

GUMU™

Integration for

salesforce

Sage 100

GREYTRIX OFFERINGS

Greytrix GUMU™ integration for Salesforce with Sage 100 will streamline your front and back office operations. Due to this integration, a single console view of Customer transactions like Sales Orders, Invoices, etc. can be viewed in real – time.

Salesforce user can also link / unlink Customers from Salesforce to Sage 100. Sales representatives can promote Sales Order to the ERP, view Order and Invoice related transactions of the Customers anywhere, anytime.

Sales representatives have access to clients' Purchase and additional details, thereby optimizing your investments in Sage 100 and Salesforce.

To strengthen business processes, organizations invest significantly in their ERP and CRM systems. When the focus is on immediate revenues, the shortcomings of isolated systems are often ignored. Hence organizational benefits of ERP and CRM integration remain concealed. Sage 100 handles the back-office operations like managing Purchases, Finances, Inventories, Sales Orders, and Accounts etc.

Laterally, Salesforce takes care of front-office operations like Customer support, improving Sales by converting Leads to Customers/ Opportunities and retaining existing Customers. However, as they work in isolation, employees lack visibility in Customer information, Order Statuses, Outstanding Invoices which make servicing Customer requests a time-consuming task. Additionally, it decelerates the agility in decision-making process.

Hence, it becomes crucial to weed out the pain points by opting for an integrated solution that would ensure an effective business flow.



BENEFITS



Based on real-time data, Management can make informed decisions & identify business opportunities.



Sales person can extract real-time and on the go.



Increased employee productivity due to data consistency and reduced manual efforts.



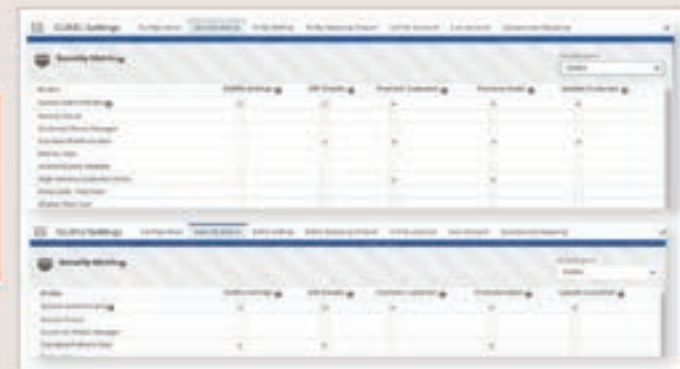
Enhanced client experience due to faster resolution of queries and personalized responses.

1. DATA SYNC:

GUMU™ allows bi-directional (& User controlled) Accounts and Order information data movement on real-time basis between Sage 100 and Salesforce. It allows users to choose the “Master” system for controlling the data flow. This helps in maintaining data consistency and reliability between the two systems. Order History information like Quote, Sales Order, Shipment, Sales Invoices, Credit Note, and Payments Receipts against Invoices can be viewed on user-friendly Salesforce tabs for Individual Accounts. The Salesforce lightning components interface in GUMU™ integration allows users to synch additional field values for Accounts from Salesforce object to the corresponding A/R Customers in Sage 100 ERP system.



Refer pt. 1



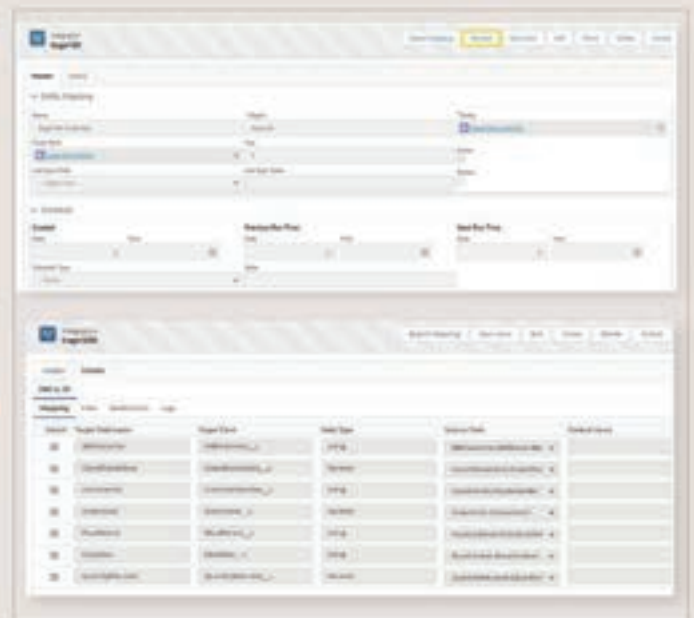
Refer pt. 2

2. AUTHORIZATION CONTROL:

GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels to Integration functionality with prescribed user privileges. Thus, giving Administrators the power to secure data and control systems efficiently & effectively.

