

# Business Cloud X3 Solutions

## ABOUT US

Greytrix – a Premium Sage Gold Development Partner and leading Sage X3 Certified Partner provides best in-class development, customization and support services to Sage business partners and Sage PSG worldwide since 1998. Greytrix team of highly experienced and certified Sage X3 Techno-functional consultants ensure that customer requirements are always delivered with quick turnaround time, high quality and at low costs. Greytrix Solutions for Sage X3 includes Greyportal – a B2B self-service portal, CRM seamless integrations with Salesforce.com and Sage CRM along with add-ons like Catch Weight, Letter of Credit, India Legislations, and ECommerce. Take advantage of Greytrix global reach, outcome-focused methodologies, domain skills and deep industry expertise to accelerate your business.

## OUR SERVICES:



Integrations



Add - ons



Migrations



Outsourcing



Development



Configuration



Implementation



Technical Support

Greytrix GUMU™ bi-directional connector establishes a seamless relationship between Customers, Sales Orders and Products within Salesforce and Sage X3. The integrated business system allows users to experience real-time information of financial, managerial and marketing processes together thereby making informed decisions on the go. This solution empowers organizations by connecting their customer, accounting and financial data into one system accessible from anywhere on any device.

## ▶ FEATURES:

### 1. Data Sync

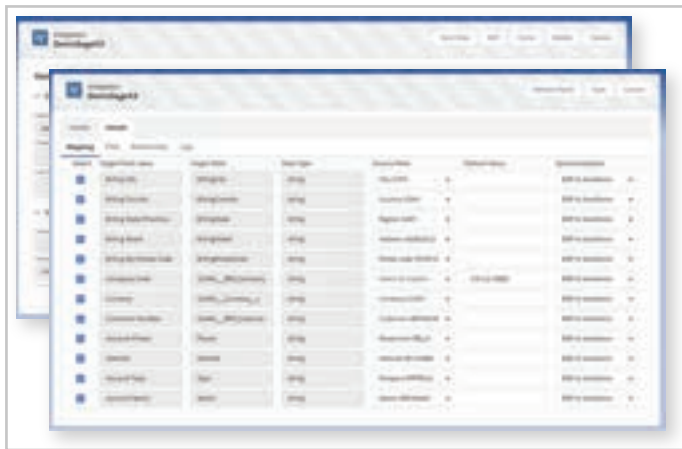
GUMU™ allows bi-directional Accounts - Customer data sync - Order history information view on real-time basis between Sage X3 and Salesforce. It allows you to choose the “Master” system thus controlling the data flow. This helps to maintain data consistency and reliability between the two systems. Order history information like Important Quote, Sales Order, Shipment, Invoices, Credit Note, and Payments Receipts against Invoices can be viewed on user-friendly Salesforce tabs for individual customers.



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### 2. Entity synchronization

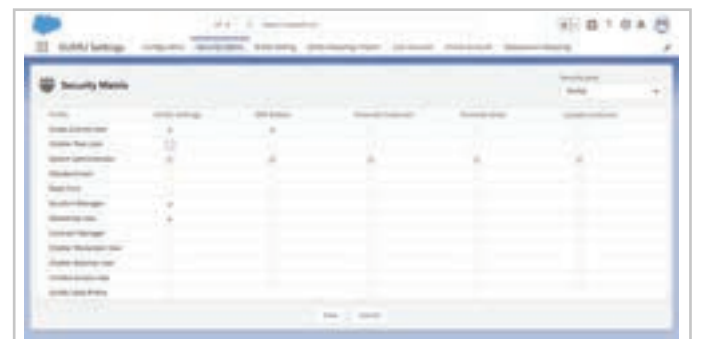
System Administrators has the flexibility to map /import any Custom / Standard Sage ERP entity data into Custom or Standard Salesforce objects. This can further be leveraged to perform analysis using any Wave analytics, Dashboard reporting and Visual charts. With the cloning feature, they can reformat / filter / restructure existing entity without disturbing its original form and use it for specific purpose. They can also set schedules to sync entities as per their need and also have the option to support multiple sync of entities with processes running in the back ground. Log tracking provides them with complete progress track.



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### 3. Authorization control

GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels with prescribed user privileges for each individual using the data. Thus, providing power to secure data and control the flow in the systems effectively.



Refer pt. 3

## 4. Linking customers

Link existing Sage X3 customers and Salesforce Accounts to avoid data duplication.

## 5. Flexibility to configure

Add or Create New Inquiries in Salesforce system as per your business needs based on the data in Sage X3. Modify existing Inquiries to include custom fields in Salesforce reflecting associated Sage X3 data.

