



GUMU™ for Sage CRM - Sage X3 ERP Integration

GUMU™ for Sage CRM – Sage X3 Integration is a comprehensive system, specially designed to satisfy all your business priorities. It deliver seamless, real-time, bi-directional integration. It empowers the enterprises to leverage the information within the organization and make smarter and faster business decisions. With Sage CRM and Sage X3 integration, mid-market and enterprise businesses can achieve a single, customer-centric view across their organization. This enables accounting, operations, sales, marketing and customer service teams to share a single consistent view of customer's information and provide a better customer experience.

Challenges of disparate Sage X3 and Sage CRM:

Majority of manufacturing, distribution, and service industries have opted Sage X3 and Sage CRM for simplifying business complexities. Sage X3 takes care of the backend operations like storing, managing and interpreting business data from product planning, purchasing, manufacturing or service delivery. With Sage CRM, marketing data, customer interactions are recorded and maintained. These systems provide significant benefits. However, with disparate functionalities and distinct architectures, it becomes arduous to track down critical customer information decelerating sales. This happens because of the lack of data sharing between systems that results in constant toggle between different applications to view a 360° customer information. To make your organization free from these hurdles, it becomes necessary to integrate your frontend and backend operations. This accelerates business processes by providing single console view of your business operations across the organization.

Benefits:

- Management makes informed decisions, 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 no effort duplication
- Enhanced agility to act on new information quickly
- Maximize ROI
- Synchronize Information
- Complete Suite Integration

Features



Real-Time Customer Sync



Sales Order Sync



Real-Time Customer Inquiry Information



Quote Correct Prices on real time basis



Access from portable devices



Authorization Control



Import Customers from ERP to CRM and link unlink the



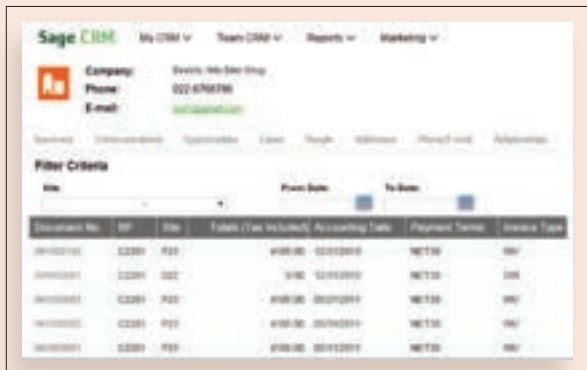
Product Synchronization

Highlighting Features



Real-time Bi-directional Integration:

Important Sales Orders and Invoices, Quotes and Shipments can be viewed on user-friendly Sage CRM tabs for particular customer.



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 provides same view on all the devices.



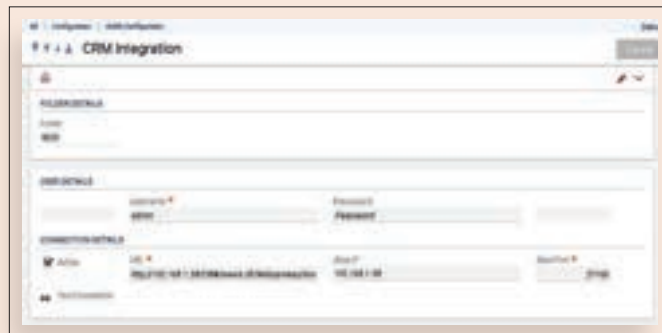
Authorization Control:

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.



Real-time Customer Sales information:

Important sales and service information can be viewed on user-friendly Sage CRM tabs for particular customer. 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. Also, we can create our own Sage X3 data tabs in Sage CRM using GUMU™ Customizer. Additionally, we can promote orders and quotes from Sage CRM to Sage X3 and can update promoted orders as well in Sage CRM.



Sage X3 Side Configuration:

To sync customers information on real time from Sage X3 to Sage CRM, user will have to configure Sage CRM credential in Sage X3 configuration screen.



Real-time Customer Sync:

On click of save, customer data gets synced from Sage X3 to Sage CRM on real time.



GUMU™ Customizer:

Using GUMU™ customizer the user can create his own new screen related to inquiries. They can also decide on which context or entity their inquiry tab to display. It will be a real time information from Sage X3.



Discover Our Newly - Added Features!