3. ENTITY SYNCHRONIZATION:

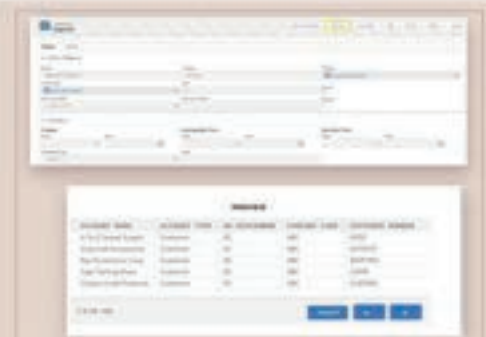
GUMU™ provides the flexibility to map and import any custom or standard Sage 100 entity data into standard or custom Salesforce objects. This feature can further be leveraged to perform analysis using any Wave Analytics, Dashboard Reporting and Visual Charts. With the additional Cloning feature, user can reformat/filter/restructure existing entity without disturbing its original form and use it for specific purpose. User can also set schedules to sync entities as per their business needs and have the option to support multiple sync of entities with processes running in the background. Log tracking provides administrator the option to completely track progress and notify themselves (or any other users) via email on failure of scheduled jobs for immediate action.



Refer pt. 3

4. PREVIEW DATA BEFORE IMPORT:

To improve the overall user experience in GUMU™ integration, a “Salesforce – ERP Data Preview” feature is available. This feature provides user the ability to preview & validate the ERP data prior to it being imported in Salesforce CRM which further minimizes data error.



5. LINKING/UNLINKING CUSTOMERS:

Link existing Sage 100 Customers with existing Salesforce Accounts to avoid data duplication. Customizable "Link/Unlink Customer" screen helps in configuring additional fields such as Billing Country, Account status etc.



Refer pt. 5

6. REAL-TIME INQUIRIES WITH FLEXIBILITY TO CONFIGURE:

Sales representatives can view list of Sales Orders, Invoices, and Additional Customer details on user friendly Salesforce UI. You can customize this as per your custom need and add an additional business-related information. Other than these GUMU™ also provides user the capabilities to Add/Create new Inquiries in Salesforce system as per their business needs based on the data in Sage 100. Modify existing Inquiries to include custom fields in Salesforce reflecting associated Sage 100 data.

7. EASY TO PROMOTE:

GUMU™ integration provides functionality of promoting/updating Customers and promotion of Sales Orders from Salesforce to Sage 100 with a single click. The ERP specific required information such as the Default Shipping Address, Salesperson, Tax code fields and Customer Specific Pricing are brought/filled up (auto populated) in real-time to Salesforce in order to give the Sales representative the liberty to worry free data entry to ERP directly.



Refer pt. 7



8. STANDARD SALESFORCE OPPORTUNITY:

GUMU™ provides the freedom to user to take a complete advantage of the Standard functionality in Salesforce of creating Opportunity along with Quote items and convert to Sales Order. GUMU™ extends the functionality and allows user to promote the Quote to ERP. And when the same is converted in order the respective quote record in ERP will be converted to Order automatically.



Refer pt. 8

9. PORTABLE DEVICES:

Integration can be accessed across hand-held devices like tablets/mobile. Sales Orders can be promoted from Salesforce to ERP on-the-go. All of the Customer information is available on the click of a few links/buttons to keep Sales Rep upto date with the Clients information.



Refer pt. 9

10. REPORTS AND DASHBOARDS:

With GUMU™ integration you can create Reports and Dashboards in Salesforce based on the data synchronized from Sage 100 to Salesforce using Entity Sync Mapping. These Reports and Dashboards are important for taking informed decisions, identifying new Business Opportunities & Forecast Sales.

11. ADD-ONS FOR OTHER ENTITIES:

GUMU™ clients can request additional add-ons for other entities like Vendor & Purchase Order Promotion, Sales Invoice Add-On & AvaTax add-on at an extra cost over and above the standard GUMU™ integration to establish a seamless relationship between Salesforce objects and other Sage ERP entities.

12. FLEXIBILITY TO INCORPORATE YOUR BUSINESS NEEDS

GUMU™ integration has been designed such that it can accommodate your business scenarios and make the integration move the data across the system which is specific to your business scenario and necessary for completion of the process at affordable rates.



What's NEW?

► Bulk Promotion & Update of Account and Orders

This integration supports bulk posting, i.e., promoting multiple accounts/customers from Salesforce to Sage ERP. One can also update Accounts and other related objects (Contacts and Addresses) from Salesforce to Sage ERP.

