

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).
- Keep in mind whichever user we are assigned to configure the integration, that user will also be configured for scheduled imports. As a result, any new or existing records imported from Sage into Salesforce will display this user as the 'Last Modified By'. For example, if you give us a Salesforce user for 'Bob Smith' (with System Administrator rights), then you will see the 'Last Modified By' as Bob Smith. For this reason, we recommend assigning a user to us who does not actively create or update records.
- 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. What edition of Salesforce do you use?

Professional

Enterprise

Unlimited

2. Salesforce Access Credentials:

a. Production username: _____

b. Production password: _____

3. Salesforce Sandbox Credentials:

- a. Sandbox username: _____
- b. Sandbox password: _____
- c. Sandbox Security Token: _____
- d. No Sandbox, please create

4. 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:

- a. Login to Production/Sandbox Salesforce Org.
- b. Go to Setup → Administration Setup → Security Controls → Network Access.
- c. Click on the 'New' button.
- d. Enter our IP address (**49.248.14.234**) in both the 'Start' and 'End' IP address fields.
- e. Save the record.

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

5. Customer Salesforce Contact: _____

Email Address: _____ Phone: _____

Section 2 - REQUIRED INFORMATION FROM SAGE INTACCT PARTNER1. We will use this Sage Intacct Web service URL: <https://api.intacct.com/ia/xml/xmlgw.phtml>

2. 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.

3. 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](#)
Please confirm this has been completed

4. 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](#)



GREYTRIX

sage Intacct



5. Sage Intacct company code: _____

6. Sage Intacct Contact: _____

Email Address: _____ Phone: _____

Please email these 2 completed sections to your My CRM Manager Project Manager