User Guide

GUMU™ FOR SAGE CRM – SAGE INTACCT INTEGRATION

Contents

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.

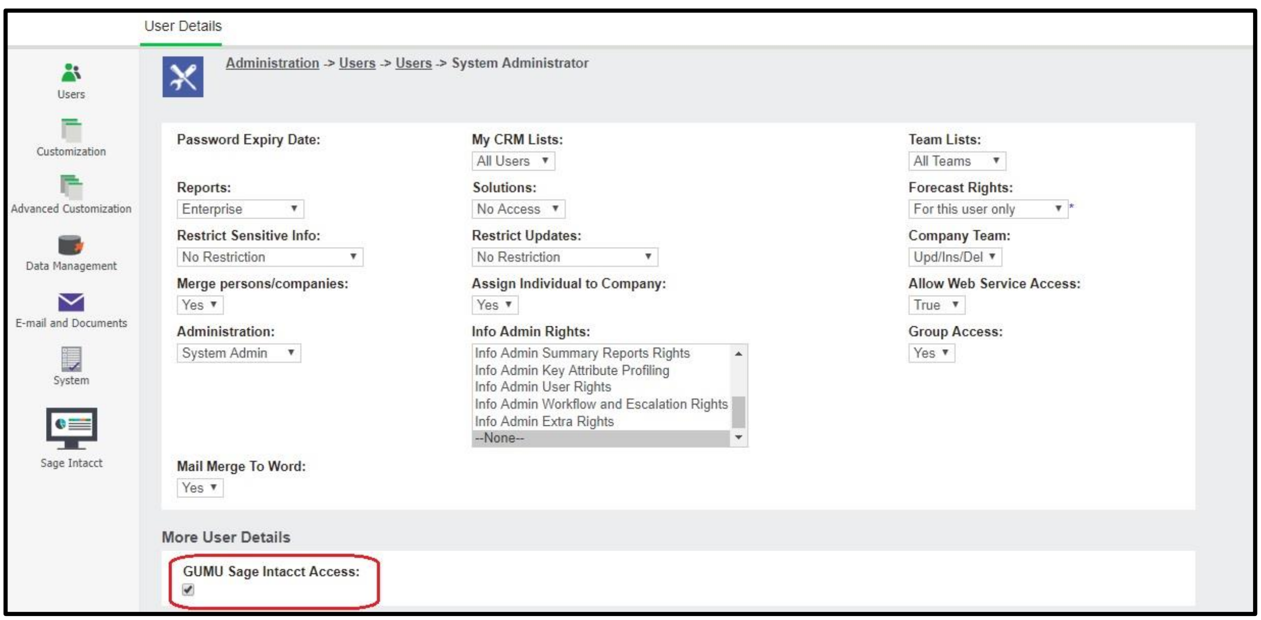
For example, if you have purchased total 5 user license from Greytrix for GUMU™ integration then you will have to enable access for those 5 users as given below.

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.

