Reinvent the face of your business

WITH GREYTRIX'S
SAGE INTACCT SERVICES

As reputed and long-term **Sage partners for over 22+ years**, Greytrix has developed a pristine skillset of offering complete and all-around Sage Intacct Services. Sage Intacct is a leading accounting and financial management solution that seamlessly integrates with your existing business systems and is also compatible with new applications, organizations may want to introduce later. With our champion system integrator GUMUTM, we enable 15+ Sage Intacct Integrations across domains like CRM, E-commerce, payment solutions, POS and many others. With our expertise as an offshore development partner for Sage Intacct and multi-years of experience in migration, add-on development and consulting services, we help Sage Intacct partners and end-users to simplify business operations at a low cost, quick turnaround time and highest quality.

Deep-dive into our services for Sage Intacct:

Development

App Integration

App Development

Consulting

Migration

24/7 Support

Development

Our skilled team of developers focus on customizing the solution to best suit your business needs.
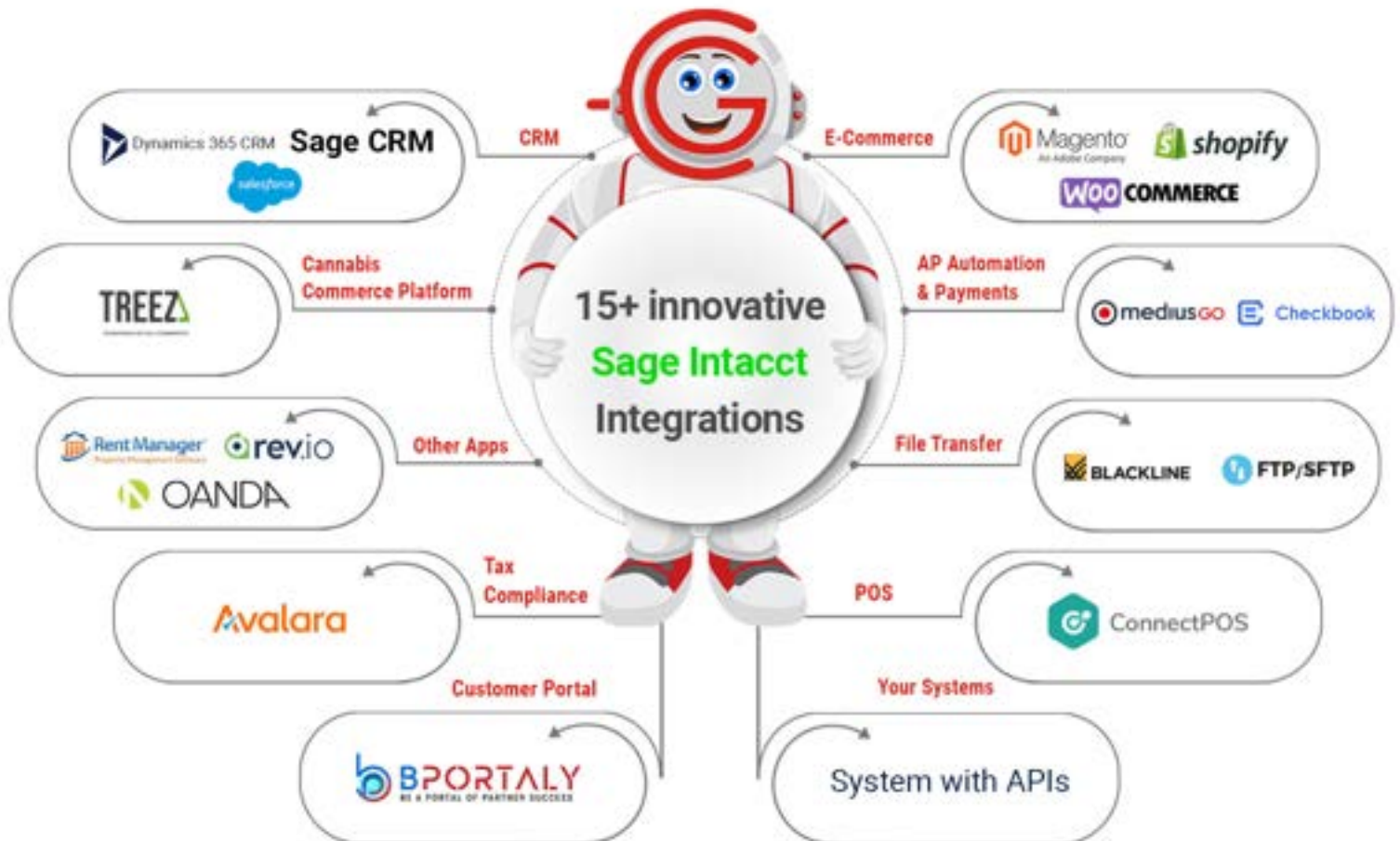We offer integration services for Sage Intacct with CRM software, E-commerce, third-party and cloud storage systems. In addition, Sage Intacct Developmental Services simplifies the reporting processes with customized reports, inquiry screens and SQL Requester for reports of ERP software. Our developmental services also include fast turnaround delivery at a budget-friendly cost.

