

sage CRM
Integration

GUMU™

sage X3
sage 100
sage 500
sage 300
sage Pro
sage 50 US
sage Intacct
QuickBooks

sage X3
sage 100
sage 300

GUMU™

Salesforce
Integration

sage X3
sage 100
sage 500
Migration

GUMU™

sage 100
sage 50 US
sage Pro
QuickBooks
sage 50 CA
sage BV
sage BW

Salesforce
ACT!
Sales Logix
Goldmine
Sugar CRM
Maximizer

GUMU™

sage CRM
Migration



GREYTRIX

www.greytrix.com

ABOUT US

Greytrix- Sage Premier Gold Development Partner is a one stop solution provider for all your Sage ERP and Sage CRM needs. We provide complete end-to-end assistance for your pre-sales technical consultations, product customizations, data migration, system integrations, third party add-on development and implementation expertise.

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Introduction

Greytrix is one of the oldest and the largest Gold Development Partner of Sage with 21+ years of association and has 375+ business partners worldwide. Greytrix's forte lies in delivering high quality, quick turnaround and cost-effective services for Sage Partners, End users and Sage PSG. With an expert team of 250+ consultants, 500+ successful implementations and 1100+ man years of experience, Greytrix has established itself as one of the integration specialists in Sage community, having bagged multiple awards in its enclave for its contribution to SME ERP industry such as Sage Software Development Partner - 2004, 2006, 2008, 2009, 2011, 2013 and 2019.

- Working with simple plug-and-play applications with no manual mapping, coding or complex configurations required.
- Installation can be done in a few minutes and users require minimal training to deploy and use solutions.
- Real-time data transfer or viewing makes it possible to move data quickly and maintain data consistency across applications.
- Connecting multiple databases and systems using a single framework to move data across the entire organization.
- Importing clean and organized data to maintain existing business logic and streamline workflows. (particularly with data migration applications)

Greytrix Flagship GUMU™ Integration products are:

- Sage CRM Integration with – Sage X3 | Sage 100 | Sage Intacct | Sage 500 | Sage 300 | Sage Pro | Sage 50 US | QuickBooks
- Salesforce Integration with – Sage X3 | Sage 300 | Sage 100
- Dynamics 365 CRM Integration with - Sage 100 | Sage 300| Sage X3

Greytrix Flagship GUMU™ Migration products are:

- Sage 50 US | Sage Pro | QuickBooks – Sage X3
- Sage 100 | Sage 50 US | Sage 50 CA | Sage Pro | QuickBooks | Sage Business Vision | Sage BusinessWorks – Sage 300
- Sage 50 US | QuickBooks | Sage Business Vision | Sage BusinessWorks – Sage 100
- Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer – Sage CRM

GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct | Sage 500 Integration

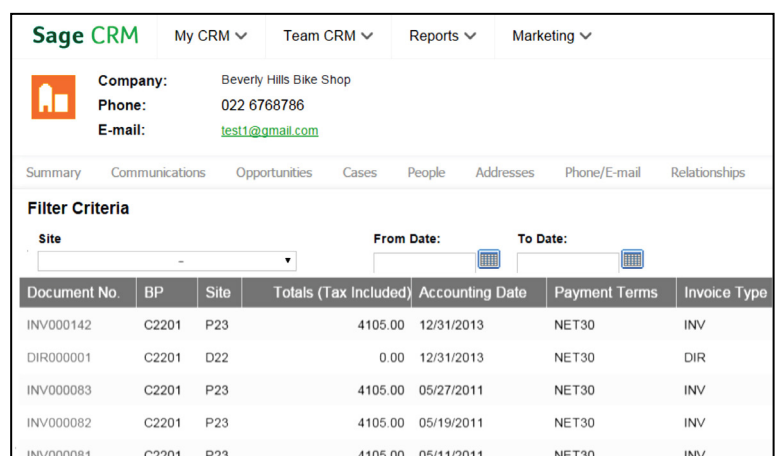
Greytrix offers GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct | Sage 500 Integration - a comprehensive system, specially designed to satisfy all your business priorities. It delivers seamless, real-time, bi-directional integration that plays a pivotal role in unlocking the potential of enterprise data to make smarter and faster business decisions. Industries operating in manufacturing, distribution and services opt for Sage CRM and Sage ERP for simplifying business complexities.

With Sage CRM, front-office operations such as marketing data and customer interactions are recorded and maintained. Sage ERP takes care of the back-office operations like storing, managing and interpreting business data from product planning, purchasing, manufacturing or service delivery. These systems provide significant benefits. However, with disparate functionalities and distinct architectures, it becomes arduous to track down business critical customer information. As a result there is constant toggle between different applications to view 360° Customer Information. With Sage CRM and Sage ERP integrated using GUMU™ connector, enterprises can achieve a single, customer-centric view across their organization. Thereby enabling Accounting, Operation, Sales & Marketing and Customer Service teams to share a single consistent view of Customer information and provide a better customer service.

Features of GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct Sage 500 Integration:

1. Real-time Bi-directional Integration:

GUMU™ allows users to selectively sync data between systems depending on business needs on bi-directional basis. Companies' master data comprising addresses, contact details and transactions can be viewed on user-friendly Sage CRM tabs for particular customer. Sage CRM Company can be promoted as Sage X3 | Sage 100 | Sage Intacct | Sage 500 Customer or Vendor.



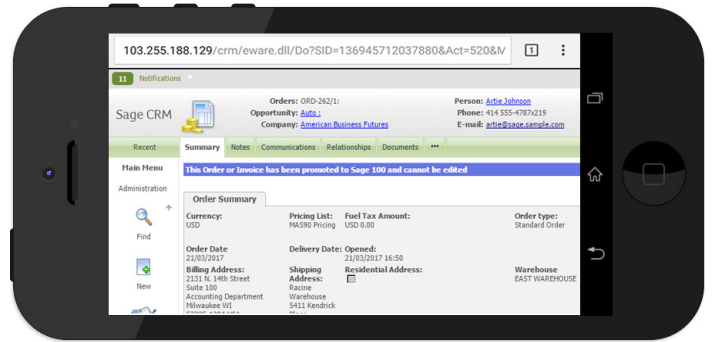
The screenshot displays the Sage CRM interface for a customer named 'Beverly Hills Bike Shop'. The interface includes navigation tabs for Summary, Communications, Opportunities, Cases, People, Addresses, Phone/E-mail, and Relationships. Below these tabs is a 'Filter Criteria' section with a 'Site' dropdown menu and 'From Date' and 'To Date' fields. A table of invoices is shown below the filter criteria.

Document No.	BP	Site	Totals (Tax Included)	Accounting Date	Payment Terms	Invoice Type
INV000142	C2201	P23	4105.00	12/31/2013	NET30	INV
DIR000001	C2201	D22	0.00	12/31/2013	NET30	DIR
INV000083	C2201	P23	4105.00	05/27/2011	NET30	INV
INV000082	C2201	P23	4105.00	05/19/2011	NET30	INV
INV000081	C2201	P23	4105.00	05/11/2011	NET30	INV

GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct | Sage 500 Integration

2. Easy Access to Data from Portable Devices:

Critical information regarding Leads, Customers and Orders can be accessed across devices like desktops, mobiles, and tablets ensuring that sales and service teams respond quicker to customer needs. It provides same view on all the devices. Sales reps can view Sales Orders on the go along with user-friendly view of the line items, delivery status and related information.



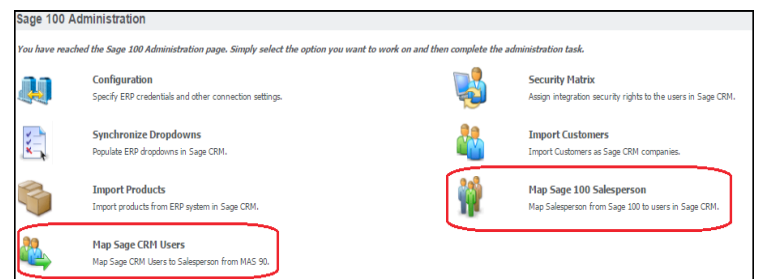
User No	User Name	View Customer Info	View AR Inquiries	View Order Inquiries	Promote Customer	Promote Sales Order	Select All	Language
1.	Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	American
2.	FinchJ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English
3.	JohnsonP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English
4.	Mayer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English
5.	WardK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English
6.	McGrawT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English
7.	DolanW	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	English

3. 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.

