

Coordinated CRM-Finance Operations, Built for Control and Scalability



GUMU™ delivers a governed, bi-directional integration between Creatio and Sage Intacct, designed for organizations where CRM execution must operate within financial structure, not alongside it. By synchronizing customers, contacts, products, orders, invoices, and financial context in a controlled manner, GUMU™ eliminates fragmented workflows, manual handoffs, and reconciliation delays. The outcome is not just connected systems, but predictable, auditable, finance-aligned growth.

Built-In Integration Architecture

GUMU™ is an inbuilt integration engine developed by Greytrix, engineered to facilitate secure data exchange without storing business data or relying on third-party middleware.

Operating independently within the CRM-ERP ecosystem, GUMU™ provides:



Secure, authenticated connectivity



Governed data movement

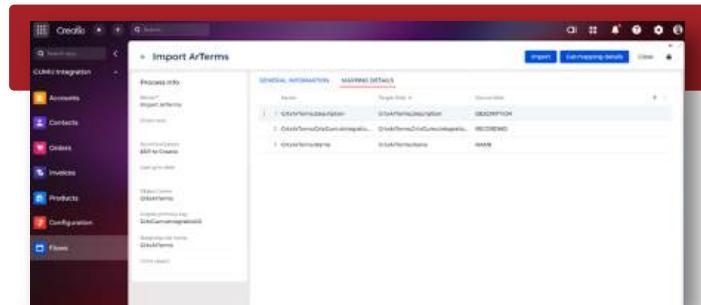


Near real-time and scheduled synchronization

All while preserving system ownership, data integrity, and audit readiness.

Structured Data Mapping Enhances Visibility

Customer records, contacts, products, orders, invoices, and supporting financial entities are aligned through structured mappings—ensuring consistency across platforms, eliminating duplicate data entry, and reducing reconciliation effort.



Clear mappings lead to clear visibility across sales, finance, and operations.

Pre-Sync Data Validation & Controlled Review

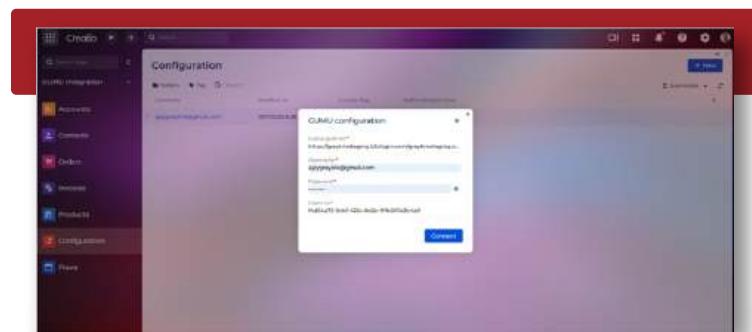
Before data is introduced into Creatio or promoted to Sage Intacct, GUMU™ validates records against defined business and financial rules. This controlled review layer ensures:

- Only complete and compliant records move forward
- Errors are intercepted early
- Downstream corrections and trust erosion are avoided

Finance retains control—without slowing CRM execution.

Secure Authentication & Connection Validation

Every integration begins with verified connectivity. GUMU™ establishes authenticated connections using secured credentials provided by Greytrix. Each configuration is validated upfront, with clear success indicators and error visibility—ensuring synchronization only proceeds on verified, authorized connections.



This prevents silent failures and reinforces operational confidence from the start.

Automated Import Scheduling

Integration should respect business operations. GUMU™ enables automated scheduling of data imports, allowing organizations to:

- Run synchronization during non-business hours
- Adjust frequency based on operational needs
- Align execution with preferred time zones

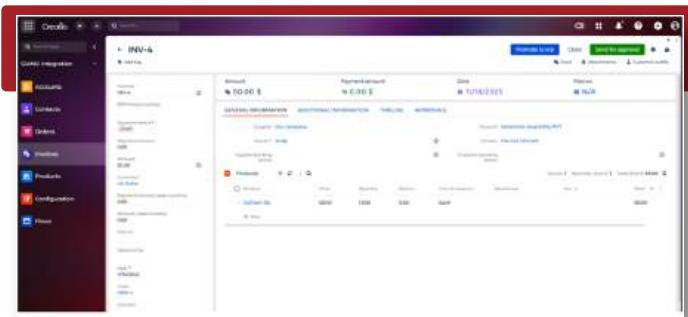


This ensures up-to-date CRM data without disrupting daily business activity or system performance.

Controlled Promotion with ERP Traceability

When records are promoted from Creatio to Sage Intacct, GUMU™ assigns and stores the corresponding ERP document number back into Creatio.

This persistent identifier maintains a live, auditable link between CRM and ERP records—supporting accurate updates, traceability, and long-term data integrity across the record lifecycle.



Authorization Control

Security should reinforce governance. GUMU™ provides granular authorization controls to define:

- Which users can initiate synchronization
- Which entities are eligible for promotion
- Which financial states qualify for transfer

CRM workflows automatically respect accounting controls, approval hierarchies, and audit requirements—by design.

Bi-Directional Data Synchronization

GUMU™ supports structured, two-way data synchronization between Creatio and Sage Intacct. Customer records, contacts, orders, and invoices can be imported from Sage Intacct into Creatio through automated batch processes—ensuring CRM teams operate on financially validated data.

Integration Monitoring & Operational Visibility

Visibility builds trust. GUMU™ provides real-time operational insight into synchronization activity, including:

- Records inserted
- Records updated
- Records failed

Each sync cycle is traceable and measurable—supporting compliance, diagnostics, and proactive issue resolution.



Integration Scope & Functional Coverage

GUMU™ supports structured synchronization across key CRM and ERP domains, including:



Contacts



Sales Orders



Invoices



Customers & Accounts



Products & Pricing



Financial dimensions and supporting entities

All data exchange is governed by validation rules, authorization logic, and configurable sync controls—ensuring consistency without compromising system ownership.

Why GUMU™

Data can move fast and still be wrong. GUMU™ ensures it moves correctly with structure, validation, automation, and traceability built into every interaction between Creatio and Sage Intacct.

The result is growth that scales with confidence, control, and clarity.

About Greytrix

25 Years of ERP Excellence

Trusted by **5000+ businesses across the globe**, Greytrix specializes in cloud integrations that simplify complex operations.



Our GUMU™ framework powers seamless connectivity between leading **CRMs and ERPs — from Salesforce to Sage 100**.

With 25 years of expertise and **30+ certified consultants**, we help businesses **work smarter, integrate faster, & grow stronger**.

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