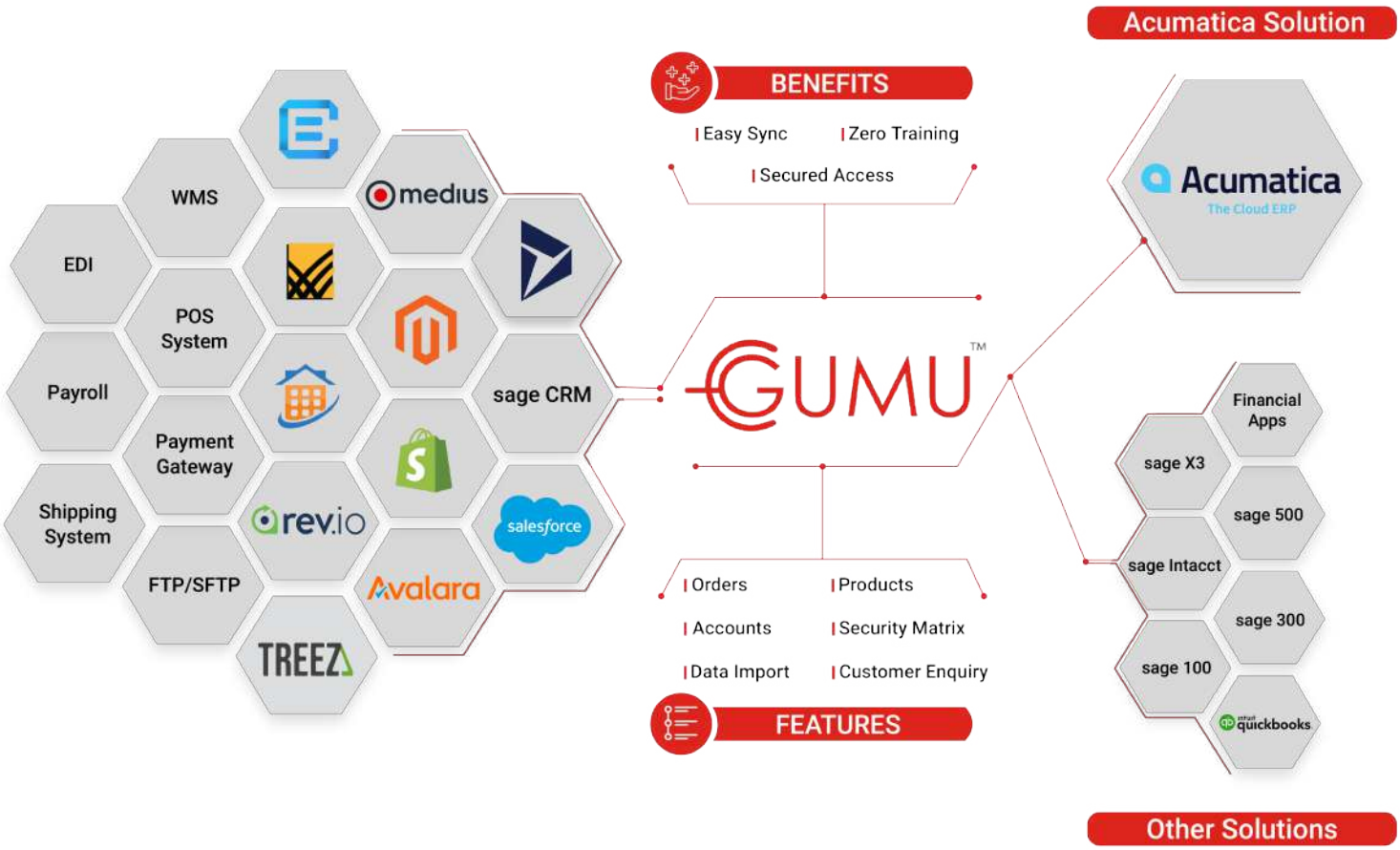
Integration
Framework

- **GUMU™ Integration**
- Web-based UI
- Plug-in Configuration
- Entity Mapping
- Processes
- Integration framework
- **Bi-directional Updates**
- Scheduler
- Logs & Reporting

Integrated Apps



Connections



Acumatica Integrations

Greytrix provides end-to-end services to Acumatica for development, customizations and integration with third-party apps via GUMU™ connector. This SaaS integrator enables seamless integration of Acumatica with CRM systems (MS Dynamics 365 CRM), E-commerce (Magento & Shopify), apps and will expand to include many more systems in future. GUMU™ enables on-demand or scheduled data synchronization between the two systems leading to a unified view of data and streamlined processes.

1. GUMU™ for Dynamics CRM and Acumatica

This powerful integration enables bi-directional data synchronization that can be scheduled or initiated on demand. Access core modules like Sales Quotes, Orders, Invoices, Customer Data, Product Information in both the systems. The GUMU™ Dynamics 365 CRM Acumatica Integration is a strong combination that enables easy and uniform access to data across the organization, which helps maintain transparency and drive processes faster.

Key highlights:

- Promote customers & orders of all entities from Dynamics CRM to Acumatica
- Get a holistic view of customers' complete profiles and map the trends
- Any product-related changes can be updated and easily accessed
- Caters to dynamic business demands by regulating processes, managing projects and precise forecasting
- Easy access to data and visibility of essential entities like customers, contacts and orders
- One gets quick and real-time access to product details

2. GUMU™ for Acumatica and Magento

The GUMU™ connector for Acumatica & Magento unites two robust solutions into one integrated system that can manage operations like supply chain, inventory, marketing, customers, etc. GUMU™ for Acumatica & Magento integration enables seamless data flow, simplified workflows, optimizes inventory levels, etc.