Highlights of our development skillset:

- ▶ Bespoke customization with platform services
- ▶ Web API & SDK Development
- ▶ Sage Intacct Portal
- ▶ Development of Financial reports, Dashboards & BI

Integrations

Our pool of 15+ Sage Intacct Integrations cover multiple domains enabling your business to enhance and integrate niche functionalities with Sage Intacct.

1. GUMU™ for Salesforce-Sage Intacct Integration

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. It syncs sales, revenue and financial processes, streamlines workflows, improves inter-departmental collaboration and delivers excellent customer service with reduced sales friction. It allows the sales team to analyse their performance based on the financial impact. The top-notch functionalities help reducing operational costs with cash management, shorter cash cycles and fewer days of sales outstanding.

Key highlights:

- The data preview feature helps minimize errors by examining and approving ERP data before importing it into Salesforce CRM
- Salesforce enables altering customer information in real-time into Sage Intacct
- To help 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

2. GUMU™ for Sage CRM and Sage Intacct Integration

Greytrix's well-designed GUMU™ connector platform enables seamless data movement between Sage Intacct and Sage CRM through an easy data exchange framework. This integration brings the front and backend processes together improving data visibility, automating business processes, reducing data redundancy, and thus results in faster workflows.

Key highlights:

- On user-friendly Sage CRM screen, get a unified view of customer information
- Trace and track crucial information like leads, accounts and orders
- Empower system administrators by setting different access levels
- Build strong customer experience with faster resolution of queries and personalized responses
- Make informed decisions with real-time data and reporting tools

3. GUMU™ for Microsoft Dynamics 365 CRM and Sage Intacct Integration

The GUMU™ for Dynamics 365 CRM - Sage Intacct Integration allows high data visibility on both systems helping one access key business metrics. In addition, this integration has easy customer data management of your front-end and back-end systems. With the GUMU™ connector for Sage Intacct and Dynamics 365 CRM, it becomes simpler for a user to quickly implement and configure through its simplified implementation process.

Key highlights:

- Configure multiple Sage ERP companies with a single Dynamics 365 CRM environment
- Sync Sales Quotes, Orders and Invoices from Sage Intacct to Dynamics 365 CRM in one go
- Quote correct prices by on-demand synchronization of the latest information
- Seamless data flow across accounting and customer information enhances finance, customer relation and inter-departmental communication
- Have better visibility into key business metrics by cross-selling and up-selling more effectively
- Manage and monitor customer responsiveness to evaluate existing and potential customers

4. GUMU™ for Sage Intacct and MediusGo Integration (AP Automation)

MediusGo is a digitized accounts payable system that helps process invoices, streamline workflows, generate reports and automate payments. Sage Intacct is a highly efficient cloud-based accounting system that helps automate key modules enabling quick and easy processing. The GUMUTM for Sage Intacct-MediusGo Integration enables seamless and efficiently flowing workflows. It enables smooth integration of purchase orders and invoices, making it accessible from both systems. When the power of Sage Intacct-the cloud accounting software meets the seamless automated accounts payable process of MediusGo, the results are wondrous!