4. Seamless Mapping of Customer Details from Sage X3 | Sage 100 | Sage Intacct | Sage 500 to Sage CRM:

Sage CRM - Sage X3, Sage 100, Sage Intacct, Sage 500 Integration is designed to seamlessly import Customer details from Sage ERP into Sage CRM. Users can also opt for easy mapping of their Customer records that existed in the system for years.



GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct | Sage 500 Integration

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. This feature eliminates the selection of Salesperson on Order Entry and ensures easy and proper commission calculation on the ERP front.

6. Multi-Company Integration:

Data related to multiple company codes in Sage X3 | Sage 100 | Sage Intacct | Sage 500 can be accessed through a single instance in Sage CRM. It provides users with a holistic view of Customer data to offer actionable insights.

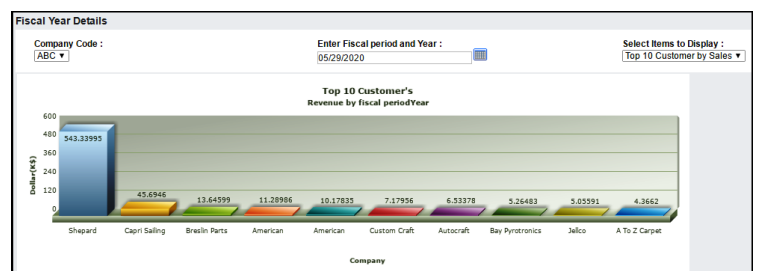
Company Code	Company Description
ABC	ABC
ABX	ABX

7. Unified View of Customer Data:

GUMU™ Integration enables organizations to view Customer details, invoices and orders that have been generated in Sage CRM. This provides customer-facing teams personnel easy access with the data required to effectively cross-sell and up-sell.

8. Superior Visibility through Dashboards (Only for Sage CRM Integration with Sage 100):

GUMU™ Dashboard is used to visualize important data at a glance, so a decision maker could have all the data at one place. From sales to customer, it displays current status of metrics or KPI's of any department in an organization.



9. Multi-Currency Support (Only for Sage CRM Integration with Sage 500 | Sage X3):

GUMU™ eliminates manual computation of error-prone currency conversions. With multi-currency support, you can create orders in Sage CRM with the currency value defined in Sage 500 | Sage X3.

GUMU™ for Sage CRM with Sage X3 | Sage 100 | Sage Intacct | Sage 500 Integration

Order Summary					
Currency: USD	Pricing List: MAS90 Pricing	Fuel Tax Amount: USD	Order type: Standard Order	Created by: System Administrator	Include In Quotes Total: <input checked="" type="checkbox"/>
Order Date: 21/03/2017	Delivery Date:	Opened: 21/03/2017 16:50			
Billing Address: 2131 N. 14th Street Suite 100 Accounting Department Milwaukee WI 53205-1204 USA	Shipping Address: Racine Warehouse 5411 Kendrick Place Racine WI 53120 USA	Residential Address: <input type="checkbox"/>	Warehouse: EAST WAREHOUSE		
Ship Via: Flat Rate Base on Amount	Terms Code: C.O.D.	Tax Schedule: Wisconsin	FOB:	Status: Active	Batch Fax: <input type="checkbox"/>
Contact: Artie Johnson 414 555-4787/219	PO Reference:	Comments			
Salesperson: Shelly Westland	Print Order: <input checked="" type="checkbox"/>	Print Pick Sheets: <input checked="" type="checkbox"/>			
Payment Type:		Document Type: Order			
Freight: USD 0.00	Sales Tax Amount: USD 0	Order Total: USD 84	Amount Subject to Discount: USD 84		

10. Secure 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 | Sage 100 | Sage Intacct | Sage 500 from Sage CRM.

11. Superior Order Visibility:

Seamless integration of order from Sage CRM to Sage X3 | Sage 100 | Sage Intacct | Sage 500 allows superior order visibility of information on promoted orders.

Currency: USD	Pricing List: MAS90 Pricing	Fuel Tax Amount: USD 0.00	Order type: Standard Order	Created by: System Administrator	Include In Quotes Total: <input checked="" type="checkbox"/>	Sales Order Number: 0000293
Order Date: 21/03/2017	Delivery Date:	Opened: 21/03/2017 16:50				
Billing Address: 2131 N. 14th Street Suite 100 Accounting Department Milwaukee WI 53205-1204 USA	Shipping Address: Racine Warehouse 5411 Kendrick Place Racine WI 53120 USA	Residential Address: <input type="checkbox"/>	Warehouse: EAST WAREHOUSE			
Ship Via: Flat Rate Base on Amount	Terms Code: C.O.D.	Tax Schedule: Wisconsin	FOB:	Status: Completed	Batch Fax: <input type="checkbox"/>	
Contact: Artie Johnson 414 555-4787/219	PO Reference:	Comments				
Salesperson: Shelly Westland	Print Order: <input checked="" type="checkbox"/>	Print Pick Sheets: <input checked="" type="checkbox"/>				
Payment Type:		Document Type: Order				
Freight: USD 10.00	Sales Tax Amount: USD 0.00	Order Total: USD 94.00	Amount Subject to Discount: USD 84.00			

12. Streamlined Customer Response System:

Seamless integration between the systems streamlines inquiry recording and the related follow ups.

13. Effortless Multitasking:

Easy to handle multiple queries or multiple companies at an instance thus providing user with highly efficient user experience. Additionally, multiple companies in Sage X3 | Sage 100 | Sage Intacct | Sage 500 are integrated at an instance with Sage CRM thus simplifying enterprise operations.



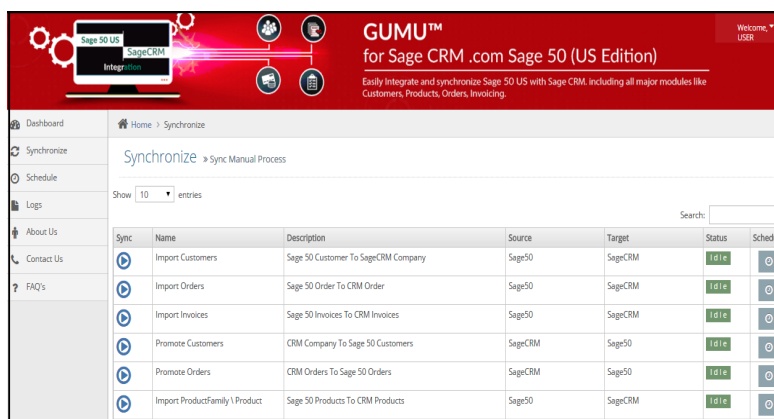
GUMU™ for Sage CRM with Sage 50 US | QuickBooks Integration

GUMU™ for Sage CRM with Sage 50 US | QuickBooks Integration has immense potential as it transforms handy Accounting software into a powerhouse of insights by linking it to Customer information in your Sage CRM. It is designed to deliver bi-directional integration between Sage 50 US | QuickBooks and Sage CRM. It empowers the companies to leverage the information within the organization and make smarter and faster business decisions. This integration is ideal for agile and fast-growing enterprises, as it helps organizations to derive maximum ROI while providing superior business visibility that is critical in streamlining operations and managing customer relationships.

Features of GUMU™ for Sage CRM with Sage 50 US | QuickBooks Integration:

1. Bi-directional Integration:

GUMU™ Integration between Sage 50 US | QuickBooks and Sage CRM is flexible as it allows users to selectively sync data between systems according to their business needs on a bi-directional basis. The integration also allows scheduling processes at a fixed time interval thereby automating the data flow.