## 6. Easy to promote

GUMU™ allows sales team to easily promote Customers and Sales Orders from Salesforce to Sage X3. Thus, reducing time and data redundancy in Sage X3.

## 8. Real-time Inquiries:

Important Quote, Sales Order, Shipment, Invoices, Credit Note, Payments Receipts against Invoices and Sales summary can be viewed on user-friendly Salesforce tabs for particular customer. You can add any custom inquiries to the system as per your business needs.



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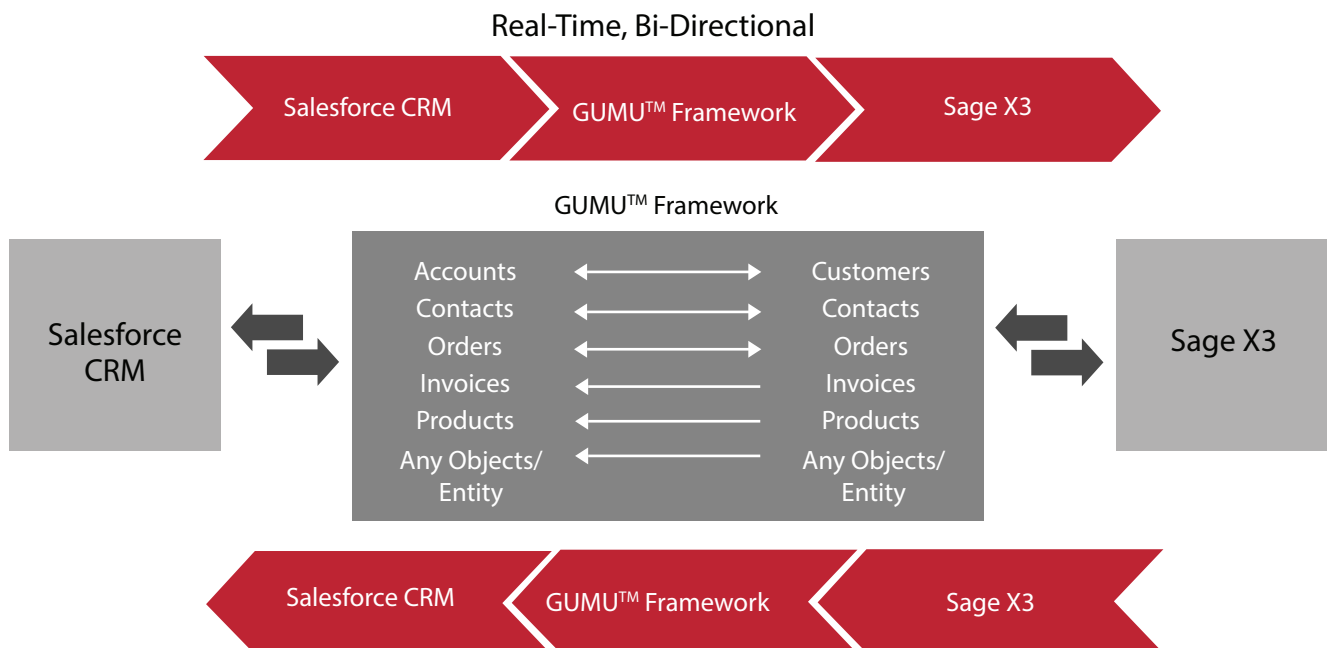
## 7. Data access on the go

Cross device integration, critical information regarding Leads, Customers and Orders can be accessed across devices – Sales Order created, can be promoted to Sage X3 on the go.

## 9. Add- ons for other entities:

Salesforce users can request additional add- ons for other entities like vendors and purchase orders at an extra cost to establish a seamless relationship between Salesforce objects and Sage ERP entities.