Key highlights:

- Monitor product information rules, calculate product costs, simulate new product development processes and validate product readiness against channel standards
- Get new customers, retain existing ones, and craft a better experience by simplifying order processes, accurate reporting, and tracing order history
- Have end-to-end data synchronization from e-commerce stores to Acumatica on time
- Identify best-selling products, get customer insights and improve business performance by meeting upcoming demands
- Boosts customer engagement by assuring on-time delivery and easy tracking
- Reducing data duplication errors and enhancing consistency across systems

3. GUMU™ for Acumatica and Shopify

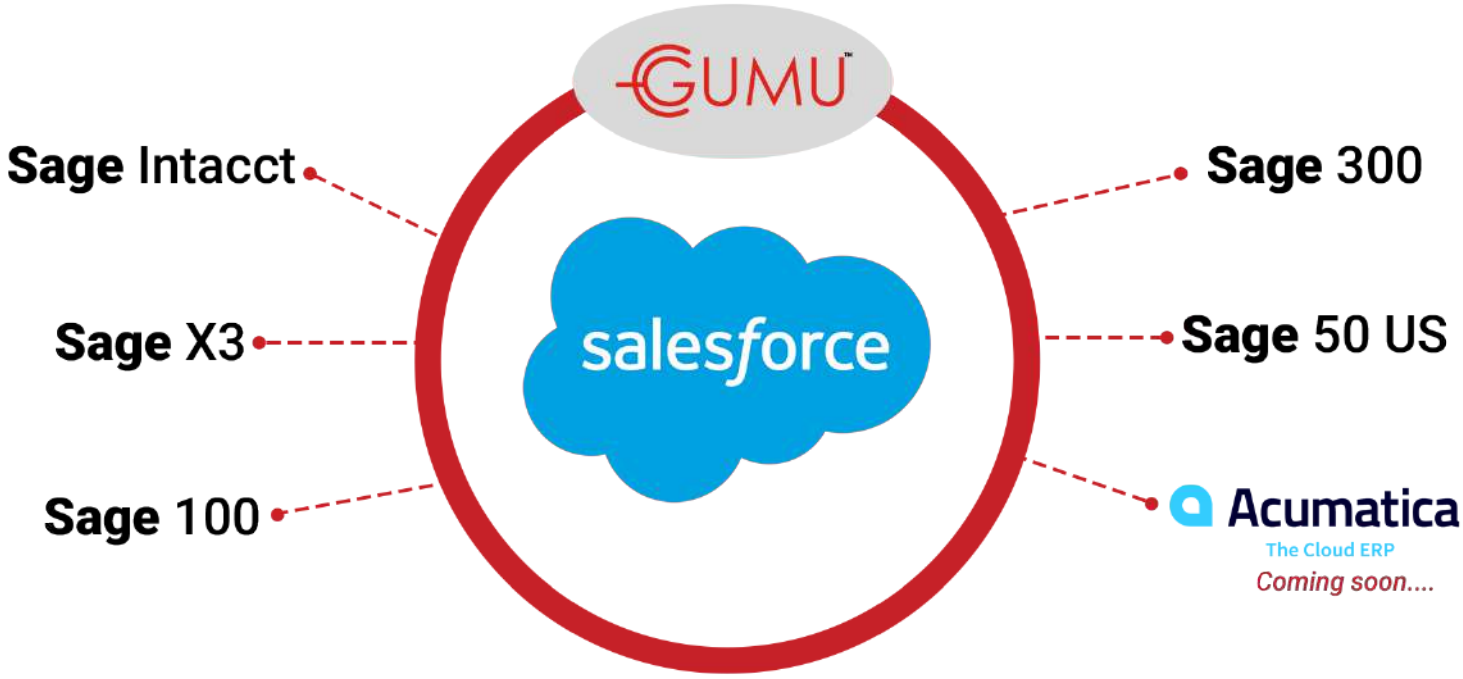
The Acumatica-Shopify Integration is for modern world businesses that look for instant results. This ERP and E-commerce integration synchronizes workflows, integrates entities and helps entail a better buying experience with accurate product status and timely service. In addition, it helps manage critical processes and ensures the smooth functioning of your e-commerce.

Key highlights:

- An intelligent and easy UI helps cater to better engagement, track deliveries, view order history and process orders faster
- Get in-depth visibility of customers' needs, preferences, buying patterns, order history, and account information
- All entities like sales orders, invoices and quotes are appropriately synched in the right stores
- Create tailor targeted campaigns and build long-lasting relationships with customers
- It helps entrepreneurs to scale their performance in both online and offline stores
- Eliminates any communication gaps in the departments

Salesforce Integrations

Greytrix brings an impeccable integration of **Salesforce – Sage ERP** powered by its native cloud connector platform, **GUMU™**. Salesforce can be seamlessly integrated with Sage ERPs like Sage Intacct, Sage X3, Sage 100 (US), Sage 300, and Sage 50 (US). **GUMU™** enables seamless and secured transfer of entities, bringing together your revenue, sales, and financial processes. As you automate complex processes and receive critical insights timely, you tend to make informed business decisions and tailor the best customer experience. Moreover, it helps get maximum ROI on your IT investment and saves time, reduces duplicate data entry, and improves data consistency.



Real-time Inquiries with Flexibility to Configure

Manage additional business and customize Customer details with user-friendly Salesforce UI. Meet changing business needs by creating new inquiries in the Salesforce system based on data in Sage ERP through GUMU™. To include custom fields, modify existing inquiries by associating Salesforce and Sage ERP data. This feature also eliminates the worry of additional data storage charges from Salesforce by fetching the related information from the Sage system and duplicating the data storage.

Standard Salesforce Opportunity

GUMU™ supports the standard Salesforce workflow of creating an Opportunity with Quote items and converting them to Sales Orders for them to be later promoted to Sage ERP. GUMU™ connector empowers this functionality by allowing the user to use the pricing defined in Salesforce and promoting the Quote to an ERP system. While converting a Quote into an order, the ERP record for that Quote is automatically transformed to an order. GUMU™ also eliminates the need for users to maintain complex pricing structures in Salesforce through CPQ. And instead, use the pricing directly from the Sage system.

