Microsoft Dynamics 365 CRM - sage X3 Integration

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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 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.

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™ data exchange framework that facilitates rapid data movement between Sage X3 and Dynamics 365 CRM seamlessly. An integrated Dynamics 365 CRM – Sage X3 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 organization.

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 X3

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	

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## 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.
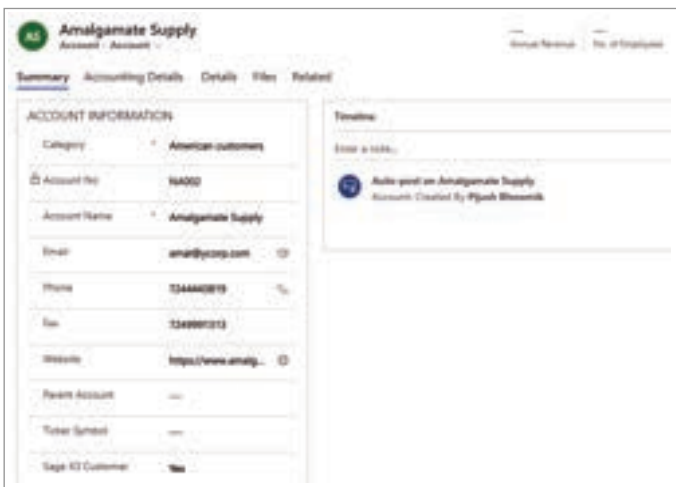

Multi-Company Integration:

Can configure multiple Sage 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.
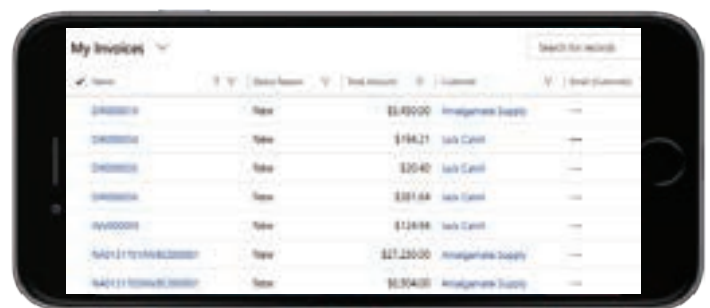
Updated Customer Sales Information:

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.