



GREYTRIX
NON ARTIFICIAL INTELLIGENCE

Installation Guide

GUMU™ FOR SAGE CRM – SAGE INTACCT INTEGRATION



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Chapter 1: Pre-requisites

Pre – Requisites for installing GUMU™ (New Installation)

1. Operating System Requirements

GUMU™ setup should be installed on a Windows system, where Sage CRM can be installed. However following versions of Operating systems are preferred or as supported by Sage CRM.

- Windows Server 2003
- Windows Server 2008
- Windows 8
- Windows 8.1
- Windows Server 2008 (R2)
- Windows Server 2012 (R2)

➤ *Browser - Supports the latest version of Google Chrome and Internet Explorer.*

2. Version Compatibility

GUMU™ for Sage CRM – Sage Intacct integration is currently compatible and tested with following versions of Sage CRM.

- Sage CRM (Version 2017 R1/R2/R3, 2018 R1/R2/R3)

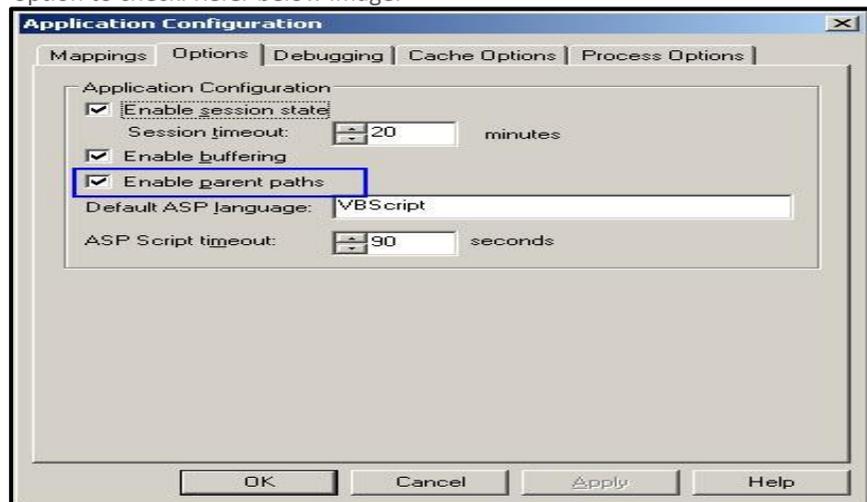
Note: If you have Sage CRM versions other than mentioned above, you can contact us at sage@greytrix.com

3. Pre-requisites

1. Please make sure that Sage Intacct URL is accessible from Sage CRM server.
2. **Backup of Complete Sage CRM:-**
Take a backup of Sage CRM database and complete Sage CRM installation directory.
3. **Configure IIS:-**
 - a. **For Configuring IIS versions before 6.0.**
 - Select Start | Settings | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
 - Click on Web Services Extensions folder, you will see a list on the left-hand side. When you initially install IIS, the services installed are in a highly secure and "locked" mode. By default, IIS serves only static content meaning features like ASP, ASP.NET, Server-Side and FrontPage Server Extension do not work unless enabled. If you do not enable this functionality after installing IIS, IIS returns a 404 error. Refer the below image.