## Technical Flowchart: Salesforce - Sage X3 Integration

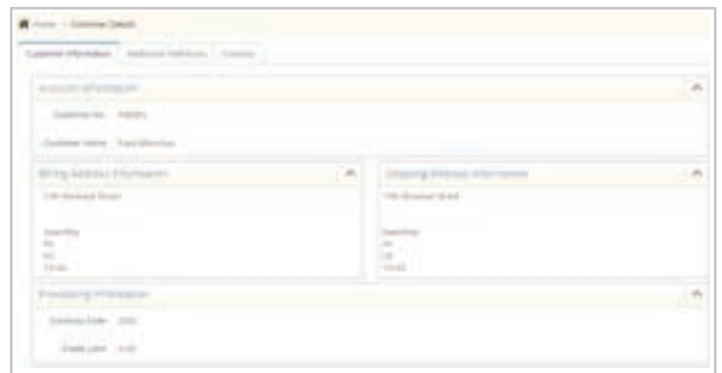


Greytrix's GreyPortal for Sage X3 automates the power of personalizing and delivering business information through self-service web portals and mobile applications to their customers keeping your business on an "always-on" mode. GreyPortal enables customer's access on their preferred device to selected organizations business information based on internal workflows such as order history, account address and demographic information, past & pending invoices, price quotes, credit memo, credit limits and other resources. Greyportal keeps security profiles from Sage X3 to provide each customer with the right level of access, customer service and convenience that foster better user experiences. An upcoming robust built-in Order Entry & Customer Complaint and Support Modules provides customers with easy transaction and communication methodology to the correct department and keep historical data for future references.

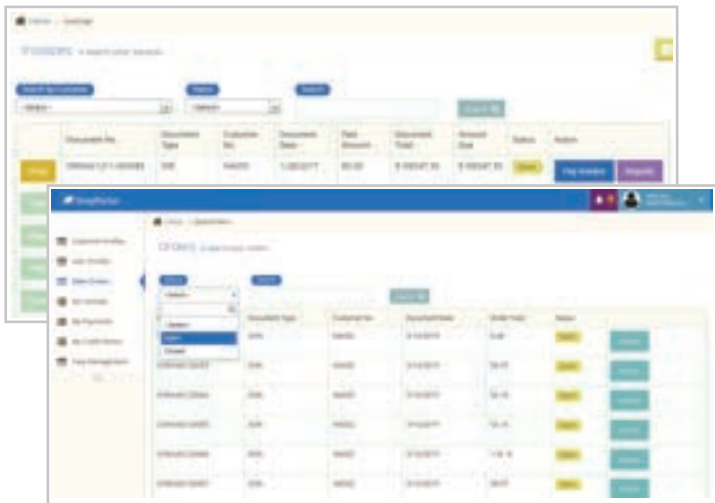
## FEATURES:

### 1. Account & People Information & Updates

Sage X3 customers can manage their account data and change their login as needed thus, helping the customers in tracking all interactions associated with their accounts. Customers will be able to view their current credit status (outstanding balance and available credit limit), addresses and contacts along with other resources in their account statistics.



Refer pt. 1



Refer pt. 2

### 3. Online Payments - Invoice and Bill

GreyPortal enables customers to pay for services directly through the Portal via Payment Gateway. Online payments involve seamless, efficient and fast transactions resulting in convenient sales. Users can integrate their custom Payment Gateway with the GreyPortal for efficient transactions. Customers can initiate payments through various payment methods and complete the transaction.

### 2. Order & Invoice Details and Tracking

Customers can keep a track on orders and revisions made to the order line in GreyPortal. Customers can also view a list of all invoices which are displayed arising from the validated customer shipments. The Portal invoice report is called and printed in Sage X3 report format.

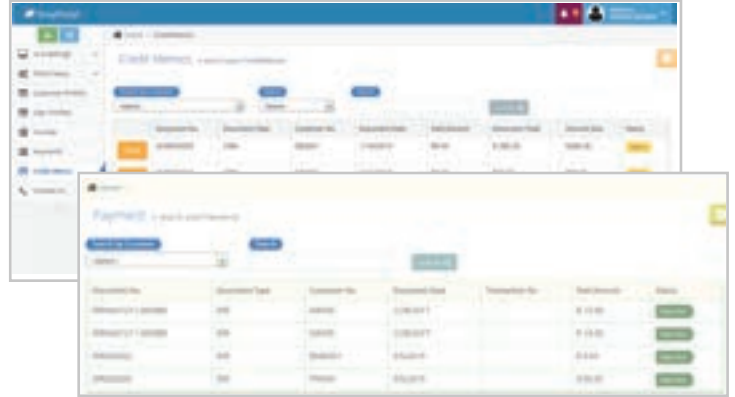


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## 4. Financial Transaction History

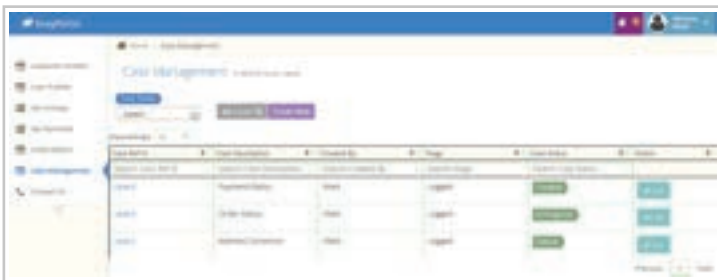
Transaction history comprises many complex components and is a critical element in determining the credit of a business. Greytrix's GreyPortal displays status of past and present payments/ credit memo for customers helping them to monitor their credit report. The transaction history displays open invoices providing information on the amount owed and the due date of the payment. Multiple or individual open invoices can be selected for payment and transacted.