The screenshot shows the GUMU™ interface for Sage CRM .com Sage 50 (US Edition). The main area displays a 'Synchronize' section with a 'Sync Manual Process' button. Below this is a table of synchronization tasks. The table has columns for Sync, Name, Description, Source, Target, Status, and Schedule. The 'Status' column shows 'Idle' for most tasks, and a 'Requires Sync' button is visible for the 'Import Customers' task.

Sync	Name	Description	Source	Target	Status	Schedule
▶	Import Customers	Sage 50 Customer To SageCRM Company	Sage50	SageCRM	Idle	⊙
▶	Import Orders	Sage 50 Order To CRM Order	Sage50	SageCRM	Idle	⊙
▶	Import Invoices	Sage 50 Invoices To CRM Invoices	Sage50	SageCRM	Idle	⊙
▶	Promote Customers	CRM Company To Sage 50 Customers	SageCRM	Sage50	Idle	⊙
▶	Promote Orders	CRM Orders To Sage 50 Orders	SageCRM	Sage50	Idle	⊙
▶	Import ProductFamily \ Product	Sage 50 Products To CRM Products	Sage50	SageCRM	Idle	⊙

2. Information on the Go:



The screenshot shows the GUMU™ interface for Sage CRM .com Sage 50 (US Edition). The main area displays a 'Synchronize' section with a 'Sync Manual Process' button. Below this is a table of synchronization tasks. The table has columns for Sync, Name, Description, Source, Target, Status, and Schedule. The 'Status' column shows 'Idle' for most tasks, and a 'Requires Sync' button is visible for the 'Import Customers' task.

Sync	Name	Description	Source	Target	Status	Schedule
▶	Import Customers	Sage 50 Customer To SageCRM Company	Sage50	SageCRM	Requires Sync	⊙
▶	Import Orders	Sage 50 Order To CRM Order	Sage50	SageCRM	Idle	⊙
▶	Import Invoices	Sage 50 Invoices To CRM Invoices	Sage50	SageCRM	Idle	⊙
▶	Promote Customers	CRM Company To Sage 50 Customers	SageCRM	Sage50	Idle	⊙
▶	Promote Orders	CRM Orders To Sage 50 Orders	SageCRM	Sage50	Idle	⊙
▶	Import ProductFamily \ Product	Sage 50 Products To CRM Products	Sage50	SageCRM	Idle	⊙
▶	Sync DropDown	Synchronize DropDown	Sage50	SageCRM	Idle	⊙

GUMU™ Sage CRM – Sage 50 US | QuickBooks Integration allows push and pull of data from Sage CRM to Sage 50 US | QuickBooks and vice versa. Once the data is synched into Sage CRM using GUMU™ Integration, user can access and view information residing on Sage CRM using Desktop, Mobile or Tablet.

GUMU™ for Sage CRM with Sage 50 US | QuickBooks Integration

3. Unified View of Customer Data:

In addition to gaining easy access to Customer information on Sage CRM, the integration solution enables organizations to view customer details, invoices and orders that have been generated in Sage CRM. This provides customer-facing personnel with the data to cross-sell and up-sell effectively.

Order Summary

Currency: USD	Pricing List: Price Level 1	Created by: Dinesh Muttani
Reference: ORD-581	Opened: 04/04/2015 01:35	Delivery Date: 04/04/2015 01:35
Description:		Status: Active
Contact: None selected-	Billing Address: 412 Sever Rd Norcross GA 30092	Shipping Address: 412 Sever Rd Norcross GA 30092
Document Number: 03345	Document Type: Order	Shipping Method: Mail
Sales Rep: Colista A. Swinton	Terms: 2 %	Sales Tax: Cobb County Sales T
		Sales Order Date: 04/04/2015
		Freight: 0.00

Line Items

Line #	Product Name	UOM	Quantity	List Price (USD)	Quoted Price (USD)	Line Item Discount (USD)	Quoted Price Sum (USD)
1	Bel-Gro Chrysanthem Daisy Seeds (Polar Star)	Packet	1.00	1.39	1.39	0.00	1.39
2	Bel-Gro Basil Cilantro Seeds (Long Standing)	Packet	1.00	0.99	0.99	0.00	0.99
						TOTALS	USD 0.00
						Discount Amount:	USD 0.00
						Total:	USD 2.38

Discount Type: Percentage Discount %: 0.00 Discount Amount: USD 0.00 Total: USD 2.38

Company

Company name: Alhed Builders, Inc.	Type: LAND	Company Reference:	SLA:
Status: Active	Segment:	Employees:	Revenue:
Source:	Territory: Worldwide	Account Manager:	Mail Restriction:
Website: http://www.sage50accounting.com	On Hold: <input type="checkbox"/>		
Credit Limit: USD 50,000.00	Customer Number: ALHEDB	Discount %: 2	Discount Days: 10
Linked Company: <input checked="" type="checkbox"/>	Price List: Price Level 1	Sales Rep: Derrick P. Gross	Sales Tax Code: Gwinnett County Sal
			Net Due Days: 30

Address

Street: 412 Sever Rd	City: Norcross	State: GA	Business: 770 555 0654
	Zip Code: 30092	Country:	Fax: 770 555 0656
			Toll Free: 770 555 0655
			Business: sage@smile.sage.com

Contact

Last Name: Alhed	First Name: Tony	Salutation:
Title:	Department:	
Business Email:	Area Code:	Phone Number:

4. Easy Access to Data:

With Sage CRM being accessible from anywhere through its web-interface, users can enter orders remotely via the easy-to-navigate Sage CRM interface. This feature is critical in processing new orders faster and reducing customer service response times.



GUMU™ for Sage CRM with Sage 300 | Sage Pro Integration

Greytrix offers GUMU™ Sage CRM – Sage 300 | Sage Pro Integration that enables a perfect synergy of two powerful systems and makes customized order entry effortless while maximizing your investment on Sage 300 | Sage Pro. Built on top of the standard Sage CRM – Sage 300 | Sage Pro integration provided by Sage, Greytrix Order integration product makes it possible to enter Orders into Sage 300 | Sage Pro and Sage CRM over the web. Thus, empowering Sales personnel to not only to enter Orders in Sage CRM, but also to seamlessly promote each order into Sage 300 | Sage Pro.

Features of GUMU™ for Sage CRM with Sage 300 | Sage Pro Integration:

1. Secure Order Promotion:

Your Sage CRM Administrator enjoys better control over the system and can configure Promote Order rights to other Sage CRM users with ease. This ensures better security for users to promote Orders in Sage 300 | Sage Pro from Sage CRM.

2. Superior Order Visibility:

Powered by seamless order integration of Sage CRM and Sage 300 | Sage Pro, users can easily view all information on promoted orders. This is made possible within Sage CRM by navigating to the Promoted Orders tab of an Opportunity.

The screenshot displays the 'Order Summary' page in Sage CRM. The page is divided into several sections: 'Order Summary' (top left), 'Line Items' (bottom left), and a sidebar of actions (right). The 'Order Summary' section contains fields for Currency (USD), Order Date (07/07/2016 18:15), PO No., Description, Billing Address, Tracking No., FOB Point, Pricing List (RTL), Exp Ship Date, Ship Via (International Air Freight), Contact (Jose Grange), Shipping Address, Territory (CA), Tax Group (California State Tax Group), CRM Order Ref (ORD-225/40), Status (Active), Location (Central warehouse - Seattle), On Hold (No), SAGE 300 ERP Order No., Order Type (Active), Calc. Tax (Yes), and Terms Code (Net 30 Days). The 'Line Items' section is a table with columns: Line #, Product Name, Order Location, UOM, Price List, Quantity, Order Discount %, List Price (USD), Quoted Price (USD), and Quoted Price Sum (USD). It shows one line item: 1 13W Mini Fluorescent Bulb, Central warehouse - Seattle, Case, RTL, 1.00, 0.00, 7.10, 7.10, 170.40. The sidebar on the right includes buttons for 'Continue', 'Change Summary', 'Promote to Sage 300' (highlighted with a red box), 'Display Ordered Items', 'New line item', 'New Free Text item', 'New Comment line item', 'Clone', 'Merge to Word', 'Merge to PDF', 'Add to Group', 'Print Order', 'Send Order', and 'Help'. At the bottom right, there are summary fields: 'TOTALS USD -7.10', 'Discount Type: Percentage', 'Discount %: 0.00', 'Discount Amount: USD 0.00', and 'Total: USD 170.40'.

