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Sage 300 ERP Newsletter

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Connected Services for Sage 300 ERP

Like an App Store for Your ERP System

Sage has been hard at work enhancing the Connected Services program which was originally introduced last year. These Connected Services allow you to choose from a library of “a la carte” business applications that are integrated with your Sage 300 ERP software (formerly “Sage ERP Accpac”). Let’s take a look at what that means for you.

It's the Cloud Built Around Your Business

The idea behind Connected Services is to let you reach beyond the four walls of your business and into the cloud, picking and choosing specialized add-on “apps” and services that are integrated with Sage 300 ERP. That way, you get the best of the cloud combined with your traditional on-premise ERP installation - without the hassle of purchasing, installing and configuring new software or third party applications on your in-house server.

Each application is designed to “plug-and-play” with your existing Sage accounting software so the data flows from the cloud straight to Sage 300 ERP without duplicate data entry.

When and Where You Need Them Most

With Connected Services, you’re adding functionality on the fly, when and where you need it most. Let's say you decide it's time to add credit and debit card processing to Sage 300 ... a quick visit to www.SagePayments.com (a Connected Service) and you're up and running in no time. You’ve now added the ability to process payments for all major credit cards onsite, online, and via mobile device – safely and conveniently.

Easy Access

Sage is currently working on a standardized **in-product marketplace** of Connected Services that you can access right from within Sage 300. This will make it easy to review, evaluate, and download available services without ever leaving your ERP system - similar to the way you can browse apps and podcasts from directly within Apple iTunes. Some Connected Services will be available at no charge, while others can be purchased on a subscription basis.

Available Connected Services

As Sage continues to build out the platform, more Connected Services will become available. Some of the more widely-used Connected Services that are currently available include Sage Payment Processing powered by Sage Exchange, Sage Sales Tax powered by Avalara, and Business Credit Monitoring powered by Experian.

Be sure to Contact Us if you’d like to learn more about the valuable Connected Services.

Uncovering Hidden Revenue & Cost-Savings with CRM

For years now, businesses have been watching for the Green shoots of economic recovery before investing in technology and business growth. But the fact is, what we see now may just be the new economy. And in the new economy, 'business as usual' may not cut it.

That's why companies are investing in CRM software – like Sage CRM - that not only protects your existing customer relationships, but helps uncover hidden revenue opportunities and cost savings that have been there all along.

How Does CRM Help?

First, CRM software helps you get to know your customers better, uncover hidden cross-sell opportunities, and breathe new life into your **existing** customer relationships.

Beyond your existing customers, CRM software can also help you find and attract **new** business at a lower cost-of-sale than traditional methods where sales people are managing contacts and opportunities in spreadsheets and Outlook folders – an approach that requires more people, more administration, and more cost.

CRM Lowers the Cost of Sales

CRM software is designed to help you sell more effectively and efficiently. This is due to the fact that your sales people (and managers) have a **single point of access** to contacts, calendars, meetings, follow-up tasks, accounts, call lists, sales opportunities, pipeline reports, and everything else they need to produce more revenue per sales hour. And with automated workflow built right into the software, there's less paperwork and administration and a lot more selling. It also means that everyone is following the same successful sales methodology and focusing on opportunities that are most likely to close.

Keep Customers Coming Back for More

For many businesses, customer relationships are more profitable **after** the initial sale … and that's where CRM comes in. You can track your customers' communication preferences (phone, email, fax, etc.), sales history, recent purchases, complementary products, and other important data that will help you deliver highly-targeted and timely follow up. In that way, CRM software helps you uncover up-sell and cross-sell opportunities and maximize the lifetime value of every customer relationship.

Integration and a Bird's Eye View

The goal of any good CRM system should be to integrate everything you know about your customers into a single location. With **Sage CRM** and **Sage 300 ERP**, you've got one less thing to think about because the integration between ERP and CRM is built right in!

Everyone who has direct contact with a customer – whether it's a sales person, support technician, or accounting staff - has up-to-date customer information on-hand. That means sales people have access to recent shipments or customer credit status without fumbling around in the accounting system. It also means that your customer service and support staff are better able to resolve customer inquiries on the spot, rather than passing them to another department or promising to call back with an answer.

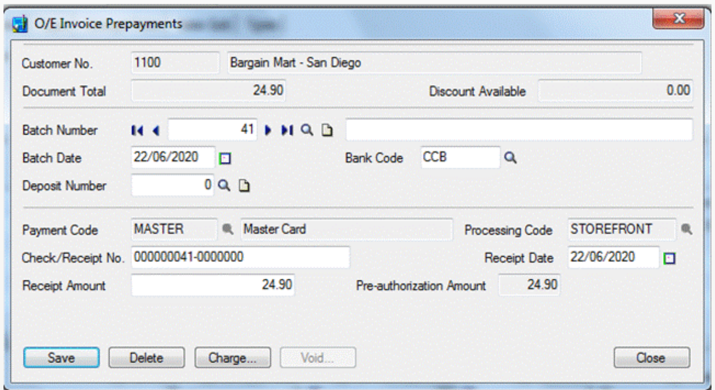
Contact us if you'd like to learn more about how Sage CRM can help your business uncover hidden revenue and cost-savings.

Credit Card Processing Enhancements to Come

Last year, Sage unveiled a new credit card processing solution powered by Sage Exchange. This new functionality allowed you to begin processing credit card transactions directly from within Sage 300 ERP data entry screens. Looking forward, there are a couple of enhancements to this credit card integration that are planned for the next release of Sage 300 scheduled for later this year. Let's take a look at the two main features that will be added.

Credit Card Pre-Authorizations During Invoice Entry

The ability to capture credit card pre-authorization already exists in Shipment Entry. But some companies prefer to have an employee in accounting or finance process the pre-authorization rather than requiring shipping personnel to perform this task as items are shipped. Therefore, the next version of Sage 300 ERP will make the pre-authorization functionality available during **Invoice Entry** as well.



Credit Card Pre-Authorization Screen Will be Available During Invoice Entry with Next Release of Sage 300 ERP

Processing a Batch of Orders

Once orders have been pre-authorized and shipped, it's time to actually charge the credit cards. That's where the new "**Process Pre-Authorized Payments**" form in Order Entry will come in handy. It allows you to generate a list/batch of orders that have an outstanding pre-authorization, have been shipped (required by law), and are ready to process. Just select the orders you want to charge and hit "Process." This new functionality should make it faster and easier for companies that process a high volume of orders.

Improvements Based on YOUR Feedback

The original credit card integration introduced last year has been well-received and the Sage development team is looking to build on that momentum. Both of the new features discussed in this article are being developed based on feedback from existing customers like you. If you have an enhancement request, be sure your voice is heard and submit your feedback today at:

www.Sage300erp.com/Feedback

SAGE SUMMIT REGISTRATION NOW OPEN!

Registration is now open for Sage Summit - the annual conference for Sage customers and partners. This year, Sage Summit will be hosted August 14-17 at the Gaylord Opryland Resort and Convention Center in Nashville, TN and features live performances by Trace Adkins, Montgomery Gentry, and others. Register, plan your trip, and view sessions at:

www.SageSummit.com

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