Bulk Post Tab

Account Name	Account Type	Phone	Type	Account Order No.
A To Z Carpet Supply	Customer	774-888-8888	Customer	1000
Autocraft Accessories	Customer	774-888-8888	Customer	1000
Bay Pyrotechnics Corp.	Customer	774-888-8888	Customer	1000
Caper Sailing Ships	Customer	774-888-8888	Customer	1000
Custom Craft Products	Customer	774-888-8888	Customer	1000

Bulk Update Tab

Account Name	Account Type	Phone	Type	Account Order No.
A To Z Carpet Supply	Customer	774-888-8888	Customer	1000
Autocraft Accessories	Customer	774-888-8888	Customer	1000
Bay Pyrotechnics Corp.	Customer	774-888-8888	Customer	1000
Caper Sailing Ships	Customer	774-888-8888	Customer	1000
Custom Craft Products	Customer	774-888-8888	Customer	1000

► Preview data before Import

The new feature, 'Salesforce – ERP Data Preview,' enables users to preview and validate data before importing it from Sage ERP to Salesforce.

Account Name:

Account Type:

AR Division No:

Company Code:

Customer Number:

PREVIEW

ACCOUNT NAME	ACCOUNT TYPE	AR DIVISION NO	COMPANY CODE	CUSTOMER NUMBER
A To Z Carpet Supply	Customer	02	ABC	AT02
Autocraft Accessories	Customer	02	ABC	AUTOCR
Bay Pyrotechnics Corp.	Customer	02	ABC	BAYPRO
Caper Sailing Ships	Customer	02	ABC	CAPRI
Custom Craft Products	Customer	02	ABC	CUSTOM

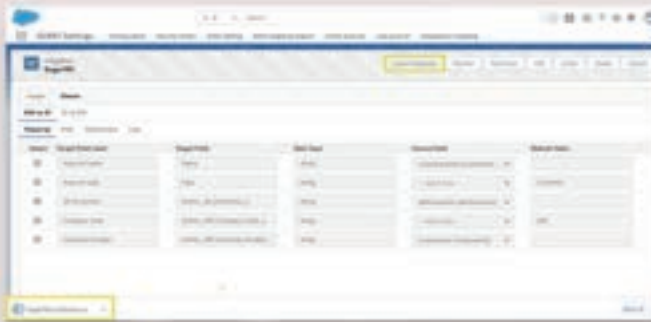
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Import

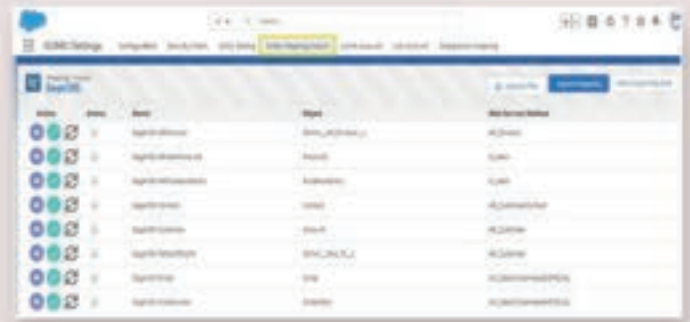
▶ Export/Import Entity Mapping

Users can now import/export entity mapping in sync routines.

Export mapping



Entity mapping/Import



▶ Real-time Product Inquiry

Viewers can now view real-time information of Products while adding/updating line items on GUMU™ Sales Order Screen.



Sales Order Tab

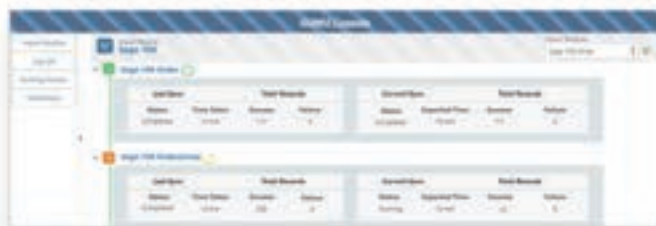
▶ GUMU™ Console

Using the GUMU™ view all logs on a single screen

Sales Order Tab



It also alerts users on connection failure/schema changes



Sales Order Tab



GUMU™ Console Import routine status

Receive timely updates on import routine status as it can be easily viewed on the GUMU™ console

About Greytrix

Greytrix has delivered cutting-edge ERP and CRM solutions worldwide for the past 22+ years. As Sage development and integration partners, Greytrix has provided all-around business management solutions across various industry verticals. Greytrix's native cloud connector GUMUTM, offers seamless integration between ERP systems (Sage Intacct, Sage X3, Acumatica, Sage 100 and Sage 300) with CRM (Salesforce, Dynamics 365 CRM and Sage CRM), third-party apps (Rev.io, Rent Manager, Avalara and MediusGo), and cloud storage systems (HRMS and Sales App). With Salesforce and Sage ERP integration, automate and streamline your business processes.

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

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Know More

GUMU™ Cloud | Greytrix™