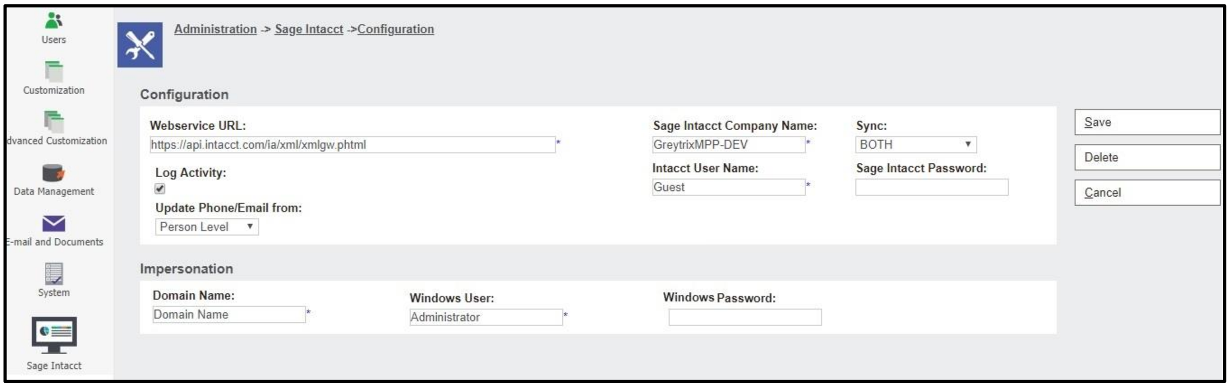


GUMU™ Configuration with Sage Intacct Company

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

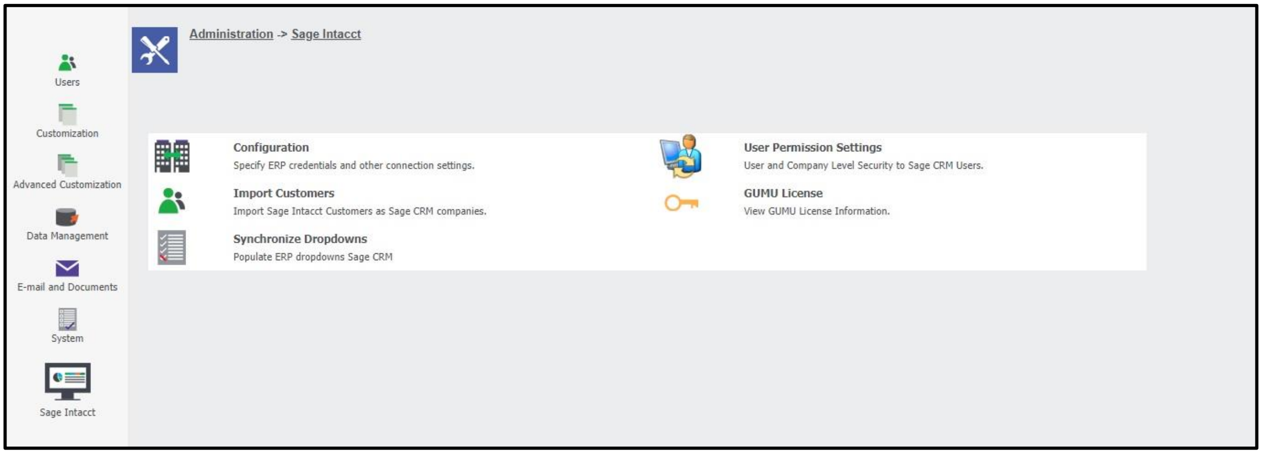
User Permission Settings

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.

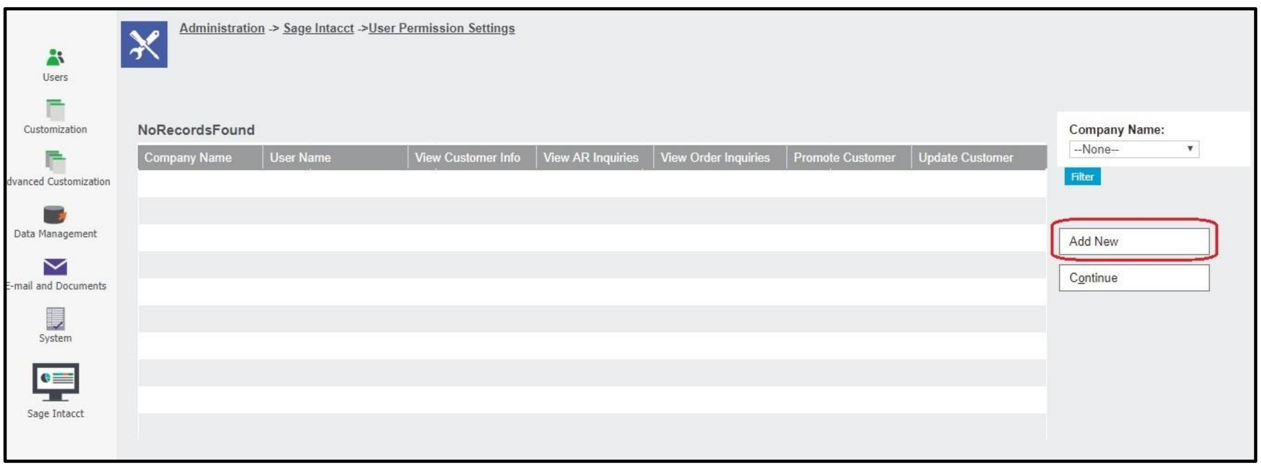
1. View Customer Info
2. View AR Inquiries
3. View Order Inquiries

