



for
Sage CRM



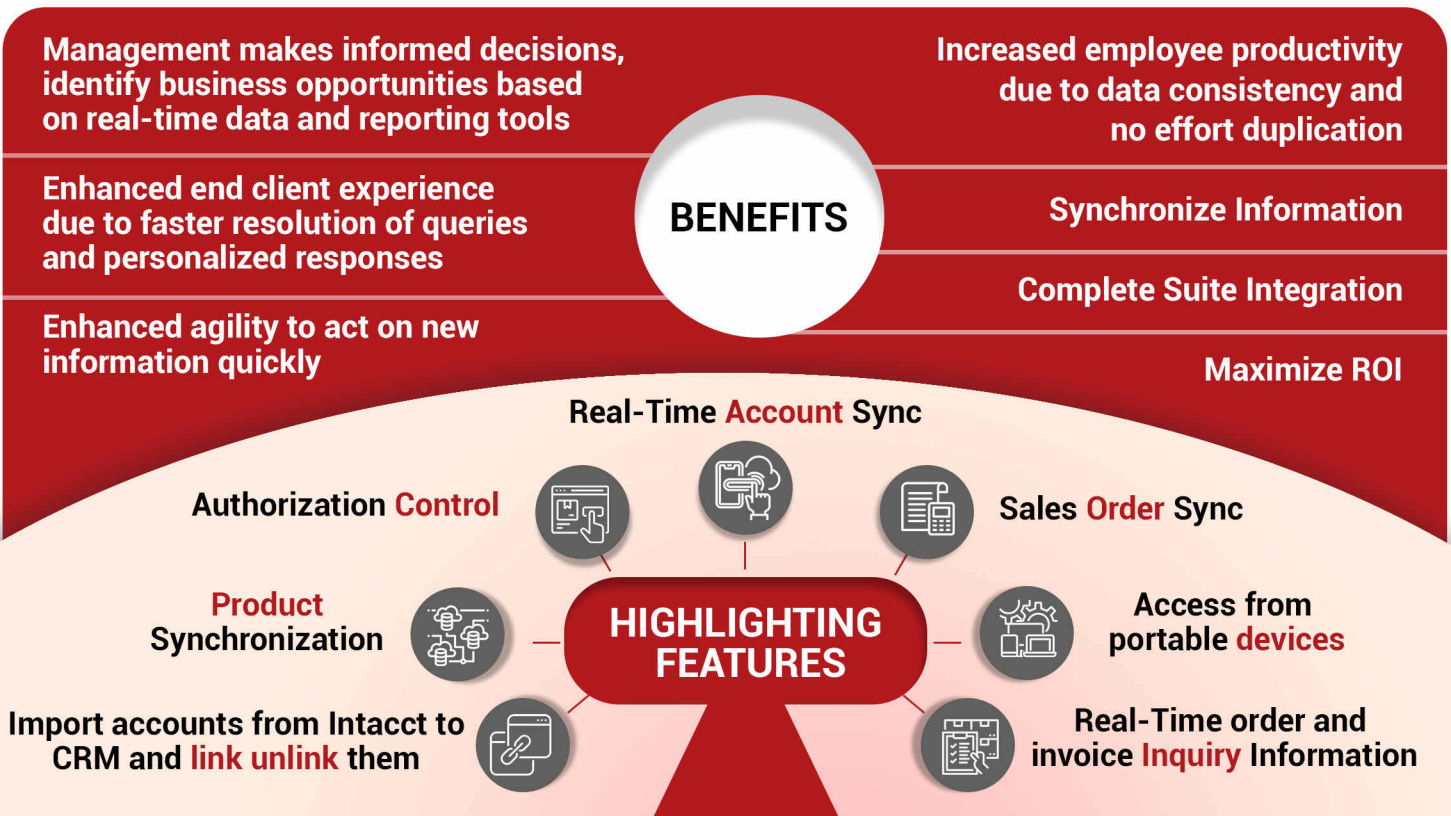
Sage Intacct
Integration

Can you promise that your organization will learn from your various target groups while still being able to engage and map their complete customer journey from enquiry to customer conversion without missing a single beat? With Greytrix' unique & iconic Integrated CRM module, you'll be able to address the right person with the right information at the right time – the solution is browser-based and on all types of devices. This can only be made possible by offering a full and seamless integration of various specialized enterprise platforms, each of them a leader in their specific functional segment. The information that is stored about the various users accessing the portal is shared with specialized cloud tools fully integrated into Greytrix to plan, develop and coordinate marketing activities. Most importantly, from Sage Intacct your accounts & customer details can be promoted to Sage CRM to enable marketing automation. This communication can fundamentally improve sales performance through forecasting, upsell and commission management.