Refer pt. 4

## 5. Complaint Logging & Tracking

Handling customer complaints effectively is necessary, because it's often the make-or-break point when it comes to ensuing loyalty to your brand. By having complaint management systems in place, businesses can use the information that is captured to make process improvements. Through Greytrix GreyPortal, customers can raise concerns or grievances effectively through its ability to generate automated complaint reports.



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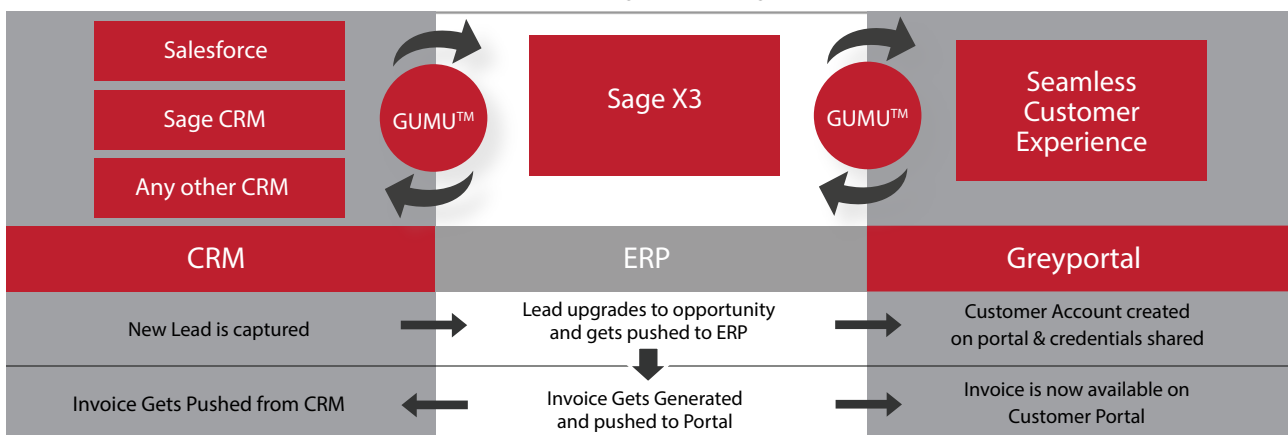
## 6. Printed Invoice Downloads

Through the GreyPortal customers can print the invoices based on the required parameters. The report generated by the portal will be called and printed in the Sage X3 report format.



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## Seamless Customer Experience Engine for Sage Business Applications



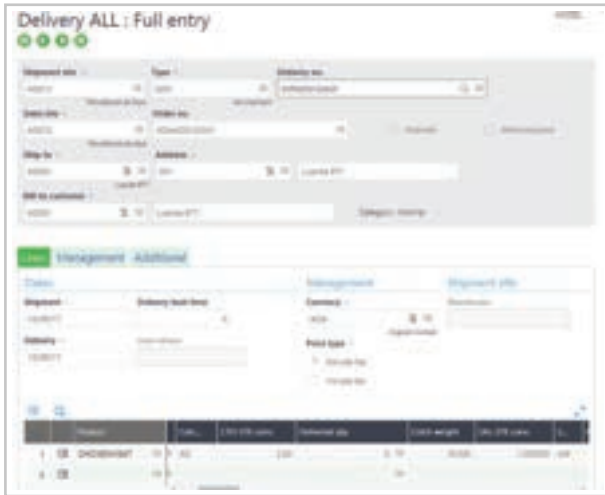
## CATCH WEIGHT

Greytrix with a track record of proven success in Sage X3 with industry verticals, addresses the challenges of perishable food and process manufacturing industries by introducing catch weight tracking system. Catch weight add-on for Sage X3 captures the weight of an item during distribution, managing critical business processes such as inventory control, costing, reducing taxation and accurate invoicing of customer. It also accounts for the scenario wherein the products are purchased and sold in the same units.

### FEATURES:

#### 1. Catch Weight at Purchase Side

On the purchase side, catch weight is automatically calculated on the master setting of stock catch conversion rate and user can then enter actual catch weight of product. The user is warned if Variance threshold is exceeded while entering catch weight. User can enter catch weights in either average weight or for individual catch weight per unit. The catch weight can vary for each lot-sub lot. The purchase invoice amount is reflected as per the calculated catch weight price instead of the purchase order price.