4. Promote Customer
5. Update Customer

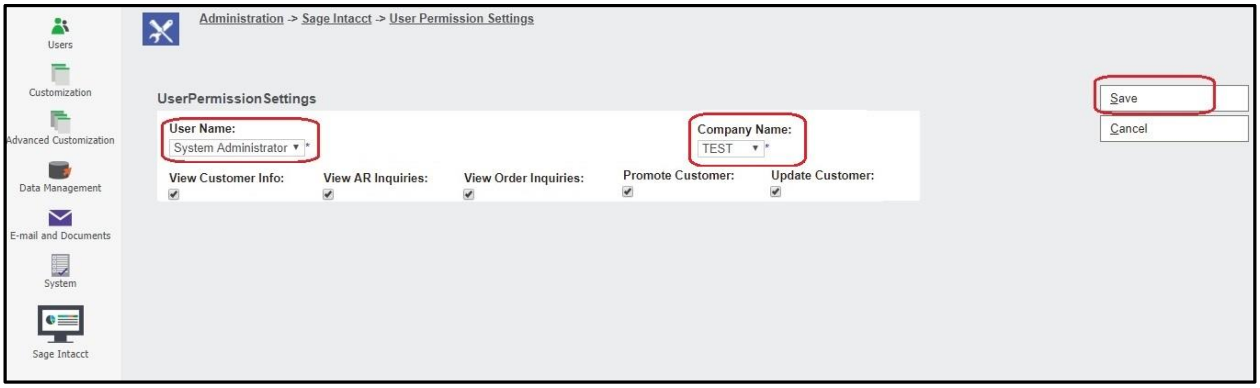
Sage CRM System Admin user can access this setting by navigating to below path in Sage CRM, **Administration**-> **Sage Intacct**-> **User Permission Settings**



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.

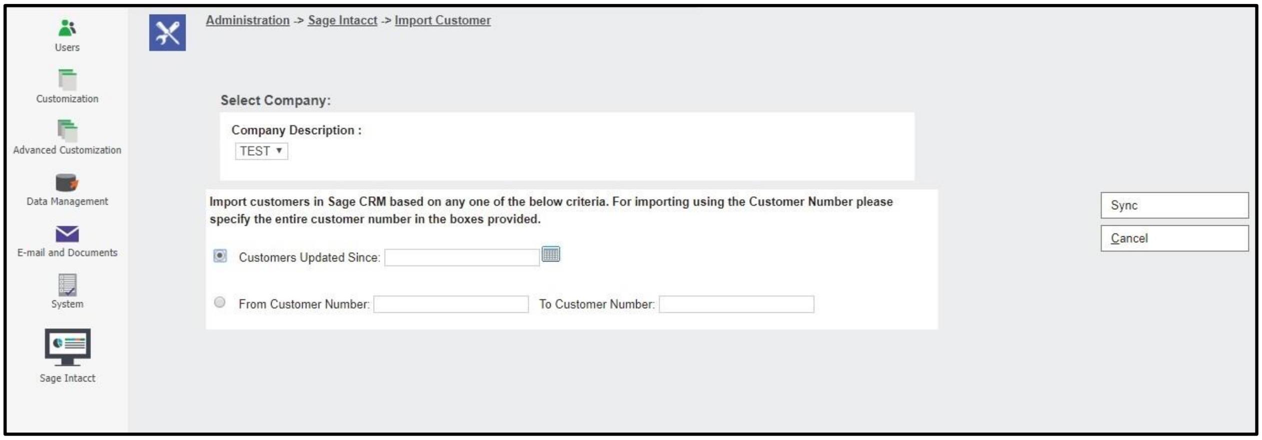
Import Customers from Sage Intacct to Sage CRM

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.

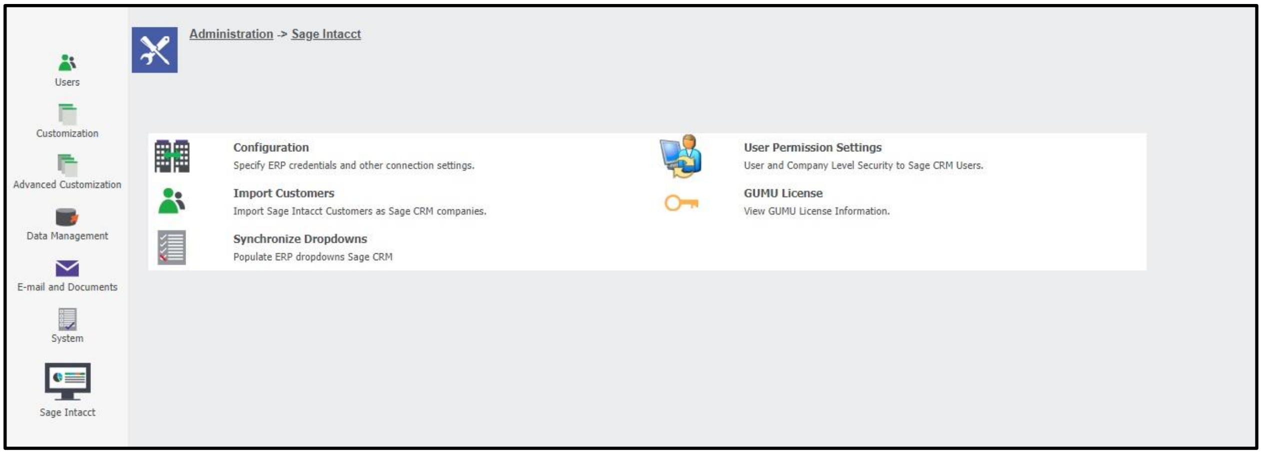
2. **Customer Number: -** User can also synch customers by specifying a particular range of customer numbers in **From** and **To** field.

