

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.



Integration for



Deliver excellent customer experience consistently!

## 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 | Intacct | 300 | 100 | 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 | Intacct | 300 | 100 (US) | 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.

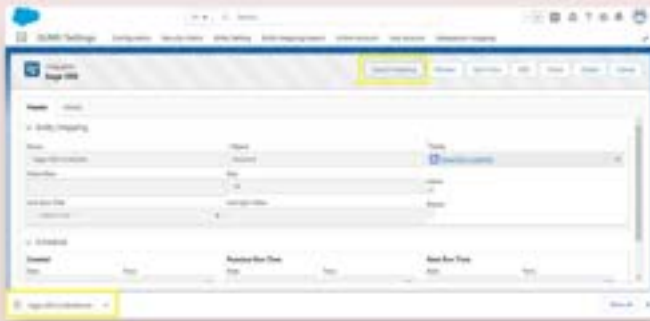




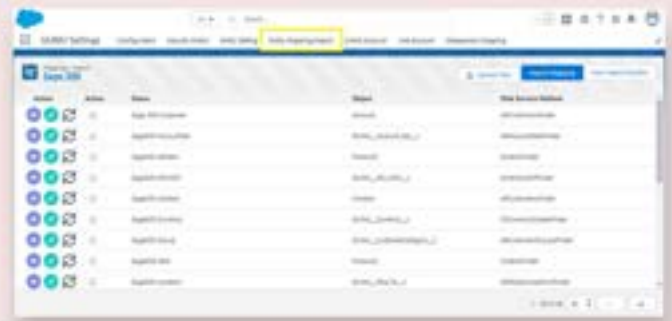
## ▶ Export/Import Entity Mapping

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.

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Know More

GUMU™ Cloud | Greytrix™

