

# GUMU™

Integration for

salesforce

Sage X3

Every organization in order to achieve continuous growth should engage itself in integrating its business software solutions. When focus is on achieving immediate revenue targets, planning and integrating functional software tools and applications with ERP solution often takes back-seat. As a result of these disconnected software solutions inefficiencies creep in, manual data entry and data duplication affects employee productivity, which in turn affects the end customer experience. So how does one achieve this front-end and back-end integration to optimise the business software solutions?

## GREYTRIX OFFERINGS

Greytrix offers a gamut of in-house developed GUMU™ integration solutions which helps Partners and Customers in cloud based and on-premises integration of CRM and Sage ERP products so you can have the best of both worlds. With Sage X3 and Salesforce Cloud CRM integration your sales representatives would no longer struggle to have single console view of the customers as their details are exchanged between ERP and CRM in real-time. They can now promote sales order to the ERP and also view transactions i.e. sales order and invoice related to the customer on the go and on real-time basis. Sales representatives have access to clients purchase details and financial history. Thereby optimizing your investments in Salesforce with Sage X3.



## 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.

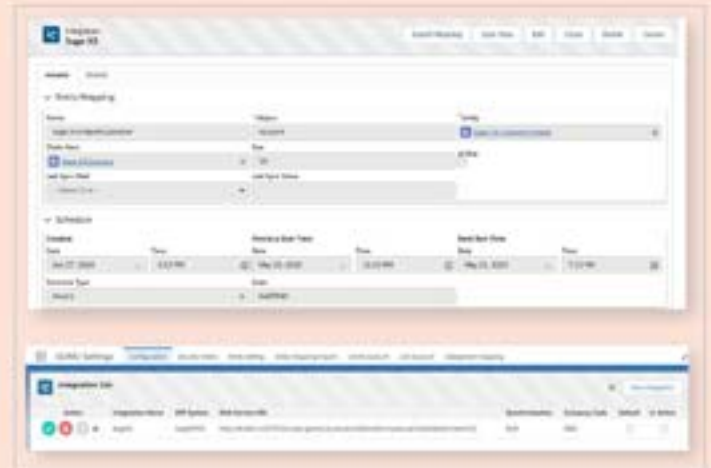


Enhanced client experience due to faster resolution of queries and personalized responses.



## 1. DATA SYNC:

GUMU™ allows bi-directional (& User controlled) Accounts and Order information data movement on real-time basis between Sage X3 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 X3 ERP system.



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## 2. AUTHORIZATION CONTROL:

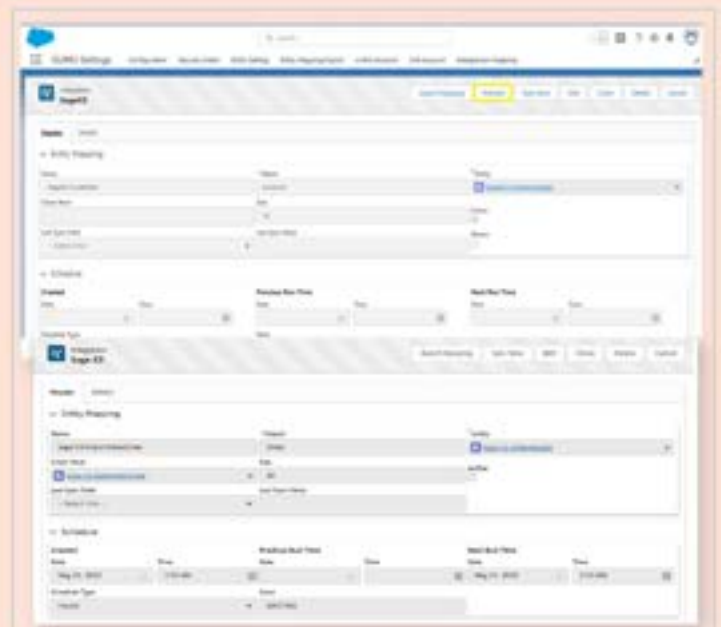
GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels to Integration functionality with prescribed user privileges. Thus, giving Administrators the power to secure data and control systems efficiently & effectively.