Refer Pt. 2



Refer pt. 1

#### 2. Catch weight at sales side

Sales order delivery is allocated in stock unit of measure automatically by the standard Sage X3. User can update catch weight in the stock issue screen which is modified for issuing and updating catch weight for the desired number of lots / slots. Price calculation is carried based on catch weight. Sales invoice is created over delivery based on catch weight price evaluation.



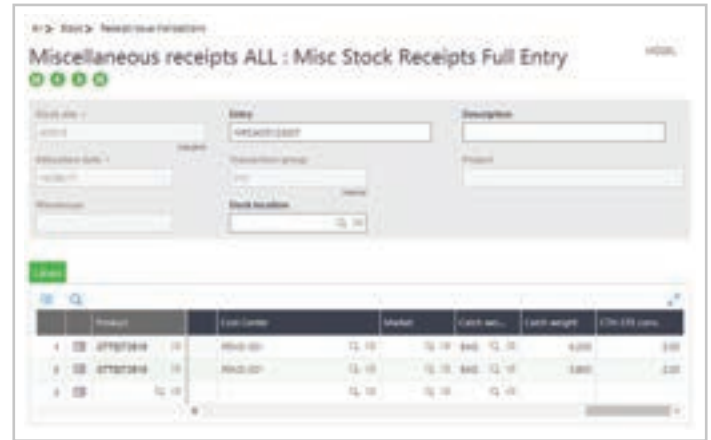
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#### 3. Capture different weights

The setup of Catch weight add-on is simple. Catch weight add-on has three fields which lets user to define the Catch weight unit, Catch Stock Conversion and Threshold Variance supporting products which vary in weight from piece to piece. Catch weight can be defined for lot-sub lot managed products. User can also opt for recalculating gross price as per catch weight.

## 4. Catch weight in stock management

In case of any discrepancy between physical quantities and system quantities in the inventories, miscellaneous issue transactions are used to issue out catch weight products resulting in inventory adjustments. Catch weight management is also included in stock management. Users can create miscellaneous receipt similar to purchase receipt to receive catch weight items.



Refer Pt. 4



Refer pt. 5

## 5. Catch weight in manufacturing

In Manufacturing Process we record the finished products catch weight as per its changing catch weight in routing operations. The food industry has constant challenges like perishability, shrinkages, % yield efficiency etc. Each package of product is weighed and labeled with its exact weight. The customer pays for the exact amount purchased.

## LETTER OF CREDIT

Greytrix Letter of Credit add-on for Sage X3 manages procedures required to create and maintain letter of credits given to the suppliers or obtained from buyers, for local or international business transactions. The add-on for Sage X3 gives more value to buyers and sellers by managing the lifecycle of letter of credit facilitating tracking effortlessly and accurately.

### FEATURES:

- Inward letter of credit
- Outward letter of credit
- Amendment Process
- Invoice & Legal Documents Management
- Loan Management

### BENEFITS:

#### 1. For Importer/ Buyer/ Applicant

- Reasonable cost of funding
- Financing of up to 100pct of contract value
- Easier business with unknown sellers
- No payment until documentary evidence received with shipment details
- Documents examined in compliance with International Chamber of Commerce rules and LC

#### 2. For Exporter/ Seller/ Beneficiary

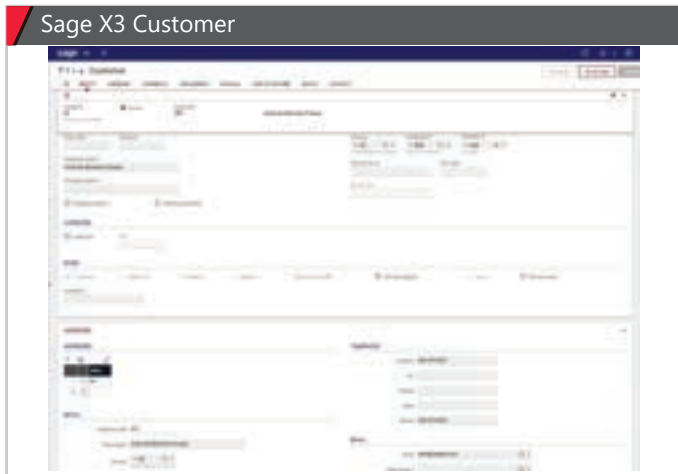
- Certainty of payment
- Financial standing of buyer is replaced by issuing bank
- In case of confirmed LC, additional assurance from Confirming bank

Greytrix GUMU™ for Dynamics 365 CRM – Sage X3 Integration, to be launched soon, is a comprehensive integration, specially designed to satisfy all your business priorities providing seamless, bi-directional integration. With Dynamics 365 CRM - Sage X3 integration, enterprise businesses can achieve a single, customer-centric view across their organization enabling Accounting, Customer Service, Sales and Marketing teams to share a single consistent view of customer details.

