



GREYTRIX
NON ARTIFICIAL INTELLIGENCE

User Guide

GUMU™ FOR SAGE CRM – SAGE INTACCT INTEGRATION



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Chapter 1: Sage Intacct GUMU™ Administration

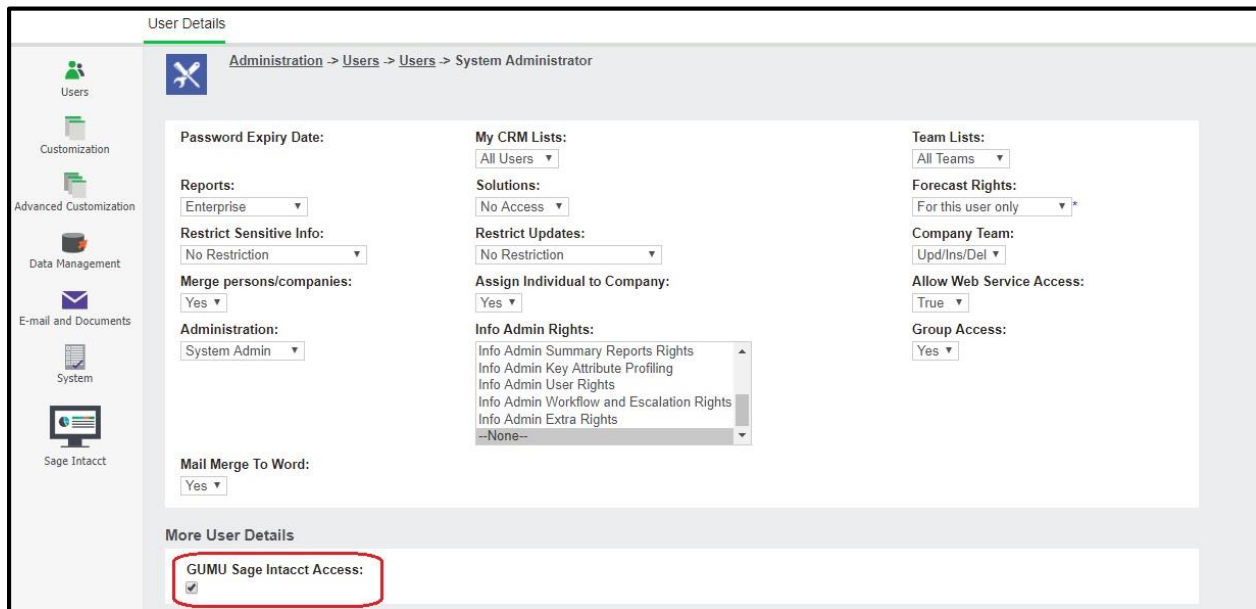
Enabling GUMU™ Integration access to each Sage CRM user

Before enabling GUMU™ Integration access to each Sage CRM user, kindly refresh the metadata.

Once GUMU™ integration is installed, Sage CRM system administrator needs to decide which Sage CRM users will have access to GUMU™ integration.

For example, if you have purchased total 5 user license from Greytrix for GUMU™ integration then you will have to enable access for those 5 users as given below.

1. In Sage CRM, navigate to **Administration** -> **Users** -> select the user for which you want to enable integration access.
2. Check the **GUMU Sage Intacct Access** checkbox as mentioned in below screen.
3. This will allow a particular user to access GUMU™ integration related functionality.
4. Repeat the above steps for the other remaining users for which you want to enable GUMU™ integration access.

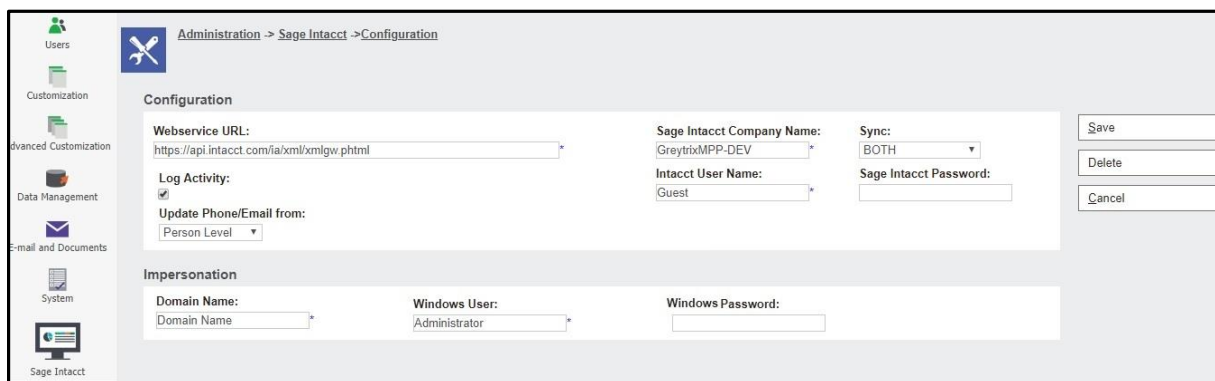


GUMU™ Configuration with Sage Intacct Company

At the time of GUMU™ setup installation, we have to enter all the details for Sage Intacct credentials which will be saved automatically in this GUMU™ Configuration page. If there are any changes, you can always edit/update from this page.

