



 GREYTRIX



Product Whitepaper

GUMU for Sage CRM - MAS 500 Integration

GUMU™ for Sage CRM™ - MAS 500™ Integration

Introduction

Integrate your MAS 500 ERP system with Sage CRM to have your Salespersons, Accountants Managers and others within the organization to consistently talk with each in a real time environment.

With the GUMU for Sage CRM MAS 500 integration, all information regarding your customers status along with their financial transactions like orders and invoices are updated in the CRM system instantly when changed in MAS 500.

The integration not only keeps your Sales team updated with the customer's latest financial details but also enables them to promote new companies created in Sage CRM into the MAS 500 application by a click of a button. With the GUMU integration link, information flow is not only bi-directional but also real time as users take no additional steps to avail latest information.

Primary Features

- Synchronize all your AR Customer Address data in MAS 500 as companies in Sage CRM

The screenshot shows a Sage CRM customer record form. The customer name is 'Addbaron, Inc.com'. The form is divided into several sections: 'Customer' (Customer Class: Other, Status: Active, etc.), 'Primary Address' (Street Address: 436 Telenark St, City: Los Angeles, State: CA, Postal Code: 90001, Country: USA), and 'Primary Contact' (Name: Jeff Clark, Title: Manager, Telephone: (818) 652-2421, Fax: (818) 652-2400, E-Mail: jclark@addbaron.com).

With the new installation of Sage CRM, why take the process of manual data entry when you can import information from your MAS 500 AR data? With the integration setup with your ERP system, you can synchronize your available AR customer data and bring them over as companies in Sage CRM.



The screenshot shows the Sage CRM main dashboard. At the top, it says 'Company: American Business Solutions'. Below that is a navigation menu with options like 'Home', 'Back List', 'Relations', 'Sales', 'Transactions', 'Opportunities', 'Lead', 'Track', 'Address', 'Forecast', 'Company', 'Client', 'MSD', 'Product', 'RT', 'Tools', 'Help', 'Logout'. The main area displays a list of companies with columns for Name, Type, SIA, and Website. One company is highlighted: 'American Business Solutions' with Type 'Solutions', SIA 'Salesperson', and Website 'http://www.addbaron.com'. Other sections like 'Address' and 'Contact' are also visible.

GUMU will accumulate the information and position all the record information in the respective slots meant in Sage CRM.

- View all financial transactions like orders and invoices generated for customers from Sage CRM itself

Salespersons being an integral part of business and closest to the customer channel can avail all information on the customer's orders that have been placed as well as the invoices that have been raised against the customer.

Apart from having access to invoices and orders, Sage CRM users can also separately view the list of invoices that are outstanding and the orders that are currently pending using a filtering option in Sage CRM. The real time ability helps salespersons to know the current status and keep themselves updated on every transaction encountered to the customers account from the ERP side.

