Sage ERP | CRM Data Migration

GREYTRIX
NON ARTIFICIAL INTELLIGENCE

Data Migration is a complex task which involves mapping and moving of data and objects from old system to new system. It is more of a business – level decision than a technical one, as there may occur instances wherein sub-standard migrations may adversely affect ERP - CRM deployments leading to data loss thereby loss in business opportunities.

At Greytrix, we understand this and help you with entire Extraction, Transformation & Loading process of data migration to Sage ERP or CRM with GUMU™ connector that includes:

● **Analysis:**
Based on your business requirement we identify the entities that need to be migrated to ERP/CRM. We analyze source database and identify if any customization is required for it or not.
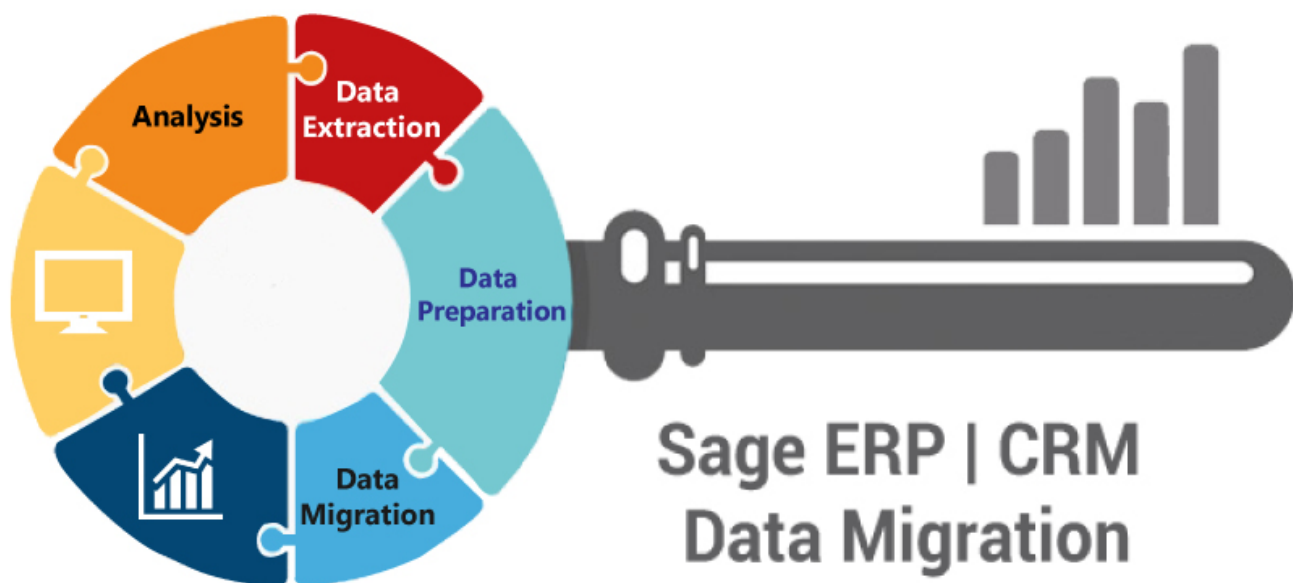
● **Data Extraction:**
Gather data from data sources like SQL, Oracle, Flat files, ERP / CRM products, existing applications etc.

● **Data Preparation:**
Prepare data for migration as per the tool being used for migration, for instance prepare CSV files in case the migration tool to be used is Apex data loader.
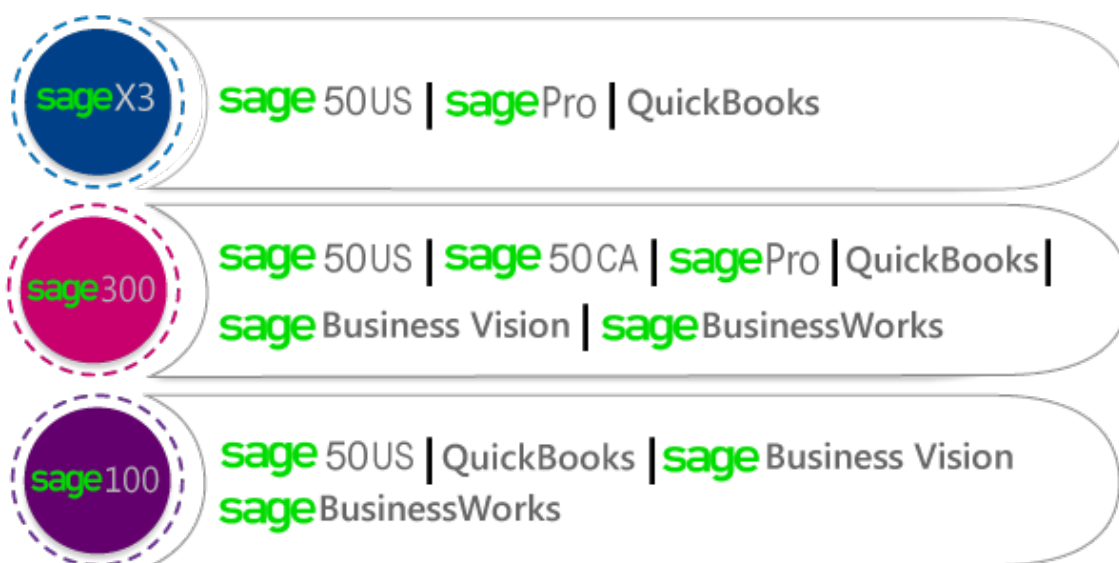
● **Data Migration:**
Initiate test migration upon successful testing import data to Sage ERP or CRM.