For Configuring Sage CRM with Sage Intacct

- Go to the Sage CRM **Administration** menu.
- Click on **Sage Intacct** → **Configuration** → Click on the hyperlink of your Sage Intacct Company → Click on **Change** button. It will navigate you to below GUMU™ Configuration edit screen.



The user can update the details in this GUMU configuration page. The GUMU™ Configuration entry fields are explained in below table.

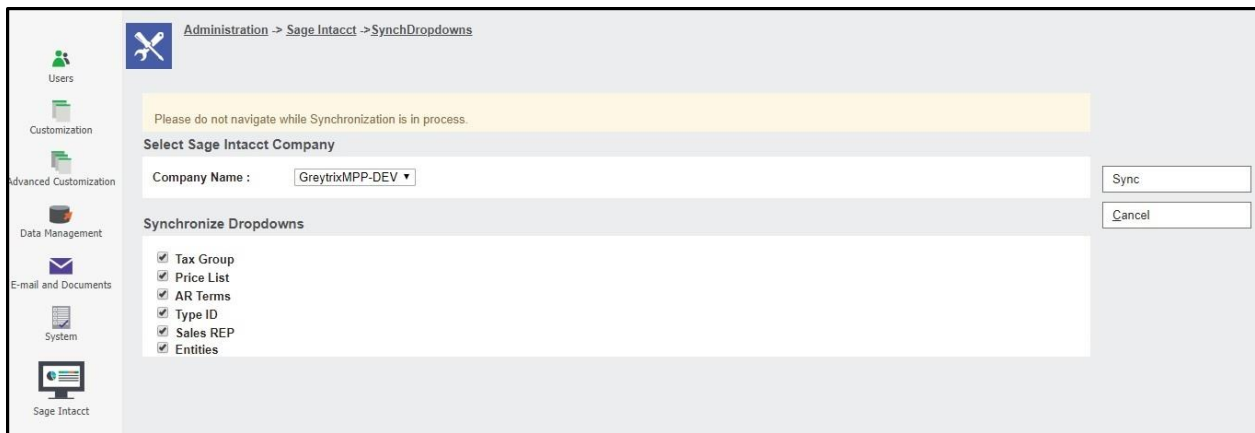
Field	Description
Sage Intacct Web service URL	Sage Intacct Web service URL. This will load automatically.
Sage Intacct Company Name	Enter the Sage Intacct Company name.
Sync	Select the synchronization setting by which you want data to be flow.
	1. INTACCT TO CRM: - If the user sets this option, data will flow only one way from Sage Intacct to Sage CRM.
	2. CRM TO INTACCT: - If the user sets this option, data will flow only from Sage CRM to Sage Intacct.
	3. Both:- If the user sets this option, GUMU™ will synch data on the bi-directional basis
Intacct User Name	Enter Admin level Sage Intacct Application User Name (case sensitive).
Sage Intacct Password	Enter Sage Intacct User's password
Update Phone/Email from	In Sage Intacct, Phone and Email are stored on Contact level. While importing customers using GUMU, we import this phone/email in Sage CRM primary contact's as well as Company's Phone/Email tab. But while updating Imported information from Sage CRM, the user can

	decide whether he wants to update Phone/Email from Company level or Contact level using this setting. Depending on the option selected, data will to Sage Intacct.
Impersonation Section	
Domain name	Enter Sage CRM Window domain name
Windows Username	Enter domain Windows username. This user should have domain administrator-level rights.
Windows Password	Enter the Windows password of Windows user

Synchronize Dropdown

To synchronize dropdown information:

1. Select **Administration** → **Sage Intacct** → **Synchronize Dropdown**. The page is displayed.



2. There will be below options which you can sync by clicking on **Sync** Button.
3. Sync Options:-
 - Tax Group
 - Price List
 - AR Terms
 - Type ID
 - Sales REP
 - Entities
4. Refresh Sage CRM Metadata

