PRE-SALES SCREENING QUESTIONNAIRE FOR
GUMU™ Salesforce Integration to Sage Intacct

The purpose of this pre-screening checklist is to minimize surprises. Please note that this checklist is constantly evolving and that some questions may appear similar in different sections. Some of these questions are followed by an asterisk (*) because they may require additional effort.

Today's Date: _____

Company Name: _____

SECTION 1 – GENERAL INFO

Different companies leverage the GUMU™ in different ways. It's important to know the options you have and for the CRM team to understand the nuances of your Salesforce and Sage systems.

1. How long have you used Salesforce for? _____

2. Do you have a Salesforce consultant? _____
   Yes   No

3. What type of synchronization would you prefer for your integration?
   - ERP to Salesforce (ERP → SF)
   - Salesforce to ERP (SF → ERP)
   - Both

4. Do you have multiple Sage Intacct databases that need to be linked to Salesforce?* Please list the company codes below:
   _____

5. Do you use multiple locations within each Intacct company code?
   Yes   No

   If yes, please list the location IDs and names that Salesforce will need to push or pull data for. The GUMU™ allows us to promote customers into specific locations.

   _____
   _____
   _____

6. What is your vision for leveraging the GUMU™ integration?

_____

_____

_____

SECTION 2 - HISTORICAL DATA

Some organizations we work with are new to Salesforce. Others have been using Salesforce and have historical information (customers, orders, invoices, etc.) to connect with Sage data.

7. Do you have existing data in your Salesforce environment that you want to link to Sage records?*

Yes   No   Unsure

    a. If yes, we need to know exactly what fields and objects you are currently using so that we can map them for integration. Just let us know if this applies and we will give you a template.

       Yes, send template   No, not applicable

    b. Is there any specific criteria or conditions that need to be considered for linking the records? (e.g., matching only active records, specific date ranges, etc.)

       Yes   No   Unsure

       Please list the criteria/conditions:

_____

_____

_____

8. How many additional custom fields need to be added? We will provide you with a spreadsheet of the GUMU™'s standard linked fields and objects. If you need additional fields mapped, we will need you to append this spreadsheet.*

    a. Do you want us to send you the spreadsheet?   Yes   No

    b. Do these fields already exist in Salesforce?   Yes   No

    c. Who will map these fields?   Your Team   Greytrix

9. Select the Customers you want imported from Sage Intacct to Salesforce

Active   Inactive   Temporary   All

10. Do you have Vendors in Sage Intacct that will be imported to Salesforce?*

Yes   No   Unsure

11. Do you have Products in Sage Intacct that will be imported to Salesforce?

Yes   No   Unsure

    a. How many Products do you currently have in Sage Intacct? _____

    b. How often do you add new Products (i.e. daily, weekly, monthly, rarely)? _____

12. By default, the GUMU™ allows users to see order and invoice history that exists in Sage Intacct within the context of an individual account record. These features display real-time data from Sage Intacct, however, the data for those records does not exist inside of Salesforce. A common request is for us to pull order or invoice data into Salesforce so that it can be used globally for viewing and reporting purposes. To accomplish this, new Salesforce objects must be created and then we can configure the GUMU™ to pass data to these new objects.*

    a. Is this important to you?

      Yes   No   Unsure

    b. If yes, please describe:

      _____

      _____

      _____

    c. If yes, who will create these objects?   Your Team   Greytrix

13. In past projects with Sage Intacct, we have created Intacct projects from Salesforce opportunities. Does this apply to your company?*

Yes   No   Unsure

SECTION 3 - QUOTES, ORDERS & PRICING

A popular function of the GUMU™ is to accommodate order processing within Salesforce. This eliminates duplicate entry and reduces the need for non-accounting staff to access Sage Intacct directly. However, this often leads to adjusting the GUMU™ to match the existing order entry requirements.