Sage ERP | CRM
Data Migration

Sage ERP Data Migration

Source ERP		GUMU™	sage ERP	
GL	Bank	Entity	GL	Bank
Tax	IC	Field	Tax	IC
AR	AP	Data	AR	AP
Sales	Purchase	Import	Sales	Purchase

Greytrix offers GUMU™ Migration for the following ERPs:

sageX3 — sage 50US | sagePro | QuickBooks

sage300 — sage 50US | sage 50CA | sagePro | QuickBooks | sage Business Vision | sage BusinessWorks

sage100 — sage 50US | QuickBooks | sage Business Vision sage BusinessWorks

Transitioning from legacy systems to Sage X3 | Sage 300 | Sage 100 can be a daunting task unless it is strategically planned and executed to minimize time, cost and efforts. Greytrix with its GUMU™ connector makes it easy to migrate data from standard modules such as General Ledger, Bank, Tax, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Order and Sales Order / Order Entry.

Basic functionalities of data migration to Sage X3 | Sage 300 | Sage 100:

- Analysis and extracting Data from the source system.

- Data clean-up in case where the data is purged / deleted or duplicate.

Sage ERP Data Migration

- Entity Mapping (Chart of Accounts, Customer, Vendor, Items, Sales Person, Banks or Tax) from source system to Target ERP.

- Processing / Restructuring of Source enterprise data.

- Data writing into Target ERP.

Entity Mapping from Source ERP to Target Sage ERP

GUMU™ ERP Migration Screenshot:

Sage ERP Data Migration

Features of GUMU™ ERP Migration are:

1. Robust Migration Framework:

Greytrix's robust migration framework enables a seamless extraction of data from legacy systems with zero impact on operational performance during data migration. Importantly, this migration offers significant flexibility to meet enterprise's unique needs.

2. Reduced Total Cost of Ownership:

GUMU™ migration solution helps the company to retire from legacy systems and includes data archival after migration into Sage X3 |Sage 300|Sage 100. As a result, the organization saves on operational costs while reducing the outlay on maintaining legacy systems.

3. Superior Business Visibility:

GUMU™ enables business users to create, manage and share critical business context in the data migration process by providing superior visibility and control. By simplifying access to mission-critical data on a common platform, it empowers teams to explore more revenue generating opportunities and reduce time-to-market for innovative products.

4. Simplified Data Management:

The migration increases efficiency and meets an organization's need for data security, data sub-setting and data archiving. Enterprise data comes onto a single platform while data is normalized into table target formats and loaded into Sage X3 | Sage 300 | Sage100 cost-effectively without custom coding resulting in quick data access, integration and delivery.

Sage CRM Data Migration

Source CRM		GUMU™	sage CRM	
User	Company	**Entity Mapping**	Resource	Company
Contact	Address	**Field Mapping**	Person	Address
Email	Phone	**Data Processing**	Email	Phone
Activity	Lead	**Data Writing**	Communication	Lead
Opportunity	Attachment		Opportunity	Document

GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration:

GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer to Sage CRM Migration is the solution of choice for enterprises seeking a smooth, hassle-free migration to Sage CRM. Our solution works efficiently to enable a seamless transfer of historical data into the new system. It provides you the flexibility required to migrate data in minimum steps and maximum cost effectiveness. GUMU™ Migration solution makes it possible to upgrade clients by effortlessly migrating key customer data into the new system. Company names, addresses and notes, as well as advanced data such as attachments, emails and phone records can be easily shifted from Source CRM fields into Sage CRM. Also, the custom fields from Source CRM can be taken over into Sage CRM during the migration process. Driven by our proprietary migration framework, Greytrix ensures an on-time, on-budget migration at affordable costs.

GUMU™ CRM Migration Screenshot:

Sage CRM Data Migration

Features of GUMU™ CRM Migration are:

1.   Efficient Data Migration onto Single Platform:

With GUMU™ from Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM |Maximizer to Sage CRM Migration all essential enterprise data is effortlessly migrated onto a single platform. This results in increased efficiency while meeting all data requirements pertaining to security, sub setting and archiving.

2.   Cost-Effective Data Delivery:

The migrated data can be accessed, integrated and delivered seamlessly. The Source CRM system retirement and data archival that takes place post migration, results in reduced legacy system operational and maintenance costs.

3.   No Impact on Operational Performance:

The data is extracted from the Source CRM system and migrated to the new system with no interruption to client systems. As the source and destination both remain undisrupted, clients benefit from zero impact on operational performance.