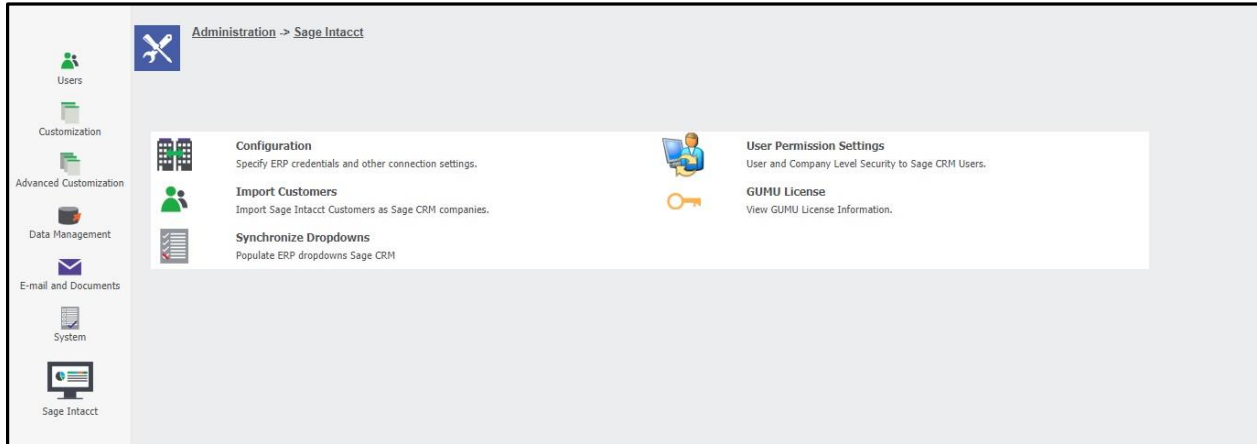
User Permission Settings

The system administrator of Sage CRM can provide Sage Intacct Company wise restrictive access of Sage Intacct integrated data to all the Sage CRM users. He can decide whether to allow/deny Sage Intacct integrated data access to particular Sage CRM user for particular Sage Intacct Company. There are below rights which Sage CRM system administrator can provide to CRM users.

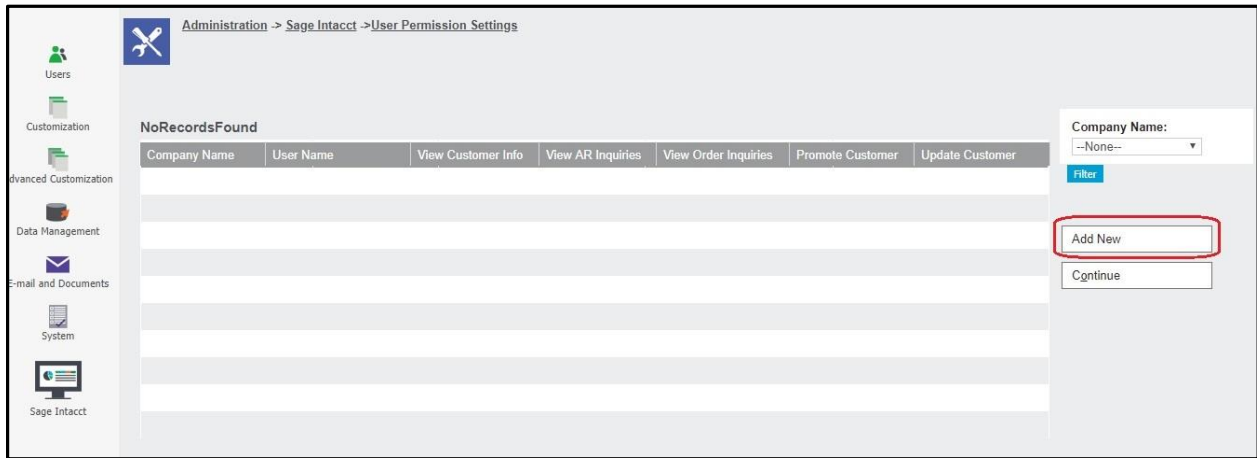
1. View Customer Info
2. View AR Inquiries
3. View Order Inquiries

4. Promote Customer
5. Update Customer

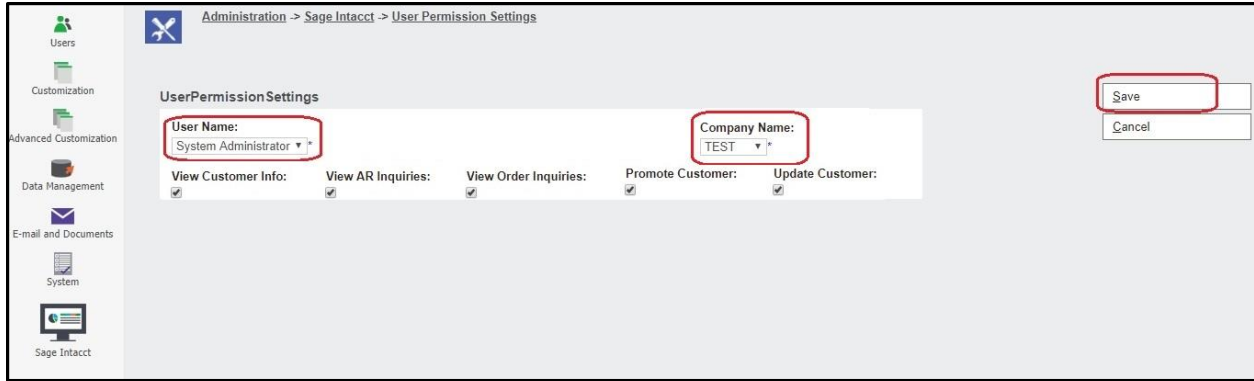
Sage CRM System Admin user can access this setting by navigating to below path in Sage CRM, **Administration-> Sage Intacct-> User Permission Settings**