Bulk Promotion & Update of Account and Orders

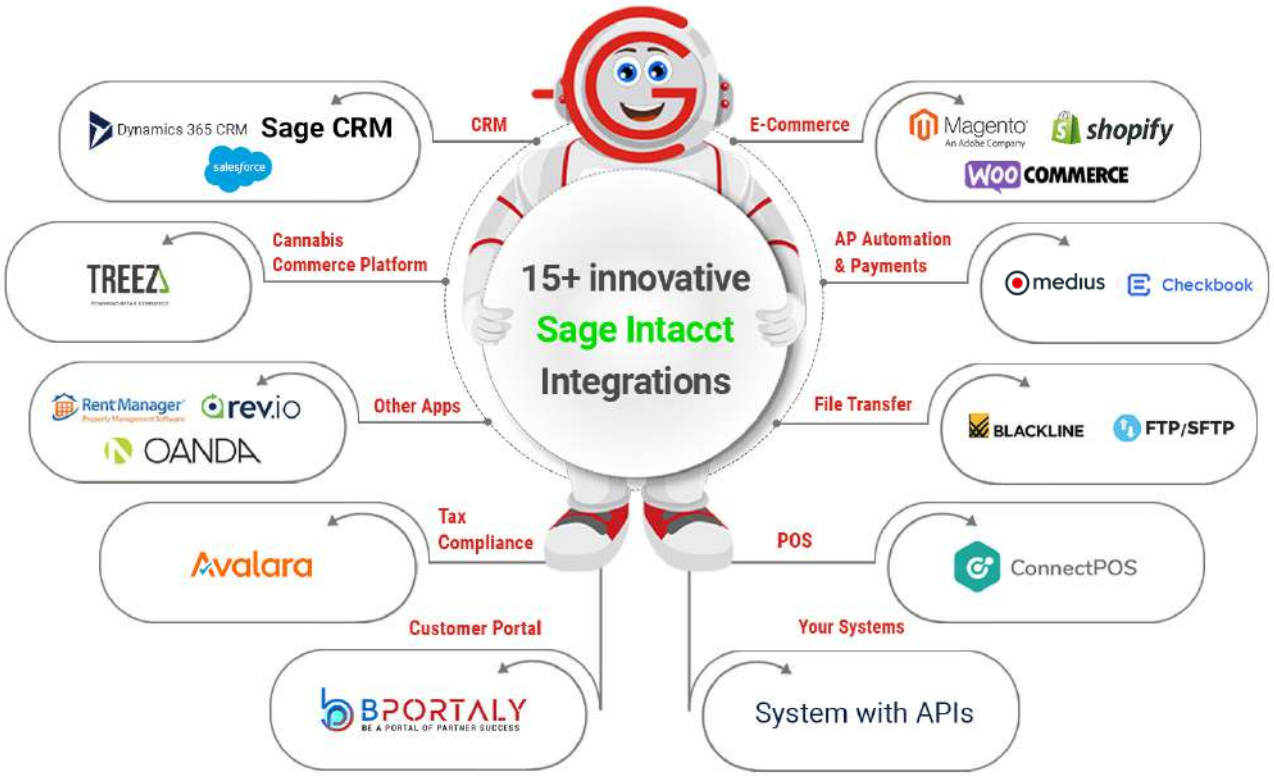
This integration supports bulk posting, i.e., promoting multiple accounts/customers from Salesforce to Sage ERP. One can also update Accounts and other related objects (Contacts and Addresses) from Salesforce to Sage ERP.

Linking/Unlinking Customers

Avoid data re-entry errors in your existing non-communicational systems by linking your existing Sage ERP Customer record with your Salesforce Account record. The customizable 'Link/Unlink Customer' screen helps configure additional fields like Billing Address, City, State, Zip Code, Country, and Status of the Account/Customer record.

Sage Intacct Integrations

GUMU™ powers 15+ Sage Intacct Integrations with various systems like payments, CRM, Tax compliance, E-commerce, AP automation, cloud storage systems etc. It helps businesses to extend the functionalities of Sage Intacct and help systems work in sync.



1. GUMU™ for Salesforce and Sage Intacct Integration

The GUMU™ integration of Salesforce and Sage Intacct is an impeccable integration that brings Sales, Revenue and Financial processes together by integrating key data points and eliminating any inaccuracies during data synchronization. It syncs sales, revenue and financial processes, streamlines workflows, improves inter-departmental collaboration and delivers excellent customer service with reduced sales friction. It allows the sales team to analyse their performance based on the financial impact. The top-notch functionalities help reducing operational costs with cash management, shorter cash cycles and fewer days of sales outstanding.

Key highlights:

- The data preview feature helps minimize errors by examining and approving ERP data before importing it into Salesforce CRM
- Salesforce enables altering customer information in real-time into Sage Intacct
- To help streamline your purchase processes, we offer a range of Vendor-related add-ons like Vendor Masters, Vendor Contact, Purchase Address and Billing Address
- We also offer Add-ons for AR Sales Invoice Promotion and Purchase Order Promotion
- We enable seamless import of entities like Salesperson, Currency, Category, Inquiry, Shipment, Quotes etc. from Sage Intacct to Salesforce

2. GUMU™ for Sage CRM and Sage Intacct Integration

Greytrix's well-designed GUMU™ connector platform enables seamless data movement between Sage Intacct and Sage CRM through an easy data exchange framework. This integration brings the front and backend processes together improving data visibility, automating business processes, reducing data redundancy, and thus results in faster workflows.

Key highlights:

- On the user-friendly Sage CRM screen, get a unified view of customer information
- Trace and track crucial information like leads, accounts and orders
- Empower system administrators by setting different access levels
- Build strong customer experience with faster resolution of queries and personalized responses
- Make informed decisions with real-time data and reporting tools

3. GUMU™ for Microsoft Dynamics 365 CRM and Sage Intacct Integration

The GUMU™ for Dynamics 365 CRM - Sage Intacct Integration allows high data visibility on both systems helping one access key business metrics. In addition, this integration has easy customer data management of your front-end and back-end systems. With the GUMU™ connector for Sage Intacct and Dynamics 365 CRM, it becomes simpler for a user to quickly implement and configure through its simplified implementation process.

Key highlights:

- Configure multiple Sage ERP companies with a single Dynamics 365 CRM environment
- Sync Sales Quotes, Orders and Invoices from Sage Intacct to Dynamics 365 CRM in one go
- Quote correct prices by on-demand synchronization of the latest information
- Seamless data flow across accounting and customer information enhances finance, customer relation and inter-departmental communication
- Have better visibility into key business metrics by cross-selling and up-selling more effectively
- Manage and monitor customer responsiveness to evaluate existing and potential customers

4. GUMU™ for Sage Intacct and Medius Integration

Medius is a digitized accounts payable system that helps process invoices, streamline workflows, generate reports and automate payments. Sage Intacct is a highly efficient cloud-based accounting system that helps automate key modules enabling quick and easy processing. The GUMUTM for Sage Intacct Medius Integration enables seamless and efficiently flowing workflows. It enables smooth integration of purchase orders and invoices, making it accessible from both systems. When the power of Sage Intacct-the cloud accounting software meets the seamless automated accounts payable process of Medius, the results are wondrous.

Key highlights:

- This integration allows a seamless data exchange from Sage Intacct to Medius on GL account numbers, warehouse, department, location, UOM and vendors
- GUMU™ enables customized company mapping for users to map companies individually & push data into the designated company
- Enable flawless integration of purchase orders, delivery receipts and invoices across both systems
- Make effortless transactions with multi-currency functionality
- Accelerate financial operations by having accurate financial reports

5. GUMU™ for Sage Intacct and Shopify Integration

The GUMU™ for Sage Intacct-Shopify Integration allows you to operate more efficiently as an E-Commerce business by streamlining your order, inventory, item, customer and shipping/tracking information. While many online companies still use one-way integration or batch upgrades leading to data silos in the system. Bi-directional, real-time data flow can be achieved with Sage Intacct connector for Shopify leveraging users to have inventory, transactions and pricing information at hand.