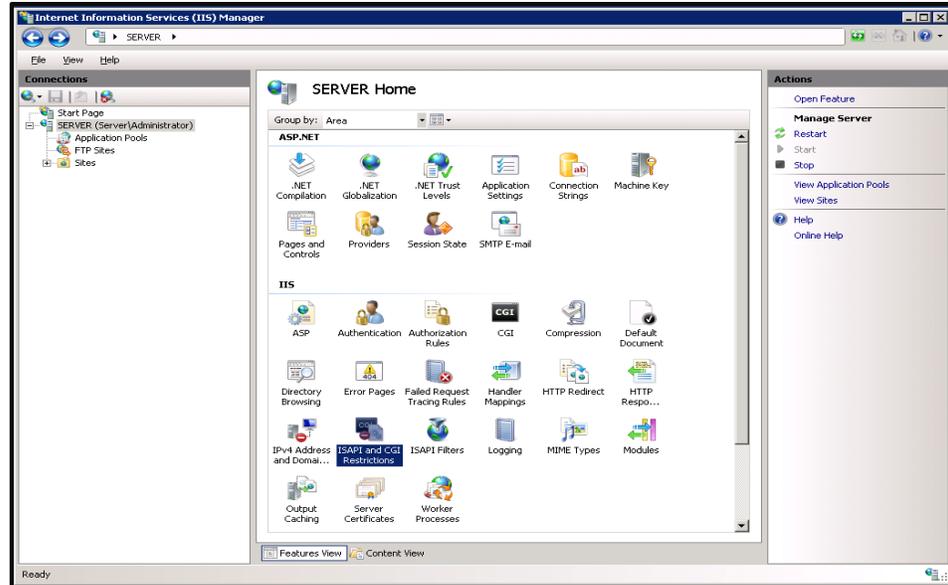


- Select all unknown ISAPI Extensions from the Web Services Column and select the allow button.
- Also, select the Active Server Pages and click the allow button.
 - Enable parent paths
 - Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
 - In IIS Manager, Go to default Web site properties by simply click the right mouse button and click Properties.
 - In Default Website properties window, click on “Home Directory” tab.
 - In “Home Directory” tab click on “Configuration” button.
 - In Configuration screen, click on Options tab and set the Enable Parent Path option to check. Refer below image.

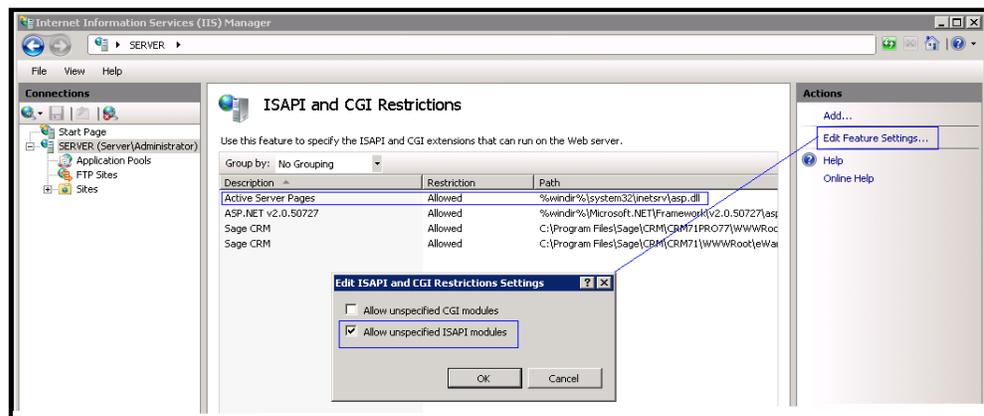


b. Configure IIS version 6 or above

- Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager.
- Click on to the Internet Information Service Manager (IIS) Manager| Server (Server\Administrator) | ISAPI and CGI Restrictions.

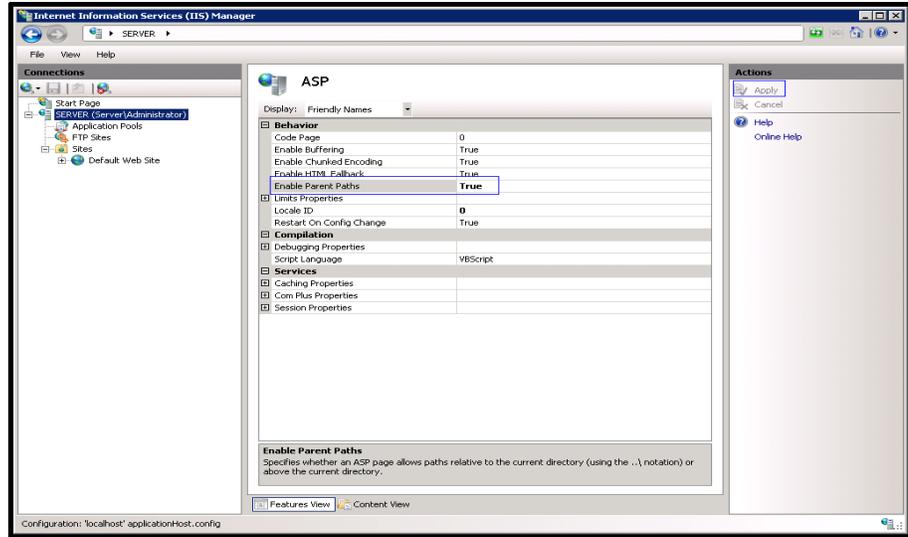


- Click on ISAPI and CGI Restrictions, allow access to Active Server pages, and Allow unspecified ISAPI modules. When you initially install IIS, the service is installed in a highly secure and "locked" mode. By default, IIS serves only static content meaning features like ASP, ASP.NET, Server-Side and FrontPage Server Extension do not work unless enabled. If you do not enable this functionality after installing IIS, IIS returns a 404 error. Refer the below image.