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## 3. ENTITY SYNCHRONIZATION:

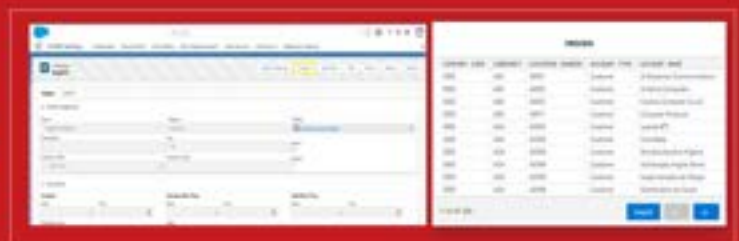
GUMU™ provides the flexibility to map and import any custom or standard Sage X3 entity data into standard or custom Salesforce objects. This feature can further be leveraged to perform analysis using any Wave Analytics, Dashboard Reporting and Visual Charts. With the additional Cloning feature, user 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.



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## 4. PREVIEW DATA BEFORE IMPORT:

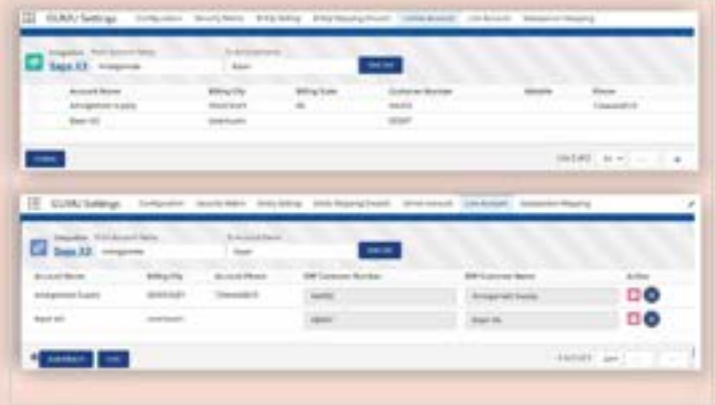
To improve the overall user experience in GUMU™ integration, a "Salesforce – ERP Data Preview" feature is available. This feature provides user the ability to preview & validate the ERP data prior to it being imported in Salesforce CRM which further minimizes data error.



