Step up your game with Greytrix 's Salesforce Acumatica Integration

Your Ticket to Amplify Customer Satisfaction

Do you want to build long-lasting customer relations and ensure your customers return? Then use GUMU™ Integration for Salesforce – Acumatica. With this well-vetted integrated solution, you can have enhanced customer engagement with accurate customer information, and increased customer retention. Integrating Salesforce - Acumatica offers a 360° view of their operations so businesses can adapt swiftly, and drive continuous growth. Trust GUMU™ Integration for Salesforce CRM – Acumatica by Greytrix to make data your greatest asset and unlock opportunities to excel in customer service.

GUMU Setup	Configuration	Security Matrix	Entity Setting	Entity Mapping/Import	Accounts ⌄	Contacts ⌄	Orders ⌄	Link Account	UnlinkAccount	

Integration List   New Integration

Action	Integration Name	ERP System	Web Service URL	Synchronization	Default	In-Active
✏ 🗑 + ⚙	Extended Endpoint	Acumatica	http://49.248.14.237:8085/Acumatica21_211_0033	Both	☐	☐
✏ 🗑 + ⚙	Acumatica Demo	Acumatica	http://49.248.14.237:8085/Acumatica21_211_0033	Both	☑	☐

Integration Touchpoints:

Customers

Contacts

Addresses

Salespersons

Products

Product Categories

Quotes

Sales Orders & Invoices

How our **Salesforce – Acumatica integration** can help you?

Simplified Data Mapping

GUMU™ enables effortless data mapping between Salesforce CRM and Acumatica. This on-demand sync, powered by GUMU™, provides a comprehensive data view across both systems, with secure synchronization and instant accessibility. It enhances department communication and increases employee efficiency.

Preview Data Before Import

It gives you control over the data you import by identifying and resolving data errors beforehand and also minimizing the risks of inaccurate information. Improve your data accuracy by thoroughly reviewing your ERP data before importing it into Salesforce CRM.

Authorization Control

Our integration ensures your system's highest level of security with GUMU™ Security Matrix. It allows administrators to define user permissions precisely, granting access only to authorized individuals. They can also customize and monitor content accessibility effectively for different users.

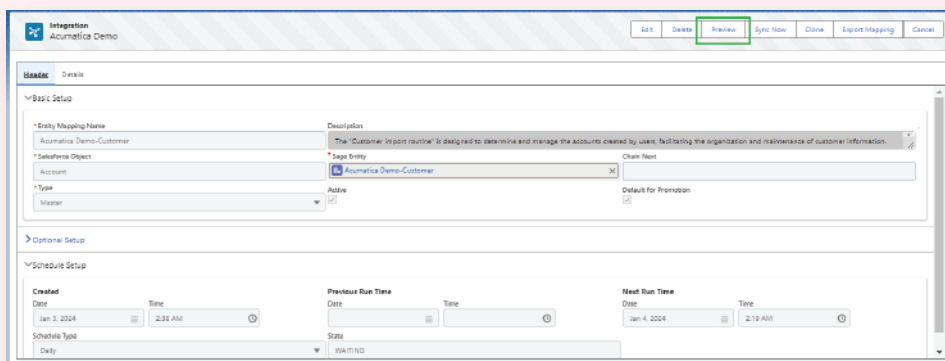### Real-time Inquiries with Flexibility to Configure

With Acumatica Salesforce CRM integration, add custom fields and easily modify existing inquiries by associating SF and Acumatica data. It also eliminates additional data storage charges in SF by fetching related information from Acumatica and avoiding data duplication. Also, you can optimize storage resources while maintaining a seamless flow.

Easy Entity Synchronization

Experience the power of flawless entity sync and get the latest insights with real-time data sync from Salesforce and Acumatica. GUMU™ is our in-house integrator offering two-sync and one-way on-demand sync. You can easily access sales quotes, invoices, order details, including addresses and history, and customer details for all entities.

Exclusive Entity Add-ons

At Greytrix, we offer a range of additional add-ons to expand your Salesforce capabilities, like Vendor-related add-ons Vendor Masters, Vendor Contacts, Purchase Addresses, and Billing Addresses. Also, we've add-ons for AR Sales Invoice Promotion and Purchase Order Promotion.

Standard Salesforce Opportunity

Elevate your sales process with our seamless Acumatica ERP record transformation feature, which can be triggered manually or automatically when your quote reaches a specific status, such as 'closed won.' It enables effortless conversion of quotes or any sales document into orders or other relevant records within your ERP system.

Reports & Dashboards

Simplify data management, predictive analysis, and insightful recommendations with Einstein Analytics in Salesforce CRM. Create interactive dashboards, generate dynamic reports, and present essential business metrics in an intuitive and user-friendly way. Stay agile and drive success with quick updates and timely information for stakeholders.

About Greytrix

Greytrix is a leading provider of comprehensive business management solutions using cutting-edge technologies, including ERP and CRM systems. With over 24+ years of experience serving clients in over 50+ countries, Greytrix has a strong expertise in systems such as Sage (Intacct, X3, 100, 300, 50), Acumatica, QuickBooks, Sage CRM, Salesforce and Dynamics 365 CRM. We provide a range of services, including development, customization, integration, implementation, and consultation, as well as ongoing support for our diverse customer base of over 2000+ Customers across various industries. We have a track record of helping more than 350+ business partners achieve growth through seamless integrations and high-quality, cost-effective solutions.

Have queries in mind?
Talk to our experts.
salesforce@greytrix.com / +1 888 221 6661

For more details:
Greytrix™ | GUMU™ | Acumatica