GUMU™ for Sage CRM with Sage 300 | Sage Pro Integration

3. Easier Access to Data:

Users can import/synchronize all Sage Pro customer data in Sage CRM with ease. Additionally, users can view sales orders on the go along with a user-friendly view of the line items, delivery status and more useful information.

4. Real-time Bi-directional Integration:

Any changes made to data in Sage CRM are reflected in real time on Sage 300 | Sage Pro. Additionally, GUMU™ provides flexibility in the integration by allowing users to selectively sync data between systems depending on business needs on a bi-directional basis.

5. Streamlined Customer Response System:

With this integration, inquiry recording and follow-up gets streamlined because both systems are effectively linked. This is enabled by the creation of Sage CRM Quotes and Discounts using Sage 300 | Sage Pro Pricing. Later, when required, these Quotes can be converted to Sage 300 | Sage Pro Order using standard Sage CRM functionality.



GUMU™ for Salesforce with Sage X3 | Sage 300 | Sage 100 Integration

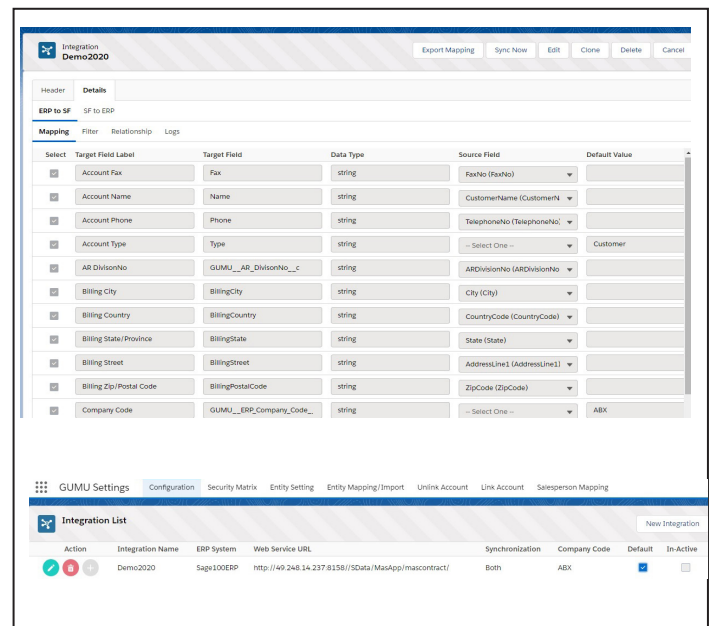
Greytrix offers a gamut of in-house developed GUMU™ Integration solutions for Salesforce with SageX3-Sage300-Sage 100 in order to streamline enterprises front and back office operations. GUMU™ connector delivers seamless, real-time, bi-directional integration that plays a pivotal role in unlocking the potential of enterprise data to make smarter and faster business decisions.

Users can Link / Unlink Customers from Salesforce to Sage X3 - Sage 100 - Sage 300. Sales reps can create orders and promote new customers on the go, through any smart devices capable of accessing Salesforce.com. This saves their time from creating orders manually in Sage X3 - Sage 100 - Sage 300 with order entry promotion feature. Plus, sales teams benefit from a real-time inventory count update by location to maintain proper inventory levels. Thereby optimizing your investments in Sage X3 - Sage 100 -Sage 300 and Salesforce.

Features of GUMU™ for Salesforce with Sage X3 | Sage 300 | Sage 100 Integration:

1. Data Sync:

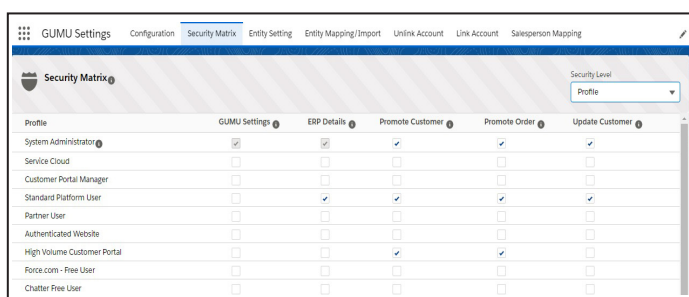
GUMU™ allows bi-directional (and user controlled) Accounts and Order information data movement on real-time basis between Sage ERP and Salesforce. It allows users to choose the “Master” system for controlling the data flow. This helps in maintaining data consistency and reliability between the two systems. Order History information like Quote, Sales Order, Shipment, Sales Invoices, Credit Note, and Payments Receipts against Invoices can be viewed on user-friendly Salesforce tabs for Individual Accounts. The Salesforce lightning components interface in GUMU™ integration allows users to synch additional field values for Accounts from Salesforce object to the corresponding A/R Customers in Sage ERP system.



Refer pt. 1

2. Authorization Control:

GUMU™ Security Matrix empowers System Administrators by allowing them to set different access levels to Integration functionality with prescribed user privileges. Thus, giving Administrators the power to secure data and control systems efficiently & effectively.

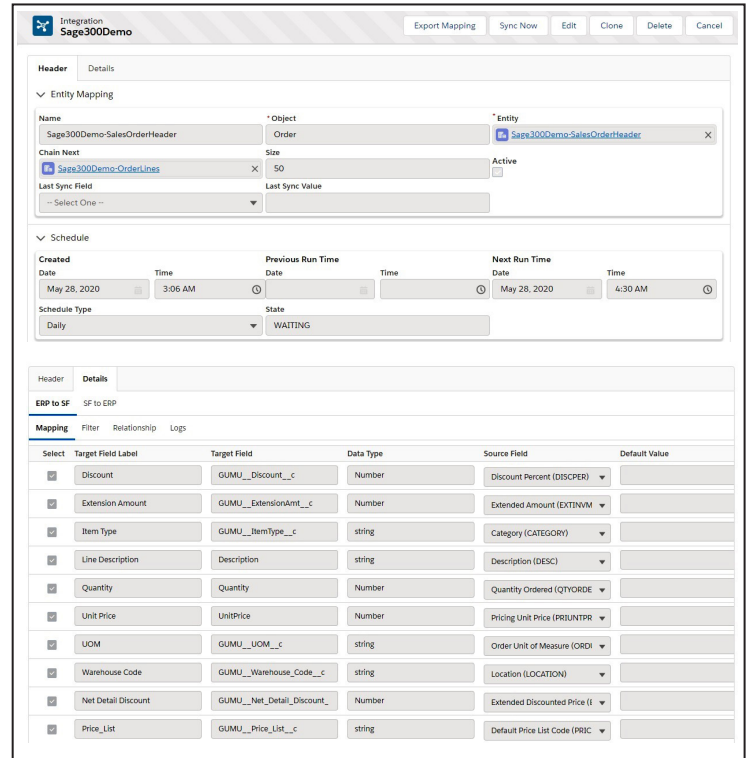


Refer pt. 2

GUMU™ for Salesforce with Sage X3 | Sage 300 | Sage 100 Integration

3. Entity Synchronization:

GUMU™ provides the flexibility to map and import any custom or standard Sage ERP entity data into standard or custom Salesforce objects. This feature can further be leveraged to perform analysis using any Wave Analytics, Dashboard Reporting and Visual Charts. With the additional Cloning feature, user can reformat/filter/restructure existing entity without disturbing its original form and use it for specific purpose. User can also set schedules to sync entities as per their business needs and have the option to support multiple sync of entities with processes running in the background. Log tracking provides administrator the option to completely track progress and notify themselves (or any other users) via email on failure of scheduled jobs for immediate action.