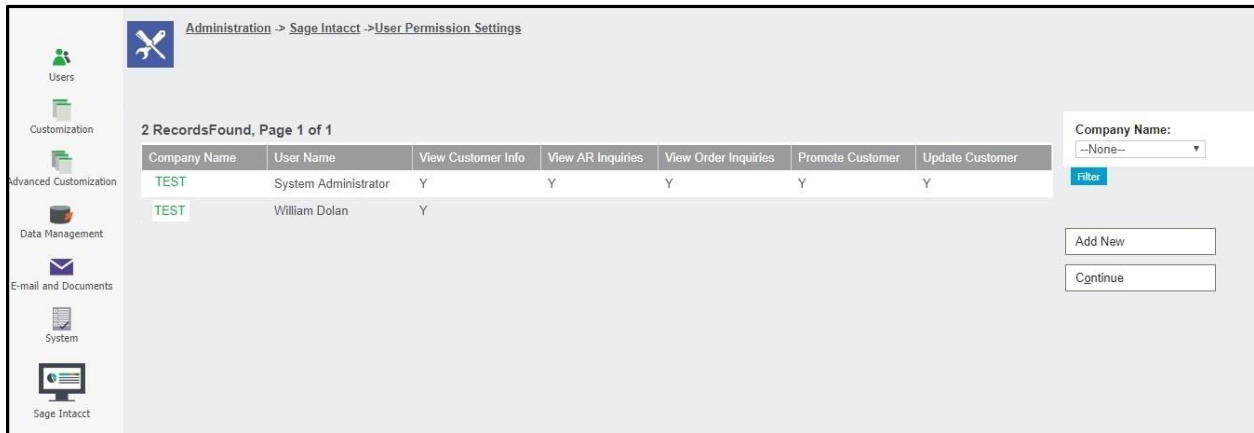
As shown in below screenshot, on click of **Add New** button, the admin user can assign permission to Sage CRM users as per Sage Intacct Company.



In below screenshot, permission is assigned to the System Administrator user for **TEST** Company.



In below another screenshot, for user **System Administrator** all the rights are given for **TEST** Company and for other **William Dolan** user only view customer rights are given for **TEST** Company that means **System Administrator** can access all the activities related to **TEST** Company of Sage Intacct while **William Dolan** can access only view customer of **TEST** Company of Sage Intacct. He will not be able to see AR Inquiry, Order Inquiry, Promote Customer and Update Customer.



Also if the user wants to change the settings which are already assigned to any Sage CRM user then just by clicking on Username in grid System administrator can edit it.

Note - If the user unchecks Update Customer then the real-time Customer/Address/Contact level changes from Sage CRM to Sage Intacct will not work.

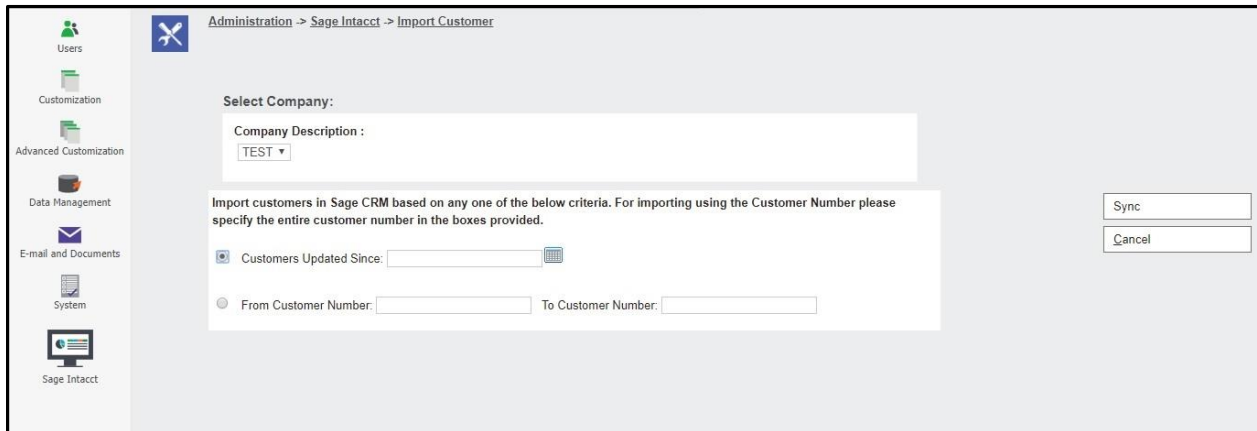
Import Customers from Sage Intacct to Sage CRM

The user can import all the customers from the Sage Intacct to Sage CRM.