Key highlights:

- This integration allows a seamless data exchange from Sage Intacct to MediusGo on GL account numbers, warehouse, department, location, UOM and vendors
- GUMU™ enables customized company mapping for users to map companies individually & push data into the designated company
- Enable flawless integration of purchase orders, delivery receipts and invoices across both systems
- Make effortless transactions with multi-currency functionality
- Accelerate financial operations by having accurate financial reports

5. GUMU™ for Sage Intacct and Shopify Integration

The GUMU™ for Sage Intacct-Shopify Integration allows you to operate more efficiently as an E-Commerce business by streamlining your order, inventory, item, customer and shipping/tracking information. While many online companies still use one-way integration or batch upgrades leading to data silos in the system. Bi-directional, real-time data flow can be achieved with Sage Intacct connector for Shopify leveraging users to have inventory, transactions and pricing information at hand.
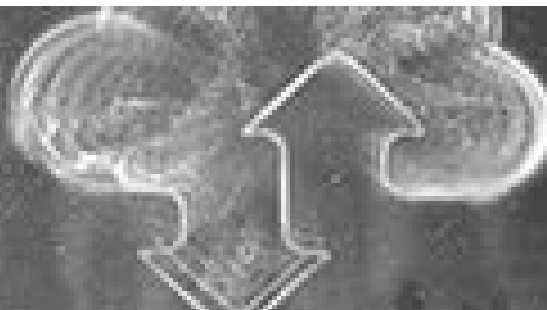
Key highlights:

- Enhance the correct customer group alignment with the right customer categories or statistical groups
- Streamline inventory synchronization by maintaining exact inventory levels
- Simplified access to accounts, orders, order history, invoices, pricing, and stocks
- Manage pricing and product changes
- Extensive analysis and reporting

6. GUMU™ for Sage Intacct and Magento Integration

GUMU™ for Sage Intacct-Magento Integration automates product, pricing and stock updates from Sage Intacct to Magento web, providing accurate product information and availability. Automated synchronization enables bi-directional data visibility and eliminates errors possible due to manual intervention. The integration of these systems can help manage the supply chain, track inventory, financials, provide efficient customer service and achieve accelerated results.

Key highlights:

- Access product and category details in both systems, giving everyone a single view of the inventory and product-specific details
- GUMU™ connector synchronizes the company with multiple stores in Magento for a centralized data management environment
- Quickly fulfilling orders reduces the cost to process and prevents any inadequacy during order processing
- The integration enables you to define a customer-specific pricing list in Sage Intacct and sync it with the pricing rules

7. GUMU™ for Sage Intacct and Woo Commerce Integration

GUMU™ for Sage Intacct-Woo Integration is your chance at building agile, flexible and future-ready processes. Get a united view of product, customer, inventory and other details in both the systems, improving data visibility and promoting insight-driven decisions. automates product, pricing and stock updates from Sage Intacct to Magento web, providing accurate product information and availability. Automated synchronization enables bi-directional data visibility and eliminates errors possible due to manual intervention. The integration of these systems can help manage the supply chain, track inventory, financials, provide efficient customer service and achieve accelerated results.

Key highlights:

- Monitor and track inventory-levels as you sync it from Sage Intacct to WooCommerce
- Manage orders with product description, product code, quantity, shipping and delivery address at hand
- Reduce operational costs as you automate processes and eliminate any chances of error
- Manage multiple stores and improve inter-departmental communication with uniform data access
- Map customer preferences based on order history and get a deeper understanding of customer lifecycle

8. GUMU™ for Sage Intacct and Treez Integration

Set up Sage Intacct and Treez integration to automate the recording of accounting transactions into Sage Intacct. By integrating Treez with accounting and financial management software like Sage Intacct, retailers can meet their core financial requirements like quick financial and operational data reporting. In addition, it assists dispensaries in automating the recording of accounting transactions into Sage Intacct.