➤ **Enable parent path**

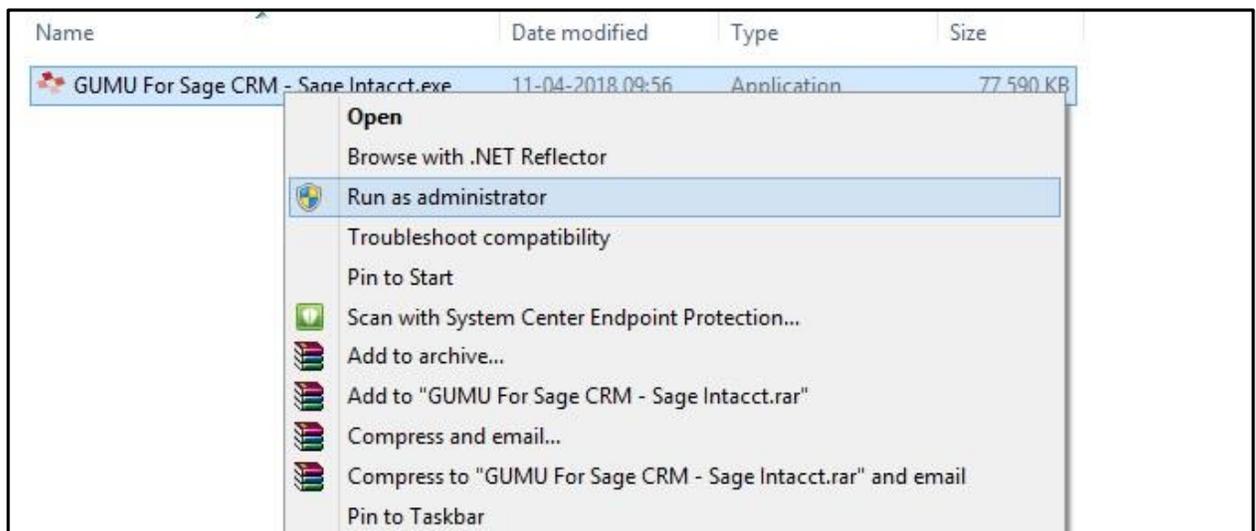
- Select Start | Control Panel | Administrative Tools | Internet Information Services IIS Manager. You can even do this by clicking your Windows Start button and entering "inetmgr" into the search box. Then press enter.
- On the Connections pane, expand the server node and select your site from underneath "Sites."
- On the Features view, double-click "ASP."
- Change "Enable Parent Paths" to "True."
- Under the Actions pane, click "Apply."



Chapter 2: GUMU™ Setup Installation

Installing GUMU™ Integration setup on Sage CRM server

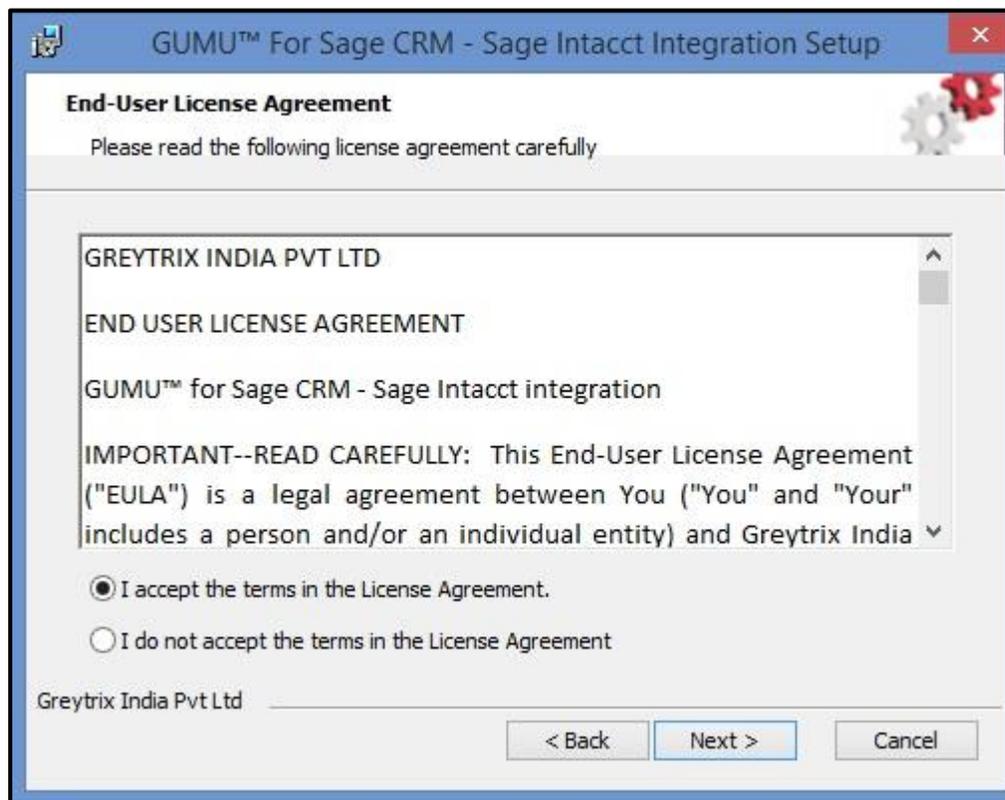
1. Download the GUMU™ integration setup from our website.
2. This setup has to be installed on the Sage CRM server.
3. Please login to Sage CRM server as a Domain Administrator.
4. Click on the GUMU™ Integration setup and run the setup with “Run as Administrator” option on Sage CRM server.