Charts on Company Summary Screen



Detailed Insight into A Customer's Sales Data



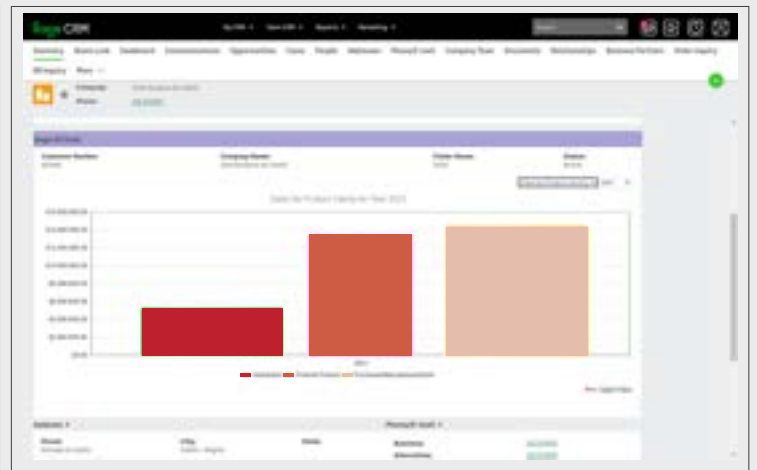
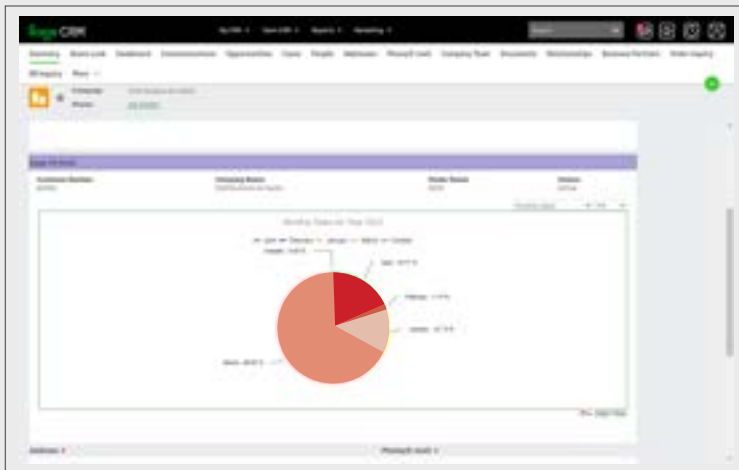
Monthly-Wise Yearly Customer Sales



Statistical Data View Through Different Graph Types



Product Category Wise Sales View



Customer Level Dashboard



Sales Data View Through Different Bar Graph Types



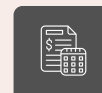
View Sales Data in Different Categories



Current vs Previous Year Sales Insights



View Sales by Product Family



Monthly Sales Insight of a Particular Year



View Sales by the Salesperson



Global Folder Level Dashboard



Sales Data View Through Different Bar Graph Types



Compare Current vs Previous Year's Sales



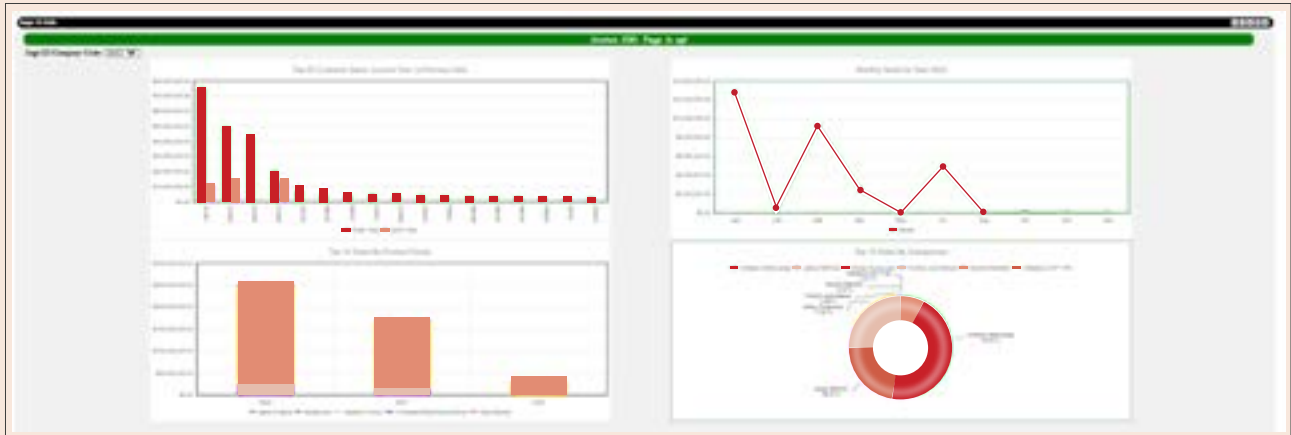
Monthly Sales View of a Particular Year



View Top 10 Sales by Product Family



Get Top 10 Sales Insight by the Salesperson



Let's Have a Look at the Existing Features



Promote

- Promote Customers
- Promote Orders



View

- Invoice Inquiry
- Order Inquiry



Real-Time

- Customer Data Updates
- Order Promotion



Security

- User-Wise Security
- Accessible From Tablet

With these newly added features, your business processes can be further strengthened while ensuring a comprehensive insight into sales and better decision-making.

About Greytrix

Greytrix is a leading business management solutions provider across all industries, with a customer base of over 1500. As Sage Development partners for 23+ years, Greytrix has provided end-to-end services for various Sage ERPs like Sage Intacct, Sage X3, Sage 300 and Sage 100, and Acumatica, starting with development, customization, integration, implementation, up to consultation, and support. We also provide a complete range of services for CRM systems like Salesforce, Sage CRM, and Dynamics 365 CRM. In addition, our IP division has the expertise to work on 50+ add-ons, migration, and integration solutions.

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Know More

GUMU™ Cloud | Greytrix™