For importing customers from Sage Intacct:-

- Go to the Sage CRM **Administration** menu.
- Click on **Sage Intacct → Import Customers** button. It will navigate you to the Import Customer page.
- Select Sage Intacct Company Name from which you want to import customers into Sage CRM.
- There are 2 import criteria which user can use while importing customers from Sage Intacct to Sage

CRM. Please refer below screenshot.



1. **Last Updated Since:** - Using this criterion, the user can import customers on the basis of the last updated date of a particular customer. The user can select a particular date from the field and can sync customers updated/inserted after the selected date.
2. **Customer Number:** - User can also synch customers by specifying a particular range of customer numbers in **From** and **To** field.

Note: - If the user does not enter anything in the date field **or** FROM and TO field and clicks on **Sync** Button, GUMU™ just synch all customers from the Sage Intacct system to Sage CRM. While synching customers into Sage CRM, GUMU™ first check for the existence of customer in CRM using **Customer ID, Record Number, and Company Name** combination. If it does not exist, GUMU™ inserts the corresponding customer into Sage CRM and if it already exists then it updates the customer info into Sage CRM. While synching customer information, GUMU™ also sync's primary address and primary contact for each customer.

GUMU™ License Details

Sage CRM system administrator can see the GUMU™ License key details of the installed GUMU™ Integration version from this page.

This page displays all the details like Product version, Max number of users, Number of active users, Date of installation, Date of expiry of license type.

Administration -> Sage Intacct

- Users
- Customization
- Advanced Customization
- Data Management
- E-mail and Documents
- System
- Sage Intacct

Configuration
Specify ERP credentials and other connection settings.

Import Customers
Import Sage Intacct Customers as Sage CRM companies.

Synchronize Dropdowns
Populate ERP dropdowns Sage CRM

User Permission Settings
User and Company Level Security to Sage CRM Users.

GUMU License
View GUMU License Information.

Administration -> Sage Intacct -> GUMU License

- Users
- Customization
- Advanced Customization
- Data Management
- E-mail and Documents
- System
- Sage Intacct

License Information Continue

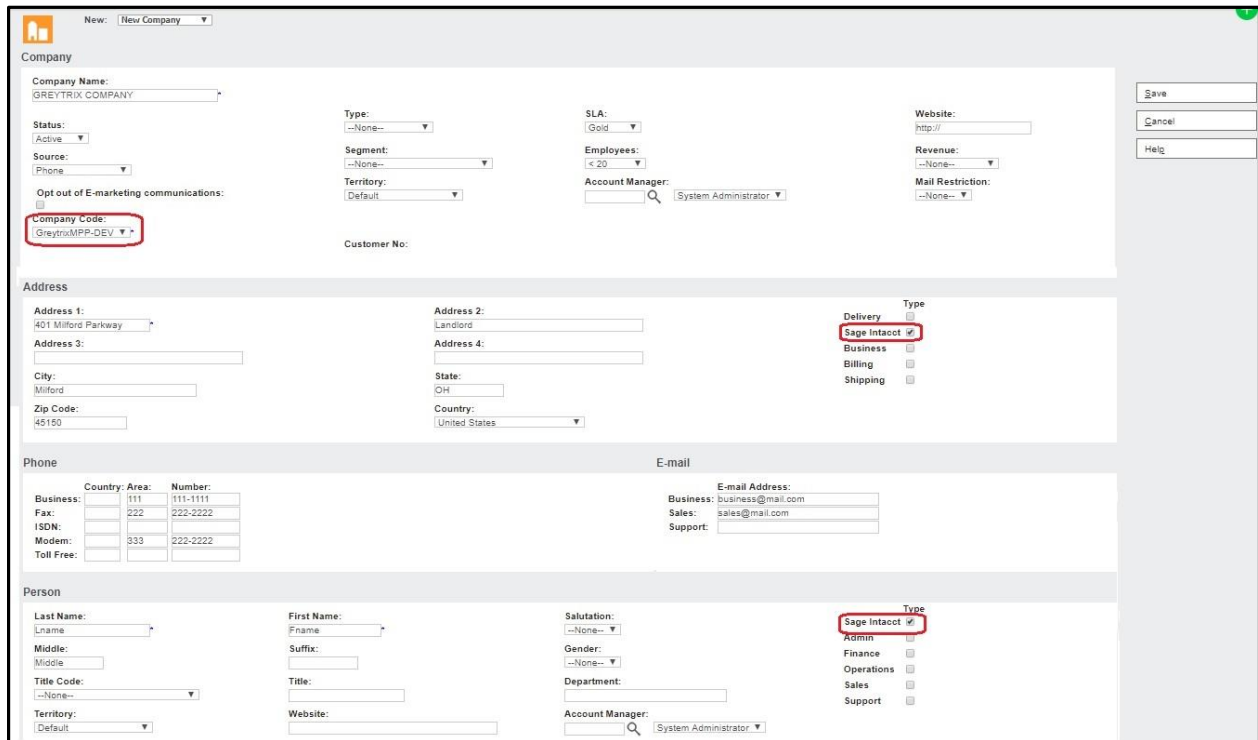
Product GUMU™ for Sage CRM – Sage Intacct	Product Version v1.0
Max number of users 5	Number of active users 2
Date of Installation (mm/dd/yyyy) 4/11/2018	Date of Expiry (mm/dd/yyyy) 5/11/2018
License Type TRIAL	