Key highlights:

- Enhance the correct customer group alignment with the right customer categories or statistical groups
- Streamline inventory synchronization by maintaining exact inventory levels
- Simplified access to accounts, orders, order history, invoices, pricing, and stocks
- Manage pricing and product changes
- Extensive analysis and reporting

6. GUMU™ for Sage Intacct and Treez Integration

Set up Sage Intacct and Treez integration to automate the recording of accounting transactions into Sage Intacct. By integrating Treez with accounting and financial management software like Sage Intacct, retailers can meet their core financial requirements like quick financial and operational data reporting. In addition, it assists dispensaries in automating the recording of accounting transactions into Sage Intacct.

Key highlights:

- Automate recording of revenue and payments entries into Sage Intacct. Entries are posted to desired GL accounts and dimensions
- Accurately record sales, returns, payments and refunds. This minimizes errors and assists in reconciliation
- Various transactions from Treez are integrated as summarized GL entries in Sage Intacct
- Rounding differences between the two systems are integrated into separate GL Accounts

7. GUMU™ for Sage Intacct and Magento Integration

GUMU™ for Sage Intacct-Magento Integration automates product, pricing and stock updates from Sage Intacct to Magento web, providing accurate product information and availability. Automated synchronization enables bi-directional data visibility and eliminates errors possible due to manual intervention. The integration of these systems can help manage the supply chain, track inventory, financials, provide efficient customer service and achieve accelerated results.

Key highlights:

- Access product and category details in both systems, giving everyone a single view of the inventory and product-specific details
- GUMU™ connector synchronizes the company with multiple stores in Magento for a centralized data management environment
- Quickly fulfilling orders reduces the cost to process and prevents any inadequacy during order processing
- The integration enables you to define a customer-specific pricing list in Sage Intacct and sync it with the pricing rules

8. GUMU™ for Sage Intacct and Avalara Integration

The GUMU™ Sage Intacct and Avalara integration ensure quicker tax calculations, hassle-free returns filing & effortless handling of exemption certificates. Also, AvaTax for Sage Intacct enables real-time monitoring of tax regulations by creating a single tax profile tailored to the specific customer regardless of the mode of purchase and payment. Track changing law, rates and rules modules and ensure appropriate compliance with the GUMU™ integration of Sage Intacct and Avalara.

Key highlights:

- Multi-entities are treated as independent firms for multi-entity taxation, resulting in error-free tax records
- Enhance your working environment with better compliance to all state and federal regulations
- Automate your tax compliance processes with an easy filling of returns and remittance calculation
- Have precise sales and usage tax calculations by verifying all the rates and rules

9. GUMU™ for Sage Intacct and Checkbooks Integration

The GUMU™ integration of Sage Intacct and Checkbook.io provides users ease of automating digital check payments at the click of a button through Sage Intacct – a cloud-based accounting software. Process e-checks electronically and reduce costs when converting these transactions with Sage Intacct - Checkbook connector. Payments are made from the Accounts Payable workflow, and the general ledger entries are automatically updated using Sage Intacct Checkbook.io Integration.

Key highlights:

- Payments are tracked as the recipient receives and deposits the amount within 3-to-4 days
- The digital checks ensure security as data is encrypted and transmitted via secured protocols
- Instantaneously track check status as payments is managed in one system
- ACH payments are processed fast with rapid verification

10. GUMU™ for Sage Intacct and Rev.io. Integration

The GUMU™ for Sage Intacct and Rev.io Integration enables efficient back office management with innovative billing solutions. Optimize customer billing experience while ensuring their satisfaction. It enables smooth workflows and order management resulting in customized billing options for individual accounts and customer's specific needs.

Key highlights:

- Updates revenues by posting journal entries to the mapped chart of accounts and dimensions, thus giving the users a clear view of sales
- While handling data during promotion, users can edit and reprocess the failed entries to GL Account, which will generate other receipts in Sage Intacct after the user has edited the payment
- You can manage sophisticated usage-based billing transactions with Rev.io and the Sage Intacct Connector

11. GUMU™ for Sage Intacct and Blackline Integration

The GUMU™ for Sage Intacct – Blackline SFTP integration delivers easily embedded analytics, dashboards and configurable reports to help close client processes. Automation of data through Sage Intacct connector assures visibility into financial data and high-risk items throughout the period. A multi-company framework is supported via the Sage Intacct – Blackline SFTP integration platform. In addition, the records are stored in a single import file, which eliminates the possibility of data entering mistakes.

Key highlights:

- Integrate and Import CSV, Excel, text, and XML files from Sage Intacct into Blackline SFTP
- Support various accounting processes, ensuring compliance and reporting to stakeholders without APIs
- Data is imported automatically, matched in minutes, and account reconciliations are auto-certified, reducing time in journal preparation

12. GUMU™ for Sage Intacct and FTP/SFTP Integration

GUMU™ connector for Sage Intacct & FTP/SFTP can directly import multiple CSV files, import a single CSV file to multiple related objects, and use various string and numeric expressions for mapping, among other things. Moreover, GUMU™ integration hosted on the cloud assists users in fast data synchronization of schedules, data transfer and view logs etc. In contrast, the data is exported or imported using predefined formats in configured SFTP directory.

According to business requirements, stakeholders can set up plugins for desired applications between FTP/SFTP and Sage Intacct. The SFTP details for importing and exporting processes are also maintained. Users can also use the preset data entities to easily import external data into Sage Intacct according to their needs. This integration can be used to schedule imports based on the frequency of arrivals of new files.

13. GUMU™ for Sage Intacct and Rent Manager Integration

The integration empowers unit availability listings, boosting prospect traffic and much more while Sage Intacct aligns front and back-office operations. The connector streamlines front and back-office processes for a consolidated view of revenues, GL, unit availability, prospect traffic etc.

14. GUMU™ for Sage Intacct and Customer Portal Integration

The GUMU™ for Sage Intacct – Customer Portal integration enables easy access to data by synchronizing processes. With powerful financial insights from Sage Intacct and customer-related data from Customer Portal, enterprises can plan the future course of action. GUMU™ enables seamless integration of products from Sage Intacct into Customer portal enabling Sales reps to check stock levels, product type and other details.

