



Microsoft Dynamics 365 CRM - sageERP Integration



GUMU™ for Dynamics 365 CRM – Sage ERP integration streamlines your sales process and aligns all your business processes to deliver seamless, bi-directional integration. It empowers the enterprises to seize the full potential of the integration by extending it's functionality to enhance other processes within your organization. With Dynamics 365 CRM and Sage ERP

integration mid-market and enterprise businesses can achieve a single, customer-centric view across their organization which can help in making smarter and faster business decisions. The integration ensures accuracy when sharing information (such as customer records, orders, invoices, product information, and other data) across the systems.

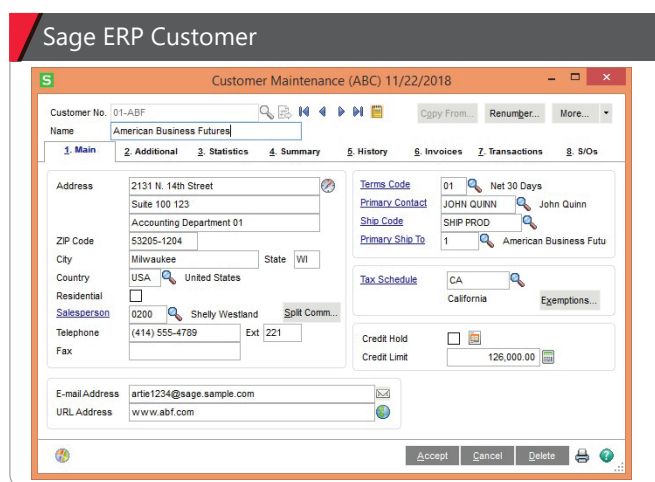
Benefits:

- ▶ Make informed decisions, identify business opportunities based on latest synchronized information of Customers and reporting tools.
- ▶ Improve Finance, Customer Relation and Sales Interdepartmental communication with seamless process flow of accounting and customer information.
- ▶ Enhanced end client experience due to faster resolution of queries and personalized responses.
- ▶ Increased employee productivity due to data consistency and no data duplication.
- ▶ Enhanced agility to act on new information quickly and maximize ROI.
- ▶ Enables more effective supply chain and inventory management as sales data from CRM is available in the ERP.
- ▶ **Easy implementation:** The whole package is easy to implement and configure it with Dynamics 365 CRM and Sage ERP.

Features:

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 ERP system.



Sage ERP Customer

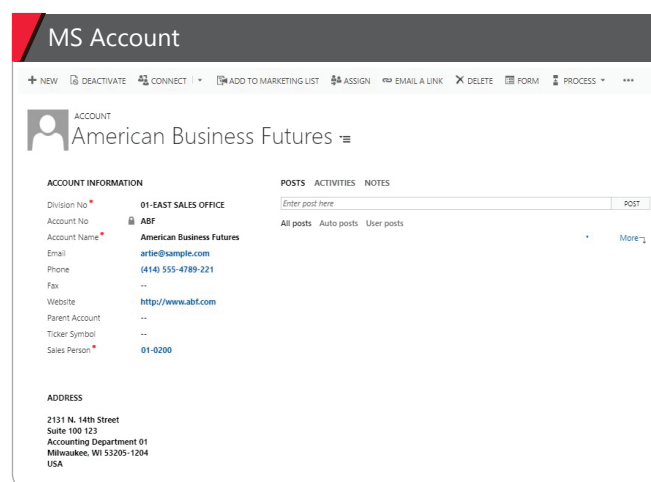
Customer Maintenance (ABC) 11/22/2018

Customer No. 01-ABF
Name American Business Futures

Address 2131 N. 14th Street
Suite 100 123
Accounting Department 01
ZIP Code 53205-1204
City Milwaukee State WI
Country USA United States
Residential
Salesperson 0200 Shelly Westland Split Comm...
Telephone (414) 555-4789 Ext 221
Fax
E-mail Address artie1234@sage.sample.com
URL Address www.abf.com

Terms Code 01 Net 30 Days
Primary Contact JOHN QUINN John Quinn
Ship Code SHIP PROD
Primary Ship To 1 American Business Futu
Tax Schedule CA California Exemptions...
Credit Hold
Credit Limit 126,000.00

Accept Cancel Delete



MS Account

ACCOUNT American Business Futures

ACCOUNT INFORMATION

Division No 01-EAST SALES OFFICE
Account No ABF
Account Name American Business Futures
Email artie@sample.com
Phone (414) 555-4789-221
Fax
Website http://www.abf.com
Parent Account
Ticker Symbol
Sales Person 01-0200

POSTS ACTIVITIES NOTES

Enter post here POST

All posts Auto posts User posts

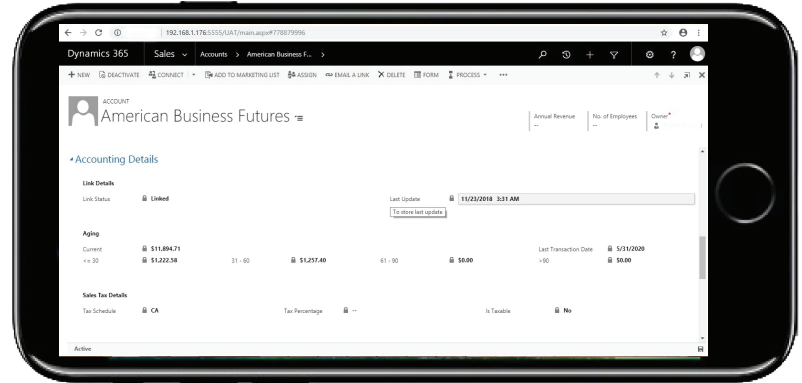
ADDRESS

2131 N. 14th Street
Suite 100 123
Accounting Department 01
Milwaukee, WI 53205-1204
USA



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.



Mobile Browser View

Multi-Company Integration:

Can configure multiple Sage ERP companies with single Dynamics 365 CRM environment.

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.

Synced from Sage ERP

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	

Integration Touch Points:

- Synchronization of Accounts/ Customers in both systems.
- Synchronization of Sales Quote, Sales Order, Sales Invoice etc. in both systems.
- The synced Sage Data can be utilized for providing details to the clients.
- Quote Correct Prices by Synchronization of latest information.

Business Partners

- Customer Details
- Addresses & Contact Information
- Persons

View/ Add Sales Inquiries

- Sales Orders
- Sales Quotes
- Sales Invoices

Inventory Information

- Product Information
- Quantity on Hand