

Your Gateway to Happier Customers & Smarter Teams



With GUMU™, Salesforce and Acumatica work as one, bringing all your customer, order, credit, and transaction data together — in real time. This integration solution allows you to seamlessly sync key modules like customer data, order history, and payment details for a comprehensive customer view. Integrating Acumatica with Salesforce through GUMU™ also allows you to respond faster and boost upselling and cross-selling opportunities. No more switching screens. No more waiting for updates. Just faster responses, empowered selling, and stronger customer relationships.

How our Salesforce – Acumatica Integration can help you?

Effortless Data Mapping — Because Your Teams Deserve Simplicity

Configure fields, objects, and sync logic with flexibility. Maintain consistent records, eliminate manual overlap, and let teams work from trusted data — always.

Header	Active	Target Field Label	Target Field	Data Type	Source Field	Default Value
ERP to SF	11 to 13	Account Fax	fax	string	Fax (Main Contact/Ext)	
		Account Name	Name	string	Customer Name (CustomerName)	
		Account Phone	Phone	string	Phone (Main Contact/Phone)	
		Billing City	ShippingCity	string	City (BillingContact/Address/City)	
		Billing Country	ShippingCountry	string	Country (BillingContact/Address/Country)	
		Billing State/Province	ShippingState	string	State (BillingContact/Address/State)	

Review Before Sync —

Control what enters your CRM. Validate Acumatica records before they flow into Salesforce. Prevent errors, enforce data quality, and protect CRM integrity at scale.

ACCOUNT FAX	ACCOUNT NAME	ACCOUNT PHONE	BILLING CITY	BILLING COUNTRY
43227524	Amelia White	527345287	US	US
	ABC Holdings Inc		US	US
	Amity Munoz		US	US
	AMRO Bank Japan	+81 (777) 443-4657	Tokyo	JP
	Angela Grant			US
800-555-5761	Anika Small	987654321	US	US
	Anika Ingram			US
	Anton's of Westchester	+1 (777) 592-5260	Illmford	US
	Jesca A. Diehl			US
	Church of the Apostles	+1 (872) 462-0434	Coppell	US
	April Aguirre			US
800-555-5761	Anissa Farmer	987654321		US

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Authorization Control:

Configurable Real-Time Inquiries Pull live ERP data directly into Salesforce screens. Customize fields, add business logic, create inquiries — all without leaving the CRM environment.

The image shows two screenshots of the GUMU Settings interface. The left screenshot displays the 'Security Matrix' where users can define permissions for various actions (ERP Details, Promote Customer, Promote Order, Update Customer, Promote Quote) across different profiles (System Administrator, gtesting, Shelly Wetland, Minimum Access - AP Only Integrations, Minimum Access - Salesforce, Standard User, Read Only, Solution Manager, Marketing User). The right screenshot shows the 'Details for USA Branching School' screen, which includes sections for 'Customer Details' (Customer ID: 100000000000000000, Name: USA BRANCHING SCHOOL, Email: naresh@usabranching.com, Phone: 1234567890, Customer Class: 100, Customer Type: 100, Customer Status: Active) and 'Address' (Billing Street: 123 Lower Hatch Rd, Billing City: 1234567890, Billing Country: US, Billing Zip/Postal Code: 1234567890). Below these are 'Details for Acumatica - Customer' and 'Field Level Setup' sections.

Effortless Entity Sync

Pull live ERP data directly into Salesforce screens. Customize fields, add business logic, create inquiries — all without leaving the CRM environment.

The screenshot shows the 'Integration Acumatica' interface for 'Entity Mapping'. It displays a 'Basic Setup' section with fields for 'Entity Mapping Name' (Acumatica - Customer), 'Source Entity' (Acumatica - Customer), 'Type' (Master), and a 'Description' (In Acumatica, Customers are the people or businesses buying from a company). Below this is an 'Optional Setup' section with a 'Sync Now' button.

Simplify Your Data Mapping

Import/export mappings across sync routines to replicate setup across environments, reduce configuration hours, and standardize workflows.