Chapter 2: Working with Customers

Promoting new customers from Sage CRM to Sage Intacct

To promote a new Customer from Sage CRM to Sage Intacct.

1. Create a new company in Sage CRM.
2. Fill all the details on Company summary screen along with **Company Code** which user has integrated with GUMU™ Integration.



3. Enter the Company details. The fields are described in the below table.

Field	Description
Company Name	Name of the company
Website	Company's website
Company Code	Select the Sage Intacct Company Code in which you want to Promote customer into Sage Intacct. This is a required field
Status	The user can set the company status as Active or Inactive

4. Enter details into below field for the address. This will be the customer’s Default address.

Field	Description
Address1	Address line 1
Address2	Address line 2
Type	Select the Sage Intacct address type. Please note that if the user does not select this Sage Intacct type checkbox then that address will not get created/ promoted into Sage Intacct .
Zip Code	Enter Zip code
City/State/Country	Enter City/State/Country

5. Enter details into below fields of Phone and Email section of Company. This will store under Phone/Email tab of Company.

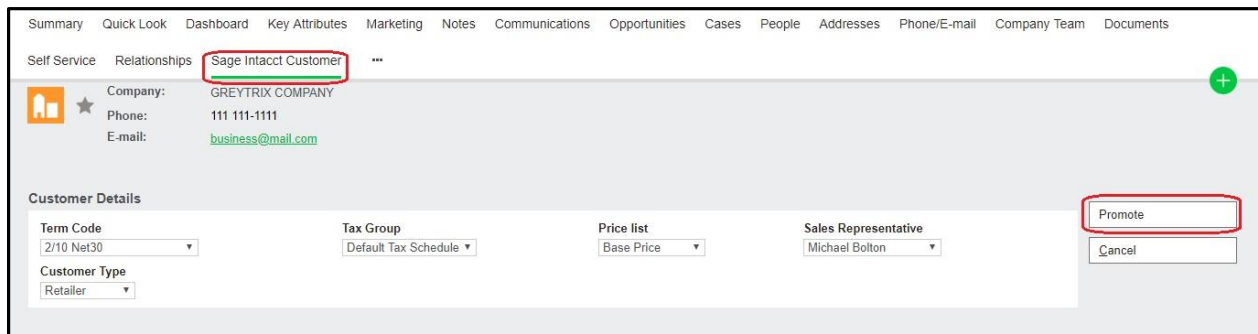
Phone No. (Business)	Phone number of type Business (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field)
Phone No. (Fax)	Phone number of type Fax (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field)
Phone No. (Modem)	Phone number of type Modem (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field). This field is integrated with Mobile field of Contact in Sage Intacct.
Email ID (Business)	Email address of Business
Email ID (Sales)	Email address of Sales

6. Enter below details into Person Panel. This will be set as the customer’s default Contact.

Field	Description
First Name	First name of the contact
Last Name	Last Name of the Contact
Middle Name	Middle Name of the Contact
Type	Select the Sage Intacct as Person type. Please note that if the user does not select this Sage Intacct type checkbox then that contact will not get created/promoted into Sage Intacct.
Print As	This is the field integrated with Sage Intacct’s PRINT AS field. If the value from this field is blank in Sage CRM then after promoting Customer into Sage Intacct, it will by default set as Company Name.
Phone No. (Business)	Phone number of type Business (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field)
Phone No. (Fax)	Phone number of type Fax (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field)

Phone No. (Mobile)	Phone number of type Mobile (first 3 numbers from AREA CODE field and remaining numbers from NUMBER field)
Email ID (Business)	Email address of Business
Email ID (Private)	Email address of Private. This field will get display user save the company/person information

7. Save the Customer details. This will create a customer in Sage CRM.
8. Once Customer is saved, click on **Sage Intacct Customer** tab. Select the values for other fields like Terms Code, Tax Group, etc. The user will be able to see **Promote** Button. Click on that **Promote** button. Once the customer is promoted you will receive a message that it is successfully promoted. If there are any errors then it will be displayed on the screen.



