

GUMU™ for sage CRM - sage 100 Integration



Organizations today have realized the importance of adopting ERP and CRM solutions to automate their process flows. ERP and CRM applications have today become DNA of any growing organization to facilitate quick and precise decision making. But their success solely depends on how seamlessly they are integrated. It is important to have clear understanding about reasons of integrating the two systems, which is to share the data that both systems collect to get a single and holistic view of the business. So how does one accomplish this front-end and back-end integration to optimise their investment in the business software solution?

Greytrix Offerings

Greytrix offers GUMU™ integration designed to deliver seamless, real time bi-directional integration between Sage CRM and Sage 100. GUMU™ integration solution empowers the small and medium enterprise to leverage information within the organization to make smarter business decisions while making data available across desktop, web and mobile devices. Whether it is allowing Sage CRM users to access mission-critical Sage 100 accounting data or enabling Sage 100 users to access customer information from Sage CRM, GUMU™ plays a pivotal role in unlocking the potential of enterprise data.

BENEFITS

- Facilitates informed decision making and identify business opportunities based on real-time data and reporting tools
- Enhanced end client experience due to faster resolution of queries and personalized responses
- Increased employee productivity due to data consistency and non-redundancy of data
- Enhanced agility to act on new information quickly
- Maximize ROI
- Synchronize Information
- Complete Suite Integration

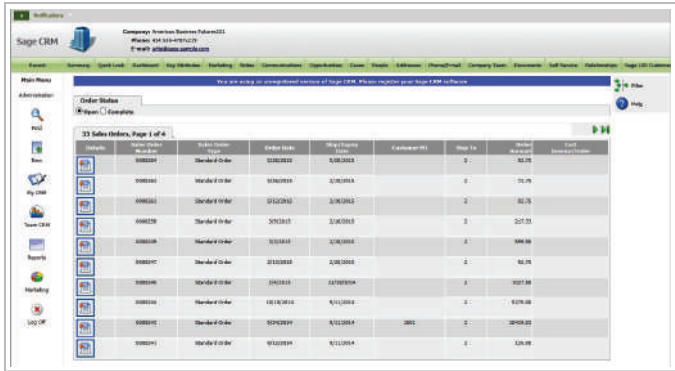
Highlighting Features

- » Real-Time Customer/Vendor Sync
- » Sales Order Sync
- » Real-Time Customer Inquiry Information
- » Quote Correct Prices on real time basis
- » Access from portable devices
- » Find Inventory
- » View Customer's Credit History information on real time
- » YTD, LYTD and Last Invoice Date data
- » Authorization Control
- » Import Customers from ERP to CRM and link/ unlink them
- » Product Synchronization
- » View YTD Sales Data on real time
- » View RMA details on real time
- » Customer's Credit Limit Exceed and
- » On Hold message on real time
- » Rapid Item Picker

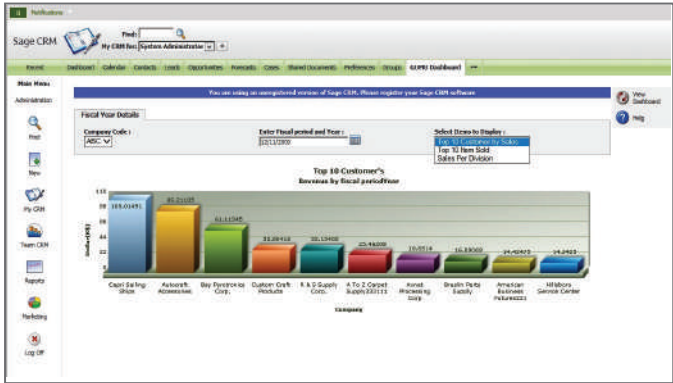


1. Real-time Bi-directional Integration:

Every Sales Order and Invoices, Quote and Shipment can be viewed on user-friendly Sage CRM tabs for particular company. Also Sales History and Sales summary can be view in Sage CRM on real-time basis.



Refer pt.1



Refer pt. 2

3. Authorization Control:

GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels with prescribed user privileges. This allows CRM System Administrator to provide restrictive access to ERP data.

2. Dashboard:

GUMU™ Dashboard is used to visualize important data at a glance, so a decision maker could have all the data at one place. From sales to customer, it displays current status of metrics or KPI's of any department in an organization.

User	Admin	Full	View	Print	Export	Import	Security	System	CRM	ERP	Dashboard
1. Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2. Full	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Import	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. CRM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. ERP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Dashboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Full	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Print	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Export	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Import	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. System	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. CRM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. ERP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Dashboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Refer pt.3

4. Access from Portable Devices:

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

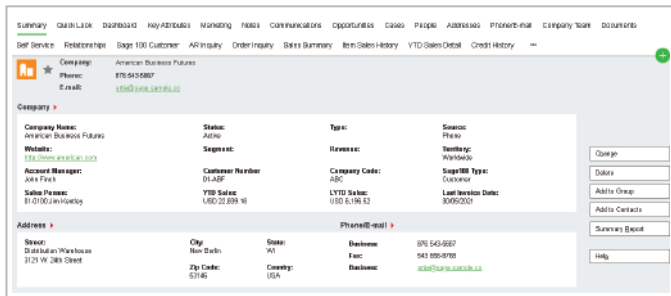


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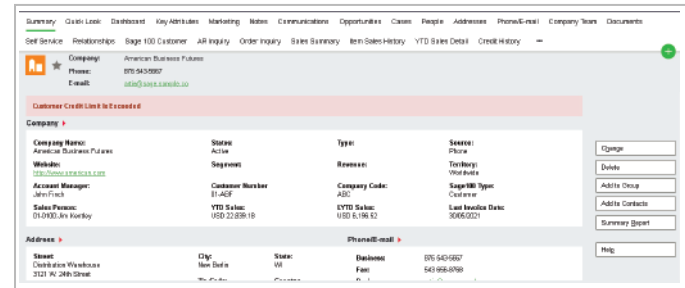


9. Customer's Credit Limit Exceed and On Hold message on Real-time:

Displaying on the fly message of Customer's Credit Limit get Exceeds or customer is on Credit Hold.



Refer pt. 10



Refer pt. 9

10. Key Statistics Data like YTD, LYTD and Last Invoice Date:

Fields like Year-To-Date (YTD), Last Year To Date (LYTD) and Last Invoice Date displays customer sales information of current year as well as of last year under YTD and LYTD fields and also the Last Invoice Date of that customer. Data gets display through Import Custom field routine or Windows scheduler.

11. Rapid Item Picker:

User can filter/search products based on selected product family and can add multiple products at a time. It is a time consuming process and modified UI design which looks good. On save of products, it will load real time pricing from Sage 100.