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

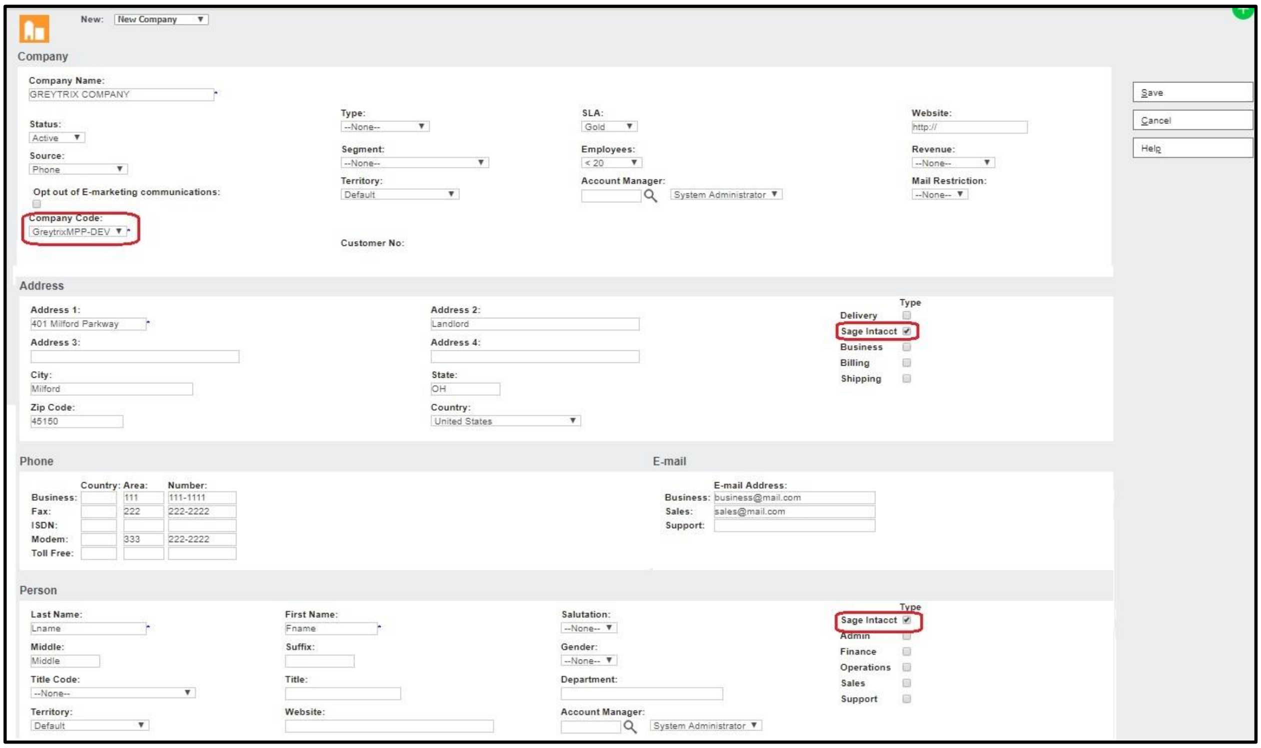
Chapter 2: Working with Customers

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

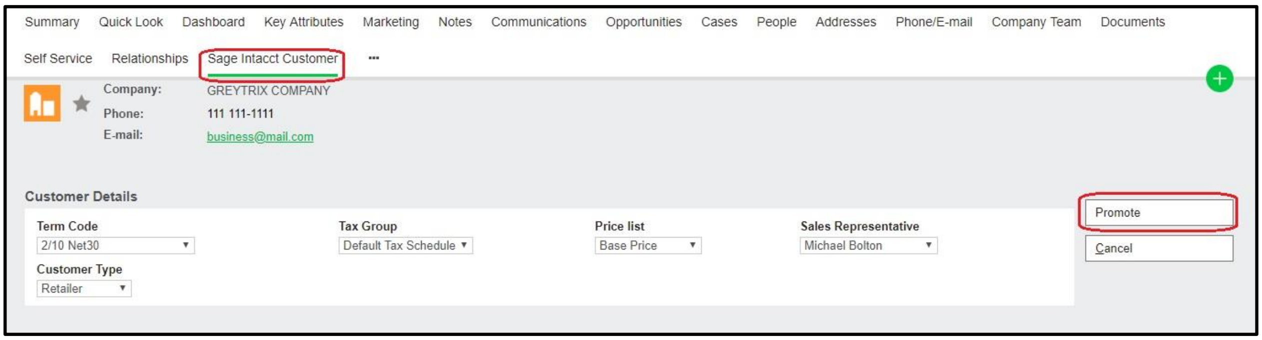
6. Enter below details into Person Panel. This will be set as the customer's default Contact.

