



# TaiRox CRM and Collections

## User Guide

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### **Important Notice**

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# Quick Overview

TaiRox CRM and Collections is a customer relationship and collections management solution that integrates fully with Sage 300. It lets you easily monitor customer activity and get paid faster.

CRM and Collections lets you manage all customer contact, opportunities, orders and collections. You can also purchase the TaiRox Collections module without CRM features to manage your receivables.

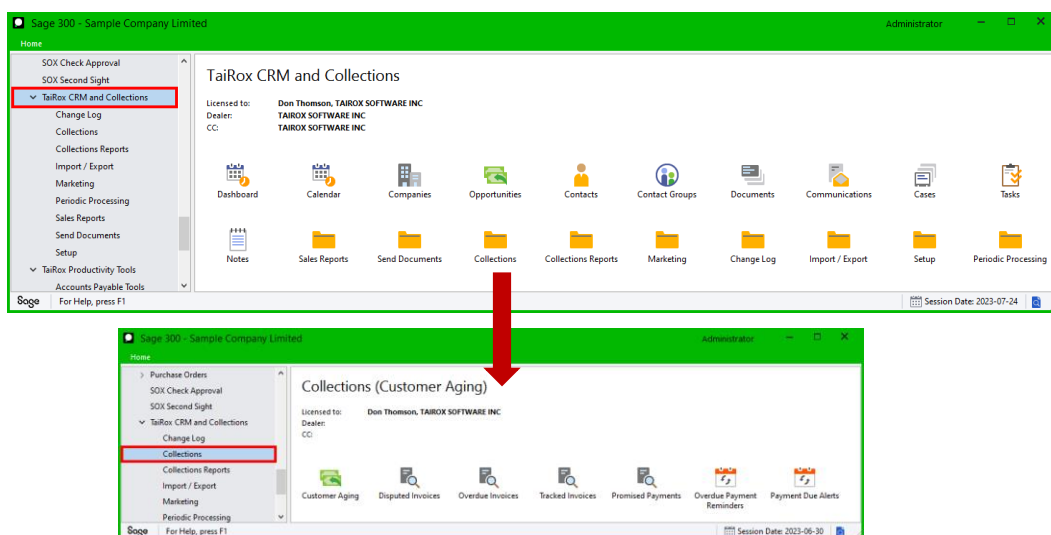
## CRM and Collections provides these entities for managing customers and sales opportunities:

- Companies that you can automatically promote to Sage 300 Customers
- Contacts that are fully integrated with Sage 300 M/T Contacts
- Bulk emailing that leverages the features of common bulk email providers such as MailChimp
- Opportunities that are linked to Sage 300 orders and quotes
- Tasks that appear on the dashboard for overdue invoices and other collections or CRM activities
- Communications that feed emailing services such as MailChimp or Swiftpage
- Cases for collections, support, on-site appointments, and other activities

## It includes the following features for managing customer accounts and collections efficiently:

- Calendar and Dashboard views that show opportunities, cases, tasks, disputed invoices, tracked/overdue invoices, and promised payments by revisit date for the day, week, or month
- Event emails (ics files) that update users' email calendars with new opportunities, cases, and tasks to which they are assigned
- Overdue invoice features for scheduling and sending aging period-specific overdue payment reminder emails and generating phone tasks for calling customer contacts
- Payment due alerts to send customer reminder emails for invoices before they are overdue
- Programs to email A/R and O/E invoices, statements, and letters to multiple recipients per company **and** store emails with attachments for easy retrieval
- Functionality to resend existing O/E and A/R documents and statements to any contacts
- Invoice tracking for attaching documents and notes to invoices and other A/R documents
- Promised payments for tracking customer agreements for settling accounts
- Customer Aging screen to give you a lightning-fast view and report of overdue customer accounts
- Collections cases, disputed invoices and promised payments that are created directly from the customer aging screen
- Reports to assess your collections performance and review the status of disputed invoices, overdue invoices, and promised payments

All CRM and Collections entities and functions appear on the Sage 300 desktop.



CRM and Collections includes setup options for customizing opportunities and cases, creating demo data for any Sage 300 database, generating opportunities for multiple companies, and scheduling and sending payment due alerts and overdue payment reminders to multiple contacts per company.

