

# 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.

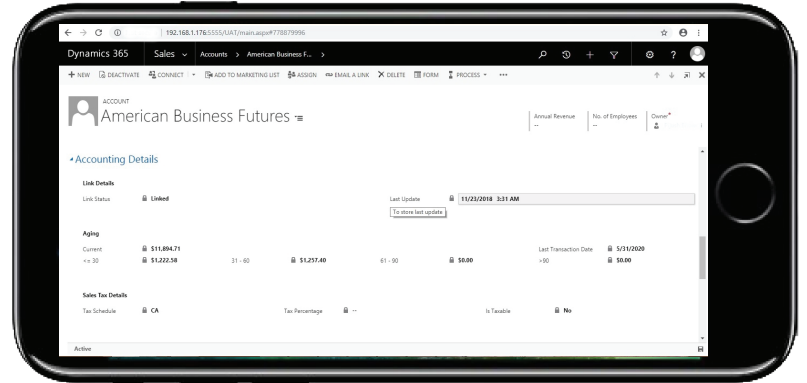
The screenshot shows the Sage ERP Customer interface for 'Customer Maintenance (ABC) 11/22/2018'. The customer name is 'American Business Futures' (ID: 01-ABF). The address is 2131 N. 14th Street, Suite 100 123, Accounting Department 01, Milwaukee, WI 53205-1204. The salesperson is Shely Westland (ID: 0200). The primary contact is John Quinn (ID: JOHN QUINN). The primary ship-to is American Business Futu (ID: 1). The terms code is 01 (Net 30 Days). The tax schedule is CA (California). The credit limit is 126,000.00. The email address is arlie1234@sage.sample.com and the URL address is www.abf.com.

The screenshot shows the MS Account interface for 'American Business Futures'. The account name is 'American Business Futures' (ID: ABF). The email is arlie@sample.com. The phone is (414) 555-4789-221. The website is http://www.abf.com. The parent account is ... The ticker symbol is ... The sales person is 01-0200. The address is 2131 N. 14th Street, Suite 100 123, Accounting Department 01, Milwaukee, WI 53205-1204, USA.

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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.

Name	Status	Reason	Total Amount	Customer	Email (Customer)
0000212	New		\$781.23	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