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.

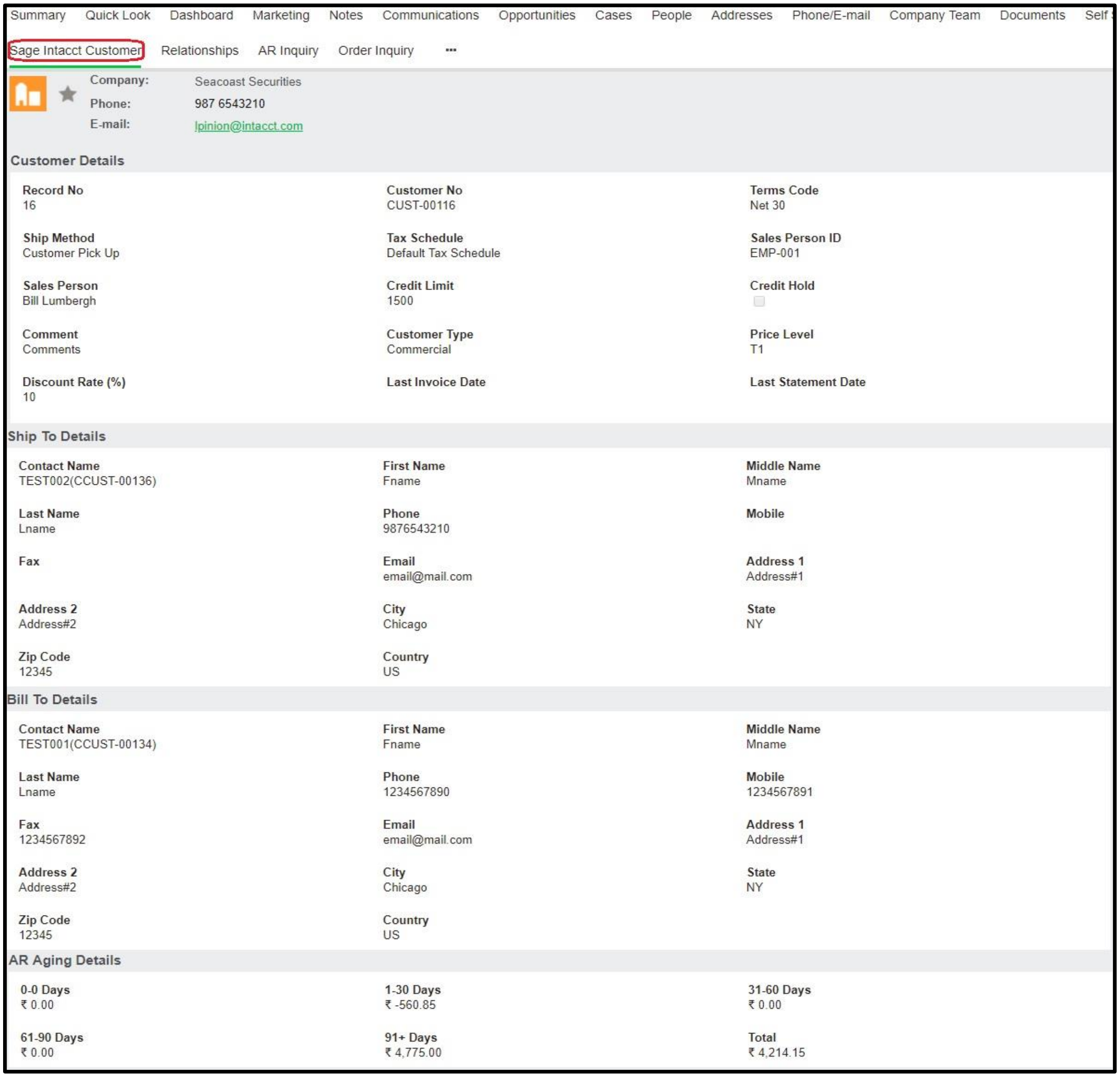
8. Once Customer is saved, click on **Sage Intacct Customer** tab. Select the values for other fields like Terms Code, Tax Group, etc. The user will be able to see **Promote** Button. Click on that **Promote** button. Once the customer is promoted you will receive a message that it is successfully promoted.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



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.



