

PRE-SALES SCREENING QUESTIONNAIRE FOR GUMU™ Salesforce Integration to Sage 100

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 100 databases that need to be linked to Salesforce?* Please list the company codes below: _____

5. 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.

6. 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:

7. 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

8. Select the Customers you want imported from Sage 100 to Salesforce

Active Inactive Temporary All

9. Do you have Vendors in Sage 100 that will be imported to Salesforce?*

Yes No Unsure

10. Do you have Products in Sage 100 that will be imported to Salesforce?

Yes No Unsure

- a. How many Products do you currently have in Sage 100? _____
b. How often do you add new Products (i.e. daily, weekly, monthly, rarely)? _____

11. By default, the GUMU™ allows users to see order and invoice history that exists in Sage 100 within the context of an individual account record. These features display real-time data

from Sage 100. 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

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 100 directly. However, this often leads to adjusting the GUMU™ to match the existing order entry requirements.

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

Yes

No

Unsure

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

Yes

No

Unsure

14. Do you intend to create Orders from Quotes?

Yes

No

Unsure

15. 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 100's order module automatically?*

16. Do you intend to create direct Orders?

Yes No Unsure

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

Yes No Unsure

18. Are you using a custom Pricebook?

Yes No Unsure

19. Does your Salesforce Org use multiple Pricebooks?

Yes No Unsure

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

If yes, please describe:

SECTION 4 - SALESFORCE CONFIGURATION

21. Is your Salesforce environment configured for multiple currencies?

Yes No Unsure

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

Yes No Unsure

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

Yes No Unsure

24. 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.

25. 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

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

Yes

No

Unsure

27. Do you have any divisions other than '00'?

Yes

No

Unsure

If yes, please note that each division will be created as a separate company within Salesforce.

28. Do you use Salesperson codes within Sage 100?

Yes

No

Unsure

If yes, please provide us with an Excel spreadsheet of the Salesforce user and the corresponding Sage 100 Salesperson code.

SECTION 6 - CUSTOMIZATIONS

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

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

Yes No Unsure

a. If yes, please specify:

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

Yes No Unsure

a. If yes, please specify:

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

Yes No Unsure

a. If yes, please describe briefly:

32. Beyond the GUMU's standard real time screens, is there any additional Sage 100 data that must be displayed in real-time from the ERP Customer Details section?*

Yes No Unsure

33. Do you use Sage 100's Kitting features?*

Yes No Unsure

a. Do you want this enabled in Salesforce?

Yes No Unsure

34. 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

35. 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 100 data in real time but also synchronizes data from Sage 100 to Salesforce based on schedules that we define together in the config section.

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

SF Object	Hourly	Daily	Weekly	Monthly
Account				
Order				
Product				

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

Yes

No

Unsure

a. If yes, please specify:

38. 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:

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

Yes

No

Unsure