## FEATURES:

### 1. Bi-directional Integration

Synchronize Sales Quotes, Orders and Invoices from Sage (to Standard tables/ Objects in MS CRM) that can be viewed on user-friendly UI of Microsoft Dynamics 365 layout. And synced back to Sage Enterprise Management system.



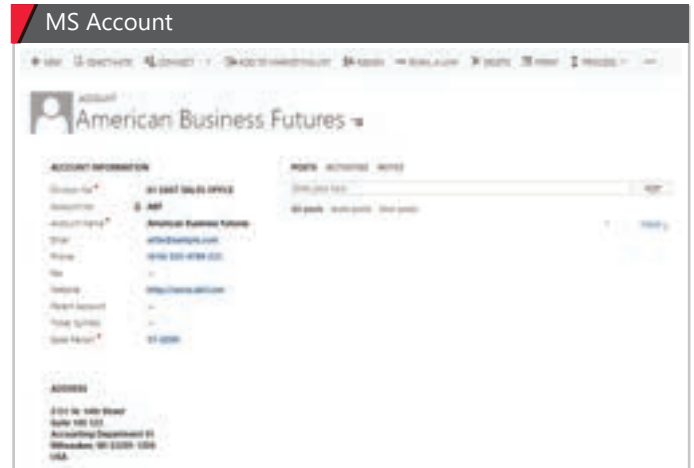
Refer Pt. 1



Refer Pt. 2

### 4. Updated customer sales information

Important Sales and service information can be viewed on user-friendly MS Dynamics CRM Lists for particular accounts. This in turn provides decision makers with superior visibility into key business metrics and enables sales and service teams to proactively cross-sell and up-sell more effectively.



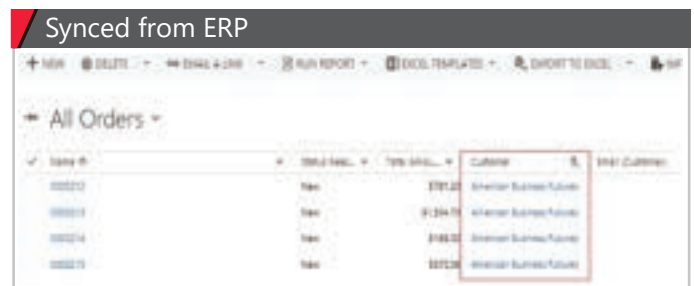
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### 2. Access from portable devices

Critical information regarding leads, accounts, and orders can be accessed across devices desktops, mobiles, and tablets ensuring that sales and service teams respond quicker to customer needs. It provides similar view on all the devices.

### 3. Multi company integration

Configure multiple Sage X3 companies with single MS Dynamics 365 CRM environment.



Refer pt. 4



Greytrix GUMU™ for Sage CRM - Sage X3 Integration is a comprehensive system, designed to deliver seamless, real time, bi-directional data integration which unlocks the potential of enterprise data and assists in making smarter and faster business decisions. GUMU™ data integration framework ensures comprehensive visibility of data within accounting, operation, sales, marketing and customer service. Thereby allowing holistic customer-centric view across organization.

## ▶ FEATURES:

### 1. Real time, bi-directional integration

GUMU™ allows users to selectively sync data on bi-directional basis between systems depending on the business needs. Master data of companies - addresses, contact details and transactions such as Sales Order, Invoices, Quotes and Shipments can be viewed on user friendly Sage CRM tabs for particular customer. Sage CRM Company can be promoted as Sage X3 Customer or Vendor.



Refer Pt 2

### 3. Secured order promotion

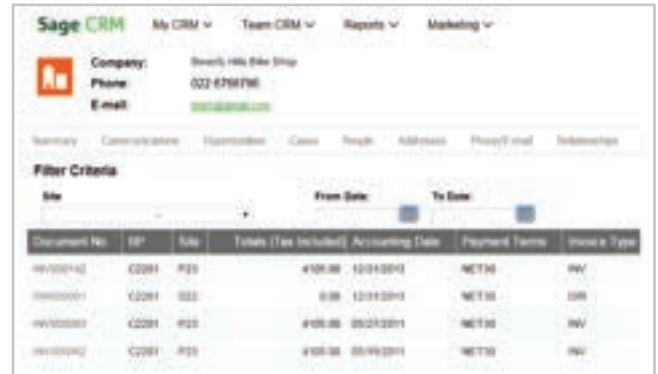
Sage CRM Admin controls the system and configures Promote Order rights to Sage CRM users. This ensures security for users to promote orders in Sage X3 from Sage CRM.