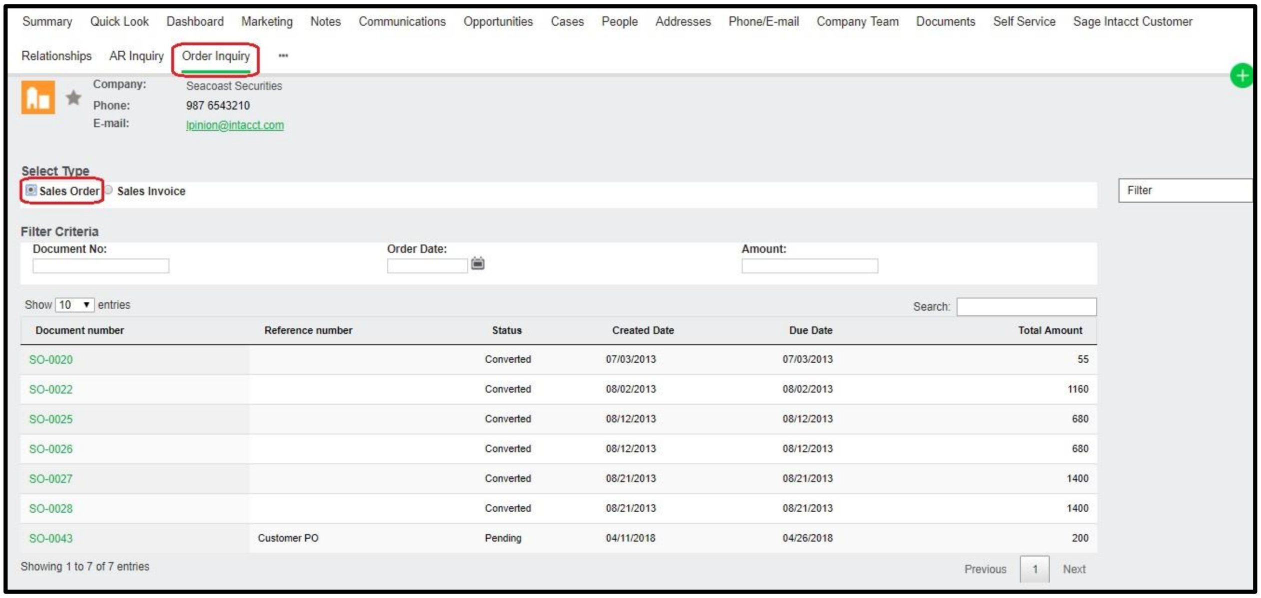
Viewing all the List of Order info for a Customer