Key highlights:

- It supports multi-company environment streamlining the management process
- Seamlessly generate sales quote and orders and sync them into Sage Intacct
- It simplifies the experience for sales rep as they get customer and product related details in Customer portal and financials in Sage Intacct
- With login-based access, it is easier and secured to maintain and store data

15. GUMU™ for Sage Intacct and Oanda Integration

Sage Intacct and Oanda are seamlessly integrated using the GUMU™ connector to help businesses and individuals leverage a unified solution that provides accurate real-time insights into the FX market. The GUMU™ for Sage Intacct and Oanda integration facilitates automation of multiple currencies management along with quick conversions for transactions. The integration also allows organizations to present reports in either the local currency of each entity or the headquarters' currency.

Key highlights:

- Get automated access to accurate and reliable foreign exchange data directly from the Sage Intacct ERP system
- The real-time dashboard provides all the insights related to the FX market as well as information on currency gains and losses
- The integration makes consolidation process as quick as a few seconds

Sage X3 Integrations

1. GUMU™ for Salesforce and Sage X3 Integration

Sage X3 and Salesforce Cloud CRM integration your sales representatives would no longer struggle to have single console view of the customers as their details are exchanged between ERP and CRM in real-time. They can now promote sales order to the ERP and also view transactions i.e. sales order and invoice related to the customer on the go and on real-time basis. Sales representatives have access to clients purchase details and financial history. Thereby optimizing your investments in Salesforce with Sage X3.

Key highlights:

- GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels to Integration functionality
- GUMU™ provides the flexibility to map and import any custom or standard Sage X3 entity data into standard or custom Salesforce objects
- Preview data before import feature provides user the ability to preview & validate the ERP data prior to it being imported in Salesforce CRM
- Sales representatives can view list of Sales Orders, Invoices, and Additional Customer details on user friendly Salesforce UI

2. GUMU™ for Dynamics 365 CRM and Sage X3 integration

Microsoft Dynamics 365 CRM allows managing and monitoring of Customer interactions to evaluate existing and potential Customers. On the other hand, Sage X3 aligns accounting, inventory, operations, distribution etc. The integration between these systems offers enterprises with bi-directional data exchange of custom entities like Customers, invoices, payment terms and account history.

Key highlights:

- Identify business opportunities based on latest synchronized information of customers and reporting tools
- Enhanced end client experience due to faster resolution of queries and personalized response
- Enables effective supply chain and inventory management as sales data from CRM is available in the ERP
- Critical information regarding leads, accounts, and orders can be accessed across devices desktops, mobiles, and tablets

3. GUMU™ for Sage CRM and Sage X3 integration

GUMU™ for Sage CRM - Sage X3 Integration is a comprehensive business management system that enables bi-directional integration between the two solutions to access Customer, invoice, and order information from either of these two systems as well as design marketing campaigns for Customer retention. It empowers the enterprises to leverage the information within the organization and make smarter and faster business decisions.

Key highlights:

- It enables all the teams to share a single consistent view of customer's information and provide a better customer experience
- Enhances agility to act on new information quickly
- Enhanced end client experience due to faster resolution of queries and personalized responses
- Critical information regarding leads, customers, and orders can be accessed across devices

4. GUMU™ for Sage X3 and Shopify Integration

The GUMU™ for Sage X3 – Shopify Integration simplifies sales and purchase of goods during web shopping whilst taking care of back-end transactions like invoices, stocks, purchases, Customer specific pricing, logistics, payment processing etc. Integrating entities improves internal eCommerce processes through bi-directional sync based on demand or schedule. Moreover, Take your e-commerce to the next level with streamlined processes.

Key highlights:

- Appropriate alignment of customers take place under appropriate customer groups grouped by customer category or specific statistical groups
- By using Sage X3, e-commerce industries can maintain exact inventory levels in web store using stock updates from ERP
- Product Inventory, Product Categories, Invoices are integrated seamlessly for complete control of your web store

5. GUMU™ for Sage X3 and Magento Integration

GUMU™ Cloud Magento integration with Sage X3 ensures cost savings, profits, higher conversion rates, shorter order cycles and streamlined administration. The connector provides automated synchronization of data ensuring that you don't re-enter information from Magento into Sage X3. This decreases labour costs and provides error free data entry in both the systems which implies that your business productivity is bound to improve. Promote your products online with the connector and perform bi-directional data synchronization in a fully automatic manner

Key highlights:

- Magento modules like Customers/ Products/ Orders and Payments are bi-directionally integrated due to which order details can be imported to the ERP system
- It enables multi store integration designed to synchronize data in appropriate stores in Magento
- Users can set daily, weekly or yearly schedules as per business requirement to sync Magento and Sage X3 modules
- eCommerce industries can maintain exact inventory levels in web store using stock updates from ERP

Sage 300 Integrations

1. GUMU™ for Salesforce and Sage 300 integration

Greytrix offers GUMU™ integration solutions for Salesforce with Sage 300 a best of breed solution for organizations to enhance their customer interaction. With Salesforce and Sage 300 integration you now have actionable customer information. 24x7x365 accessibility provides a real edge to virtual workforces, it enables employees to work without being tied to their office desk, desktop or office servers. Instead, employees can contact customers and prospects on-the-go and access for real-time data on their personal portable devices such as mobiles or tablets. By delivering more actionable and frequent customer insights, employees can increase productivity across the board. Thereby optimizing your investments in Sage 300 and Salesforce.

Key highlights:

- GUMU™ provides the flexibility to map and import any custom or standard Sage 300 entity data into standard or custom Salesforce objects
- Link existing Sage 300 Customers with existing Salesforce Accounts to avoid data duplication
- Faster query resolution Sales representatives can view list of Sales Orders, Invoices, and Additional Customer details on user friendly Salesforce UI
- GUMU™ integration provides functionality of promoting/updating Customers and promotion of Sales Orders from Salesforce to Sage 100 with a single click

2. GUMU™ for Sage 300 and Magento integration

Magento – Sage 300 connector increases accuracy while linking your online store/ ecommerce portal with the backend ERP systems. Tap the potential of eCommerce industry and automate the synchronization of orders, customer information, stock and the extended order management process with the seamless Magento and Sage 300 connector. Get enhanced capabilities as your business grows to easily accommodate your B2C as well as B2B business requirements bi-directionally. Promote your products online with the connector and perform bi-directional data synchronization in a fully automatic manner.

Key highlights:

- Optimize your processes whilst reducing the cost of manually addressing the inconsistencies through Magento connector for Sage 300
- It enables multi-company integration for a centralized management of data resources with multiple stores in Magento
- B2B Customers generated in Sage ERP are simultaneously updated as Customers in the web store
- Set schedules for integration of modules like Customers, Products, Orders and Payments with the automated data scheduler program
- By using Sage 300, eCommerce industries can maintain exact inventory levels in web store using stock updates from ERP

3. GUMU™ for Sage 300 and Shopify integration

Shopify – Sage 300 integration using GUMU™ Cloud provides end-to-end data processing connectivity, vision to streamline operations and the platform to uplift your business to new heights. Enhanced end-to-end data processing improves order-to-cash workflows to drive new revenue models. Customers, product, product category, product inventory, sales order, sales invoice can be integrated bi-directionally, on demand or on schedule according to business needs.