Key highlights:

- Automate recording of revenue and payments entries into Sage Intacct. Entries are posted to desired GL accounts and dimensions
- Accurately record sales, returns, payments and refunds. This minimizes errors and assists in reconciliation
- Various transactions from Treez are integrated as summarized GL entries in Sage Intacct
- Rounding differences between the two systems are integrated into separate GL Accounts

9. GUMU™ for Sage Intacct and Avalara Integration

The GUMU™ Sage Intacct and Avalara integration ensure quicker tax calculations, hassle-free returns filing & effortless handling of exemption certificates. Also, AvaTax for Sage Intacct enables real-time monitoring of tax regulations by creating a single tax profile tailored to the specific customer regardless of the mode of purchase and payment. Track changing law, rates and rules modules and ensure appropriate compliance with the GUMU™ integration of Sage Intacct and Avalara.
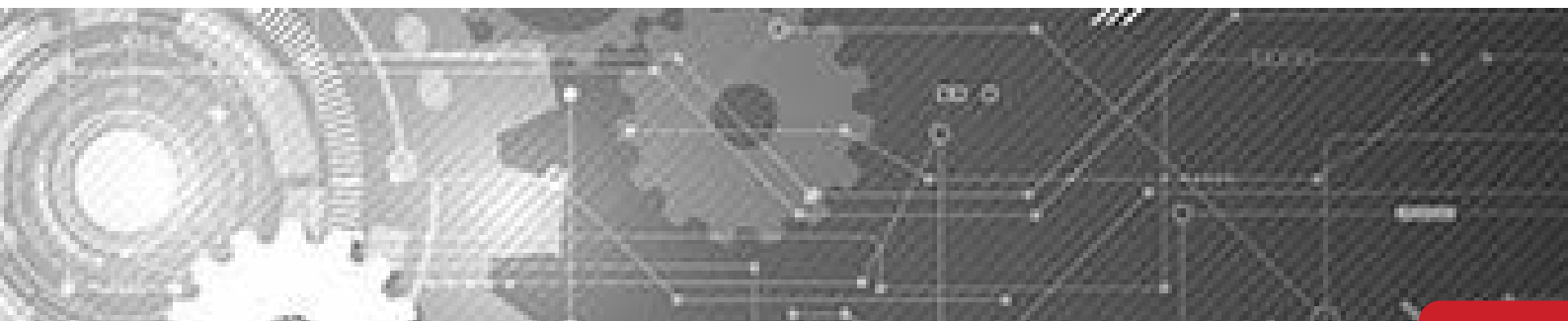
Key highlights:

- Multi-entities are treated as independent firms for multi-entity taxation, resulting in error-free tax records
- Enhance your working environment with better compliance to all state and federal regulations
- Automate your tax compliance processes with an easy filling of returns and remittance calculation
- Have precise sales and usage tax calculations by verifying all the rates and rules

10. GUMU™ for Sage Intacct and Checkbooks Integration

The GUMU™ integration for Sage Intacct and Checkbook.io provides users ease of automating digital check payments at the click of a button through Sage Intacct – a cloud-based accounting software. Process e-checks electronically and reduce costs when converting these transactions with Sage Intacct - Checkbook connector. Payments are made from the Accounts Payable workflow, and the general ledger entries are automatically updated using Sage Intacct Checkbook.io Integration.

