GREYTRIX

Microsoft Dynamics 365 CRM - sage ERP 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.
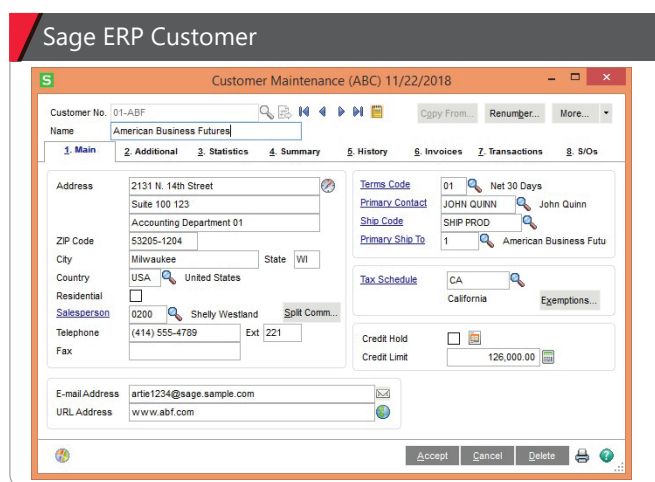
Benefits:

▶ 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.
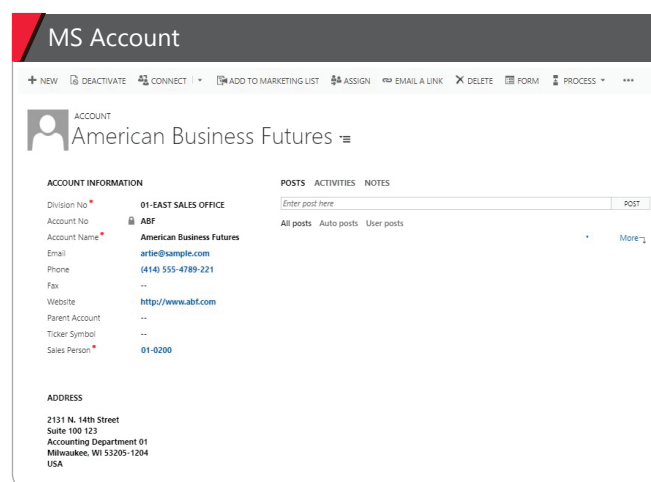

Sage ERP Customer

MS Account

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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.
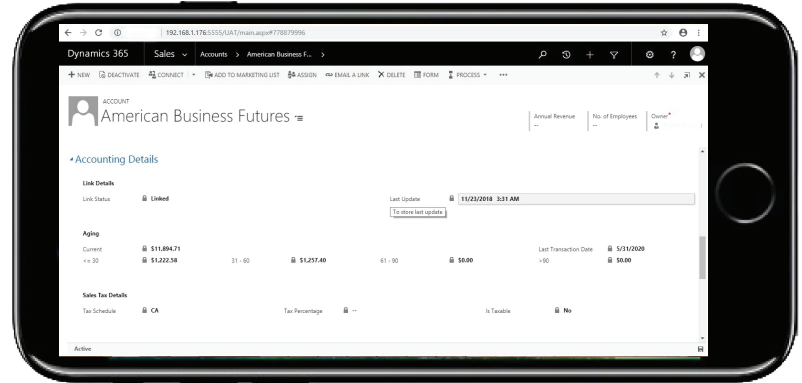
Mobile Browser View

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.

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	View/ Add Sales Inquiries	Inventory Information
• Customer Details • Addresses & Contact Information • Persons	• Sales Orders • Sales Quotes • Sales Invoices	• Product Information • Quantity on Hand