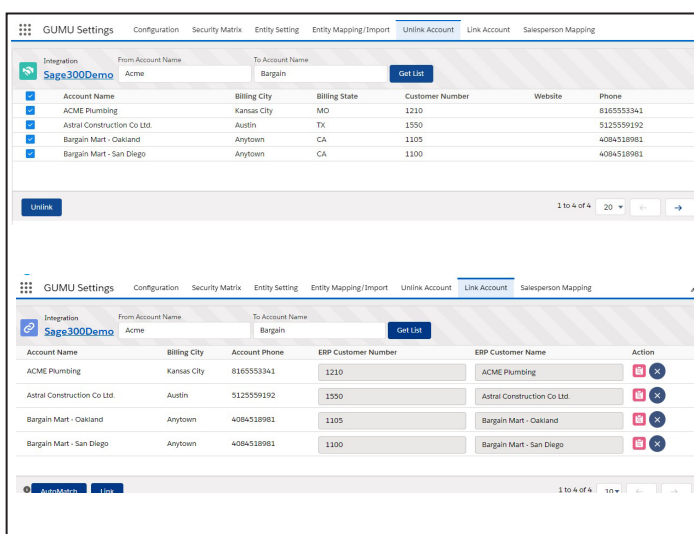
Refer pt. 3

4. Preview Data Before Import:

To improve the overall user experience in GUMU™ integration, a “Salesforce – ERP Data Preview” feature is available. This feature provides user the ability to preview & validate the ERP data prior to it being imported in Salesforce CRM which further minimizes data error.

5. Linking/Unlinking Customers:

Link existing Sage ERP Customers with existing Salesforce Accounts to avoid data duplication. Customizable “Link/Unlink Customer” screen helps in configuring additional fields such as Billing Country, Account status etc.



Refer pt. 5

GUMU™ for Salesforce with Sage X3 | Sage 300 | Sage 100 Integration

6. Real-Time Inquiries with Flexibility to Configure:

Sales representatives can view list of Sales Orders, Invoices, and Additional Customer details on user friendly Salesforce UI. You can customize this as per your custom need and add an additional business related information. Other than these GUMU™ also provides user the capabilities to Add/Create new Inquiries in Salesforce system as per their business needs based on the data in Sage ERP. Modify existing Inquiries to include custom fields in Salesforce reflecting associated Sage ERP data.

The top screenshot shows a 'Details for' page for Sales Orders. It includes a filter section and a table with columns: ORDER NUMBER, ON HOLD, ORDER TYPE, ORDER DATE, and EXPECTED SHIP DATE. The table lists 20 active orders with dates ranging from 01/15/2019 to 04/22/2019.

The bottom screenshot shows a 'Details for' page for AR Inquiries. It includes a filter section and a table with columns: INVOICE NUMBER, INVOICE DATE, BILL NAME, PO NUMBER, TERRITORY, and SHIP DATE. The table lists 12 invoices with dates ranging from 02/17/2019 to 04/22/2019.

Refer pt. 6

The top screenshot shows the 'Order' form in Salesforce. It includes fields for Account name (American Business Futures), Customer Number (ABF), and Order Start Date (May 13, 2020). It also has sections for Shipping Address and Billing Address.

The bottom screenshot shows the 'Add Product' modal window. It includes fields for Product Family (DSK), Product Code (2480-8-50), Warehouse (000), Tax Class (TX), Quantity (2.0000), and Quoted Price (3244.9500). It also shows Extended Price (6489.90), List Price (3244.95), and Tax Amount (502.9673).

Refer pt. 7

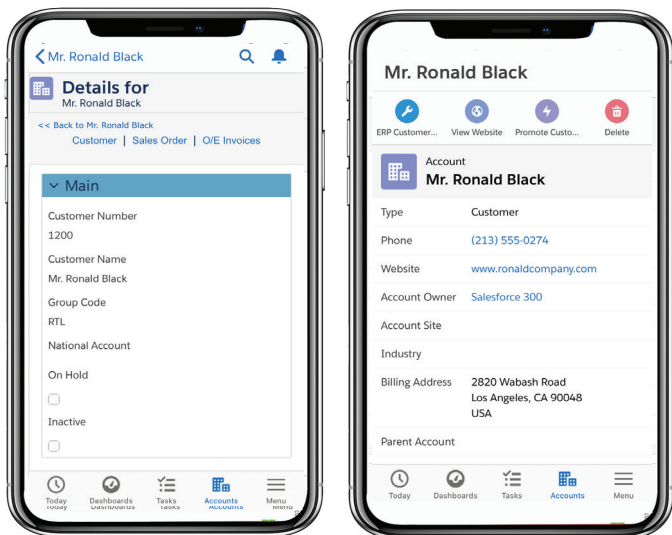
7. Easy to Promote:

GUMU™ integration provides functionality of promoting/updating Customers and promotion of Sales Orders from Salesforce to Sage ERP with a single click. The ERP specific required information such as the Default Shipping Address, Salesperson, Tax code fields and Customer Specific Pricing are brought/filled up (auto populated) in real-time to Salesforce in order to give the Sales representative the liberty to worry free data entry to ERP directly.

GUMU™ for Salesforce with Sage X3 | Sage 300 | Sage 100 Integration

8. Standard Salesforce Opportunity:

GUMU™ provides the freedom to user to take a complete advantage of the Standard functionality in Salesforce of creating Opportunity along with Quote items and convert to Sales Order. GUMU™ extends the functionality and allows user to promote the Quote to ERP. And when the same is converted in order the respective quote record in ERP will be converted to Order automatically.



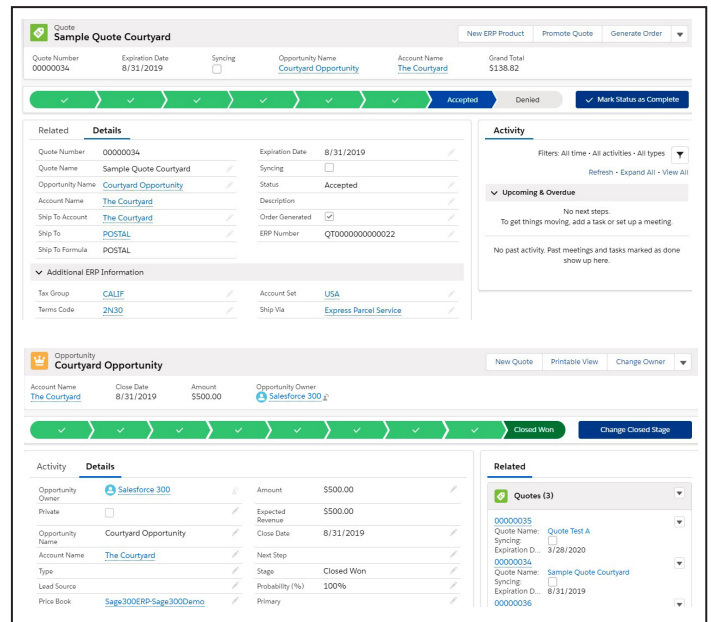
Refer pt. 9

10. Reports and Dashboards:

With GUMU™ integration you can create Reports and Dashboards in Salesforce based on the data synchronized from Sage ERP to Salesforce using Entity Sync Mapping. These Reports and Dashboards are important for taking informed decisions, identifying new Business Opportunities & forecast Sales.

12. Flexibility to Incorporate your Business Needs:

GUMU™ integration has been designed such that it can accommodate your business scenarios and make the integration move the data across the system which is specific to your business and necessary for completion of the process at affordable rates.



Refer pt. 8

9. Portable Devices:

Integration can be accessed across handheld devices like tablets/mobile. Sales Orders can be promoted from Salesforce to ERP on-the-go. All of the Customer information is available on the click of a few links/buttons to keep Sales Rep up-to-date with the Clients information.

11. Add-Ons for Other Entities:

GUMU™ clients can request additional add-ons for other entities like Vendor & Purchase Order Promotion, Sales Invoice Add-On & AvaTax add-on at an extra cost over and above the standard GUMU™ integration to establish a seamless relationship between Salesforce objects and other Sage ERP entities.

