

# Integrating **Sage Pay** and **Sage CRM**

**The Sage Pay for CRM Integration enables you to take payments directly from the dashboard of Sage CRM. You'll save time managing your accounts, and improve customer experience.**

## **Powerful integration of CRM and payments technology**

Thanks to the Enbu powered Sage Pay extension, it's now possible to integrate Sage Pay's payments functionality into Sage CRM. That means you'll never have to leave your CRM solution to gain a complete view of your customers.

The integration allows you to;

- ✓ Take secure card payments over the phone from your customers,
- ✓ Send your customers a link to a secure web portal to make the payment online,
- ✓ View all payment history associated with a customer,
- ✓ Run reports showing payments against customer activity.

The integration has been developed by Enbu Consulting, the most experienced Sage CRM Development Partner worldwide.

## **How do you benefit?**

Integrating the payments solution into Sage CRM allows you to increase efficiency in your business processes: when your operators need to take a payment, they simply open the 'Sage Pay' tab in the desired Company file within Sage CRM.

- ✓ It's easy to use – you'll find a 'Sage Pay' tab in the top navigation,
- ✓ You'll never overlook an unpaid account – view the status of all payments against each Company,

- ✓ It's secure – there's no need for operators to record card details anywhere else,

- ✓ You'll save time – all payments can be taken within your CRM solution.

## **Provide the best customer experience**

Ensure the best customer experience: by integrating Sage Pay with Sage CRM, you can ensure the smoothest sales cycle – even at the point when your customer pays you.

- ✓ Let them choose how they pay - via your operator over the phone, via a secure web portal or their mobile devices.
- ✓ Optimise the online experience – customise the emails that are generated to make a payment,
- ✓ Offer them payment options – Sage Pay helps you process numerous card types and multiple currencies.

## **Fast and simple set-up**

Integrating Sage Pay to your CRM solution is stress-free. The intuitive set-up wizard will guide you through the simple steps you need to take:

- ✓ 'Point and click' installation - no coding is required,
- ✓ Fast integration – get started in a matter of minutes,
- ✓ Expert Support – any time!

## A comprehensive, easy to use payment solution

Sage Pay enables you to securely process card payments from your customers; online or over the phone. Sage Pay is simple to manage and has a transparent pricing structure with no annual charges.

### **My Sage Pay – complete control over your payment settings**

When you set up your Sage Pay account, you'll be given access to your own administration area called My Sage Pay. Here, you can control every part of your account - for example; you can create additional users, customise your business' fraud prevention settings, or even void a high-risk transaction. The settings you select in My Sage Pay will be replicated in the Sage Pay tab within your Sage CRM system.

### **Access your account – anytime, anywhere**

You can give multiple users access to your Sage Pay account, and specify the level of control they can have. If your designated users are based in different offices, it's not a problem - My Sage Pay can be accessed from any location: all they need is an internet connection, and their login credentials.

### **Free fraud screening tools - to safeguard your business**

Sage Pay provides you with valuable fraud screening tools; including AVS/CV2 checks and 3D Secure. These free tools minimise the risk of customers placing fraudulent orders with your business. You can finely tune your security settings directly from My Sage Pay - your chosen rules and checks will be applied when you take a payment through Sage CRM.

### **Highly secure systems - to keep your customers' details safe**

Security is at the heart of all Sage Pay's services: we're a Level 1 PCI DSS payment service provider – and that means you can rest assured that your customers' card details are in safe hands. Every transaction is processed in a maximum security environment, and under the safest data storage conditions.

### **Multiple payment options - let your customers choose**

Be flexible with your customers – let them choose how they pay you. Sage Pay's payment system supports as standard: processing of Visa, Visa Delta, Visa Electron, MasterCard, Maestro, Solo, American Express, Diners Club and JCB. You can even open your business to more online shoppers – by offering PayPal as a payment option to your customers. And remember, your customers can pay you over the phone, via the secure web portal or even via their mobile device.

### **Free support – any time of day or night**

Whatever your business hours, Sage Pay's expert support team is on call to help you solve any issues. Our UK-based team is available via phone or email, 24/7.

### **What do you need to integrate the two?**

1. Sage CRM installed on your systems.
2. Sage Pay powered by ENBU integration module.
3. Sage Pay account (need Vendor Name).
4. A Merchant Account (either a MOTO account for 'Operator' configuration and/or ECOM account for 'Customer' configuration).

### **Need a Sage Pay Account?**

If you already have Sage CRM, and are looking to integrate Sage Pay, it's easy to get up and running.

Simply fill in our online application form and we'll guide you through each step to getting your Sage Pay account. Once we've received your application to accept debit / credit card payments, we'll be in touch within 48 hours. If you'd rather speak to us, we'd be happy to guide you through the process over the phone.

Visit <http://www.sagepay.com/online-payments>

or call us on **0845 11 44 66**.