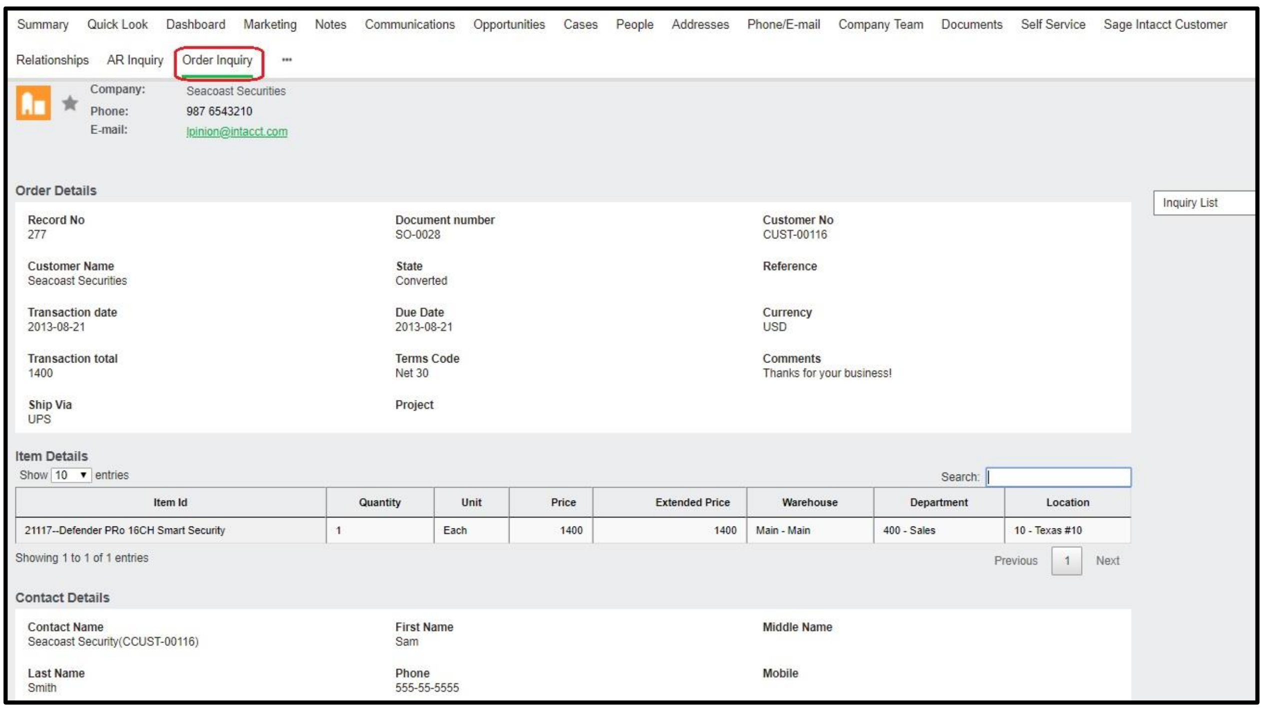
To view Order inquiry for a customer:-

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.

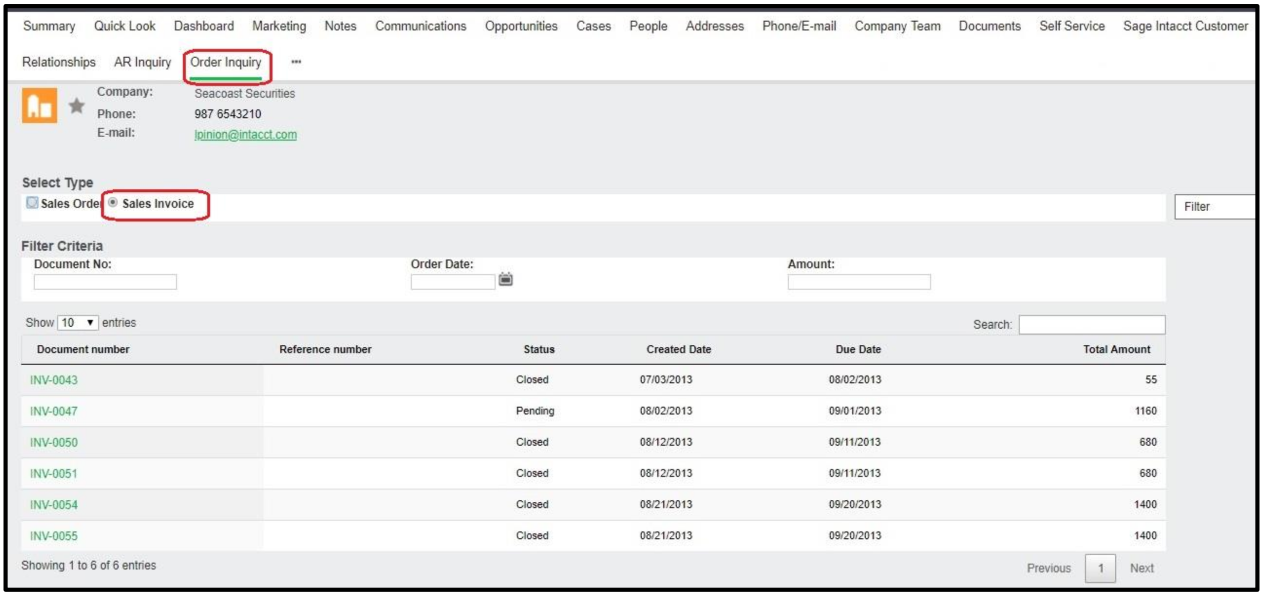
5. The user can drill down further to view order details and line item details for a particular order.