### 4. Access from portable devices

Critical information regarding leads, customers and orders can be accessed across devices desktops, mobiles and tablets. Thereby ensuring that sales and support teams respond quicker to customer needs. It provides similar view on all the devices.

### 6. Multi company integration

Data related to multiple company codes in Sage Enterprise Management can be accessed through a single instance in Sage CRM. Gives user holistic view of customer data to offer actionable insights.



Refer Pt. 1

### 2. Authorization control

GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels with prescribed user privileges. This allows CRM System Administrator to provide restrictive access to ERP data.



Refer Pt. 3

### 5. Salesperson mapping

Sage CRM admin can map Sage ERP Salesperson with Sage CRM users. This information is used to set the Salesperson on the Sales Order that is being promoted to Sage ERP. Using this feature eliminates the selection of Salesperson on Order Entry along with easy and proper commission calculation on the ERP front.

### 7. Superior order visibility

Seamless integration of order from Sage CRM to Sage X3 allows superior order visibility of information on promoted orders.

## DATA MIGRATION

Greytrix highly skilled and innovative data migration strategy brings to your business GUMU™ connector – a data integration framework that makes migration an effortless process. Our framework works efficiently to enable a seamless transfer of historical data into your new system. It provides you the flexibility required to migrate data in minimum steps and maximum cost effectiveness. GUMU™ migrates key data such as General Ledger, Bank, Tax, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Order and Sales Order / Order Entry from Source ERP fields into Sage X3. Additionally, custom fields from Source ERP can be taken over into Sage Enterprise Management during the migration process.

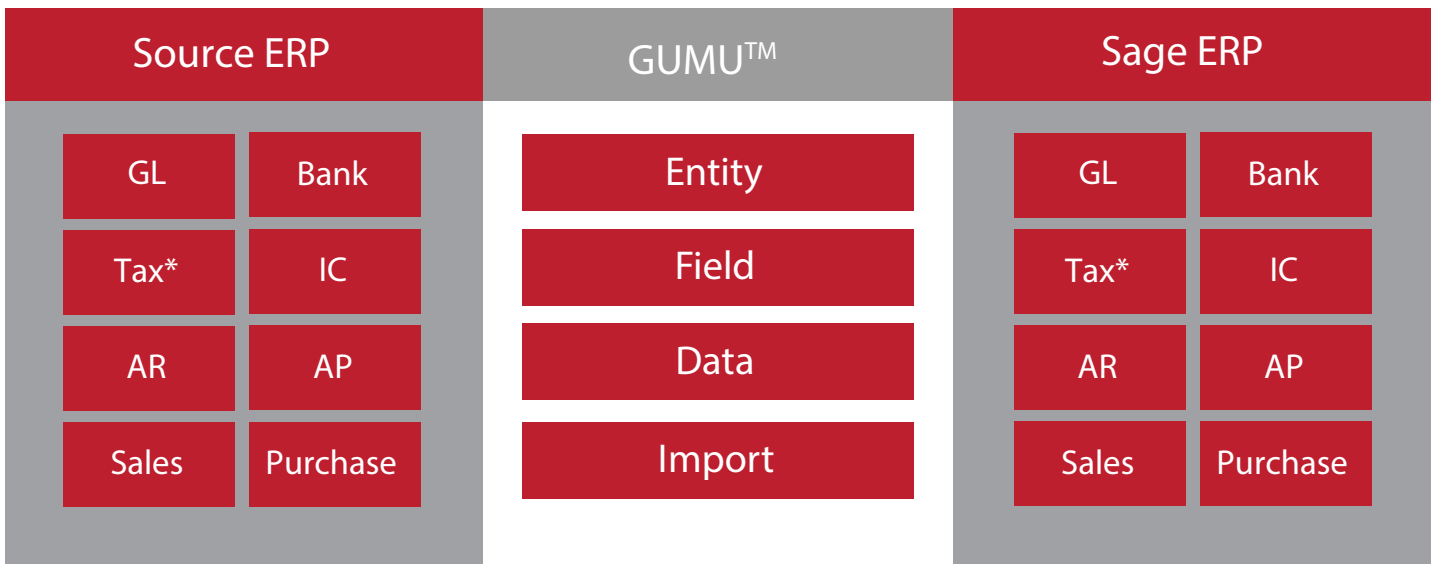
## UPGRADES

Greytrix provides upgrade of Sage X3 from lower versions to higher version, also offering timely service pack releases. With the upgrade of Sage X3 from Desktop version in 6.5 to Web version in V7 and higher, there has been a requirement of migration process that needs to be followed whenever Sage Enterprise Management needs to be upgraded from Desktop to Web versions. Greytrix has expert consultants who can perform this migration effectively.