Key highlights:

- Payments are tracked as the recipient receives and deposits the amount within 3 to 4 days
- The digital checks ensure security as data is encrypted and transmitted via secured protocols
- Instantaneously track check status as payments is managed in one system
- ACH payments are processed fast with rapid verification

11. GUMU™ for Sage Intacct and Rev.io. Integration

The GUMU™ for Sage Intacct and Rev.io Integration enables efficient back office management with innovative billing solutions. Optimize customer billing experience while ensuring their satisfaction. It enables smooth workflows and order management resulting in customized billing options for individual accounts and customer's specific needs.

Key highlights:

- Updates revenues by posting journal entries to the mapped chart of accounts and dimensions, thus giving the users a clear view of sales
- While handling data during promotion, users can edit and reprocess the failed entries to GL Account, which will generate other receipts in Sage Intacct after the user has edited the payment
- You can manage sophisticated usage-based billing transactions with Rev.io and the Sage Intacct Connector

12. GUMU™ for Sage Intacct and Blackline Integration

The GUMU™ for Sage Intacct – Blackline SFTP integration delivers easily embedded analytics, dashboards and configurable reports to help close client processes. Automation of data through Sage Intacct connector assures visibility into financial data and high-risk items throughout the period. A multi-company framework is supported via the Sage Intacct – Blackline SFTP integration platform. In addition, the records are stored in a single import file, which eliminates the possibility of data entering mistakes.

Key highlights:

- Integrate and Import CSV, Excel, text, and XML files from Sage Intacct into Blackline SFTP
- Support various accounting processes, ensuring compliance and reporting to stakeholders without APIs
- Data is imported automatically, matched in minutes, and account reconciliations are auto-certified, reducing time in journal preparation

13. **GUMU™** for Sage Intacct and FTP/SFTP Integration

GUMU™ connector for Sage Intacct & FTP/SFTP can directly import multiple CSV files, import a single CSV file to multiple related objects, and use various string and numeric expressions for mapping, among other things. Moreover, GUMU™ integration hosted on the cloud assists users in fast data synchronization of schedules, data transfer and view logs etc. In contrast, the data is exported or imported using predefined formats in configured SFTP directory.

According to business requirements, stakeholders can set up plugins for desired applications between FTP/ SFTP and Sage Intacct. The SFTP details for importing and exporting processes are also maintained. Users can also use the preset data entities to easily import external data into Sage Intacct according to their needs. This integration can be used to schedule imports based on the frequency of arrivals of new files.

14. **GUMU™** for Sage Intacct and Blackline Integration

The integration empowers unit availability listings, boosting prospect traffic and much more while Sage Intacct aligns front and back-office operations. The connector streamlines front and back-office processes for a consolidated view of revenues, GL, unit availability, prospect traffic etc.

15. **GUMU™** for Sage Intacct and Oanda Integration

- Streamline tax compliance with instant access to multi-location tax values
- Accurate and real-time exchange rates updates can help determine the best prices for your product
- Save on exchange rate APIs as FX rates for different locations are synchronized once in a day
- Get a portfolio view of FX rates that aids decisions related to product pricing, calculations, forecasting and reporting
- Manage FX risks and forget hassles of tracking multiple databases

16. GUMU™ for Sage Intacct and Customer Portal Integration

The GUMU™ for Sage Intacct and Customer Portal Integration integrates ERP master data with customer details like order/purchase status, invoice, product details, order history etc. This gives a deeper and unified view promoting targeted forecasting of future needs, maintenance of stock levels and detailed reports.

- Get real-time updates of inventory from Sage Intacct in the app
- Unified view of data helps generate dynamic reports and track key business metrics
- Data security is preserved as Customer Portal is monitored by admin and access levels can be pre-defined
- Company level tasks can be defined and triggers can be automated

17. Custom Integrations

We enable custom app integrations of Sage Intacct across domains like WMS, POS, Payment Gateway, Shipping, Payroll, E-commerce, CRM and Business Intelligence solutions. The framework connects to any internal or external IT systems either using built-in APIs or by developing new plugins to establish a link between the application and the framework.

