

Greytrix brings an impeccable integration of Salesforce – Sage ERP powered by its home, native cloud connector platform GUMU™. Salesforce can be seamlessly integrated with Sage ERPs like Sage Intacct, Sage X3, Sage 100, Sage 300 and Sage 50 US. GUMU™ enables the seamless and secured transfer of entities, thus tying your front-end and back-end processes together. As you automate complex processes and receive key insights timely, make informed

business decisions and tailor

the best customer experience.



# How can you BENEFIT from this INTEGRATION?



## Meet your business needs to the fullest

The scalability, flexibility, and affordability of Salesforce and Sage ERP − X3 I Intacct I 300 I 100 I 50 integration helps businesses cater to changing market demands and streamline operations with simplified data management across both systems. GUMU™ is built using the latest technologically advanced feature, "Lightning Web Components" from Salesforce, making it compatible with any device.



## **Authorization Control**

System Administrators have defined user rights to set different access levels with the GUMU™ Security Matrix. In addition, it ensures effective data management and system management for system operators.



## Simplified Data Sync

GUMU™ allows bi-directional synchronization of Salesforce and Sage ERP processes enabling flawless data flow, enhanced visibility, and consistency. Salesforce's user-friendly UI shows Order history information like Sales Quotes, Sales Orders, Sales Invoices, Credit Notes, and Payment Receipts. Users can effectively sync additional Account field values from Salesforce to corresponding A/R customers in the ERP system.







#### Preview Data Before Import

The ERP Data Preview feature of GUMU™ creates a better experience within Salesforce and Sage ERP - X3 I Intacct I 300 I 100 (US) I 50 (US) integration. Minimizing data errors by examining and approving ERP data before importing it into Salesforce CRM.



#### Easy data Promotion

Users can promote Customers and Sales Orders from Salesforce and Sage ERP in one go. GUMU™ is making data entries easy/hassle-free across both systems by tailoring ERP-specific information such as Tax Code Fields, Salesperson, and Default Shipping Addresses according to system data management.



#### **Linking/Unlinking Customers**

Avoid data re-entry errors in your existing non-communicational systems by linking your existing Sage ERP Customer record with your Salesforce Account record. The customizable 'Link/Unlink Customer' screen helps configure additional fields like Billing Address, City, State, Zip Code, Country, and Status of the Account/Customer record.



## Real-time Inquiries with Flexibility to Configure

Manage additional business and customize Customer details with user-friendly Salesforce UI. Meet changing business needs by creating new inquiries in the Salesforce system based on data in Sage ERP through GUMU™. To include custom fields, modify existing inquiries by associating Salesforce and Sage ERP data. This feature also eliminates the worry of additional data storage charges from Salesforce by fetching the related information from the Sage system and duplicating the data storage.



#### Add-Ons for Other Entities

We provide additional add-ons for other entities, such as Vendors, and related data such as Remit-To Address and Purchase Order promotions. The team can exclusively use the Sales Invoice Add-On for GUMU™ users to promote the Invoices without the hassle of Order entry if the company only provides service. Also, users can effortlessly connect Salesforce objects with other Sage ERP exclusive tools such as AvaTax for Tax Automation through the GUMU™ add-on.



#### Standard Salesforce Opportunity



GUMU™ supports the standard Salesforce workflow of creating an Opportunity with Quote items and converting them to Sales Orders for them to be later promoted to Sage. GUMU™ connector empowers this functionality by allowing the user to use the pricing defined in Sage and promoting the Quote to an ERP system. While converting a Quote into an order, the ERP record for that Quote is automatically transformed to an order. GUMU™ also eliminates the need for users to maintain complex pricing structures in Salesforce through CPQ. And instead, use the pricing directly from the Sage system.



## Portable Devices

Multi-device compatibility provides easy access to customer information. It helps your sales reps to give more time to serve customers efficiently with a holistic view of transaction status, billing, and payments.



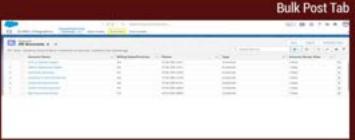
#### Reports and Dashboards

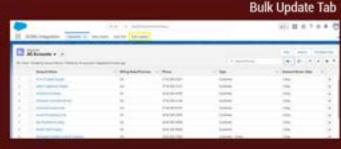
Fully utilize the unique GUMU™ interface to build Salesforce Reports and Dashboard with data across both systems. Einstein Analytics converts complex data into insights to make informed decisions, identify growing business opportunities, and forecast sales with simplified reports and dashboards. As Einstein analysis is native to the Salesforce platform, it is a secured and scalable solution that enables your business to adapt to changing market trends. It also empowers your systems to go beyond general reports and dashboards by importing data from Salesforce and external sources.



## 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.





## 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.

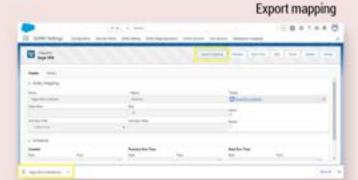


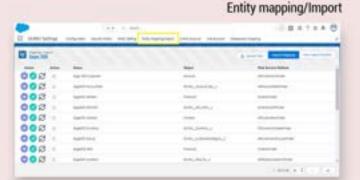




## Export/Import Entity Mapping

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





# Real-time Product Inquiry

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



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

Global Contact No: 1 888 221 6661

Know More GUMU™ Cloud | Greytrix™









