

**PRE-INSTALLATION CHECKLIST FOR  
GUMU™ Salesforce Integration to Sage Intacct**

Today's Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

**\*Note: there are 2 sections within this checklist, which may require info from 2 different contacts.**

**Section 1 – REQUIRED INFORMATION FROM YOUR SALESFORCE ADMINISTRATOR**

Ultimately, we will need user access to your Salesforce instance. However, in advance of creating a Salesforce user for us to use when configuring the integration, please be aware of the following:

- Create the username **gumu.#comp\_name#@greyrtix.com** (where #comp\_name# = your company name) with the email address **salesforce@greytrix.com** for the user in Salesforce OR you can provide us with one for an existing user (this user needs to have full Admin and Developer rights).
- This user will always be used for the integration. The user you provide doesn't need to be a dedicated user for the integration, however the user does require "Admin" level privileges for installing the GUMU™ connector from the Salesforce App Exchange.
- This integration does not consume a Salesforce user license.
- In a typical setup, we map Sage Intacct Salesperson codes to Salesforce users. In the absence of a corresponding Salesforce user to a Sage Intacct Salesperson code, the value that will display in Salesforce will be this Salesforce user that was created for the integration.
- When we install the integration, we will first do this on a Salesforce Sandbox instance. If you have created a sandbox for us already, please provide answers below, but if you have not yet done this and you want us to do this, we can.

1) Salesforce Access Credentials:

a) Production username: \_\_\_\_\_

b) Production password: \_\_\_\_\_

2) Salesforce Sandbox Credentials:

a. Sandbox username: \_\_\_\_\_

b. Sandbox password: \_\_\_\_\_

c. Sandbox Security Token: \_\_\_\_\_

d. No Sandbox, please create

- 3) Disabling MFA for the Greytrix team: To avoid the generation of verification code every time Greytrix logs in, please configure our IP to your Salesforce account by following these steps:
- Login to Production/Sandbox Salesforce Org.
  - Go to Setup → Administration Setup → Security Controls → Network Access.
  - Click on the 'New' button.
  - Enter our IP address (**49.248.14.234**) in both the 'Start' and 'End' IP address fields.
  - Save the record.

\*Here is a [60-second video covering the steps above](#). Please confirm #3 has been completed

- 4) Customer Salesforce Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

## Section 2 - REQUIRED INFORMATION FROM SAGE INTACCT PARTNER

- We will use this Sage Intacct Web service URL: <https://api.intacct.com/ia/xml/xmlgw.phtml>
- Sage Intacct user (normal user): \_\_\_\_\_ password: \_\_\_\_\_  
This user is used for testing purposes only when the integration team is configuring the GUMU. This user account can be disabled once we have completed testing.
- Sage Intacct Sender ID: \_\_\_\_\_ Sender ID password: \_\_\_\_\_
  - For #3 the Sage Intacct Sender ID and Sender password, an Intacct web-developer license is required, and the client must use their own Sender ID. This Sender ID is what is used for API calls. This web-developer license must be purchased as part of the client's Intacct subscription.
  - Additionally, you will need to authorize this Sender ID and Sender Password within Sage Intacct. [Sender ID Web service authorization - GREYTRIX](#) Has this been completed?
- Intacct Web Service User ID: \_\_\_\_\_ Web Service Password: \_\_\_\_\_
  - For #4, The Sage Intacct User ID is the web services user defined in Sage Intacct. So, a web services user must be created in Intacct and shared with us. For the web services user, please set up the User ID / Username as **GUMU / GUMUuser** [Create Web service user - GREYTRIX](#)
- Sage Intacct company code: \_\_\_\_\_
- Sage Intacct Contact: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone: \_\_\_\_\_

Please email the completed form to your My CRM Manager Project Manager