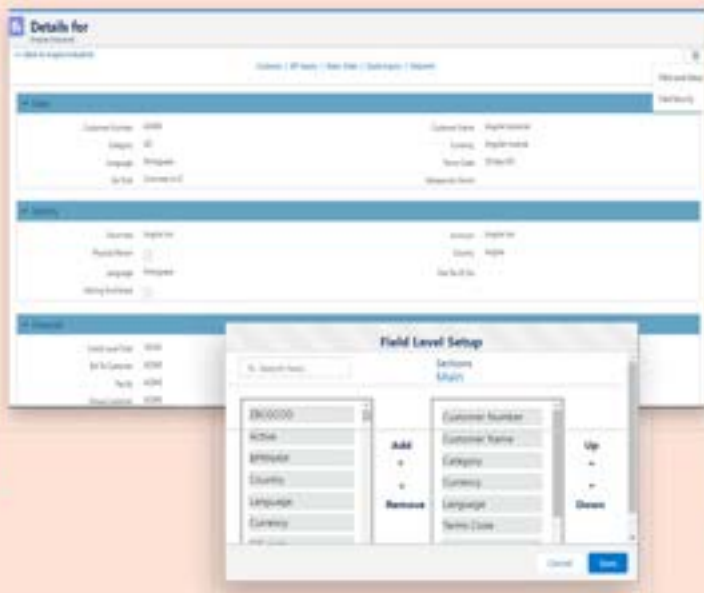


## 5. LINKING/UNLINKING CUSTOMERS:

Link existing Sage X3 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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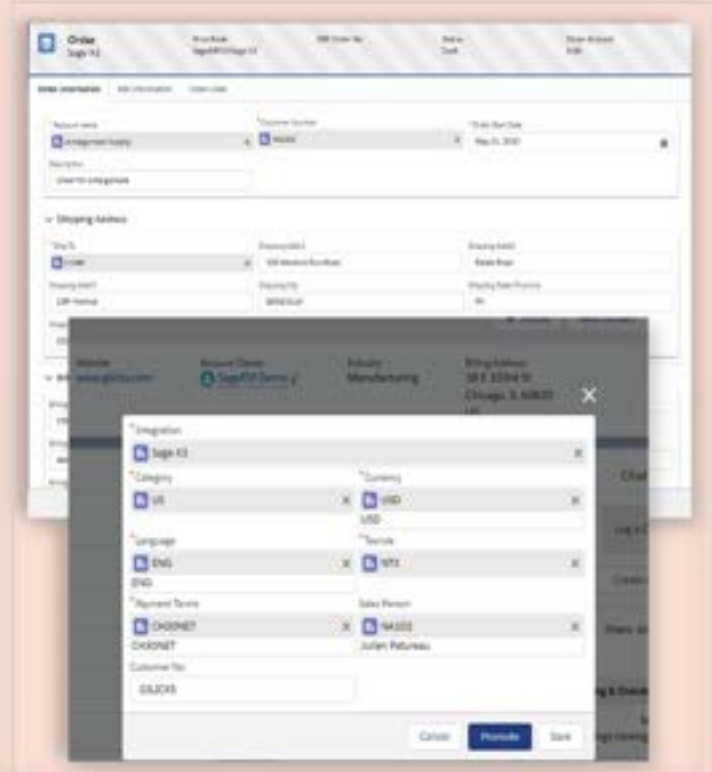


## 6. REAL-TIME INQUIRIES WITH FLEXIBILITY TO CONFIGURE:

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 X3. Modify existing Inquiries to include custom fields in Salesforce reflecting associated Sage X3 data.

## 7. EASY TO PROMOTE:

GUMU™ integration provides functionality of promoting/updating Customers and promotion of Sales Orders from Salesforce to Sage X3 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.



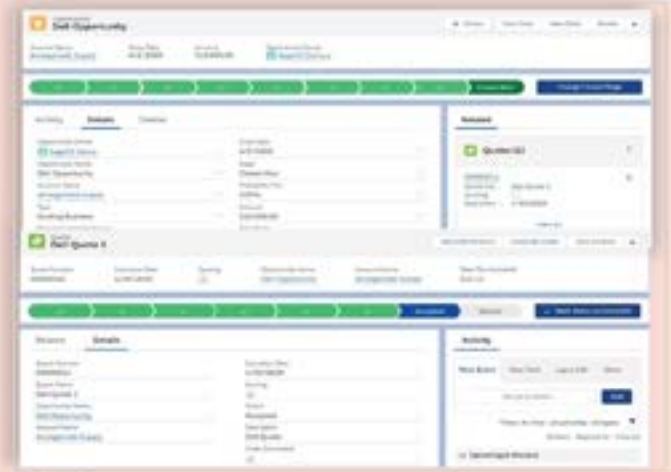
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## 8. STANDARD SALESFORCE OPPORTUNITY:

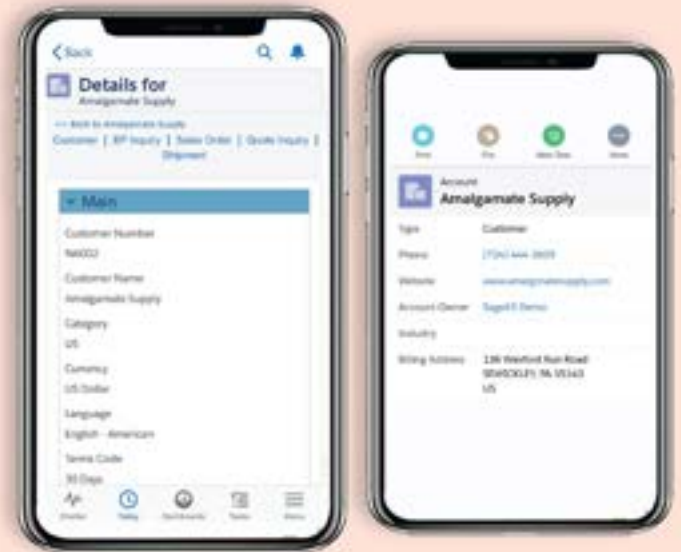
GUMU™ provides the freedom to user to take a complete advantage of the Standard functionality in Salesforce of creating Opportunity along with Quote items and convert to Sales Order. GUMU™ extends the functionality and allows user to promote the Quote to ERP. And when the same is converted in order the 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.



