



**Greytrix presents GUMU™ for**

# **Sage Intacct & Customer Portal Integration**

**Get more done in less time and deliver a smarter customer experience.**

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Provide meaningful customer experience and manage them effectively with our Partner Portal – BPortaly – an IP product of Greytrix. Customer Portal is an app which comes under BPortaly along with other relevant apps. The GUMU™ for Sage Intacct – Customer integration ensures better customer experience and easy promotion of entities like customers, quotes, orders, invoices, and products. Sage Intacct is a leading accounting and finance solution providing operational insights, real-time sales visibility, and automating critical accounting operations. The integration between Sage Intacct and Customer Portal is an ideal solution for your business to ensure seamless customer management and a proactive experience for customers by ensuring all the sales-related pursuits in one place.



## Customers

Better customer management with a comprehensive insight into customer data and details such as name, id, and history.



## Sales Quotes

Link your quotes in no time from Sage Intacct to Customer Portal with real-time quote synchronization enabled by this integration.



## Sales Orders

Streamline your order management by linking orders from Customer Portal to Sage Intacct to seamless order synchronization supported by the GUMU™ connector.



## Sales Invoice

Generate accurate invoices with appropriate order details in Sage Intacct and integrate them seamlessly to the Customer Portal with GUMU™ for Sage Intacct – Customer Portal integration.



## Products

Add new products and update existing ones through smooth product synchronization supported by for Sage Intacct – Customer Portal integration.



## Real Time Inventory

Check the real-time stock availability of a particular product at a specific warehouse using the product code and ensure better sales decisions.

# Benefits:

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## Easy Multi-Company Management

Customer Portal's multi-company support feature assures simplified operations of more than one company in one place.



## A Comprehensive View of Customers

Provide better and seamless services by meeting customer needs and knowing their buying patterns through a deep and comprehensive insight into customer data.



## Real-time Quote Generation

Process your quotes faster and ensure order accuracy through quote generation automation with editable quote documents with pre-defined rules.



## Enhance Sales Efficiency

Speed-up sales timeline and reduce sales errors with detailed financial reporting and updated sales history of every customer.



## Unique User Access

The ERP-Customer Portal solution allows you to create customized login access for users, which will be restricted to their roles to ensure platform security.



## Detailed Product Information

Product synchronization enables up-to-date product information for users. These include information like product ID, category, choice of warehouse, and availability.



## Secure Order Processing

Get orders to customers in the shortest possible time by generating timely orders with automated order processing.



## Centralized Data View

Avoid manual data entries by switching to GUMU™ integration of Sage Intacct - Customer Portal, which offers a centralized platform for all the crucial data and resources.



## About Greytrix

Since 1997, Greytrix has been one largest global Sage Partners delivering top-quality ERP and CRM solutions worldwide by crafting better integration experiences across industries. We are more than just integration experts as we also have our IP products (GUMU™, B-Portaly, & Sales Commission) helping businesses grow faster. The GUMU™ is our Champion integrator designed by our brilliant minds for integrating ERPs (Sage Intacct, Acumatica, Sage 100, and Sage X3) with CRM (Salesforce, Dynamics 365 CRM, and Sage CRM) and third-party apps (Avalara, Magento, MediusGo, Treez, Shopify) on fingertips. Improve customer engagement and ensure customer management with GUMU™ for Sage Intacct-Customer Portal integration now!

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