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UNDERSTANDING LEVEL 3 CREDIT CARD PROCESSING
For Sage 100 ERP

Sage 100 ERP customers can now take advantage of **Level 3 Credit Card Processing**. This new functionality for the Sage Payment Solutions platform allows you to qualify for lower rates when processing business, commercial, and government payments. Here's what you need to know.

What is Level 3 Processing?

Level 3 processing expands your payment processing capabilities beyond the typical consumer transaction by allowing you to process business-to-business (B2B) and business-to-government (B2G) purchase cards. That's because B2B and B2G transactions are considered "lower risk" and carry much lower interchange rates. This means that merchants like you are charged less per transaction and for other fees like charge-backs.

In exchange for these lower rates, your credit card processing system must be able to transmit detailed payment information (such as merchant name, tax amount, customer code, duty amount, etc.) in order to complete each transaction. **That's where Level 3 Processing comes in**.

When you activate Level 3 Processing for Sage 100 ERP, you can securely process government, commercial, and corporate purchase cards while automatically providing the level 3 detail required for each transaction without any added effort or manual data entry.

What Are the Benefits?

When you activate Sage 100 ERP Level 3 Processing you can:

- Sell to companies using purchase cards
- Sell to government agencies
- Save money on transaction costs
- Build relationships with large corporations and government agencies
- Simplify invoicing and reporting
- Eliminate manual data entry for Level 3 processing
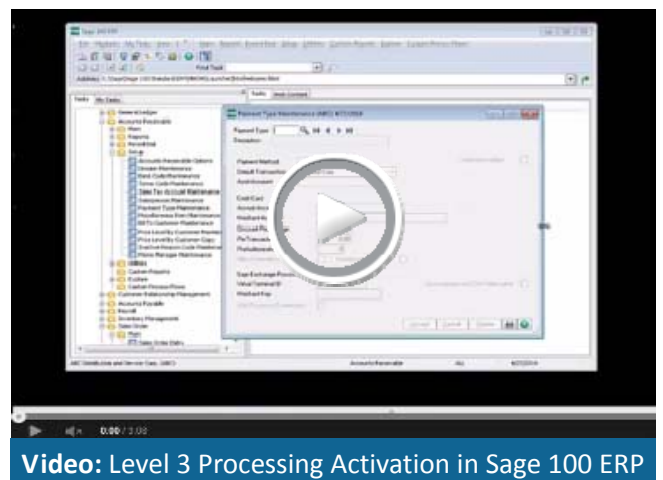
Video: Level 3 Processing Activation in Sage 100 ERP

Ready to Get Started?

Contact us for more information about Level 3 Credit Card Processing for Sage 100 ERP or for help setting up a Sage Payment Solutions account.

Note: In order to use level 3 credit card processing you must be on Sage 100 ERP Version 2013 or 2014. Contact us if you need to upgrade.

Successful companies are increasingly using tools like Sage CRM to develop and manage customer relationships. But if you only focus on your own internal CRM data, you could be missing opportunities online. Nowadays, more consumers are using social media to research products, ask questions, and solicit recommendations from their social networks.

So we want to introduce you to the concept of **Social CRM**. Combining social media conversations with your in-house CRM data to help uncover new opportunities.

What is Social CRM?

Social CRM is often used as a synonym for social media monitoring, where a company monitors services like Twitter, Facebook, and LinkedIn for relevant mentions of their business or product.

But Social CRM is more than just monitoring what people are saying. It makes customer conversations on social media a part of your traditional business activities by combining it with traditional CRM tools like Sage CRM.

It's important to note that Social CRM is not a new idea that is going to replace a traditional CRM system, but an evolution and extension of how CRM is used.

Benefits of Social CRM

Benefits of Social CRM can include:

- **360° View of Customers** - Track it all, from basic customer data to email, sales calls, and social interactions.
- **Respond Faster** - Deliver timely responses and solve customer issues quickly using social channels.
- **Drive Revenue** - Leverage "social prospecting" to pick up on conversations and take advantage of potential revenue opportunities you might otherwise miss.
- **More Targeted Marketing** - Know which social sites your customers are using and what they are looking for to develop more targeted marketing campaigns.
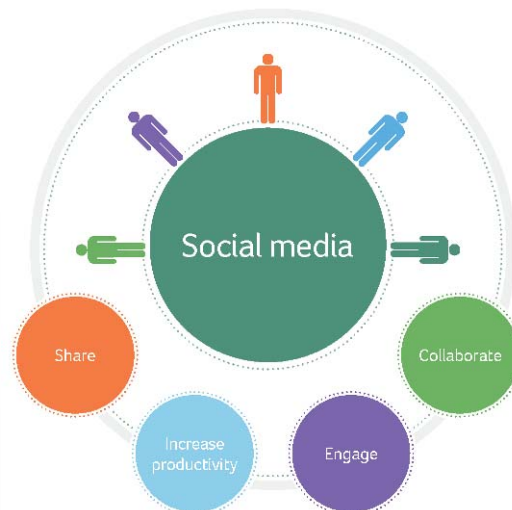
How Sage CRM Can Help