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# Setting Up CRM and Collections

This guide provides instructions for setting up *TaiRox CRM and Collections* and *TaiRox Collections* – a product that provides the complete Collections module without TaiRox CRM's sales features.

This guide uses the product name “CRM and Collections” throughout, and indicates where a feature is available in TaiRox CRM and Collections but not available in the stand-alone TaiRox Collections module.

**See the CRM and Collections Implementation Guide and data input Setup Forms.**

## System Requirements

- Sage 300 2018 or later  
TaiRox CRM and Collections has been extensively tested on Sage 300 2018 and later platforms. CRM and Collections for earlier versions of Sage 300 may be provided upon request.
  - **Activate Sage 300 M/T Contacts if it's available with your version of Sage 300.**  
If you previously used TaiRox Productivity Tools to add contacts in Extended Customers, **make sure that you update TaiRox Productivity Tools contacts to Sage 300 M/T Contacts** before you continue.
- SQL Server 2012 or later

## LanPaks and Multiuser Licensing

CRM and Collections does not have its own multiuser licensing system. The number of users is controlled by Sage 300 LanPaks. If you need to increase the number of users concurrently accessing CRM and Collections, you must increase the number of LanPaks.

## Installing TaiRox CRM and Collections on the Server

### Uninstall prior version of CRM and Collections before installing a new version

- In Windows 10 or Windows 11, go to **Settings > Apps and Features**, click TaiRox CRM, and choose the Uninstall button.
- In Windows 7, go to **Control Panel > All Control Panel Items > Programs and Features**, right-click TaiRox CRM and Collections, and select Uninstall.

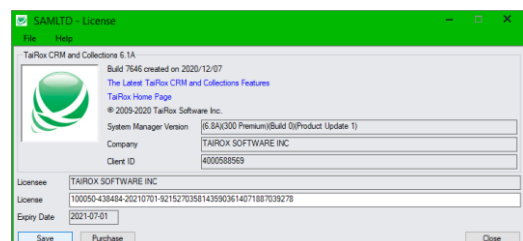
### Install the new version of CRM and Collections

- Run **Setup-2018-2024.msi** to install TaiRox CRM and Collections.
- Click Next, Accept the license agreement, click Next, and click Next again to install.
- After installing, run RegAcc.exe on each workstation that runs Sage 300 from a server.

## Activating CRM and Collections and Entering License Information

### Activate CRM and Collections to add and update database tables

- Select **Administrative Services > Data Activation**.
- Choose the new version of CRM and Collections from Applications for Activation, and click Next.
- Click Activate.
- Add CRM and Collections license information
- Select **TaiRox CRM and Collections > Setup > License Information**.
- Enter the license number in the License field and click Save.



## Set Up Options, Opportunity Stages, Case Stages, Communication Types, and Optional Fields

After installing and activating CRM and Collections, follow these steps to choose options and add the opportunity stages, case stages, communication types, territories, optional fields, and emailed accounting documents that you want to use for your company.

### Activate Sage 300 M/T Contacts if available with your version of Sage 300

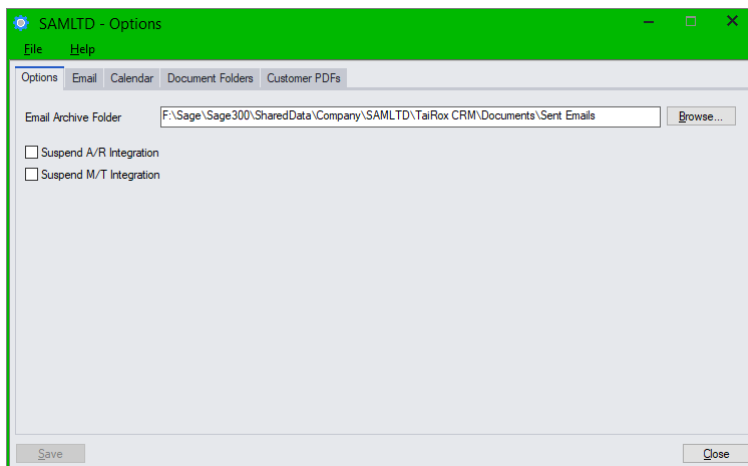
TaiRox contacts are fully integrated with Sage 300 M/T Contacts. TaiRox's Contacts program lists all contacts added in CRM and Collections or with the Sage 300 Multiple Contacts module. And A/R integration ensures that you have the same contacts in TaiRox that you have in Sage 300 A/R.