5. Setup will be launch. Click on the **NEXT** button to proceed further.



6. Click on 'Next' button to accept the terms in License Agreement.



7. Select the Sage CRM Instance name from the list of available Sage CRM instances. Kindly enter correct system admin level Sage CRM username and password along with Domain Administrator level Windows user and password. Click **NEXT**.

GUMU™ For Sage CRM - Sage Intacct Integration Setup

Sage CRM Instance
Select Sage CRM instance

Select the Sage CRM instance, to install GUMU™ Integration on.

Select Sage CRM Instance: CRM2018R1

Sage CRM User: admin

Sage CRM User Password:

Sage CRM Windows Server Administrator User Detail For Impersonation:

Windows Domain Name: Domain Name

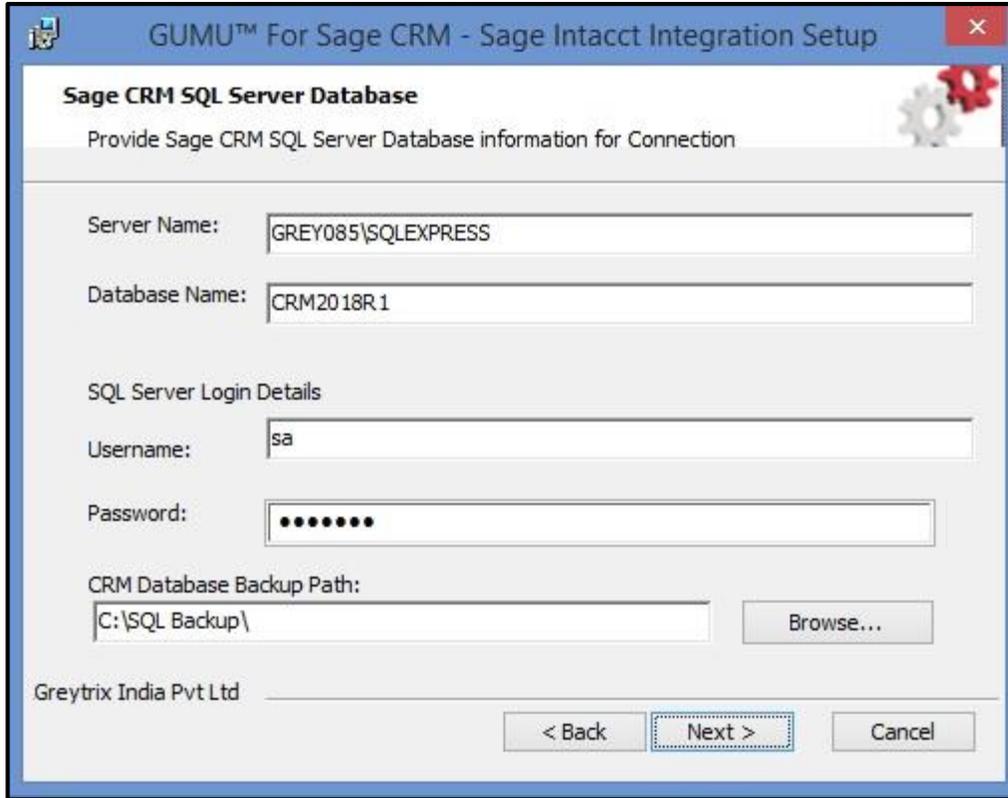
Windows Domain User: Windows User

Windows Domain Password:

Greytrix India Pvt Ltd

< Back Next > Cancel

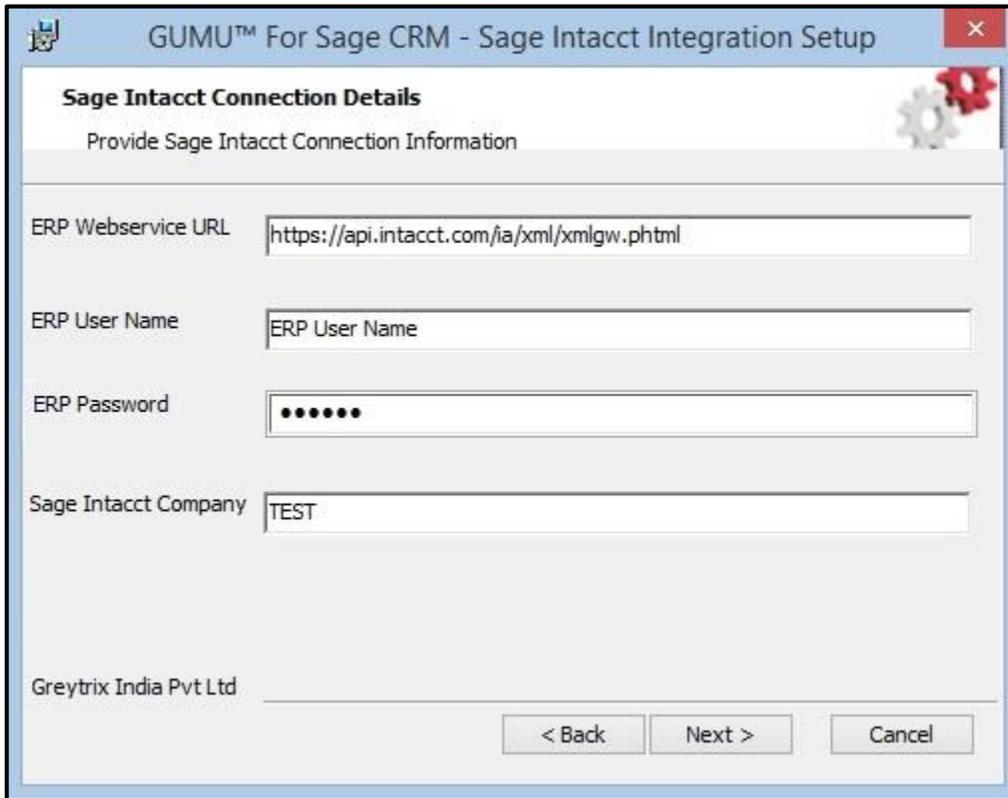
8. Enter the Sage CRM SQL Server Instance name, Sage CRM SQL Database Name and Sage CRM SQL Server Credentials. Also, browse the path where you want to keep Sage CRM database backup. This will take the backup of your Sage CRM Database at the specified location.



The screenshot shows a Windows-style dialog box titled "GUMU™ For Sage CRM - Sage Intacct Integration Setup". The main heading is "Sage CRM SQL Server Database" with a sub-heading "Provide Sage CRM SQL Server Database information for Connection". The form contains the following fields and controls:

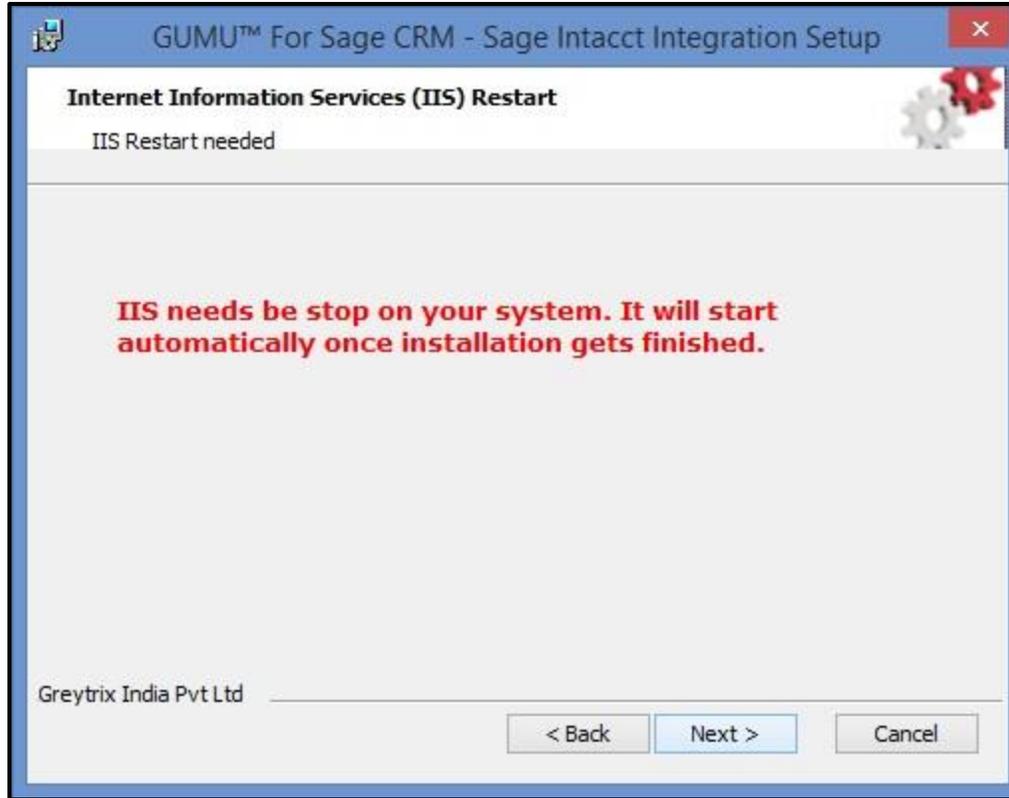
- Server Name:
- Database Name:
- SQL Server Login Details section:
 - Username:
 - Password:
- CRM Database Backup Path:
- Footer: Greytrix India Pvt Ltd
- Navigation buttons: < Back, Next > (highlighted with a dashed border), Cancel