The screenshot shows the 'GUMU Settings' interface. The top navigation bar includes 'Integration Acumatica', 'Entity Mapping/Import', 'Sync Now', 'Export Mapping', 'Share Data', and 'Back'. The main area shows 'Basic Setup' for 'Acumatica - Customer' and a table of 'Integration Acumatica' sync routines. The table includes columns for 'Action', 'Active', 'Entity Mapping Name', 'Description', 'Salesforce Object', 'Sync Type', and 'Source Entity'. Examples include 'Acumatica - Branches' (Description: This import routine maps data to the corresponding company branches in Acumatica., Salesforce Object: gmu_aci_branches_i, Sync Type: Custom, Source Entity: Acumatica - Branches), 'Acumatica - Contact' (Description: In Acumatica, contacts are individuals linked to customers. They serve as key points of contact for customers., Salesforce Object: Contact, Sync Type: Custom, Source Entity: Acumatica - Contact), and 'Acumatica - Customer' (Description: In Acumatica, Customers are the people or businesses buying from a company., Salesforce Object: Account, Sync Type: Custom, Source Entity: Acumatica - Customer).

Promote with a Click

Push Accounts, Customers, and Orders from Salesforce to Acumatica instantly. Multi-branch businesses benefit from the Branch Promotion feature for organized, accurate syncs.

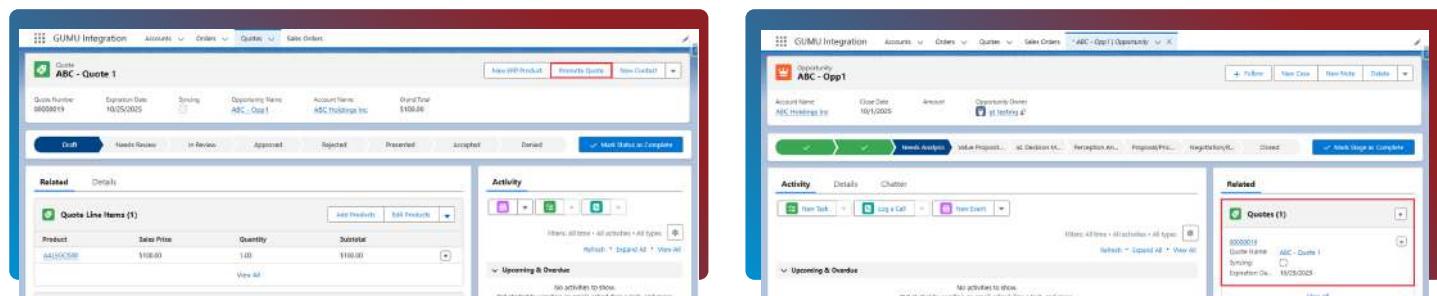
The screenshot shows the 'GUMU Integration' interface. The top navigation bar includes 'Accounts', 'Orders', 'Quotes', and 'Sales Orders'. The main area shows 'Promote Customer' (Customer Name: ABC Holdings Inc, Customer Class: 100, Customer Type: 100, Customer Status: Active, Email: info@abcholdings.com) and 'Promote Order' (Order Name: Order 00005257, Order Start Date: 2/7/2013, Status: Draft, Total Order Amount: \$500.00). The 'Order Products' table lists a single item: AACOMM771 (Product Code: AACOMM771, Quantity: 1.00, Unit Price: \$500.00). The bottom right corner shows an 'Activity' section with a 'Upcoming & Ongoing' list.

Exclusive Entity Add-ons

Elevate your sales process with our seamless Acumatica ERP record transformation feature, which can be triggered manually or automatically when your quote reaches a specific status, such as 'closed won.' It enables effortless conversion of quotes or any sales document into orders or other relevant records within your ERP system.

Empower Your Sales Journey

Create Opportunities, Quotes, and Sales Orders using Salesforce's standard features—then let GUMU™ handle the rest. Automatically promote quotes to ERP and convert them to orders without extra steps.