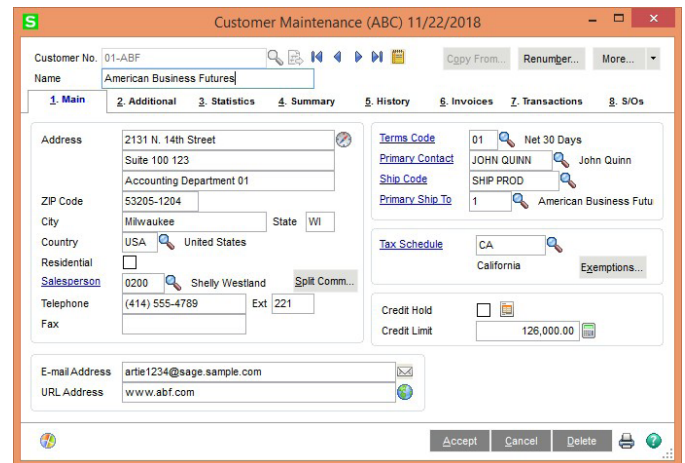
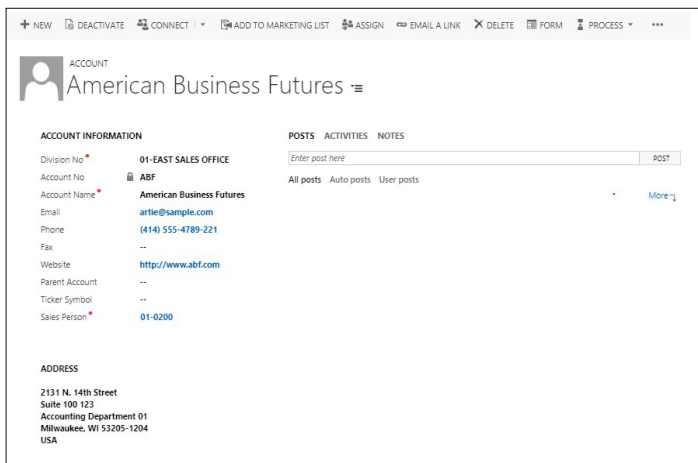
GUMU™ for Dynamics 365 CRM with Sage 100 | Sage 300 | Sage X3

GUMU™ for Dynamics 365 CRM – Sage 100 | Sage 300 | Sage X3 Integration is a comprehensive integration, specially designed to satisfy all your business priorities. It delivers seamless, bi-directional integration empowering the enterprises to leverage the information within the organization and make smarter and faster business decisions. With Dynamics 365 CRM and Sage 100 | Sage 300 | Sage X3 integration, mid-market and enterprise businesses can achieve a single, customer-centric view across their organization. This enables Accounting, Sales, Marketing and Customer Service teams to share a single consistent view of Customer information and provide a better experience.

Features of GUMU™ for Dynamics 365 CRM with Sage 100 | Sage 300 | Sage X3 Integration:

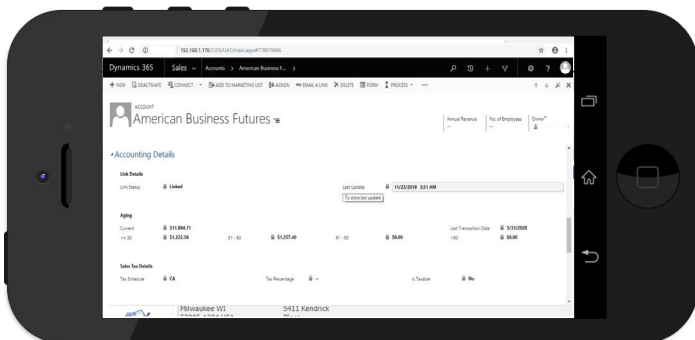
1. Bi-directional Integration:

Synchronize Sales Quotes, Orders and Invoices from Sage (to Standard tables/ Objects in Dynamics 365 CRM) that can be viewed on user-friendly UI of Dynamics 365 CRM layout. And synched back to Sage 100 | Sage 300 | Sage X3 system.



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 same view on all the devices.



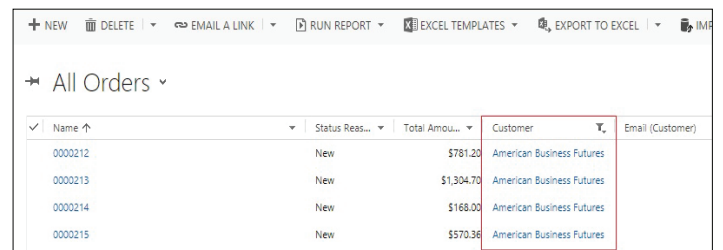
GUMU™ for Dynamics 365 CRM with Sage 100 | Sage 300 | Sage X3

3. Multi Company Integration

Can configure multiple Sage 100 | Sage 300 | Sage X3 companies with single Dynamics 365 CRM environment..

4. Updated Customer Sales Information

Important Sales and service information can be viewed on user-friendly Dynamics 365 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.



Name	Status Reason	Total Amount	Customer	Email (Customer)
0000212	New	\$781.20	American Business Futures	
0000213	New	\$1,304.70	American Business Futures	
0000214	New	\$168.00	American Business Futures	
0000215	New	\$570.36	American Business Futures	



Sage ERP | Sage CRM Data Migration

Data Migration is a complex task which involves mapping and moving of data and objects from old system to new system. It is more of a business – level decision than a technical one, as there may occur instances wherein sub-standard migrations may adversely affect ERP - CRM deployments leading to loss in business opportunities.

At Greytrix, we understand this and help you with entire Extraction, Transformation & Loading process of data migration to Sage ERP or CRM with GUMU™ connector that includes:

- **Analysis:**

Based on your business requirement we identify the entities that need to be migrated to ERP/ CRM. We analyse source database and identify if any customization is required for it or not.

- **Data Extraction:**

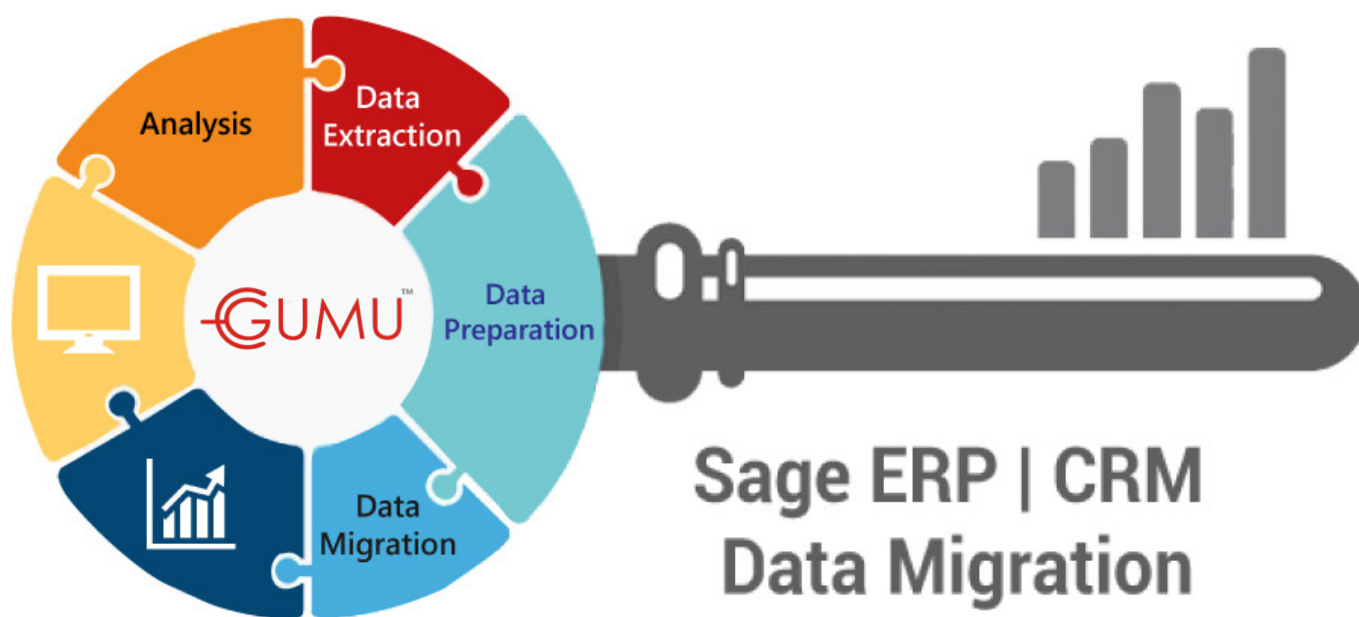
Gather data from data sources like SQL, Oracle, Flat files, ERP/CRM products, existing applications, etc.