Key highlights:

- Minimize errors and reduce costs by avoiding manually addressing the inconsistencies
- Setup automated schedules for integration of the Shopify and Sage 300 connector modules such as Customers, Products, Orders, Invoices, inventory etc
- Entities from Shopify and Entities from Sage 300 such are integrated seamlessly
- Align your data on the back-end to sync product and pricing data, order and inventory status, shipping updates, and customer information

4. GUMU™ for Dynamics 365 CRM and Sage 300 integration

Track sales lead, manage Customer relationships, maintain the marketing pipeline and deliver actionable data with GUMU™ for Dynamics 365 CRM - Sage 300 integration. Manage your processes like accounting, inventory, operations and distribution by providing a unique user interface between systems. Experience the benefit of enhanced agility to act on new information quickly and maximize ROI with the seamless bi-directional integration.

Key highlights:

- The responsive interface allows users to access critical information while on-the-go thus, providing agility in handling leads, customers and data
- Gain superior visibility into crucial business metrics and enable front and backend teams to effectively cross-sell and up-sell
- Multi- company integration simplifies important processes such as order processing, invoicing, expense approvals and fulfilments

Sage 100 Integrations

1. GUMU™ for Salesforce and Sage 100 integration

GUMU™ integration for Salesforce with Sage 100 will streamline your front and back office operations. Due to this integration, a single console view of Customer transactions like Sales Orders, Invoices, etc. can be viewed in real – time. Salesforce user can also link / unlink Customers from Salesforce to Sage 100. Sales representatives can promote Sales Order to the ERP, view Order and Invoice related transactions of the Customers anywhere, anytime.

Key highlights:

- Based on real-time data, Management can make informed decisions & identify business opportunities
- Salesperson can extract real-time client information on-the-go
- Enhanced client experience due to faster resolution of queries and personalized responses
- Increased employee productivity due to data consistency and reduced manual efforts

2. GUMU™ for Dynamics 365 CRM and Sage 100 integration

The Dynamics 365 CRM – Sage 100 integration improves Finance, Customer Relation and Sales Inter departmental communication with seamless process flow of accounting and customer information. This powerful combination delivers integration benefits including automated business processes, reduced data redundancy with faster workflows allowing enhanced business insights with increased productivity and efficiency.

Key highlights:

- Cross- device integration enables you to serve Customers across multiple platforms or devices
- Multi- company integrations prevent systems from silos and unites them under a single platform that's easy to monitor and easy to manage
- The bi- directional synchronization of latest Customer information and comprehensive reporting tools enable users to take swift and proactive decisions

3. GUMU™ for Sage CRM and Sage 100 integration

The GUMU™ Sage 100 CRM integration is a fully bi-directional solution where users can have access to Sage 100 data wherever they log into Sage CRM. Connecting Sage 100 with Sage CRM provides customer-facing staff with the option to view accounting data and create orders through the Sage CRM interface.

Key highlights:

- Sage CRM users are more informed with their accounts
- CRM users can look up information for themselves without needing to contact the accounting team
- The data can be leveraged across several devices like desktop, tablet and mobile

4. GUMU™ for Sage 100 and Shopify integration

Maintain accounts and gain the stronghold of your business inventory and financial transactions with Sage 100 – Shopify connector. It also facilitates B2B ecommerce by linking customers from Sage ERP to your online web store. Thus, by integrating Shopify and Sage ERP, businesses can scale their online sales, reduce operational cost and increase profitability.

Key highlights:

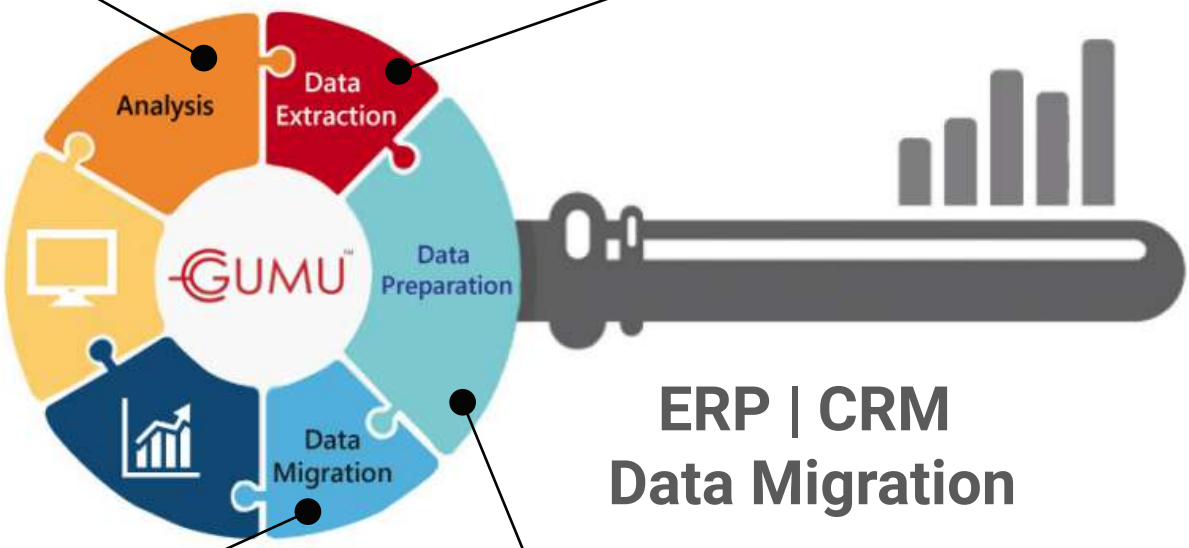
- Optimize your processes whilst reducing the cost of manually addressing the inconsistencies
- Automated schedules for integration of the Shopify and Sage 100 connector modules are run at specified intervals
- There is flexibility in data mapping between the integrated systems with a plugin-based architecture
- Entities from Shopify such as Customers, Orders and Entities from Sage 100 such as Customers, Products, Product Inventory, Product Categories, Invoices are integrated seamlessly

Migration

Data migration is a complex task that includes mapping and moving data and objects from one system to another. Greytrix understands emerging market demands and helps with entire Extraction, Transformation, and Loading of data to Sage ERP or CRM using the GUMU™ connector, which includes:

We identify the entities that need to be migrated to ERP/ CRM based on your business necessities. Then, we examine the source database to determine whether or not it needs to be customised

Capture information from data sources such as SQL, Oracle, flat files, ERP/CRM products, existing applications, and so on



Initiate test migration, upon successful testing import data to ERP or CRM.