Installing the Package:

- Acumatica Package link:

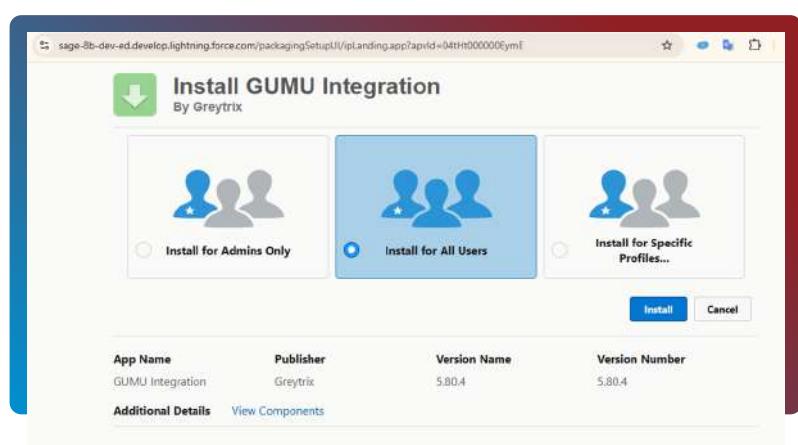
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tKY0000001iTN>

- GUMU™ Integration package Link: 5.80.4 (Managed):

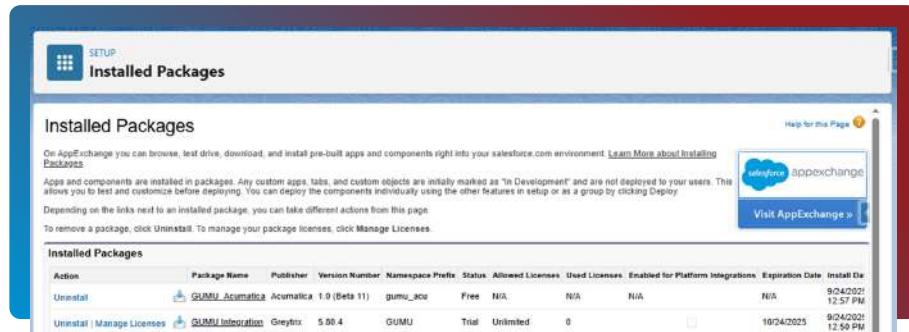
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tHt000000EymE>

To initiate the package installation, please follow the steps outlined below:

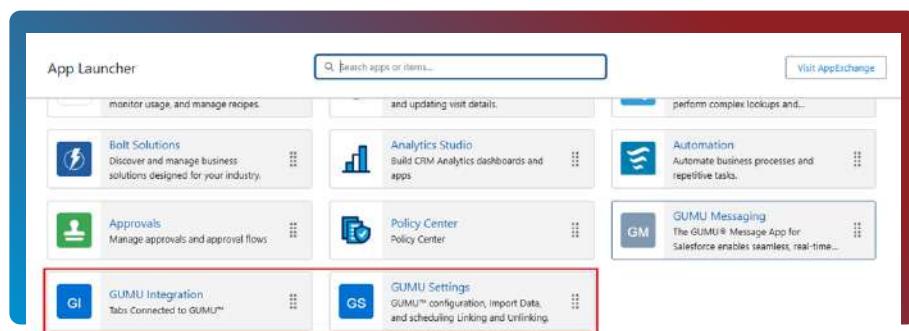
- Enter your username and password for the Salesforce organization in which you want to install the package, and then click Log In.
- After logging into the browser, copy the GUMU™ Integration package URL and paste the URL provided by the team Greytrix, and hit "Enter" on your keyboard.
- Select "Install for All Users" and then click on "Install" button.



- Once the package installation is completed for the GUMU™ Integration package, proceed with similar steps to install the Acumatica package. Once the installation is completed. The GUMU™ package will be installed and listed under the “Installed packages” setup of Salesforce.



- Upon Package installation, 2 Applications appear in the App Launcher of Salesforce.



About Greytrix

25 Years of ERP Excellence

Trusted by **5000+ businesses across the globe**, Greytrix specializes in cloud integrations that simplify complex operations.



Our GUMU™ framework powers seamless connectivity between leading **CRMs and ERPs — from Salesforce to Sage 100**.

With 25 years of expertise and **30+ certified consultants**, we help businesses **work smarter, integrate faster, & grow stronger**.

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 Greytrix | GUMU™