- **Data Preparation:**

Prepare data for migration as per the tool being used for migration, for instance prepare CSV files in case the migration tool to be used is Apex data loader.

- **Data Migration:**

Initiate test migration, upon successful testing import data to Sage ERP or CRM.



Sage ERP Data Migration



Greytrix offers GUMU™ Migration for the following ERPs:



sage 50 US | sage PRO | QuickBooks



sage 50 US | sage 50 CA | sage PRO | QuickBooks
sage Business Vision | sage Business Works



sage 50 US | QuickBooks | sage Business Vision
sage Business Works

Transitioning from legacy systems to Sage X3 | Sage 300 | Sage 100 | Sage Intacct can be a daunting task unless it is strategically planned and executed to minimize time, cost and efforts. Greytrix with its GUMU™ connector makes it easy to migrate data from standard modules such as General Ledger, Bank, Tax, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Order and Sales Order / Order Entry.

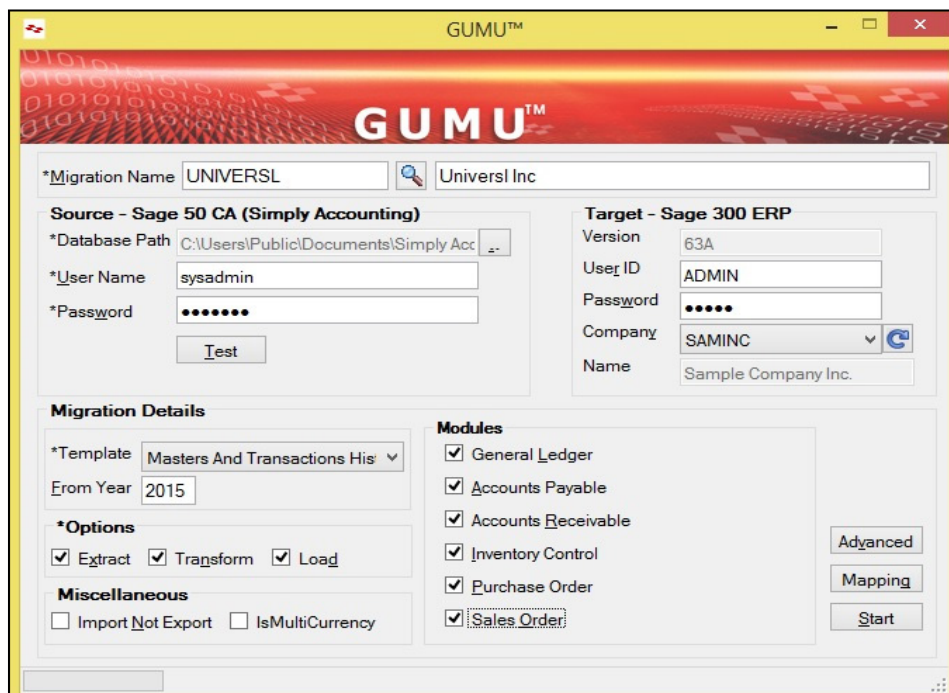
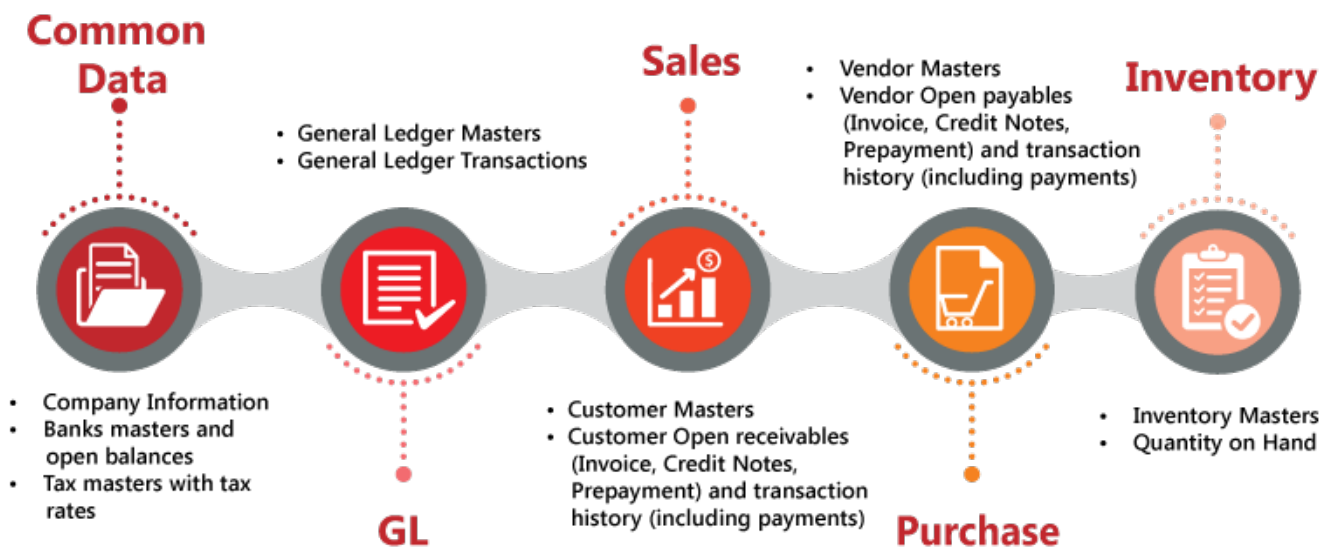
Basic functionalities of data migration to Sage X3 | Sage 300 | Sage 100 | Sage Intacct:

- Analysis and extracting Data from the source system.
- Data clean-up in case where the data is purged / deleted or duplicate.

Sage ERP Data Migration

- Entity Mapping (Chart of Accounts, Customer, Vendor, Items, Sales Person, Banks or Tax) from source system to Target ERP.
- Processing / Restructuring of Source Enterprise data.
- Data writing into Target ERP.

Entity Mapping from Source ERP to Target Sage ERP



GUMU™ ERP Migration Screenshot:

Sage ERP Data Migration

Features of GUMU™ ERP Migration are:

1. Robust Migration Framework:

Greytrix's robust migration framework enables a seamless extraction of data from legacy systems with zero impact on operational performance during data migration. Importantly, this migration offers significant flexibility to meet enterprise's unique needs.

2. Reduced Total Cost of Ownership:

GUMU™ migration solution helps the company to retire from legacy systems and includes data archival after migration into Sage X3|Sage 300|Sage 100|Sage Intacct. As a result, the organization saves on operational costs while reducing the outlay on maintaining legacy systems.