Sage CRM integrates with the top social media networks, such as **Facebook**, **LinkedIn**, and **Twitter**, so that you can engage consumers and monitor competitors online.

Another recently-added social feature in Sage CRM is the integration with **Yammer** - a private social network that allows your company to collaborate across departments and office locations.

These integrations make it easy to leverage the wealth of valuable customer and prospect data on social media and combine it with your traditional Sage CRM data to unlock opportunity and insight that drives competitive advantage.

Getting Started with Social CRM

Contact us for more information about Sage CRM or for help unlocking Social CRM functionality.

Want to Learn More?
Click to download "**Making Every Customer Conversation Count:** A Practical Guide to Social CRM"

When you originally implemented Sage 100 ERP, you probably made some important decisions about your chart of account structure, account segments, and other aspects of accounting and reporting.

But what happens if your tracking and reporting needs change over time? That's where **User-Defined Fields (UDFs)** can help. Let's take a look.

What is a User-Defined Field?

User-defined fields can be added to any table in the Sage 100 ERP database. As the name suggests, these custom fields are defined and created by the user (that's you!) and allow you to store and track additional transaction detail that may not be provided as a standard field in Sage 100.

You can create UDFs without the need for custom development, technical support, or modifying the database. Plus, the data you enter in your UDFs can be configured to carry through to your reports, orders, and invoices.

The Customization You Need

User-defined fields can be extremely useful for tracking special events, seasonal projects, or any non-financial data you want to track.

For example, you can create a UDF that stores and tracks a customer's reward level based on dollars spent. That UDF can be set up to flow into in the Sales Order Invoice to adjust for special pricing or shipping discounts.

Keeps Your Chart of Accounts Clean

One of the nice things about user-defined fields is that you can set them up and run detailed reports without adding new account numbers, segments, or anything else that might muddy up and complicate your chart of accounts.

Using "disposable" UDFs can keep your chart of accounts from growing unnecessarily large, complex, and messy.
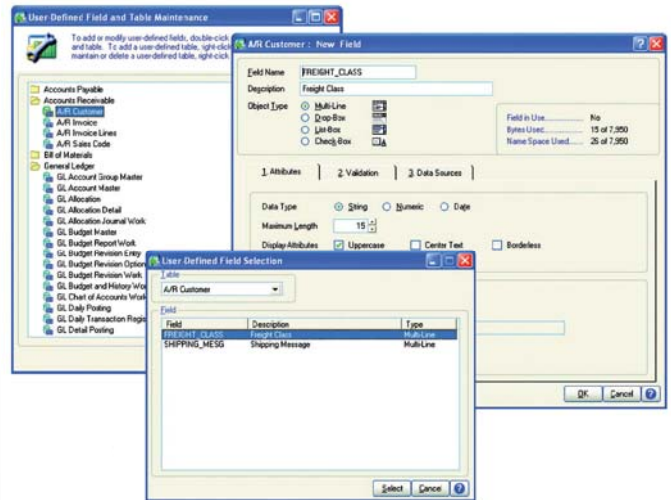
How to Create a User-Defined Field

To create a UDF we recommend that you use **Customizer** which is part of the Custom Office module for Sage 100 ERP. Here are the steps to follow:

1. Expand Custom Office and Main. Double-click **User-Defined Field** and **Table Maintenance**.

2. Expand the module folder.

3. Select the table (entity), and click the **Edit Fields** button.

4. Click the **Add** button.

5. In the **Add Field** window, enter the field name and description.

6. Select an object type, and specify the UDF attributes.

7. Click the **Validation** tab and enter data validation types, if desired. Click **OK**.

8. In the **User-Defined Fields** window, click **OK**.

That's It - you've successfully created a new UDF!

Contact us to learn about working with user-defined fields or if you need help adding UDFs to a Crystal Report.

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