

The **GUMU™** integration of **Salesforce** and **Sage Intacct** is an impeccable integration that brings Sales, Revenue and Financial processes together by integrating key data points and eliminating any inaccuracies during data synchronization. Sage Intacct, a leading cloud accounting and financial management ERP, enables automating redundant tasks and improves planning and budgeting.

It helps make data-driven decisions with predictive analysis making your enterprise future-ready!

On the other hand, Salesforce is a flexible Cloud CRM that connects processes like sales, marketing and customer engagement etc.

It allows easy access to customer data, thus reducing the turnaround time for query resolution and leads.



Integration for




The roadmap to making your enterprise  
**FUTURE-READY**

*The GUMU™ Salesforce - Sage Intacct integration helps save time and reduce errors by eliminating duplicate data entry between the systems. It allows the sales team to analyze their performance based on the financial impact. It syncs sales, revenue and financial processes, streamlines workflows, improves inter-departmental collaboration and delivers excellent customer service with reduced sales friction. The top-notch functionalities help reducing operational costs with cash management, shorter cash cycles and fewer days of sales outstanding.*

**WHAT'S NEW  
IN THE GUMU™ FOR  
SALESFORCE - SAGE INTACCT  
INTEGRATION?**

To help you streamline your purchase processes, we offer a range of Vendor-related add-ons like **Vendor Masters, Vendor Contact, Purchase Address and Billing Address**

We also offer Add-ons for **AR Sales Invoice Promotion and Purchase Order Promotion**

We enable seamless import of entities like **Salesperson, Currency, Category, Inquiry, shipment, quotes** etc. from Sage Intacct to Salesforce





## Easy Data mapping enhances visibility

With the GUMU™ connector, all data can be synchronized on demand enabling businesses to access information from both systems. In addition, as workforces get better access to inter-departmental data, they can function with key insights and evaluate their performance based on the results.

| Source Field        | Target Field        |
|---------------------|---------------------|
| Account Name        | Account Name        |
| Account ID          | Account ID          |
| Account Type        | Account Type        |
| Account Status      | Account Status      |
| Account Description | Account Description |
| Account Address     | Account Address     |
| Account Contact     | Account Contact     |
| Account Phone       | Account Phone       |
| Account Email       | Account Email       |
| Account Website     | Account Website     |



## Preview data before import

The GUMU™ Salesforce – Sage Intacct Integration enables almost all types of data import. The data preview feature helps minimize errors by examining and approving ERP data before importing it into Salesforce CRM. Our cloud integrator also enables dynamic field mapping of entities, helping you maintain the data consistency throughout.

| ACCOUNT NAME | CUSTOMER NUMBER |
|--------------|-----------------|
| CUST-01234   | CUST-01234      |
| CUST-01235   | CUST-01235      |
| CUST-01236   | CUST-01236      |
| CUST-01237   | CUST-01237      |
| CUST-01238   | CUST-01238      |
| CUST-01239   | CUST-01239      |
| CUST-01240   | CUST-01240      |
| CUST-01241   | CUST-01241      |
| CUST-01242   | CUST-01242      |
| CUST-01243   | CUST-01243      |
| CUST-01244   | CUST-01244      |
| CUST-01245   | CUST-01245      |

| Source Field        | Target Field        | Default Value |
|---------------------|---------------------|---------------|
| Account Name        | Account Name        |               |
| Account ID          | Account ID          |               |
| Account Type        | Account Type        |               |
| Account Status      | Account Status      |               |
| Account Description | Account Description |               |
| Account Address     | Account Address     |               |
| Account Contact     | Account Contact     |               |
| Account Phone       | Account Phone       |               |
| Account Email       | Account Email       |               |
| Account Website     | Account Website     |               |



## Seamless entity promotion

With our native system integrator, GUMU™, we enable seamless entity promotion/importing between the two systems. Users can also schedule two-way or one-way on-demand synchronization. All sales quotes, invoices, order details like addresses, history, tracking information, and customer details like addresses and contacts can be synched at the click of a button. In addition, all salesforce data is synched into the ERP in real-time.

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|---------------------|---------------------|
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### Enhanced customer engagement

The GUMU™ Salesforce – Sage Intacct integration equips your processes with customer information. It enables your sales representatives to contact customers anytime, anywhere. Multi-device compatibility facilitates easy access to customer details, transaction status, billing and payments.



### Streamlined Workflows

This GUMU™ integration of Salesforce and Sage Intacct brings vital business processes like finances, sales, marketing and revenue together, enabling easy access throughout the organization. All these processes work in tandem, helping the enterprise function smoothly.



### Reports and Dashboards

Einstein Analytics in Salesforce uses complex data to generate deeper insights, perform predictive analysis, identify opportunities and provide recommendations. The tools help prepare and explore data, design dashboards and define logic in the data flow. Based on the data imported, users can generate dynamic reports and dashboards. These intuitive reports help monitor business metrics in detail and analyze their performance monthly and quarterly. The dashboards give timely updates and enable enterprises to stay abreast with the latest developments. Moreover, salespeople can track their performance and its impact on business performance. It improves transparency with enhanced visibility of numbers.

*The GUMU™ integration of Salesforce and Sage Intacct helps scale and streamline your business processes, making it ready to adapt to future trends. The GUMU™ connector lets you focus on key business areas while it looks after all your integration needs.*



## About Greytrix

Greytrix hails with 22+ years of worldwide expertise in producing industry-relevant ERP and CRM systems to best suit unique business needs. As Sage development and integration partners, Greytrix has produced promising solutions to suit various business verticals.

Greytrix's native cloud system integrator GUMU™ enables easy and seamless ERP integrations (Sage Intacct, Sage X3, Acumatica, Sage 100 and Sage 300) with CRM (Salesforce, Dynamics 365 CRM and Sage CRM) and other third-party apps (MediusGo, Treez, Avalara, Rev.io and many others).

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Know More

GUMU™ Cloud | Greytrix™