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## 10. REPORTS AND DASHBOARDS:

With GUMU™ integration you can create Reports and Dashboards in Salesforce based on the data synchronized from Sage X3 to Salesforce using Entity Sync Mapping. These Reports and Dashboards are important for taking informed decisions, identifying new Business Opportunities & Forecast Sales.

## 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 add-on 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.

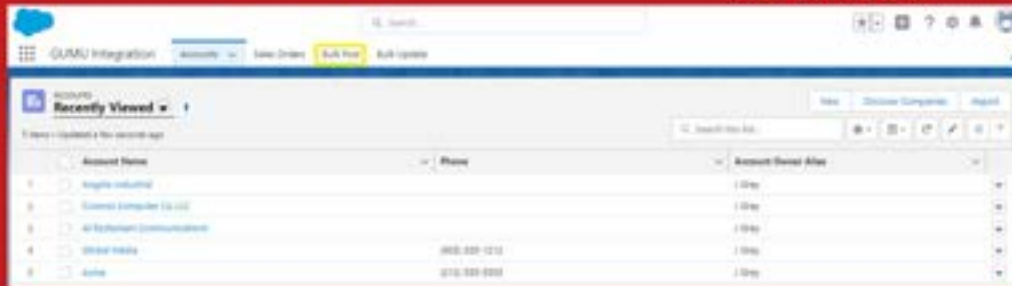


# What's NEW?

## ► 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.



PREVIEW				
COMPANY CODE	CURRENCY	CUSTOMER NUMBER	ACCOUNT TYPE	ACCOUNT NAME
SEED	AED	4001	Customer	AI Restaurant Communications
SEED	AED	4002	Customer	AI Zebra Computers
SEED	AED	4003	Customer	Compos Computer Co LLC
SEED	AED	4011	Customer	Computer Products
SEED	AOA	40001	Customer	Luanda EFT
SEED	AOA	40002	Customer	Ceto Beto
SEED	AOA	40003	Customer	Remedio Saude e Higiene
SEED	AOA	40004	Customer	Distribuição Angola Forno
SEED	AOA	40005	Customer	Supermercado do Margal
SEED	AOA	40006	Customer	Distribuidora do Casito

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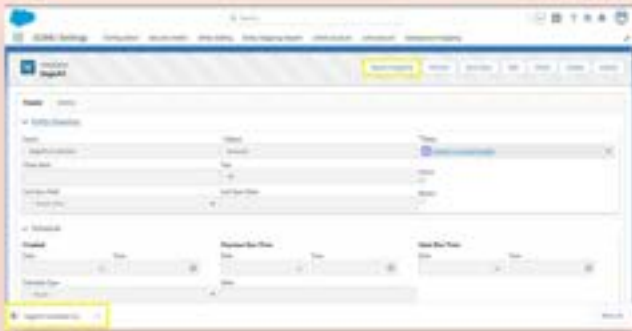
Import



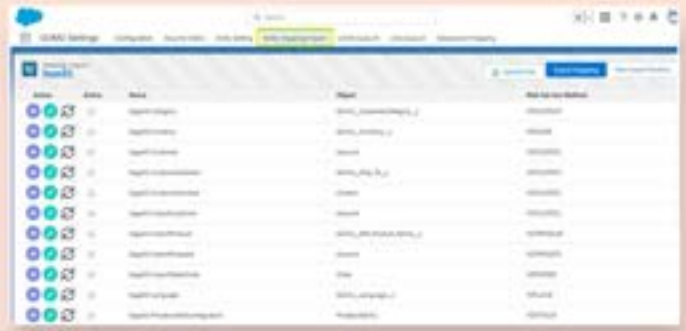
## ▶ Export/Import Entity Mapping

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.

For more information, contact us on [salesforce@greytrix.com](mailto:salesforce@greytrix.com)

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Know More

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