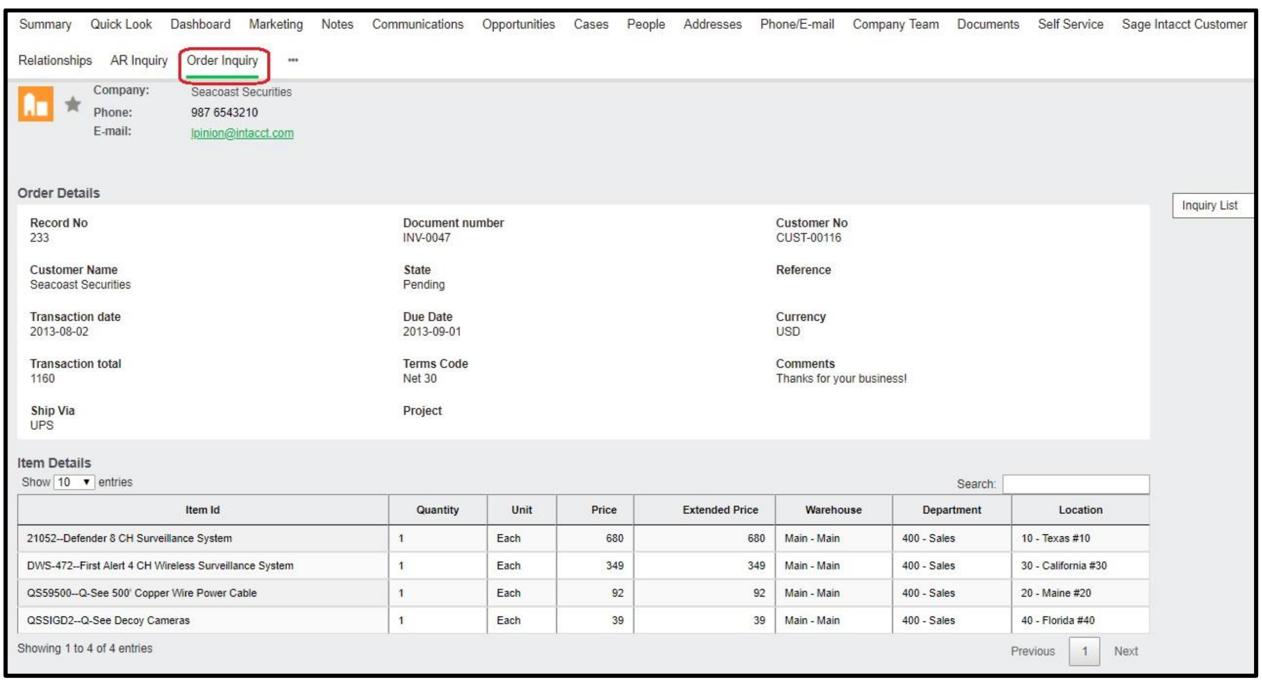
Sales Order and its details





Sales Invoice and it's details





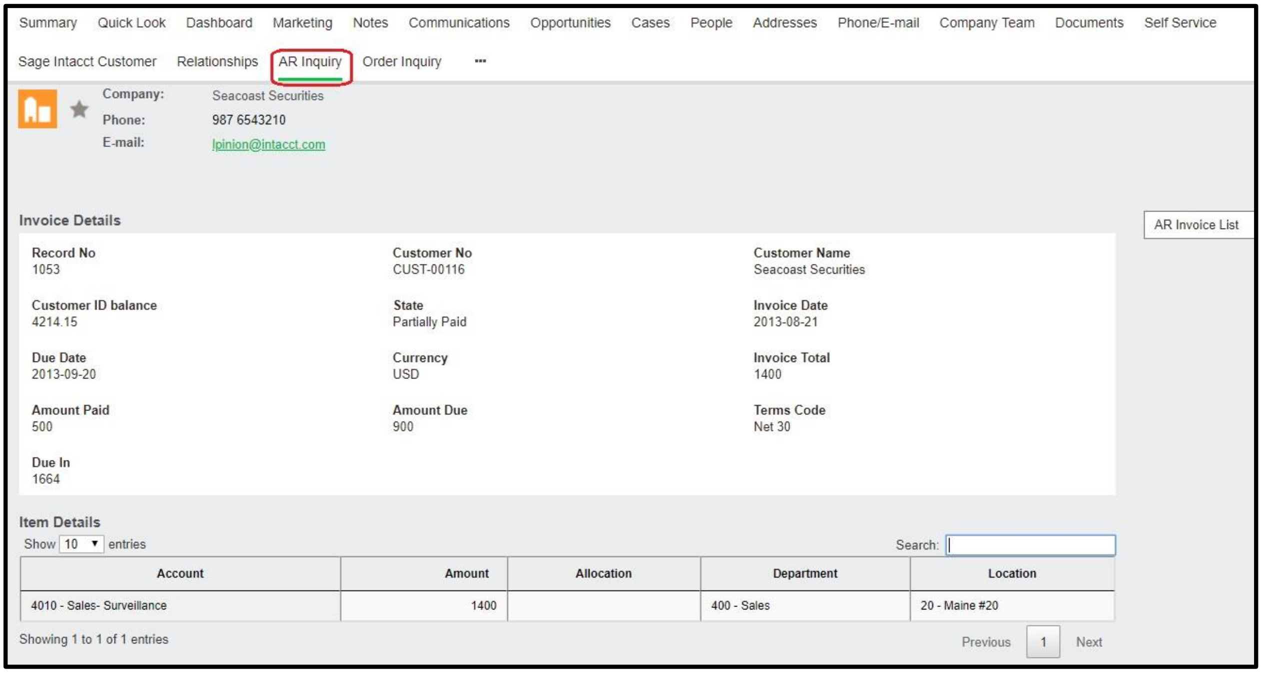
Viewing all the List of AR Invoices for a Customer

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.



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.