



Organizations tend to deal with siloed ERP and CRM systems as their contrasting architectures make it difficult to streamline integration. When two different systems are unable to communicate with each other it becomes impossible to track customer interactions and extract data from one system and then aligning it with the other systems. Sales representatives end up spending considerable amount of time juggling between applications to create a 360-degree view of their customers, slowing down sales processes. Thus, businesses need a robust CRM and ERP integration solution in order to streamline their business processes. Dynamics 365 CRM – Sage 300 integration simplifies information and provides visibility into both frontend and backend systems increasing productivity and simplifying business processes.

Challenges of Disparate ERP and CRM Systems

Organizations often deal with complexities of data management in the absence of an integrated ERP and CRM systems. Achieving a single Customer-centric view across different departments can be achieved when the CRM system is fully integrated with an ERP technology stack--whether it is shipping applications, billing systems, order status systems, etc. Greytrix brings its CRM expertise with its patented GUMU™ Connector, a data exchange framework that facilitates rapid data movement between Sage 300 and Dynamics 365 CRM seamlessly. An integrated Dynamics 365

CRM – Sage 300 system provides critical front-end and back-end information like, valuable Customer data and enriching it through interactions with marketing and Customer support, purchase history, billing and shipping details, accounting information, financial data and supply chain management details. To make your organization free from hurdles, it becomes necessary to integrate your frontend and backend operations. It accelerates business processes by providing single console view of your business operations across the Enterprise.

Benefits:

- ▶ Improve Finance, Customer Relation and Sales Interdepartmental communication with seamless process flow of accounting and customer information
- ▶ Enhanced end client experience due to faster resolution of queries and personalized responses
- ▶ Increased employee productivity due to data consistency and no data duplication
- ▶ Make informed decisions, identify business opportunities based on latest synchronized information of Customers and reporting tools..

Business Partners	View/ Add Sales Inquiries	Inventory Information
Customer Details	Sales Orders	Product Information
Addresses & Contact Information	Sales Quotes	Quantity on Hand
Persons	Sales Invoices	

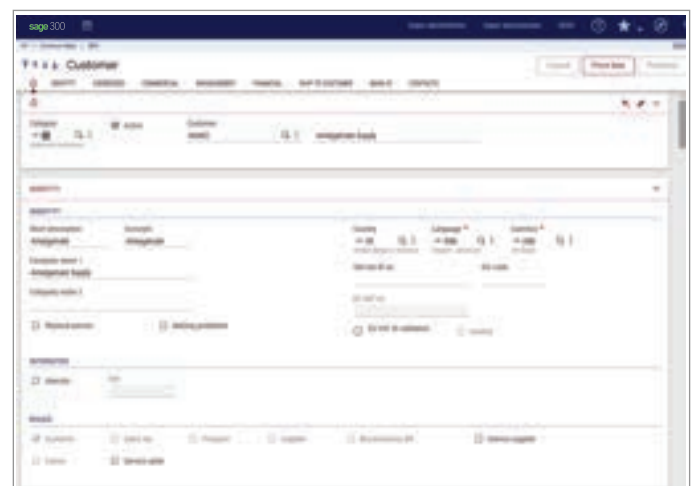
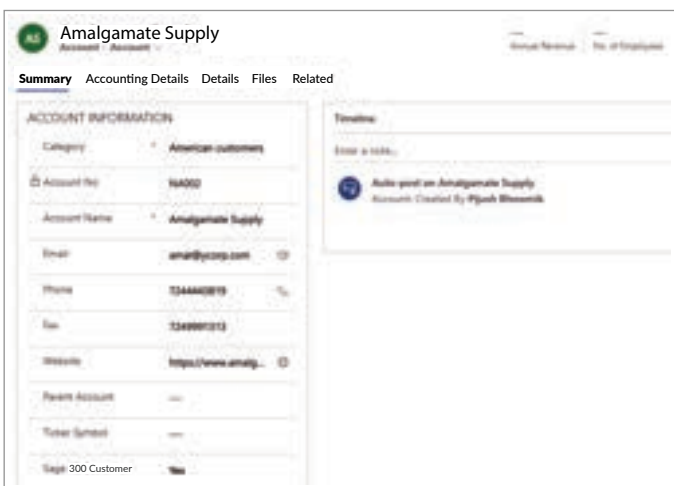
Integration Touch Points:

- ▶ Synchronization of Accounts/ Customers in both systems.
- ▶ Synchronization of Sales Quote, Sales Order, Sales Invoice etc. in both systems.
- ▶ Sage Data (synched) can be utilized for providing details to the clients.
- ▶ Quote Correct Prices by Synchronization of latest information.

Features:

Bi-Directional Integration:

Synchronize Sales Quotes, Orders and Invoices from Sage (to Standard tables/ Objects in Dynamics 365 CRM) that can be viewed on user-friendly UI of Dynamics 365 CRM layout. And synched back to Sage ERP system.

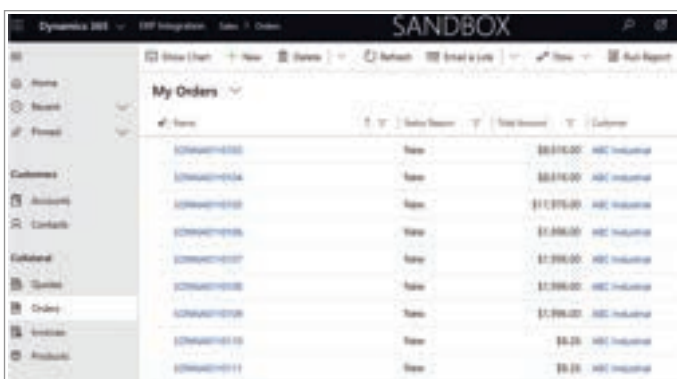
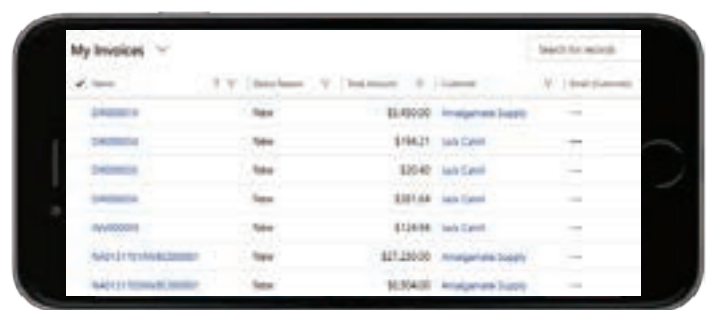


Multi-Company Integration:

Can configure multiple Sage 300 companies with single Dynamics 365 CRM environment.

Access from Portable Devices:

Critical information regarding leads, accounts, and orders can be accessed across devices, desktops, mobiles, and tablets ensuring that sales and service teams respond quicker to customer needs. It provides same view on all the devices.



Updated Customer Sales Information:

Important Sales and service information can be viewed on user-friendly Dynamics 365 CRM Lists for particular accounts. This in turn provides decision makers with superior visibility into key business metrics and enables sales and service teams to proactively cross-sell and up-sell more effectively.