Prepare data for migration in full compliance with the tool being used; for example, prepare CSV files, if the migration tool is Apex data loader

ERP Data Migration

General Ledger	General Ledger Masters General Ledger Transactions
Sales	Custom Masters Customer Open Transactions Customer History Transaction
Purchase	Vendor Masters Vendor Open Transactions Vendor History Transactions
Inventory	Inventory Masters Quantity on Hand
Common Data	Company Infomration Banks, Tax

Greytrix offers GUMU™ Migration for following ERPs:

Acumatica

Sage 300 I Sage 100 I Sage 50 US I QuickBooks I Sage Business Vision I Sage Business Vision I Business

Sage Intacct

Sage X3 I Acumatica I Sage 300 I Sage 100 I Sage 50 US I QuickBooks I Sage Business Vision I Sage Business Vision I Business works

Sage X3

Sage 300 I Sage 100 I Sage 50 US I QuickBooks I Sage Business Vision I Sage Business Vision I Business works

Sage 300

Sage 100 I Sage 50 US I QuickBooks I Sage Business Vision I Sage Business Vision I Business works

Sage 100

Sage 50 US I QuickBooks I Sage Business Vision I Sage Business Vision I Business works

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Transitioning from legacy systems to Acumatica Sage Intacct I Sage X3 | Sage 300 | Sage 100 can be tedious unless planned and executed strategically to reduce time, cost, and effort. Greytrix's GUMU™ connector makes data migration from standard modules such as General Ledger, Bank, Tax, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Order, and Sales Order / Order Entry simple.

Basic functionalities of data migration to Acumatica | Sage Intacct | Sage X3 | Sage 300 | Sage 100

Key highlights:

- Analysis and extracting Data from the source system
- Data clean-up in case where the data is purged / deleted or duplicate
- Entity Mapping (Chart of Accounts, Customer, Vendor, Items, Sales Person, Banks or Tax) from source system to Target ERP
- Processing / Restructuring of Source enterprise data
- Data writing into Target ERP

Features ERP Data Migration

Easy Migration Framework

Greytrix's robust migration framework enables seamless data extraction from legacy systems while having no impact on operational performance during data migration. Importantly, this migration provides significant flexibility to meet the unique needs of the enterprise.

Minimize Total Cost

The GUMU™ migration solution assists the company in retiring from legacy systems and includes data archival following migration into Acumatica Sage Intacct I Sage X3 I Sage 300|Sage 100. As a result, the organization saves money on operational expenses while also lowering the costs of maintaining legacy systems.

High Business Visibility

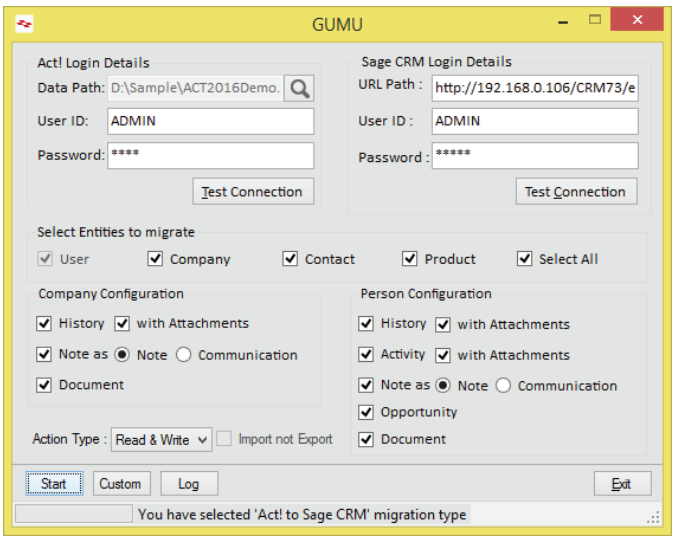
Besides providing superior visibility and control, GUMU™ enables business users to create, manage, and share critical business contexts during the data migration process. It helps the team explore more revenue-generating opportunities and reduce time-to-market for innovative products by simplifying access to mission-critical data on a common platform

Simplified Data Management

The migration improves efficiency while also meeting an organization's wants for data security, sub-setting, and archiving. Enterprise data is placed on a single platform. It is normalized into table target formats and cost-effectively loaded into Sage Intacct I Sage X3 | Sage 300 | Sage100 without custom coding, resulting in quick data access, integration, and delivery.

GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration:

Salesforce GUMU™ | ACT! | SalesLogix | Goldmine | Sugar CRM | Sage CRM Maximizer Migration is the solution of choice for businesses looking for a smooth, hassle-free transition to Sage CRM. Our solution effectively facilitates the seamless transfer of historical data into the new system. It gives you the flexibility to migrate data quickly and at the lowest possible cost. In addition, the GUMU™ Migration solution enables clients to be upgraded by seamlessly migrating key customer data into the new system. Details such as company names, addresses, notes, and advanced data like attachments, emails, and phone records can be easily transferred from Source CRM fields to Sage CRM. Additionally, custom fields from Source CRM can be transferred to Sage CRM during the migration process. Greytrix ensures an on-time, on-budget migration at a low-cost thanks to our proprietary migration framework.



Features of GUMU™ CRM Migration are:

Data Migration in a single platform

All critical data is migrated from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM |Maximizer to Sage CRM Migration through GUMU™. It helps maximize productivity while meeting all data requirements pertaining of security, sub-setting and archiving.