App Development

Our skilled IP team is constantly working to provide our users with the best and tailored experience. To help Sage Intacct adapt to every organization's niche functionalities, our team works to build custom apps that additionally boost the functioning of Sage Intacct. These apps with their specific functionalities help streamline operations and reduce the load on employees. One such flagship app is the Sales Commission App.
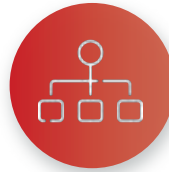
Sales Commission App for Sage Intacct

The Sales Commission App for Sage Intacct is a targeted solution for having immaculate Sales Commission Processes. It automates major commission-related workflows enabling businesses to focus on other major operations while just overseeing Commission processes.

Error - free calculations

Generate accurate commission calculations based on pre-set structures. Adjust commission earned values by transaction and accurately calculate commission pay-out. Adjust the commission payable positively or negatively.

Flexible structures and rules

The Sales Commission App is well-equipped to adapt to the diverse commission structures and rules of your enterprise. Forget all the hassles and auto-generate commission rates based on employee performance and other Key Result Areas.

Automated payments

Automate the commission payment process and render payments on time.

Commission postings

In multi entity environment commission transactions are recorded in the respective entity. Commission expense on sales transactions are automatically recorded into General Ledger.

Timely tracking of commissions

Avoid late payments as you automate the commission payment process and render payments on time.

Dynamic reports and dashboards

Get comprehensive reports on sales analysis, commissions earned and commission payable.

Boost employee morale

Timely payments

Streamlined processes

Handy reports and dashboards

Perks of getting the Sales Commission App

Consulting

Growing businesses have diverse needs and constantly work to match industry trends. Sage Intacct consulting services include easy deployment, quick training, implementation support, and tailor-made services catering to all the unique needs of different industries. Our consultation services include mapping of existing organizational processes, selection and implementation of Apps from Sage Intacct platforms and data migration from legacy systems to Sage Intacct as our expertise. We offer consulting services for multiple industries like -

Finance

Professional Services

SaaS Services

Distribution

Multi-entity

Global consolidation

Indian localization

Our consulting competencies include -

Requirement Analysis

Multi-industry support

All-around consultation

Service rendering and add-on development

As Sage Intacct Marketplace Partners (MPP), we offer cutting-edge solutions for all Sage Intacct users.
Now as new Sage Implementation Partners (SIP), we look forward to offering end-to-end consulting for different business verticals!

Migration

As an enterprise grows, switching to higher and competent systems for managing increased data inflow is inevitable. With our efficient SaaS, native cloud connector platform GUMUTM, we ensure hassle-free data migration to Sage Intacct from your ERP. All of your accounts, sales orders, purchase orders, inventory masters, tax masters, and transaction histories and custom entities are securely transferred to Sage Intacct. Also, we adhere to a roadmap that includes data analysis, data extraction, data cleansing, and data validation. Greytrix data migration services support a variety of storage kinds and formats, removing manual data entry errors.

Migrate to Sage Intacct from your systems with GUMU™

- Eliminates Errors
- No duplicate entries
- Secured process
- One-click transfer

We offer secured migration from these ERPs:

Sage 300 ● **Sage 100** ● **Sage X3** ● **Sage 50 US** ● **Sage Pro** ● **QuickBooks**

All-around support

Our dedicated development team for Sage Intacct provides a 24*7 helpdesk with a quick turnaround time. We have a strong and qualified team that is committed to providing off-shore support and 24x7 assistance Functional, Technical, Development, Configuration needs through -

Website

Email

Knowledge centre

Blogs

Videos

About **Greytrix**

Greytrix is a global Sage partner and industry leader in providing leading-edge CRM and ERP solutions. GUMU™ is Greytrix's own cloud integration system that has enabled smooth system integrations helping business expand their functionalities. Seamlessly integrate ERP systems with CRM, cloud storage systems and third-party apps with Greytrix. Find the best fit for your business today!

For more information, contact us on
sagecloud@greytrix.com

Global Contact No: 1- 888 -221- 6661

Know More
Greytrix™