9. Enter the Sage Intacct credentials (Case Sensitive) along with Sage Intacct Company Name. Click 'Next' to proceed further.



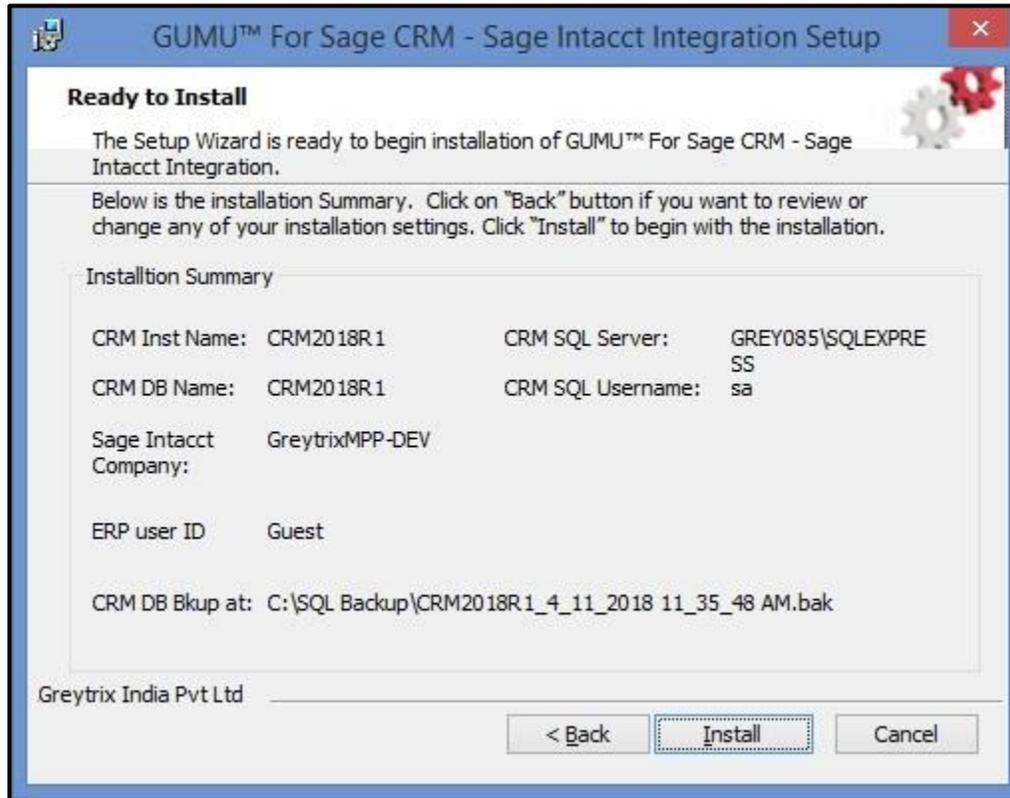
The screenshot shows a Windows-style dialog box titled "GUMU™ For Sage CRM - Sage Intacct Integration Setup". The window has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is a header section with the text "Sage Intacct Connection Details" and a sub-header "Provide Sage Intacct Connection Information". To the right of the sub-header is a gear icon. The main area of the window contains four input fields: "ERP Webservice URL" with the value "https://api.intacct.com/ia/xml/xmlgw.phtml", "ERP User Name" with the value "ERP User Name", "ERP Password" with masked characters "•••••", and "Sage Intacct Company" with the value "TEST". At the bottom left, there is a text field containing "Greytrix India Pvt Ltd". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