## ▶ FEATURES:

- Robust Migration Framework
- Superior Business Visibility
- Reduced total cost of ownership
- Simplified Data Management

### Sage ERP Data Migration



Greytrix – a Champion ISV Partner for Sage X3 has significant experience and expertise in developing integration solution between platform, applications and delivery methodology. The integrations listed below have been done as a part of internal product development for Partners and third party ISV providers that can be integrated with the Sage X3 platform on a contract basis. Leverage the benefits of our robust integration services team, to understand how Greytrix can assist you in developing new integration solutions for existing vertical or horizontal software products, develop new apps integrated and built on Sage X3 platform or to upgrade on latest technologies, providing you support services for existing add-ons and integration.

## Sage X3 - EDI Integration

EDI system integration with Sage X3 involves rapid document transfer between enterprises that includes Sales orders, Invoices, Purchase-order acknowledgements, Deliveries. In addition, outbound invoice integration supports - Outbound debits / credits and consolidated invoices.

## Sage X3 - Payment Gateway Integration

Payment Gateway system integration with Sage X3 is a bi-directional integration that authorizes payment through several modes - Pre-authorization, Force & Capture, Sale. The authorization uses Authorize.net where data flows from Sage X3 to payment gateway confirming the validity of the payment information for the invoices.

## Sage X3 - Shipping System Integration

Shipping system integration with Sage X3 is a bi-directional integration which ensures tracking details of shipping is integrated. The Sales Order, Shipment, Sales Invoice are extracted from Sage X3 to Shipping Portal. The extracted data is updated with the tracking information which is then pushed back to Sage X3. The integration helps organization compare cost and estimated time for delivering packages with different service providers.

## Sage X3 - Business Intelligence Integration

Business Intelligence integration with Sage X3 extracts data across your Sage X3 system into a single personalized dashboard, reducing the time spent on analysis and decision making. It traces data on every aspect of your business including: Budget Management & Control, Sales, Inventory Control, Quality Control, Customer Service and Productivity. The integration allows real-time information access with flexible reporting and analytical tools.

## Sage X3 - POS Integration

POS system integration with Sage X3 is a bi-directional sync process. It syncs Masters from Sage X3 to POS system that include modules such as Customers, Products, Payment Terms, Taxes, Locations, Sites, Customer / Product Category, Price Structures. Transactions carried in POS are integrated with Sage X3 are: Sales Order, Sales Invoice, Sales Return, Sales Credit Note, Adjustment Entries, AR Receipt / Refund.

## Sage X3 - WMS Integration

Warehouse Management System integration with Sage X3 manages all the stock related entries in Sage X3. The integrated solution syncs Sage X3 Masters and Transactions to WMS that include Products, Product Category, Location and Price leading to an effective supply chain management and inventory accuracy.

## Why Greytrix?

**21+**  
years

in business & a Premier Gold Development Partner for Sage ERP and CRM needs catering to Resellers and Partners

**1300+**  
years

man years of experience in Sage Enterprise Management Development and Consulting Services

Team of Certified Techno functional engineers and consultants with a working experience for

**500+**  
unique customers across  
**25+**

**250+**

consultants out of which

**50+**

work exclusively on Sage Enterprise Management Development



### Professional Services

- Technical Support
- Integration
- Onsite Resource Augmentation
- Offshore Development Center
- Bespoke Customization
- Migration
- Implementation & Configuration



### Development Skillset

- 4GL Programming
- Java Bridge Integration
- Version Upgrades
- SOAP Web services
- Crystal and BI Reporting
- ADC Programming
- Designing Dashboards
- SEI Installation & Upgrades
- Designing Workflows

## BENEFITS:

- Our services with robust technology offers better scalability as your business expands to new geographies.
- Compile and analyze extensive company information with better insights & accurate reports.
- Select from flexible engagement models that match the requirement of your operations i.e. Fixed Time / Fixed Cost, based on Time and Material.
- 24\*7 professional and timely cost effective support center to cater your Sage X3 requirements.

## Want to know more:

- ✉ [x3@greytrix.com](mailto:x3@greytrix.com)
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