14. Do you intend to create quotes from Salesforce that leverage Sage products and pricing?

Yes   No   Unsure

15. Do you intend to promote Quotes from Salesforce to Sage?

Yes   No   Unsure

16. Do you intend to create Orders from Quotes?

Yes   No   Unsure

17. Do you intend to promote Orders from Salesforce to Sage?

Yes   No   Unsure

    a. If yes, are there are any automated procedures that would convert the Salesforce order to Sage Intacct's order module automatically?*

_____

_____

_____

18. Do you intend to create direct Orders?

Yes   No   Unsure

19. Will pricing be determined within Salesforce when adding products to orders, or should it be sourced from Sage ERP?

Yes   No   Unsure

20. Are you using a custom Pricebook?

Yes   No   Unsure

21. Does your Salesforce Org use multiple Pricebooks?

Yes   No   Unsure

22. Do you have any special pricing or discounting within Sage?   Yes   No

If yes, please describe:

_____

_____

_____

SECTION 4 - SALESFORCE CONFIGURATION

23. Is your Salesforce environment configured for multiple currencies?

Yes   No   Unsure

24. Does your Salesforce instance operate with advanced and dated currency exchange rates?*

Yes   No   Unsure

25. Is the State and Country/Territory picklist functionality enabled within your Salesforce environment?

Yes   No   Unsure

26. Is Salesforce CPQ enabled within your environment?*

Yes   No   Unsure

a. If yes, for Quote generation and Special Pricing automation?

Yes   No   Unsure

SECTION 5 - GUMU™ CONFIGURATION

The GUMU™'s configuration settings allow different users to have different rights. It's here where we determine what information is synchronizing between both systems and how often.

27. Which profile(s) should be assigned the following rights?

Username or SF Profile	GUMU™ Settings	ERP Details	Promote Customer	Promote Order	Promote Quote	Update Customer
System Administrator	✓	✓				

NOTE: System Administrator has the default rights for GUMU™ Settings and ERP Details.

_____

_____

_____

a. Will your Salesforce consultant be setting this up?

Yes   No   Unsure

28. Do you have Auto Numbering in Sage for Customer creation?

Yes   No   Unsure

29. Do you use employee (Salesperson) codes within Sage Intacct?

Yes   No   Unsure

If yes, please provide us with an Excel spreadsheet of the Salesforce user and the corresponding Sage Intacct employee code.

SECTION 6 - CUSTOMIZATIONS

It's important that the CRM integration team understands any existing customizations or complexities.

30. Are there any existing additional customizations in your Salesforce system?

Yes   No   Unsure

   a. If yes, please specify:

_____

_____

_____

31. Are there any existing additional customizations in your Sage system?

Yes   No   Unsure

   a. If yes, please specify:

_____

_____

_____

32. Do you have any existing integrations between Salesforce and Sage?

Yes   No   Unsure

   a. If yes, please describe briefly:

_____

_____

_____

33. Beyond the GUMU™'s standard real time screens, is there any additional Sage Intacct data that must be displayed in real-time from the ERP Customer Details section?*

Yes   No   Unsure

34. Do you use Sage Intacct's Kitting features?*

Yes   No   Unsure

   a. Do you want this enabled in Salesforce?

   Yes   No   Unsure

35. By default, all imported records are assigned to the GUMU™ User. Should records created in Sage be assigned to specific Salesforce users?

Yes   No   Unsure

36. Are there any predefined approval processes in Salesforce (e.g. order approvals, account approvals, etc.) that must be completed before records can be qualified to be synced with Sage?

Yes   No   Unsure

SECTION 7 - FREQUENCY OF SYNCHRONIZATIONS

The GUMU™ allows Salesforce users to see a lot of Sage Intacct data in real time but also synchronizes data from Sage Intacct to Salesforce based on schedules that we define together in the config section.

37. What is your scheduling preference for accounts, orders, products?

SF Object	Hourly	Daily	Weekly	Monthly
Account				
Order				
Product				

38. Do you have custom objects you would like to schedule?

Yes   No   Unsure

   a. If yes, please specify:

_____

_____

_____

39. Do you need to pause or halt synchronization during specific time periods (e.g., scheduled server reboots or maintenance downtime)?

Yes   No   Unsure

   a. If yes, please specify:

_____

_____

40. Would your Salesforce administrators benefit from a daily summary report detailing sync Integration Statistics?

Yes   No   Unsure