### Step 1: Set up CRM and Collections options

The Options screen provides default settings that are used throughout CRM and Collections. For details on all options, see [Options](#), in the Setup and Maintenance Screens chapter in this guide.

- Go to **TaiRox CRM and Collections > Setup > Options**

The Options screen has four tabs – Options, E-Mail, Calendar, and Document Folders.



- The **Email Archive Folder** is the default location where emails created by CRM and Collections are stored as EML files. The files are referenced in CRM and Collections as Communications. (EML files store the complete email, including attachments.) You can override the default location for statements, letters, invoices, overdue payment reminders, and payment due alerts.

**If you do not specify an Email Archive Folder**, EML files will be stored in the Sage 300 Shared Data folder under COMPANY\Company ID\TaiRox CRM\Documents.

You can use UNC file paths to specify the folder (such as \\ComputerName\C\$\SentEmails).

- The **Suspend A/R Integration** checkbox lets you disable automatic updates between Accounts Receivable customer records and TaiRox CRM and Collections companies.

Leave this box unchecked to automatically synchronize customer and company records in Accounts Receivable and CRM and Collections. See [Options](#) for more information on A/R / CRM synchronization.

**Note:** Sync Companies is disabled if you select the **Suspend A/R Integration** checkbox in [Setup Options](#). Do not suspend A/R Integration while setting up CRM and Collections.

- The **Suspend M/T Integration** checkbox appears only if you are using the Sage Multiple Contacts module. It lets you disable automatic updates between Sage 300 M/T Contacts records and the Contacts program in TaiRox CRM and Collections.

**Note:** Sync Contacts is disabled if you select the **Suspend M/T Integration** checkbox in [Setup Options](#). Do not suspend M/T Integration while setting up CRM and Collections.

In addition, Sync Companies will not compare contacts added to CRM and Collections Companies and A/R Customers if you suspend M/T Integration.

## Email Tab

- **Email Server Settings** are used to send calendar events to users when you assign users and revisit dates to tasks, send emails from the Send Documents program in the Companies window, send invoices, statements and letters from the programs in the Send Documents folder, and send overdue payment reminders and payment due alerts to customers.

These settings are also used for sending bulk emails if you do not subscribe to a bulk email service. (Note that Send Bulk Email will not appear if you only have the Collections module.)

And you can override the default “From Email” address for most documents and when you resend documents using the [Send Documents](#) button in the Company window.

If this field is left blank, programs will default to the user’s email address in Sage 300.

See the following sections for more information on overriding the From Email address for specific email programs:

- For A/R Statements and Letters and for A/R and O/E invoices use the [Accounting Documents Setup](#) program to override the default From Email.
- For Overdue Payment Reminders and Payment Due Alerts, see the [Overdue Payment Reminders Setup](#) program and [Payment Due Alerts Setup](#) program.

For more details on emailing documents, see [Step 13: Add settings for emailing overdue payment reminders, and payment due alerts to customers](#) and [Step 14: Add settings for emailing invoices, statements, letters to customers](#).

## Calendar Tab

- Select the entities that you want to update users’ calendars when you change revisit dates and user assignments. You can update users’ calendars for cases, opportunities, and tasks.

Note that “Opportunities” will not appear if you are running the Collections module *without CRM*.

CRM and Collections generates .ics files when employees add or change revisit dates and user assignments for cases, opportunities, and tasks, and sends them to the “Email 1” address entered in Sage 300 for the assigned – and unassigned -- user.

**.ics files** (iCalendar files) are plain text files containing the details for a calendar event or a to-do item. Typically, they are sent as attachments to emails that you can save to a calendar, such as the calendar in Outlook or the Google calendar.

**Note:** CRM and Collections does not send calendar files when tasks are generated by the Overdue Payment Reminders program. However, it will send calendar reminders when you change the revisit date or user for tasks generated by Overdue Payment Reminders.

**To set up TaiRox CRM and Sage 300 to send calendar event files you must also:**

- Add “Email 1” email addresses for users in **Sage 300 > Administrative Services > Users**. *TaiRox CRM and Collections sends calendar events to the Email 1 email address.*
- Add your email server settings on the Email tab in **CRM and Collections > Setup > Options**. Use the Send Test Email button to test the email server settings.