Challenges of disparate Sage Intacct and Sage CRM

Organizations understand the importance of right information at the right time to compete effectively in a digitally connected system. Customer Relationship Management is the fulcrum on which the modern enterprise build their entire business model of customer centricity. Greytrix brings its CRM expertise with its patented GUMU™ data exchange framework that facilitates rapid data movement between Sage Intacct and CRM seamlessly. The integration benefits include automated business process, reducing data redundancy with faster workflows.

GUMU™ integration for CRM with Sage Intacct delivers enhanced business insights, increasing productivity and efficiency. Additionally, ensuring a single customer-centric view across business units. To make your organization free from these hurdles, it becomes necessary to integrate your frontend and backend operations. This accelerates business processes by providing a single console view of your business operations across the organization.





BUSINESS PARTNERS

- Customer Details
- Addresses & Contact Information
- Persons

VIEW/ ADD SALES INQUIRIES

- Sales Orders
- Sales Invoices
- AR Invoices

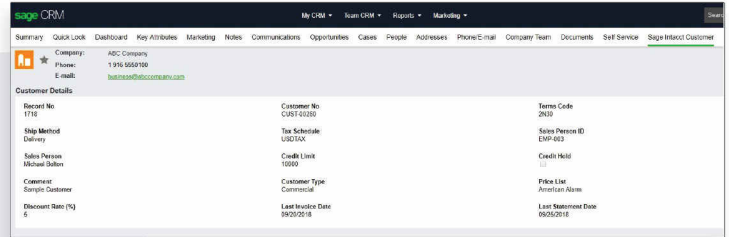
AR PAYMENTS

- Inventory Information
- Product Information
- Quantity on Hand

FEATURES

1. Real-time Bi-directional integration:

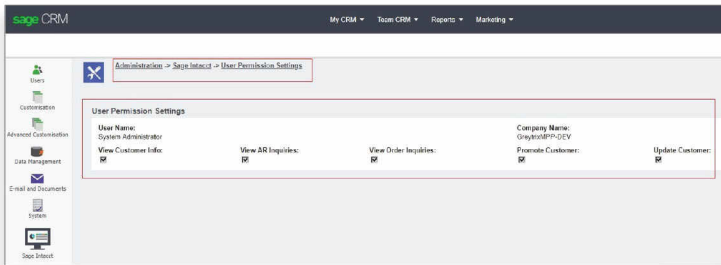
Important customer information and details can be viewed on user-friendly Sage CRM tabs for particular accounts.



Refer Point - 1

2. Authorization control:

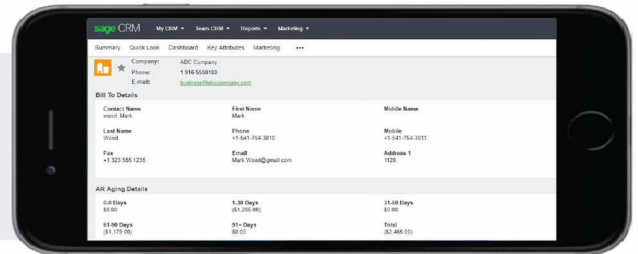
GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels with prescribed user privileges. This allows the CRM System Administrator to provide restrictive access to Intacct data.



Refer Point - 2

3. Access from portable devices:

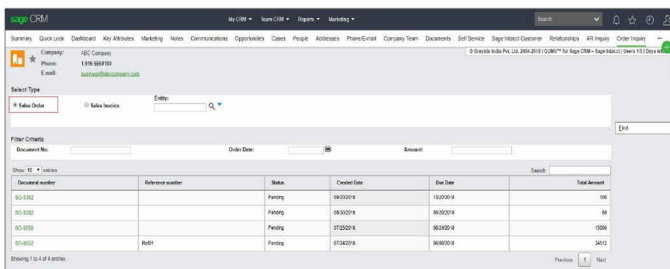
Critical information regarding leads, accounts, and orders can be accessed across devices desktops, mobiles, and tablets ensuring that sales and service teams respond quickly to customer needs. It provides the same view on all the devices.



Refer Point - 3

4. Real-time Customer Sales information:

Important sales like Orders, Invoices and Payments can be viewed on user-friendly Sage CRM tabs 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.



Refer Point - 4

About Greytrix

Greytrix is a global Sage partner and industry leader in providing leading-edge CRM and ERP solutions.

GUMU™ is Greytrix's own cloud integration system that has enabled smooth system integrations helping business expand their functionalities.

Seamlessly integrate ERP systems with CRM, cloud storage systems and third-party apps with Greytrix.

Find the best fit for your business today!

For more information, contact us on gumucloud@greytrix.com

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Know More
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