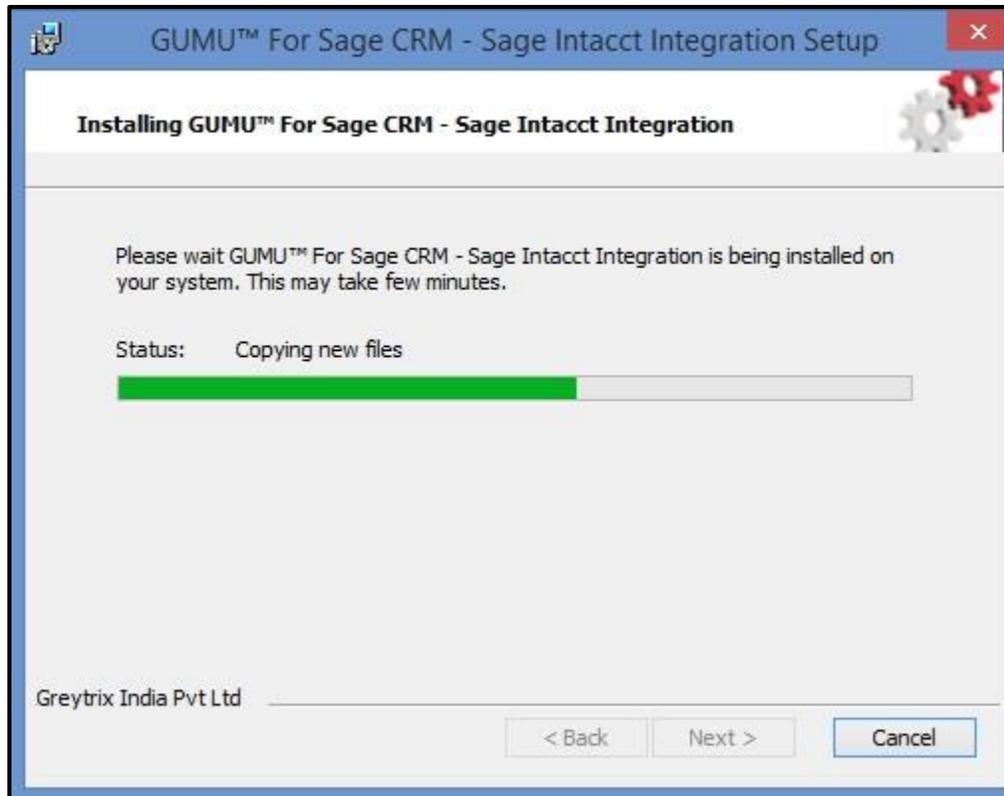
During the installation, IIS needs to restart. Click on 'Next' button to proceed with IIS reset part and it will start automatically once installation gets finished.



Now, the GUMU™ Integration is ready to get installed on the Sage CRM Server. Please verify all the details you entered and Click on 'Install' to start the installation.