For more details on ics files and setting up users for receiving emails, see [Appendix E: Updating Calendars with .ics Event Files](#).

## Document Folders Tab

The Document Folders tab lets you organize sales and accounting documents according to your company's unique needs – and in any location accessible from the CRM and Collections server.

The root folders for opportunity, case, and tracked invoice documents can be located anywhere on the network, so, for example, cases and tracked invoices could be located on an Accounting server, and opportunities on a Sales server.

You should set up the document folder locations before you start using CRM and Collections. See [Options - Document Folders tab](#) for more information.

Emails sent by Send Statements/Letters, Send A/R Invoices, Send O/E Invoices, and Overdue Payment Reminders are stored in the Email Archive Folder specified on the Options tab (unless you specify different folders on the [Accounting Documents](#) form in the Setup folder).

## Customer PDFs Tab

Click the A/R and O/E Invoice and Credit Note Options buttons to choose the report and report options to use for generating A/R and O/E invoices and credit/debit notes attached to emails sent by the Overdue Payment Reminders program, Payment Due Alerts program, and Send Invoices program.

- The A/R Invoice Options apply also to A/R Credit and Debit notes.
- The “V/M” invoice and credit note buttons appear if you use Technisoft's Service Manager application for Sage 300.

**Note:** The reports and options specified here are shared by the Overdue Payment Reminders program, Payment Due Alerts program, and the Send Invoices program, so the invoices generated by all three programs will match.

## Step 2: Add opportunity stages – if you have CRM and Collections

Opportunity stages are the key milestones of your sales process. For example, your process might include the following steps: “Prospect,” “Qualified,” “Meeting”, and “Proposal.”

Opportunity Stages appear in a dropdown list on the CRM and Collections Opportunity screen.

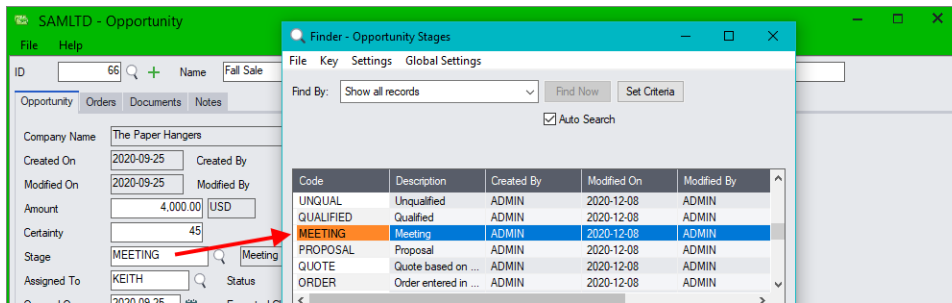
***If you are using the stand-alone Collections module, you will not see Opportunity Stages.***

- Add opportunity stages to TaiRox CRM using **TaiRox CRM and Collections > Setup > Opportunity Stages**.

The screenshot shows a software window titled "SAMLTD - Opportunity Stages". It features a green header with "File" and "Help" menus. The main content area includes a "Code" field with the value "MEETING", a "Description" field with "Meeting", and a grid for "Created On" (2022-05-10) and "Created By" (ADMIN), as well as "Modified On" (2022-05-10) and "Modified By" (ADMIN). There is an "Inactive" checkbox, a "Sort Order" field with the value "3", and a "Notes" text area. At the bottom, there are "Save", "Delete", and "Close" buttons.

**Notes:**

- The **Sort Order** determines the order that opportunity stages will appear in the Finder for the “Stage” field on the Opportunity screen. In this example, UNQUAL has sort order “1”, and so it appears at the top of the list.



- The following stages (shown in sort order) are created by default when you activate CRM:
  - UNQUAL (sort order 1)
  - QUALIFIED (sort order 2)
  - MEETING (sort order 3)
  - PROPOSAL (sort order 4)

You can edit the default stages, add new ones, and change the sort order to match your company's sales process.

