Sage 100 ERP Newsletter
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Business Solution Providers
We Don't Just Sell Software... We Provide Solutions!

In This Issue

sage Authorized Partner

CREDIT CARD PROCESSING CHANGES

In Sage 100 ERP Version 2013

The introduction of **Sage Exchange** changes the way that credit card transactions are processed in Sage 100 ERP beginning with Version 2013. It not only provides enhanced credit card security and Payment Card Industry (PCI) compliance, Sage Exchange also introduces new card swipe capabilities, mobile payment features, and other credit card processing enhancements that we'll take a closer look at in this article.

Enhanced Credit Card Security and PCI Compliance

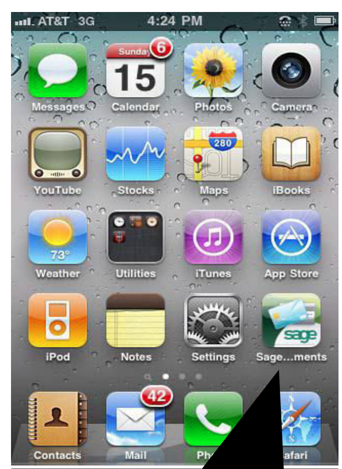
Sage Exchange is cloud-based technology that provides the integration between your Sage 100 ERP system and Sage Payment Solutions, where credit card transactions are processed online.

It also provides a connection to the **Sage Exchange Vault.** This secure cloud-based vault stores sensitive credit card information online and **outside of your Sage 100 ERP system**. By doing so, all credit card information is removed from your database which reduces fraud exposure and simplifies PCI compliance. However, it does not eliminate the potential need for Sage 100 ERP customers to perform an annual PCI compliance audit.

For added cardholder security, Sage 100 ERP 2013 also allows a "one-time use" credit card for payment transactions without saving any credit card information.

New Payment Options, Including Mobile

New **card swipe** capabilities have been truly integrated so that payment processing is built into the normal Sage 100 ERP workflow, which can replace the disconnected card swipe system that you might be using today.



Sage Mobile Payments App

New **Sage Mobile Payments** is ideal for companies with a mobile sales force or service providers that collect fees on the go. Simply launch the app from your Smartphone or tablet, choose an existing customer, and select the invoice to pay. And with a Sage Mobile card swipe device connected, you can swipe the customer's credit card onsite and present a touch screen for signature and approval.

Lastly, Sage 100 ERP 2013 provides the ability to accept credit card payments for services rendered at the time of Accounts Receivable invoice creation for the invoice total, without requiring the use of Sales Order.

IMPORTANT NOTE: Be sure to contact us if you're currently using a third party credit card merchant. Your integration options may be affected by the change in the way that credit card data is stored in Sage 100 ERP 2013.

FRx Report Conversion Tools

Tips and Resources to Convert FRx Reports to Sage Intelligence

Now that support for FRx has officially ended, it's time to start thinking about converting those reports and settings to **Sage 100 ERP Intelligence Reporting**. Here are some guides, videos, and resources that will help the process along.

Using the Report Designer Add-in

Using Microsoft Excel, the **Report Designer Add-in** simplifies the entire conversion process by allowing you to map to the FRx building blocks (Rows, Columns, and Reporting Trees), convert your report layouts, add formulas, and save the designs as new Sage Intelligence reports.

As an enhancement for the basic Report Designer, the Report Designer Add-in not only simplifies FRx report conversion, it also **provides extended design controls** that are ideal for companies with highly complex or customized reporting requirements that change often or on-the-fly.

By breaking down a report into configurable and reusable building blocks, the Report Designer Add-in provides maximum flexibility for customers that want to design reports, from the ground up, to exact specifications.

Download Report Designer Add-in FAQs for details >>

Watch a Demo of the FRx Conversion Process Using the Report Designer Add-in >>

FRx Conversion Guide

A comprehensive guide is available to walk you through the conversion process using the Report Designer Add-in. This 57-page document provides screenshots, detailed instructions, and step-by-step examples.

Download the Conversion Guide >>

System Requirements

Before you can use the Report Design Add-in to convert FRx reports, your system must have the following components installed/updated:

- FRx Version 6.7, Service Pack 11
- Sage 100 ERP Version 4.5 or Later
- Sage Intelligence Report Manager, Report Designer, and Report Designer Add-in (and a Connector License for multi-company consolidations)
- Microsoft Excel 2007 or 2010 32 Bit

Getting Help

If you aren't completely familiar with the underlying components like FRx, Sage Intelligence, or Microsoft Excel, this conversion process can be tricky. So please be sure to contact us if you need guidance. As your Sage 100 support provider and technology partner, we're here to help!

SAGE SUMMIT 2013

Registration is Now Open!

The largest gathering of the year for Sage customers and business partners, the Sage Summit annual conference offers one-of-a-kind learning sessions, networking opportunities, expert guidance, and tips that will help you master your Sage 100 ERP software.

Sage Summit 2013 will be hosted in Washington, D.C. with customer events running from **Tuesday July 23rd to Friday July 26th**. Go online to learn more about the location, agenda, and some seriously fun activities planned this year!

http://na.sage.com/sage-summit >>>

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Successful CRM:
Beyond The Software & Features

Too often when companies talk about CRM, they're referring only to the software and how they plan to use the new features. But focusing solely on the software is not going to bring about fantastic business improvement. The rush to implement new technology often overlooks the other very important aspects of successful CRM, which we'll explore here.

People, Process, AND Technology

Over a decade's worth of surveys reveal that far too many people think of CRM as a box of software packed with features and functions that will transform their business. While choosing the right software is indeed important, a well-planned and successful CRM implementation must include two other critical elements: **people** and **process**.

The People

Everyone affected by the CRM system must "**buy in**" including your salespeople, marketing folks, support personnel, and management team. Successful CRM requires a cultural shift within your organization. So without the buy-in of all involved, you'll wind up with nothing more than an expensive electronic address book that nobody uses.

That means that even if your salespeople prefer to use spreadsheets and want to continue doing it the old way, they must break the habit and use the CRM system.

Bottom Line: CRM cannot succeed without end-user acceptance (including management) and continuous use.

The Process

Once the entire company has bought in and is ready for CRM, the process begins. It's important to look carefully and evaluate your current customer interactions and touch points to decide which processes can be improved … and how CRM can be used to achieve that improvement.

It takes careful planning for any process to be meaningful, so a strategy based on long-term goals is essential. What information are you going to include in the CRM system? Which reports are critical (open quotes, lost sales, etc.) and how will you interpret the data? What criteria for action will you establish and what form will those actions take?

Standardizing processes and leveraging your CRM data not only ensures consistency, it also helps to maximize the lifetime value of your customer relationships.

Putting it All Together

A road map tells you how to get from point A to point B, but it won't take you there. The same holds true for CRM software. It can reveal the paths and connections between you and your customers and point you toward the potential opportunities. But how you make it all happen isn't going to come solely from the software. With the right people, process, and technology in place, your CRM strategy can create customers for life.

Whether you've considered implementing CRM at your company or already using CRM software, be sure to contact us about getting the most out of your customer relationships.