

GUMU™

Integration for

salesforce

Sage 50

For enterprises to run on
AUTO-PILOT!

Sage 50 US (Formerly known as Peachtree) is a state-of-art accounting solution that helps manage inventory, optimize business operations, and manage warehouses. Meanwhile, Salesforce is a modern cloud-based CRM system that allows efficient customer engagement. It enables workforces to operate in a virtual mode by delivering customer details literally anytime!

The GUMU™ for Salesforce and Sage 50 integration helps run processes seamlessly while integrating front and backend processes. In addition, the integrated solution improves data visibility, enabling employees to access data of the other system hassle-free.

Key highlights of the integration

1. AUTHORIZATION CONTROL:

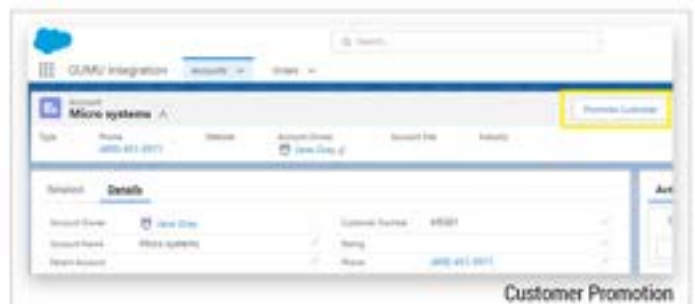
GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels to Integration functionality with prescribed user privileges. Thus, giving Administrators the power to secure data and control systems efficiently & effectively.

2. SEAMLESS ENTITY SYNCHRONIZATION:

GUMU™ enables easy mapping and importing any custom or standard Sage 50 entity data into standard or custom Salesforce objects. With GUMU™, users can set schedules for entity sync or do it on-demand. It also supports multiple syncs of entities with processes running in the background. Users can also restructure existing entities without disturbing their original form and use them with the additional cloning feature for a specific purpose.

3. EASY DATA PROMOTION:

Promote entities like customer details and transactional data like sales quotes, sales orders, and invoices from Salesforce to Sage 50 US instantly. All ERP-related data like salesperson, tax code fields, shipping data, and customer-specific pricing are synced into Salesforce in real-time.

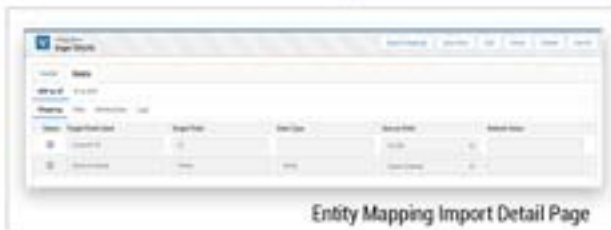


4. EXPORT/IMPORT MAPPING:

Users can now import/export entity mapping in sync routines easily. This feature also allows users to modify data in the file.



Entity Mapping Import Header Page



Entity Mapping Import Detail Page



Entity Mapping Import

5. SALESFORCE STANDARD OPPORTUNITY:

GUMU™ enables users to use the Standard functionality in Salesforce of creating opportunities with quote items and convert into sales orders. GUMU™ helps go beyond this functionality and allows users 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.

6. PORTABLE DEVICES:

Small businesses can benefit from this integration as it helps them operate from remote locations with access to customer insights on the go. Additionally, as it is compatible with different devices, it allows your salesperson instantly draw insights and data from the ERP. This, in turn, reduces turnaround time for queries, assures instant resolution of customer issues, and crafts an overall better experience every time!

7. REPORTS AND DASHBOARDS:

Einstein analysis, formerly known as wave analytics, explores data from both the systems for visualization and developing insights for business. It is native to Salesforce, secured, and generates deeper insights from data imported from external sources. As a result, the dashboards and reports are dynamic, help analyze data, highlight opportunities and predict outcomes.

The GUMU™ for Salesforce Sage 50 US Integration helps bring processes together, improves visibility, and aids the decision-making process with targeted insights.

About Greytrix

Greytrix has developed supreme expertise in delivering innovative business management solutions across various verticals in the last two decades. As one of the oldest and leading Sage development and integration partners, we offer cutting-edge integrations through our SaaS, one-click, native cloud connector platform GUMU™. It provides 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). Salesforce and Sage 50 US integration help your business experience true independence with seamless processes.

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

Global Contact No: 1 888 221 6661

Know More

GUMU™ Cloud | Greytrix™