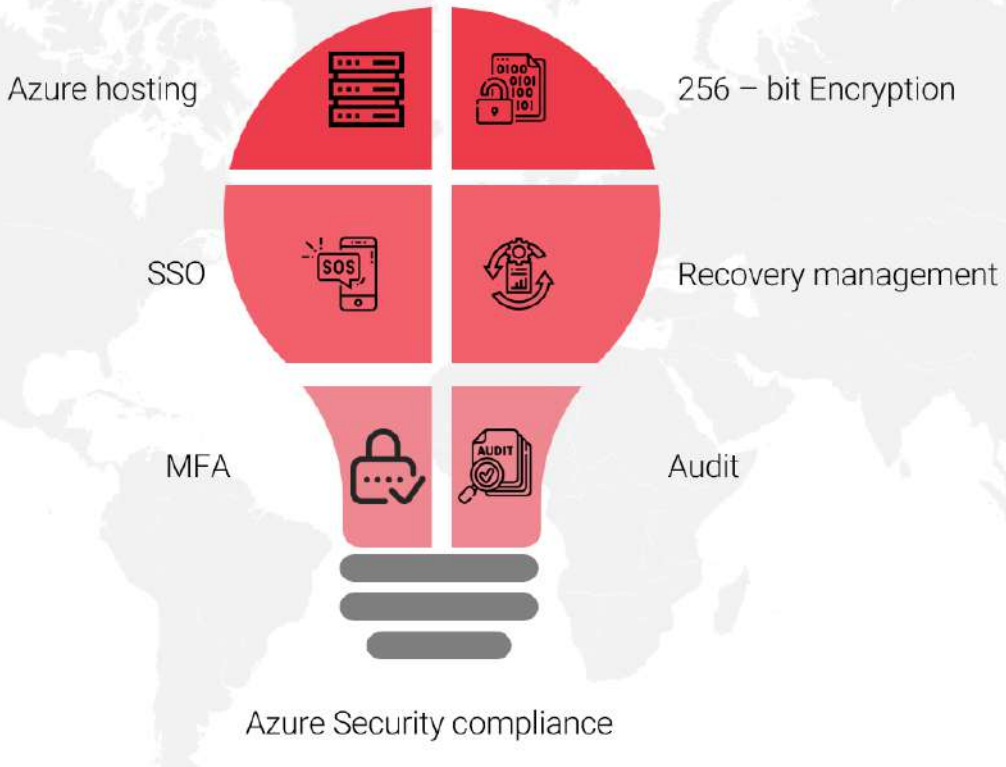
Cost-Effective data delivery

The migrated data can be easily accessed, integrated, and delivered. In addition, returning the source CRM system and data archival after migration results in lower legacy system operational and maintenance costs.

Boost your operational performance

The data is extracted from the source CRM system and migrated to the new system without causing any disruptions to client systems. As a result, clients benefit from zero impact on operational performance because both the source and destination remain unaffected.

Security Protocols



BPORTALY

BE A PORTAL OF PARTNER SUCCESS

A partner-first portal designed to crafting exquisite and end-to-end partner experiences. It is a one-stop with applications to streamline processes like Sales, Vendors and Customer-related operations, automate redundant processes and set them on a fast-track.

Customer Portal

This portal aims at enhancing customer experience by giving them complete control and improve their buying experience.

- Track Orders
- Product Details
- Quotes
- Purchase History

Suppliers Portal

The Suppliers portal aims at improving supplier experience by bringing all processes together and improving visibility.

- Dynamic reports
- Inventory status
- Real-time pricing
- Purchase orders

Shipping App

A single point for all shipping processes to improve tracking, data visibility and easy accessibility.

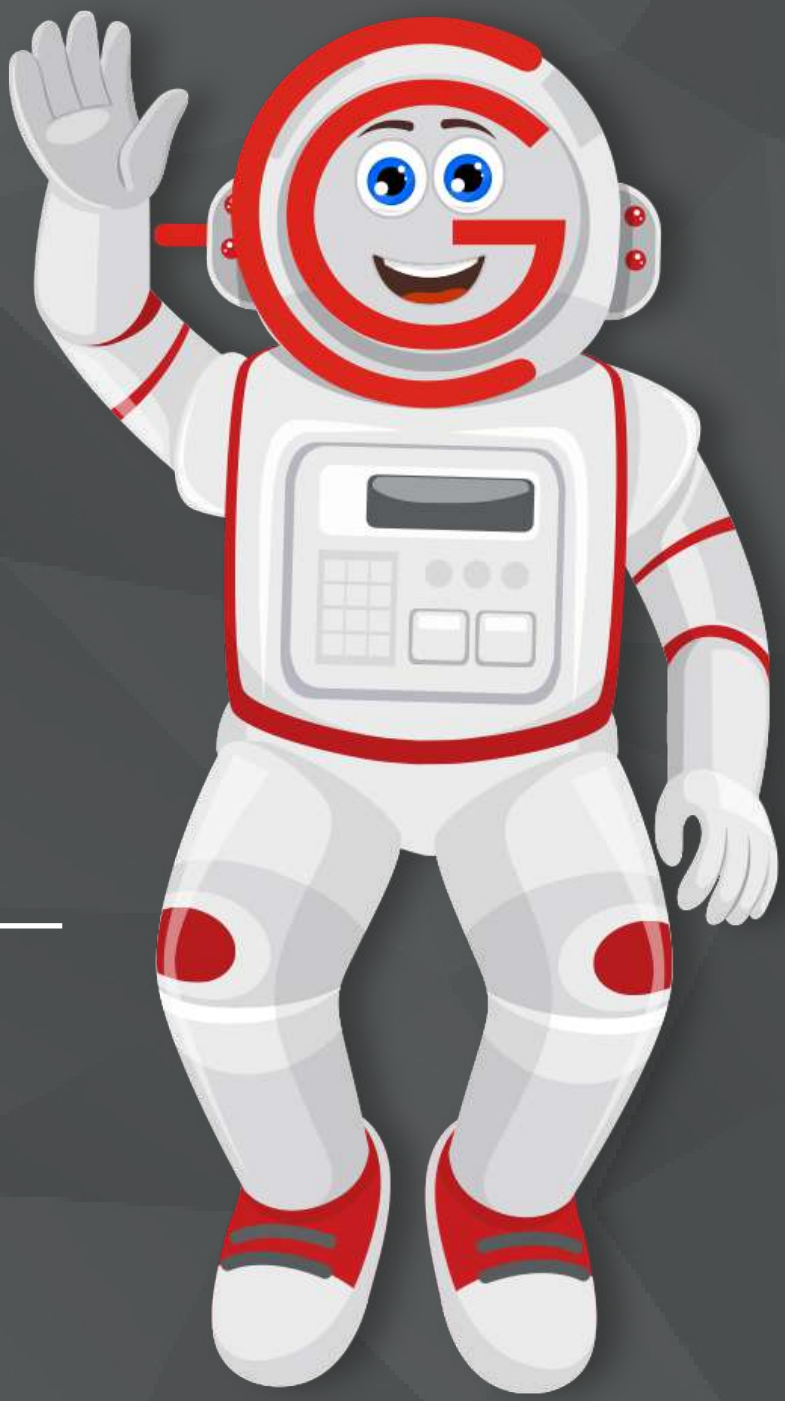
- Packaging updates
- Live tracking
- Shipment details
- Invoices

Sales Commission App

Leave all hassles of maintaining and managing complicated commission modules with this app!

- Native application
- Commission calculation
- Commission payment
- Accounting Entries
- Reporting and inquiries

GUMU



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