Please note that it will also install components in Sage CRM which will create fields and scripts require for GUMU to work.





```
C:\WINDOWS\system32\cmd.exe
"C:\Program Files (x86)\Greytrix\GUMU for Sage CRM - Sage Intacct\EncodeDecodePass.dll"
Microsoft (R) .NET Global Assembly Cache Utility. Version 4.0.30319.33440
Copyright (c) Microsoft Corporation. All rights reserved.

C:\Program Files (x86)\Greytrix\GUMU for Sage CRM - Sage Intacct>cd C:\Windows\Microsoft.NET\Framework\v4.0.30319

C:\Windows\Microsoft.NET\Framework\v4.0.30319>regasm "C:\Program Files (x86)\Greytrix\GUMU for Sage CRM - Sage Intacct\SageIntacct.dll" /codebase
Microsoft .NET Framework Assembly Registration Utility version 4.0.30319.33440
for Microsoft .NET Framework version 4.0.30319.33440
Copyright (C) Microsoft Corporation. All rights reserved.

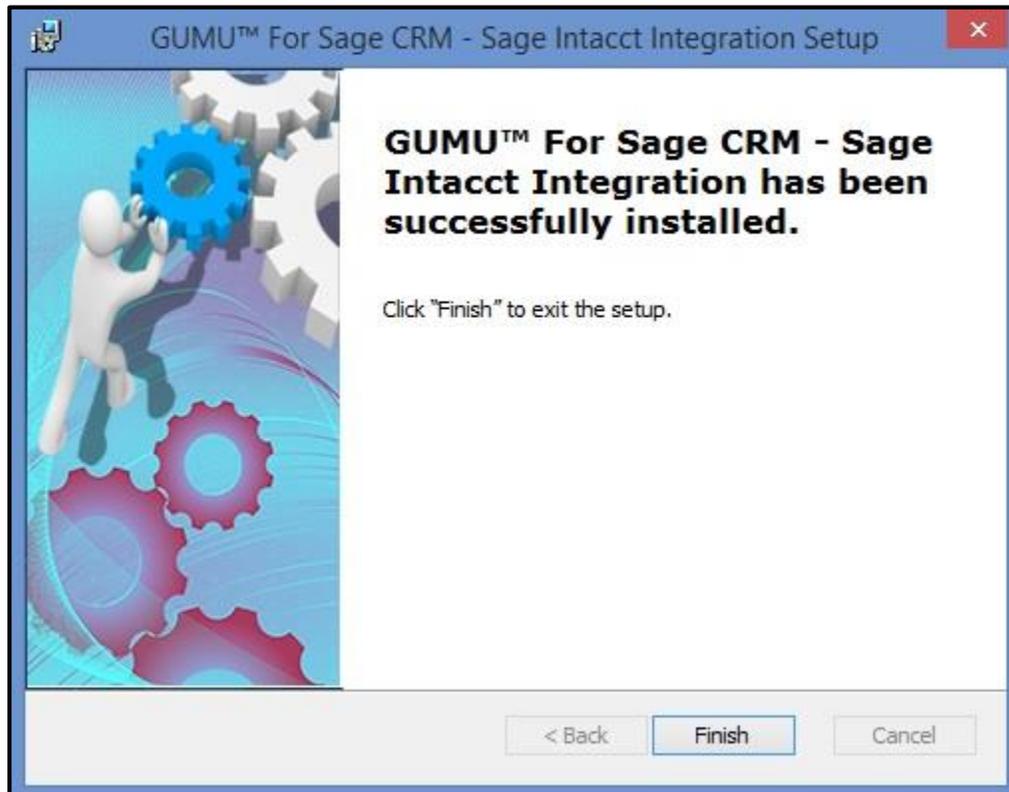
Types registered successfully

C:\Windows\Microsoft.NET\Framework\v4.0.30319>regasm "C:\Program Files (x86)\Greytrix\GUMU for Sage CRM - Sage Intacct\EncodeDecodePass.dll" /codebase
Microsoft .NET Framework Assembly Registration Utility version 4.0.30319.33440
for Microsoft .NET Framework version 4.0.30319.33440
Copyright (C) Microsoft Corporation. All rights reserved.

Types registered successfully
```



Click on 'Finish' to exit the Setup wizard.



Note: - Please note that this setup will install the Trial version of GUMU™ Sage CRM – Sage Intacct integration. You will have to contact to Greytrix to get the license key for the complete version of integration.

For Configuring GUMU™ from Sage CRM, kindly refer User Guide.

Chapter 3: Webservice User Authorization Setting

Our GUMU™ Integration use Webservice User ID for accessing Sage Intacct data which is a pre-requisite for GUMU™ Integration. For this every Sage Intacct company will have to add Greytrix Webservice User ID i.e. **GreytrixMPP** in Sage Intacct, kindly follow below steps -

1. Go to **Company > Company Info > Security tab**, then click Edit. Refer below screenshot,



2. In the Web Services authorizations section, click the + icon above the top-right corner of the table. Refer below screenshot,

Web Services authorizations			
SENDER ID	DESCRIPTION	STATUS	
1 ajax	Automatically added based on historical Web Services activity	Active	
2 GreytrixMPP	Automatically added based on historical Web Services activity	Active	
3 intacct_tstools	Automatically added based on historical Web Services activity	Active	
4 sfdc_prod_v2	Automatically added for use by the Advanced CRM Integration subscription	Active	
5 silverware	Automatically added based on historical Web Services activity	Active	

3. On the Web Services Sender Information pop-up, enter a **Sender ID as GreytrixMPP**.
Note - Sender IDs are case sensitive and cannot be changed after the authorization is added.
4. Optionally, add a Description for the sender.
5. Make sure the status is set to **Active**. Inactive sender IDs aren't able to make Web Services requests to your company.
6. Click **Save**.

Once Webservice User is authorized, the user can now access Sage Intacct Company data which can use for GUMU™ Integration.