GUMU™

Integration for

salesforce

Sage 300

GREYTRIX

Every aspect of business has seemingly transformed due to adoption of cloud-based technologies. Increasing number of businesses are moving their applications on cloud to reduce their spending on technology infrastructure, achieve economies of scale, streamline their processes and improve data accessibility. CRM is one such essential element in an organization which enables organization to deliver its business objectives. Adoption of Cloud CRM such as GUMU™ allows bi-directional (& User controlled) Accounts and Order information data movement on real-time basis between Sage 300 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 300 ERP system. Salesforce enables data to be saved, stored and accessed anytime anywhere. Prior to adopting cloud-based CRM organization must have robust business management solution such as Sage 300 in place to lower their cost for supporting multiple technologies, databases and operating systems. Both are efficient solutions in their independent domains, but their integration will enable organization to achieve its business goals with enhanced customer experience.

▶ GREYTRIX OFFERINGS

Greytrix offers GUMU™ integration solutions for Salesforce with Sage 300 a best of breed solution for organizations to enhance their customer interaction. With Salesforce and Sage 300 integration you now have actionable customer information. 24x7x365 accessibility provides a real edge to virtual workforces, it enables employees to work without being tied to their office desk, desktop or office servers. Instead, employees can contact customers and prospects on-the-go and access for real-time data on their personal portable devices such as mobiles or tablets. By delivering more actionable and frequent customer insights, employees can increase productivity across the board. Thereby optimizing your investments in Sage 300 and Salesforce.

BENEFITS

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

- Increased employee productivity due to data consistency and no efforts to correct duplication.

- Sales person can extract client information in real-time and on the go.
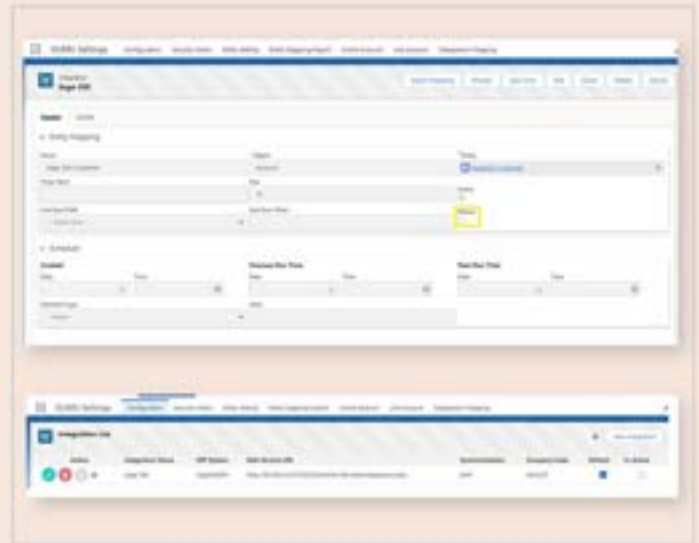
- Enhanced client experience due to faster resolution of queries and personalized responses.

1. DATA SYNC:

GUMU™ allows bi-directional (& User controlled) Accounts and Order information data movement on real-time basis between Sage 300 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 300 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 300 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.
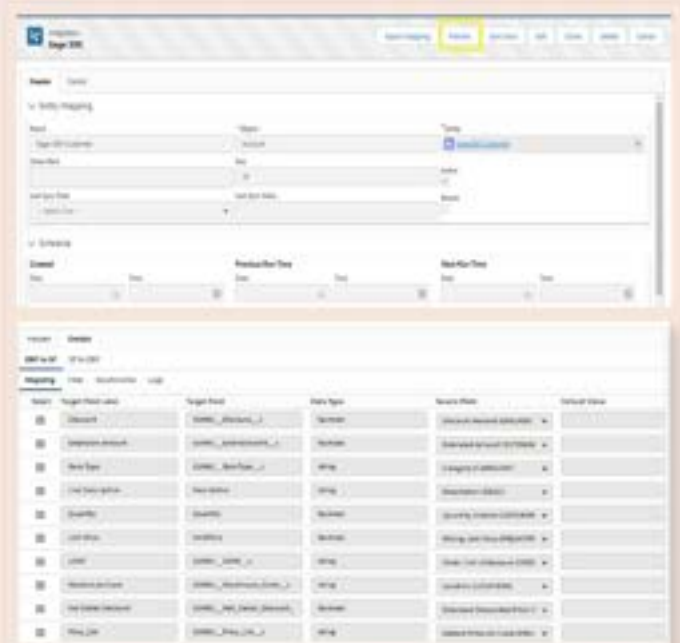
4. PREVIEW DATA BEFORE IMPORT:

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 300 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.
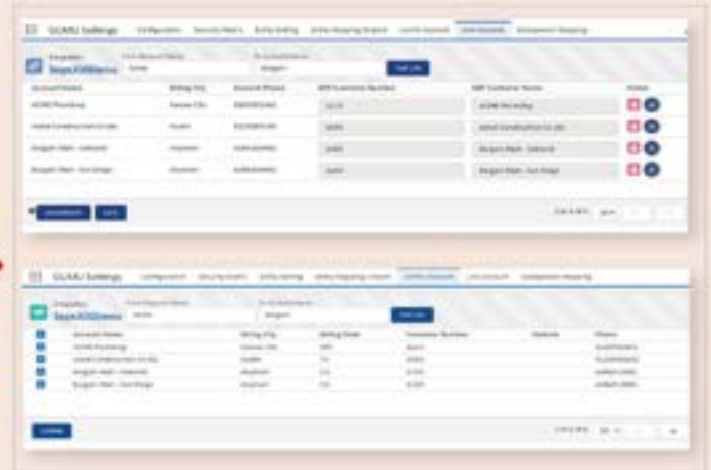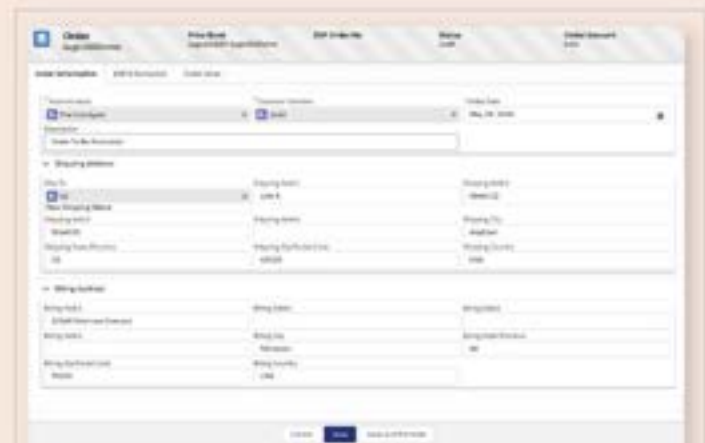
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6. REAL-TIME INQUIRIES WITH FLEXIBILITY TO CONFIGURE:

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 300. Modify existing Inquiries to include custom fields in Salesforce reflecting associated Sage 300 data.
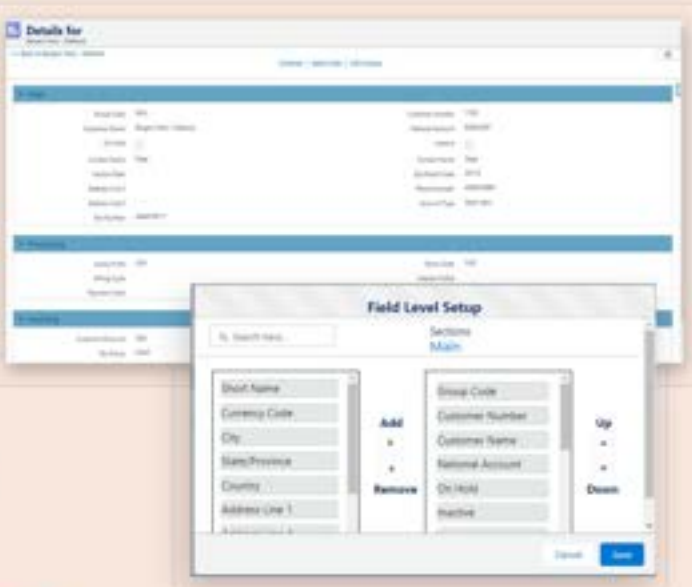
7. EASY TO PROMOTE:

GUMU™ integration provides functionality of promoting/updating Customers and promotion of Sales Orders from Salesforce to Sage 300 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.
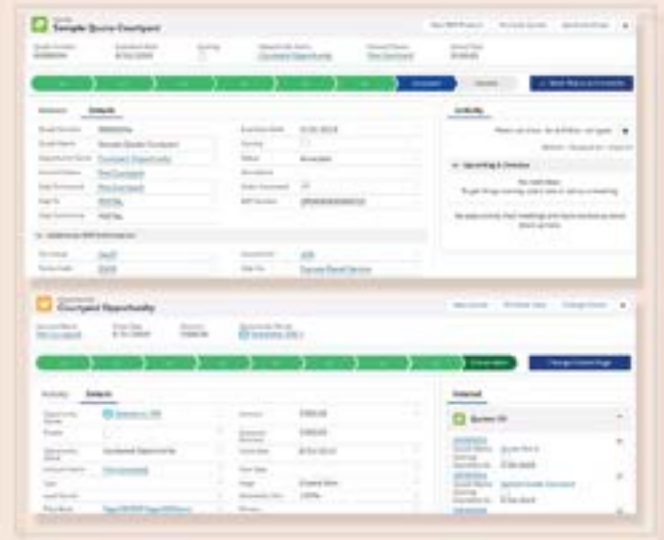
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8. STANDARD SALESFORCE OPPORTUNITY:

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 in converted in order the respective quote record in ERP will be converted to Order automatically.

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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.

10. REPORTS AND DASHBOARDS:

With GUMU™ integration you can create Reports and Dashboards in Salesforce based on the data synchronized from Sage 300 to Salesforce using Entity Sync Mapping. These Reports and Dashboards are important for taking informed decisions, identifying new Business Opportunities & Forecast Sales.

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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 addon 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.
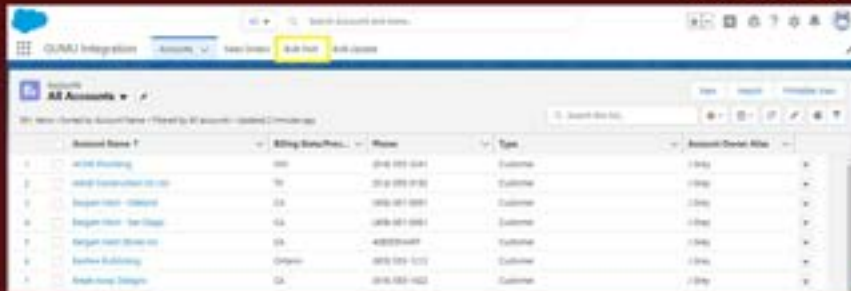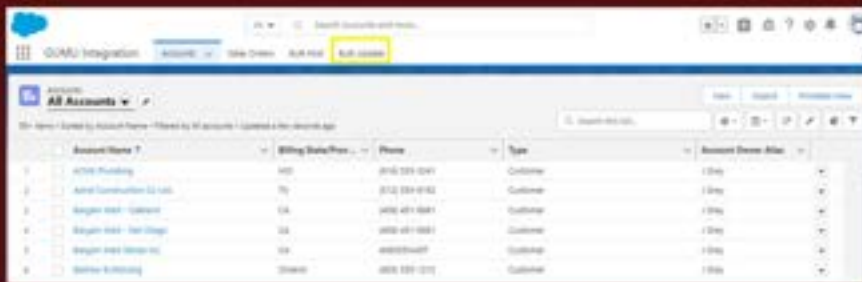
What's NEW?

▶ **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

Bulk Update Tab

▶ **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.
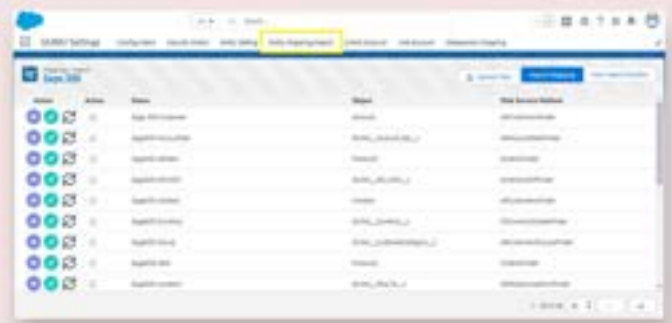
▶ Export/Import Entity Mapping

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

Export mapping
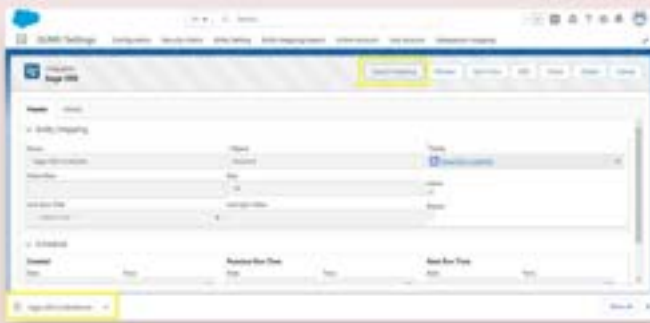
Entity mapping/Import

▶ Real-time Product Inquiry

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

Add Product

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

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For more information, contact us on

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Know More

GUMU™ Cloud | Greytrix™