The screenshot shows the Sage CRM interface with the 'Sage Intacct Customer' tab selected. The 'Customer Details' section includes dropdown menus for 'Term Code' (2/10 Net30), 'Tax Group' (Default Tax Schedule), 'Price list' (Base Price), and 'Sales Representative' (Michael Bolton). A 'Promote' button is highlighted with a red box, along with a 'Cancel' button below it.

Viewing additional Customer info for a Customer

To view additional customer information of a particular customer:-

1. Click on Sage Intacct Customer tab.
2. All this information gets displayed on a real-time basis directly from the Sage Intacct. It is not stored in the Sage CRM Database.
3. There are 4 panels. Customer details, Ship To details, Bill To details and AR Aging details.

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self

Sage Intacct Customer Relationships AR Inquiry Order Inquiry ...

Company: Seacoast Securities
Phone: 987 6543210
E-mail: lpinion@intacct.com

Customer Details

Record No 16	Customer No CUST-00116	Terms Code Net 30
Ship Method Customer Pick Up	Tax Schedule Default Tax Schedule	Sales Person ID EMP-001
Sales Person Bill Lumbergh	Credit Limit 1500	Credit Hold <input type="checkbox"/>
Comment Comments	Customer Type Commercial	Price Level T1
Discount Rate (%) 10	Last Invoice Date	Last Statement Date

Ship To Details

Contact Name TEST002(CCUST-00136)	First Name Fname	Middle Name Mname
Last Name Lname	Phone 9876543210	Mobile
Fax	Email email@mail.com	Address 1 Address#1
Address 2 Address#2	City Chicago	State NY
Zip Code 12345	Country US	

Bill To Details

Contact Name TEST001(CCUST-00134)	First Name Fname	Middle Name Mname
Last Name Lname	Phone 1234567890	Mobile 1234567891
Fax 1234567892	Email email@mail.com	Address 1 Address#1
Address 2 Address#2	City Chicago	State NY
Zip Code 12345	Country US	

AR Aging Details

0-0 Days ₹ 0.00	1-30 Days ₹ -560.85	31-60 Days ₹ 0.00
61-90 Days ₹ 0.00	91+ Days ₹ 4,775.00	Total ₹ 4,214.15

Viewing all the List of Order info for a Customer

To view Order inquiry for a customer:-

1. Select Customer for which you want to view Order Inquiry.
2. Click on Order Inquiry tab to view all the list of orders created for this customers. The user can filter Orders as per their types i.e. Sales Order or Sales Invoice by using a radio button.
3. All this information gets displayed on a real-time basis directly from the Sage Intacct.
4. The user can filter this information by using document number, order date and Amount.

5. The user can drill down further to view order details and line item details for a particular order.

Sales Order and its details

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Sage Intacct Customer

Relationships AR Inquiry **Order Inquiry** ...

Company: Seacoast Securities
 Phone: 987 6543210
 E-mail: ljunion@intacct.com

Select Type
 Sales Order Sales Invoice

Filter Criteria
 Document No: Order Date: Amount:

Show 10 entries Search:

Document number	Reference number	Status	Created Date	Due Date	Total Amount
SO-0020		Converted	07/03/2013	07/03/2013	55
SO-0022		Converted	08/02/2013	08/02/2013	1160
SO-0025		Converted	08/12/2013	08/12/2013	680
SO-0026		Converted	08/12/2013	08/12/2013	680
SO-0027		Converted	08/21/2013	08/21/2013	1400
SO-0028		Converted	08/21/2013	08/21/2013	1400
SO-0043	Customer PO	Pending	04/11/2018	04/26/2018	200

Showing 1 to 7 of 7 entries Previous 1 Next

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Sage Intacct Customer

Relationships AR Inquiry **Order Inquiry** ...

Company: Seacoast Securities
 Phone: 987 6543210
 E-mail: ljunion@intacct.com

Order Details

Record No 277	Document number SO-0028	Customer No CUST-00116
Customer Name Seacoast Securities	State Converted	Reference
Transaction date 2013-08-21	Due Date 2013-08-21	Currency USD
Transaction total 1400	Terms Code Net 30	Comments Thanks for your business!
Ship Via UPS	Project	

Item Details

Show 10 entries Search:

Item Id	Quantity	Unit	Price	Extended Price	Warehouse	Department	Location
21117--Defender PRo 16CH Smart Security	1	Each	1400	1400	Main - Main	400 - Sales	10 - Texas #10

Showing 1 to 1 of 1 entries Previous 1 Next

Contact Details

Contact Name Seacoast Security(CCUST-00116)	First Name Sam	Middle Name
Last Name Smith	Phone 555-55-5555	Mobile

Sales Invoice and it's details

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Sage Intacct Customer

Relationships AR Inquiry **Order Inquiry** ...

