



CASE STUDY

Infinite Peripherals – one of the leading companies in USA that provides over **50 varieties of mPOS and mPrinter products** and **develops Accessories** that cater Retail, Warehousing, Inventory and Healthcare Industry - implemented **GUMU™ integration** for **Salesforce** with **Sage 100** that led to transparency and accuracy in real-time tracking of invoices, tracking inventories for order entry avoiding redundant internal communication. Thereby achieving improved customer service and streamlining back office inventory.



**Industry**  
Electrical/Electronic  
Manufacturing

**Region**  
United States of  
America

**Integration Partner**  
Greytrix

**Industry Type**  
SME

**ERP**  
Sage 100

**CRM**  
Salesforce.com

**Website**  
<https://ipcmobile.com>



Founded in 1993, Infinite Peripherals has been supplanting the traditional POS systems with their sleekest and advanced mobile printing and scanning devices. This reduced the transaction cycle of their customer orders and eliminated the challenges of the traditional POS systems.

Customer information, sales opportunities, and lead development were maintained and tracked in Salesforce.com. Whereas the company had Sage 100 in place to take care of their Accounting, Inventories, Invoices, and Sales Orders. To automate the data exchange between Sage 100 and Salesforce.com for customer data and financial transactions, Infinite Peripherals used a connector that provided them with bi-directional synchronization. However, the sales team required real-time updates of their financials and order information.

To improve data exchange time between the two systems and ensure a real-time update for better tracking efficiency, Infinite Peripherals was in search of a cost-effective and easy-to-deploy integration solution that would allow sales reps to generate accurate quotes and track orders instantly.

Infinite Peripherals selected Greytrix GUMU™ integration for Salesforce with Sage 100. GUMU™ connector, being easy to deploy and cost-effective, could consolidate data, thereby facilitating real-time data transfer between the two systems.



## ■ Business Situation

Infinite Peripherals had its sales reps functional from across US, wherein the main sales centre was located in California & warehouse centred in Chicago. This meant that sales reps would often call into warehouse office for any updates on invoice, customer information and order status.

Due to the need of real-time updates of inventories and generation of order it became demanding for the sales reps to make an accurate Sales Order. This increased inquiry handling time for the sales reps.

Tricia Turner (Director of Finance) was scouting for capable solutions to improve the efficiency in business operations. An integrated approach between Sage 100 and Salesforce.com facilitated with simple deployment and real-time view of data was found to be a possible solution.



## Key Challenges for **Infinite Peripherals**

Infinite Peripherals were looking forward to optimize their business operations and reduce the dependency of their sales reps on interdepartmental communication for their operations. Infinite Peripherals key challenges with the previous connector included:

- No real – time availability of inventory levels during Quote/Order entry in Salesforce.com.
- Increased lead time for processing customer requests, considering different time zones between sales reps, the head office, and the sales center.
- Better clarity of product codes during order fulfilment.

## **Greytrix** Solution

As an alternative integration solution for their ERP and CRM applications, Tricia found Greytrix through an online search as a trusted **Sage Gold Development Partner and Force.com** development partner. The confidence in implementing the solution was further accelerated on a demo call and a successful evaluation with limited data in a sandbox **Salesforce.com** account.

Infinite Peripherals was happy with the features and capabilities of “**Out of the Box**” **GUMU™ connector** for their enterprise.

During the evaluation and initial rollout, sales teams saw immediate benefits from easy access to real-time inventory updates, as they no longer had to contact multiple departments or systems to prepare or track Sales Orders. Also, sales reps can now promote new customer records into Sage 100 from anywhere through Salesforce.com, thus saving time for the back-office team or accounting teams to manually add **new Customers or Sales Orders in Sage 100**.

Finally, with the live implementation, **Greytrix GUMU™ integration** could fulfill all of Infinite Peripherals' initial expectations, which included deep systems integration, a simple interface of Salesforce.com with Sage 100 data, and accurate customer and order information regardless of the sales reps' location.



A concrete plan was devised to improvise seamless integrations between the Salesforce.com and Sage 100 platforms. Greytrix GUMU™ connector, with its robust architecture, provided them with the following benefits:

## Real-time view of crucial data

Real-time view of crucial data GUMU™ connector made it simpler to view the crucial financial data in Salesforce.com tabs. The additional communication for updates between sales reps, accounting, and warehouse departments was reduced. As information is now readily available, it facilitated sales reps in preparing quotes and orders.

## Eliminate Data Redundancy

Easy to promote Customer and Sales Order functionality of GUMU™ integration helped sales reps to promote information and updates back into Sage 100. This eliminated data redundancy of manual data entry to Sage 100.

## Easy Quote conversion to Sales Order

Quotes were previously created in Sage 100. Sales reps would fill out a quote form and submit it to the accounting or operations team. With GUMU™ integration functionality, sales reps are more confident in the information available from Sage 100.



## Increased Productivity

As sales reps could accelerate customer handling inquiries with accurate information, this increased the organization's productivity. GUMU™ integration for Salesforce with Sage 100 provided faster and more consistent business data flow. This meant better-informed decision-making, thereby providing a better customer experience.

## Accurate item IDs for order entry

Prior to deploying GUMU™ integration, sales reps would enter their own item description for unknown item IDs in Salesforce.com. The accounting team would then correct the item ID while re-entering the Sales Order in Sage 100. With inventory imported and also updated from Sage 100 into Salesforce.com, sales reps can look up the unique product and filter on the correct items during order entry with options to search for items by name or description. GUMU™ integration provides a feature to import Sage 100 products into Salesforce.com, which will be used in preparing Sales Orders.

## Improved Interdepartmental Communications

Infinite Peripherals reduced the unwarranted communications between sales, accounting, and warehouse departments. Now, sales reps check with the warehouse department only in case of a shortage of inventories.

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[salesforce@greytrix.com](mailto:salesforce@greytrix.com)

Global Contact No.: 1 888 221 6661

[www.salesforce.com](http://www.salesforce.com)

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