


For
Sage Intacct

Integration

Organizations require numerous tools and solutions for effective management of processes throughout the organization. Enterprise Resource Management (ERP) and Customer Relationship Management (CRM) form the foundations to control the crucial aspects of a business. Microsoft Dynamics 365 CRM allows managing and monitoring of Customer interactions to evaluate existing and potential Customers. On the other hand, Sage Intacct is the #1 Financial Accounting Software which 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.

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 Intacct and Dynamics 365 CRM seamlessly. An integrated Dynamics 365 CRM – Sage Intacct 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

Make informed decisions, identify business opportunities based on latest synchronized information of Customers and reporting tools

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

Enhanced agility to act on new information quickly and maximize ROI

Enables effective supply chain and inventory management as sales data from CRM is available in the ERP

Support multiple technologies, databases and operating systems

Easy implementation: The whole package is easy to implement and configure it with Dynamics 365 CRM and Sage Intacct





Business Partners

Customer Details
Addresses & Contact Information
Persons



View/ Add Sales Inquiries

Sales Orders
Sales Quotes
Sales Invoices



Inventory Information

Product Information
Quantity on Hand

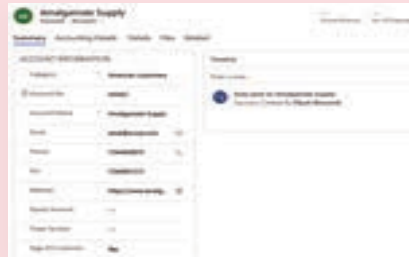
Integration Touch Points

- 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.



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.



Features



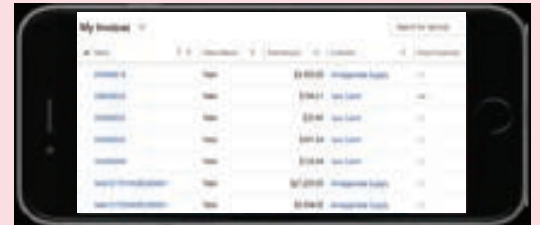
Multi-Company Integration

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



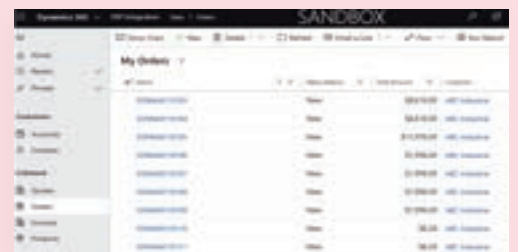
Access from Portable Devices

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.



About Greytrix

Being a global leader with 22+ years of expertise as Sage development and integration partners, we deliver rich, cloud and on-premises ERP & CRM solutions worldwide. GUMU™ our native cloud connector, integrates ERP systems (Sage Intacct, Acumatica, Sage X3 and Sage 100) with CRM systems (Salesforce, Dynamics 365 CRM and Sage CRM), third-party apps (Avalara, MediusGo, Treez, Magento, Shopify etc.), and cloud storage systems (HRMS & Sales app) by understanding varied system offerings and complexities. For e-commerce businesses struggling through changing industry needs, Acumatica and Magento integration is the easy way through!

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Know More

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