Company: Seacoast Securities
Phone: 987 6543210
E-mail: jpinion@intacct.com

Select Type
 Sales Order **Sales Invoice** Filter

Filter Criteria
Document No: Order Date: Amount:

Show 10 entries Search:

Document number	Reference number	Status	Created Date	Due Date	Total Amount
INV-0043		Closed	07/03/2013	08/02/2013	55
INV-0047		Pending	08/02/2013	09/01/2013	1160
INV-0050		Closed	08/12/2013	09/11/2013	680
INV-0051		Closed	08/12/2013	09/11/2013	680
INV-0054		Closed	08/21/2013	09/20/2013	1400
INV-0055		Closed	08/21/2013	09/20/2013	1400

Showing 1 to 6 of 6 entries Previous 1 Next

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service Sage Intacct Customer

Relationships AR Inquiry **Order Inquiry** ...

Company: Seacoast Securities
Phone: 987 6543210
E-mail: jpinion@intacct.com

Order Details Inquiry List

Record No 233	Document number INV-0047	Customer No CUST-00116
Customer Name Seacoast Securities	State Pending	Reference
Transaction date 2013-08-02	Due Date 2013-09-01	Currency USD
Transaction total 1160	Terms Code Net 30	Comments Thanks for your business!
Ship Via UPS	Project	

Item Details
Show 10 entries Search:

Item Id	Quantity	Unit	Price	Extended Price	Warehouse	Department	Location
21052--Defender 8 CH Surveillance System	1	Each	680	680	Main - Main	400 - Sales	10 - Texas #10
DWS-472--First Alert 4 CH Wireless Surveillance System	1	Each	349	349	Main - Main	400 - Sales	30 - California #30
QSS9500--Q-See 500' Copper Wire Power Cable	1	Each	92	92	Main - Main	400 - Sales	20 - Maine #20
QSSIGD2--Q-See Decoy Cameras	1	Each	39	39	Main - Main	400 - Sales	40 - Florida #40

Showing 1 to 4 of 4 entries Previous 1 Next

Viewing all the List of AR Invoices for a Customer

To view AR Invoices for a customer:-

1. Select Customer for which you want to view AR Invoices.
2. Click on **AR Inquiry** tab to view all the list of invoices created for this customers.
3. All this information gets displayed on a real-time basis directly from the Sage Intacct.

4. The user can filter this information by using document number, order date and Amount.
5. The user can drill down further to view AR details and line item details for a particular Invoice.

Summary Quick Look Dashboard Marketing Notes Communications Opportunities Cases People Addresses Phone/E-mail Company Team Documents Self Service

Sage Intacct Customer Relationships **AR Inquiry** Order Inquiry ...

Company: Seacoast Securities
 Phone: 987 6543210
 E-mail: lpinion@intacct.com

Invoice Details AR Invoice List

Record No 1053	Customer No CUST-00116	Customer Name Seacoast Securities
Customer ID balance 4214.15	State Partially Paid	Invoice Date 2013-08-21
Due Date 2013-09-20	Currency USD	Invoice Total 1400
Amount Paid 500	Amount Due 900	Terms Code Net 30
Due In 1664		

Item Details
 Show 10 entries Search:

Account	Amount	Allocation	Department	Location
4010 - Sales- Surveillance	1400		400 - Sales	20 - Maine #20

Showing 1 to 1 of 1 entries Previous **1** Next

Chapter 3: Auto Synch Customers

If user want to keep Customer's value updated on daily, weekly or monthly basis then he/she can run scheduler (on daily, weekly or monthly basis manually or by scheduling the utility. Before running scheduler, user will have to follow below steps -

1. Edit 'GT_SyncCustomerbatch' file from C:\Program Files (x86)\Greytrix\GUMU for Sage CRM - Sage Intacct\Auto Customer Synch

2. Edit the below details in that file -

<Enter Sage CRM URL> - Enter the Sage CRM URL (like <http://grey085/CRM2017R3/eware.dll>)

<Enter Sage CRM admin level Username> - Enter Sage CRM username

<Enter Sage CRM user's Password> - Enter Sage CRM password

<Enter Sage CRM Instance Name> - Enter Sage CRM Instance name

<Enter Sage Intacct Company> - Enter the Sage Intacct Company which is integrated with GUMU™ Integration.

Note: - Scheduler will work only for 1 Sage Intacct Company, not for multiple Sage Intacct Company's.

3. Save the file

4. Run 'GT_SyncCustomerbatch' with Run as Administrator which will import Customer's data from Sage Intacct to Sage CRM.