

Carroll Plumbing & Heating, Inc. Turns to Sage Integrated Payments with Sage ERP Accpac to Reduce Errors, Save Time and Gain Certainty

Double entry for credit card processing was causing errors and wasting time and paper

Carroll Plumbing and Heating is a full service plumbing, heating and cooling contractor, primarily serving residential customers. The company has been using Sage ERP Accpac for the past 10 years. Up until about two years ago, Carroll Plumbing & Heating processed credit card transactions via a credit card terminal and then manually entered the information in their Sage ERP Accpac A/R system.

Courtney Gregory, Treasurer, realized that “this two-step process was leading to input errors. There was also too much paper floating around, and we were wasting time on double-entry.” She wanted to integrate credit card transaction processing with Sage ERP Accpac A/R to cut down on manual errors, save paper and reduce the time spent on this job.

Integration with Accpac was a must—and having an experienced, trusted partner was a tremendous advantage

As a relatively small company, without internal IT staff, Gregory turned to Sklar Technology Partners, their service provider for Accpac and other technology solutions. Sklar told them about Sage Virtual Terminal and how integrated payments would automatically create A/R receipts for paid invoices within the Sage ERP Accpac software. The solution would also take care of credit card pre-authorization hassles, guaranteeing the customer’s credit status for the order amount, and capturing the pre-authorized amount when a credit card order is invoiced.

Having worked with Sklar for several years, Carroll Plumbing & Heating trusted their expertise. Sklar’s experience in helping other Sage ERP Accpac customers successfully implement integrated payments was a big plus in assuring Gregory that she was making the right choice.

Customer

Carroll Plumbing & Heating, Inc.

Industry

Plumbing, heating and cooling contractor

Location

Richmond, Virginia

SYSTEM

Sage Payment Solutions Virtual Terminal integrated with Sage ERP Accpac

CHALLENGE

Needed to decrease manual and duplicate entry for credit card payment processing to reduce errors, eliminate unnecessary paperwork and save time

SOLUTION

Sage Virtual Terminal integrated with Sage ERP Accpac

RESULTS

When credit card payments are processed, Sage ERP Accpac Accounts Receivable is updated automatically, cutting down on data entry errors and saving time

After making the decision, it took Carroll Plumbing & Heating about a week to make the transition to Sage integrated payments. “It was very easy. The Sklar people set it up in Accpac, and were there to help us. Sage also called to check and make sure things were going smoothly, but it was really very simple,” according to Gregory.

Credit Card Processing time has been cut in half and human errors are avoided

Processing a credit card transaction used to take Gregory or her A/R person 45 minutes. Using Sage integrated payments, she’s cut the time down to under 20 minutes. “Now, once we collect a credit card number, it’s securely stored. When a customer wants to use that number again, we don’t need to re-verify it, and we know immediately if we’ve entered an incorrect credit card number. There’s less paper trail, so we don’t make as many manual errors.” Gregory can also now easily run a report to tell us what credit cards are about to expire, and she has gained certainty around the cost of transactions, which helps her budget more efficiently.

Because the results have been so positive, Gregory is excited about Sage Exchange, and Sage’s plans to enable integrated payments for other forms of payment with Sage ERP Accpac. Gregory is particularly interested in solutions that will enable her to scan, digitize and post paper check payments to Accpac—and free up more time to spend on customer service.

“Our Accpac A/R [accounts receivable] is now automatically updated when we process credit card payments, saving us time and helping us cut down on personal errors.”

– Courtney Gregory, Treasurer, Carroll Plumbing & Heating, Inc.

About Sage Payment Solutions

Sage Payment Solutions, the payments division for Sage North America, has been providing businesses and organizations with electronic payment systems for more than 20 years. The company makes electronic payment processing easy for more than 155,000 merchants, allowing them to accept multiple forms of payment, including credit and debit cards, electronic checks, Check21, gift and loyalty cards, and automatic recurring payment. Sage Payment Solutions provides a wide range of secure standalone and integrated payment processing solutions. Sage Exchange, its PA-DSS certified payments platform, integrates with many Sage software products to maximize the value of customers’ business systems with automatically updated credit and debit card transaction information. Future Sage Exchange releases will offer additional integrated payment capabilities, including advanced point-of-sale (POS) device integration, payment origination solutions, and cash management applications.