3. Superior Business Visibility:

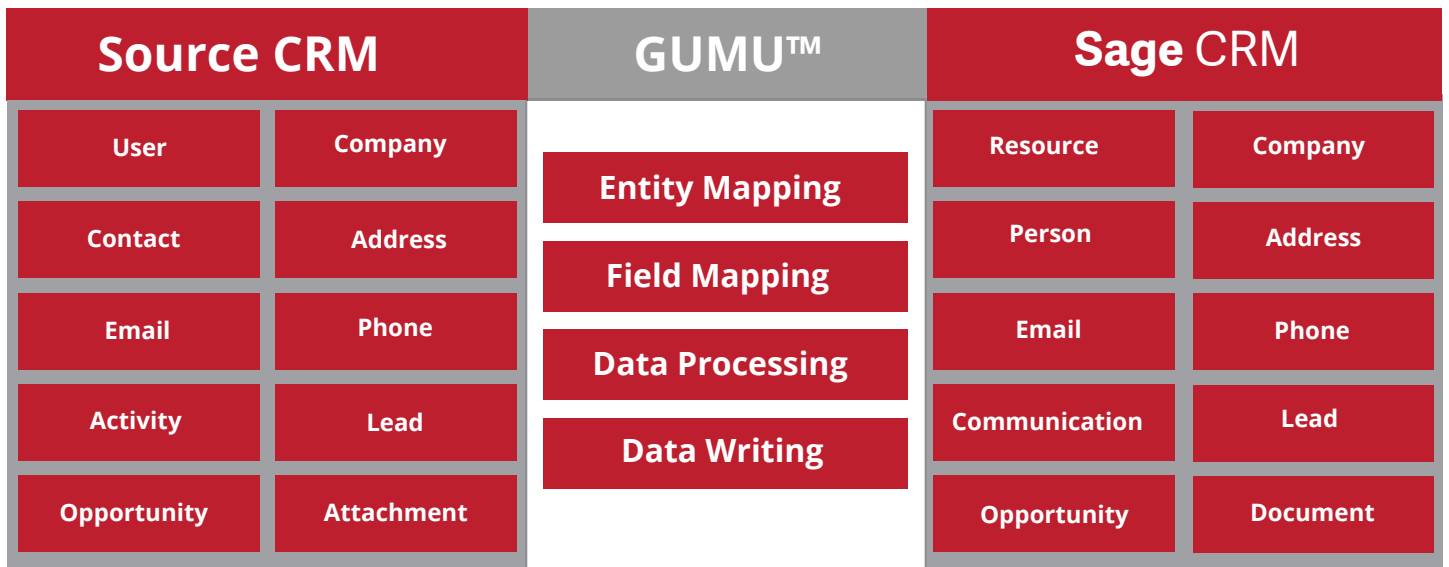
GUMU™ enables business users to create, manage and share critical business context in the data migration process by providing superior visibility and control. By simplifying access to mission-critical data on a common platform, it empowers teams to explore more revenue generating opportunities and reduce time-to-market for innovative products.

4. Simpler Data Management:

The migration increases efficiency and meets an organization's need for data security, data sub-setting and data archiving. Enterprise data comes onto a single platform while data is normalized into table target formats and loaded into Sage X3|Sage 300|Sage100 | Sage Intacct cost-effectively without custom coding resulting in quick data access, integration and delivery.

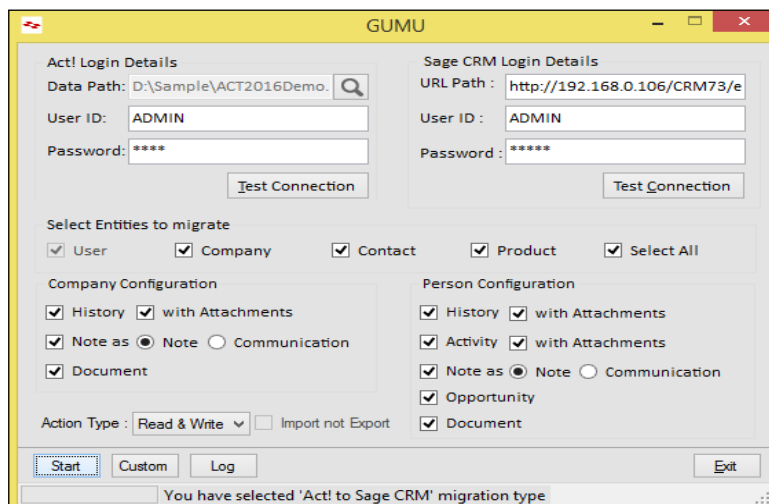


Sage CRM Data Migration



GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration:

GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration is the solution of choice for enterprises seeking a smooth, trouble-free migration to Sage CRM. Our solution works efficiently to enable a seamless transfer of historical data into the new system. It provides you the flexibility required to migrate data in minimum steps and maximum cost effectiveness. GUMU™ Migration solution makes it possible to upgrade clients by effortlessly migrating key customer data into the new system. Company names, addresses and notes, as well as advanced data such as attachments, emails and phone records can be easily shifted from Source CRM fields into Sage CRM. Also, the custom Fields from Source CRM can be taken over into Sage CRM during the migration process. Driven by our proprietary migration framework, Greytrix ensures an on-time, on-budget migration at affordable costs.



GUMU™ CRM Migration Screenshot:

Sage CRM Data Migration

Features of GUMU™ Sage CRM Migration are:

1. Efficient Data Migration onto Single Platform:

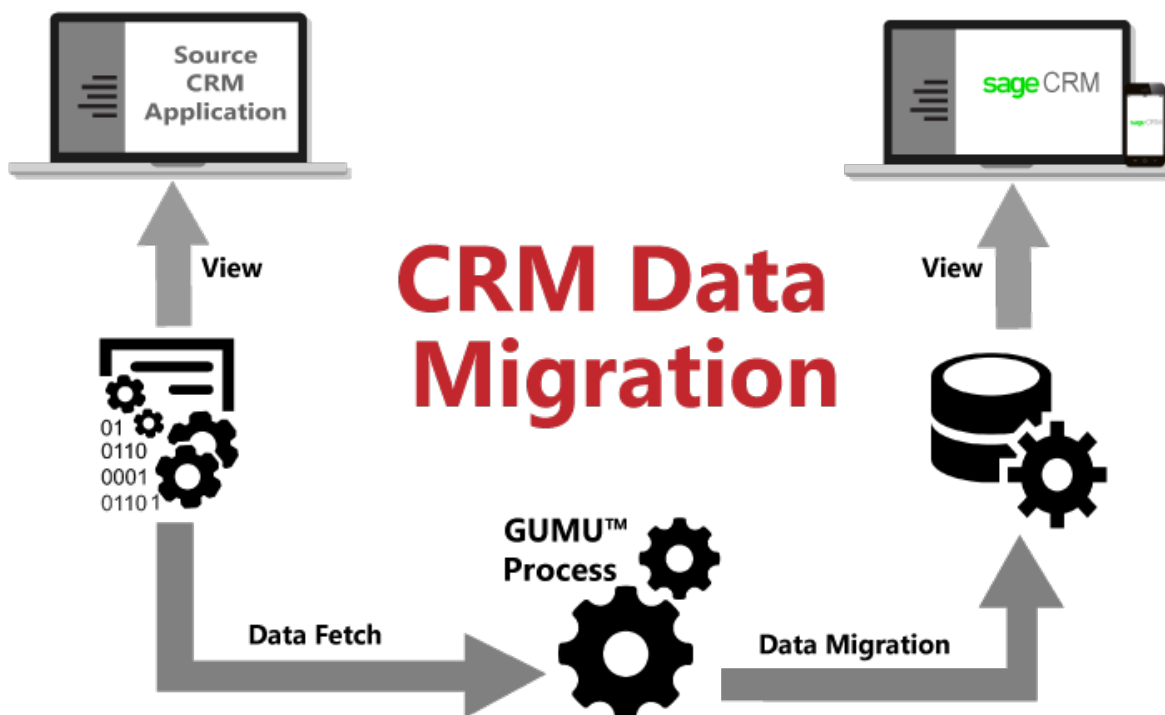
With GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration all essential enterprise data is effortlessly migrated onto a single platform. This results in increased efficiency while meeting all data requirements pertaining to security, sub setting and archiving.

2. Cost-Effective Data Delivery:

The migrated data can be accessed, integrated and delivered seamlessly. The Source CRM system retirement and data archival that takes place post migration results in reduced legacy system operational and maintenance costs.

3. No Impact on Operational Performance:

The data is extracted from the Source CRM system and migrated to the new system with no interruption to client systems. As the source and destination both remain undisrupted, clients benefit from zero impact on operational performance.





Want to know more ?

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