**Step 3: Add case stages for one or more types of cases**

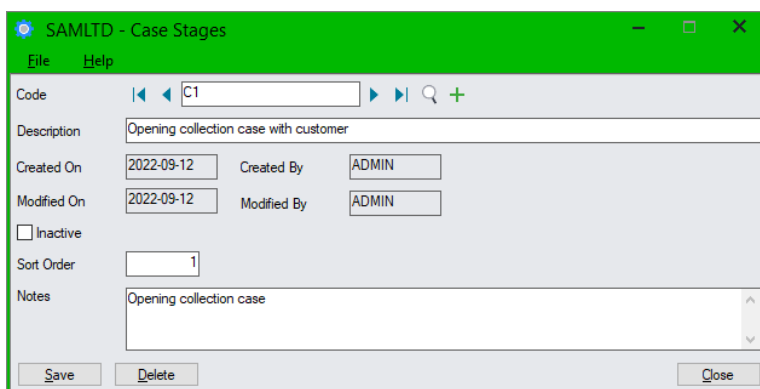
- Add case stages to TaiRox CRM using **TaiRox CRM > Setup > Case Stages**.
- You do not have to use case stages, but they let users quickly see the progress of each case.

CRM and Collections provides four different types of cases: collection, support, appointment, and other. The case stages should include the main steps that your company might complete for each of the collection, support, and customer service processes.

Each case stage that you define is identified by a code and a description. Stages also include notes where you can document the procedures for each stage.

If you use only one type of case, such as collection cases, you might have codes like this: “REMINDER,” “DEFAULTNOTE”, “DEMAND”, and “LEGAL.”

However, if you use more than one type of case – for example, cases for collection issues and for support issues – you would probably define a full set of case stages for each type of case, using codes like C1, C2, C3 for stages in the collections process and codes like S1, S2, S3 for support stages – as in the following screen.





**Notes:**

- The **Sort Order** determines the order that the case stages will appear in the Finder for the “Stage” field on the Case screen. For example, “A1” has sort order “1” and will appear at the top of the finder list.

Sort Order	Code	Description	Created On	Created By
1	A1	Appointment	2021-03-02	ADMIN
2	C1	Opening collection case with customer	2020-12-08	ADMIN
3	C2	Case still open	2020-12-08	ADMIN
4	C3	Case resolved	2020-12-08	ADMIN
5	S1	S1 - Issue logged with support	2020-12-08	ADMIN
6	S2	S2 - Issue escalated to level 2	2020-12-08	ADMIN
7	S3	S3 - Level 2 contact made	2020-12-08	ADMIN
8	S4	S4 - Customer appointment	2020-12-08	ADMIN

**Step 4: Add communication types**

Communication types appear on communications and show how you communicated with companies and contacts – such as by phone, email, mail, fax, text, or meeting. Each time you document a communication, you must also specify the communication type.

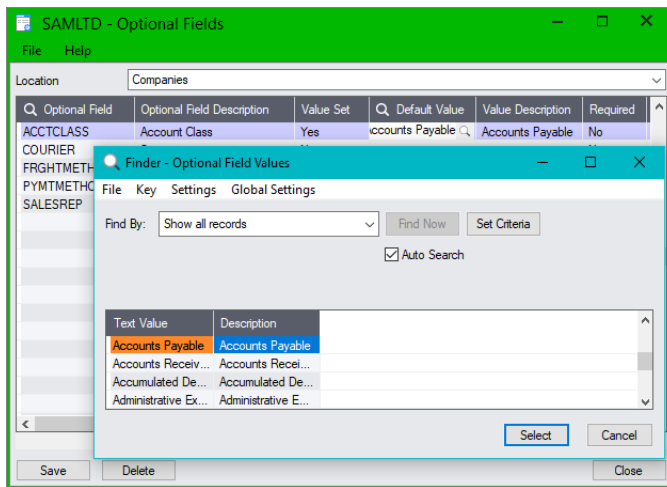
- Add communication types to CRM using **TaiRox CRM > Setup > Communication Types**.
- The following default communication types are created automatically when you activate CRM:
  - EMAIL
  - FAX
  - MAIL
  - PHONE
  - TEXT

**Step 5: Add optional fields**

You can add Sage 300 optional fields to companies, contacts, opportunities, users, documents, communications, and cases. Optional fields in CRM are displayed in data grids – such as in the lists of companies, contacts, and users – as well as on Optional Field tabs.

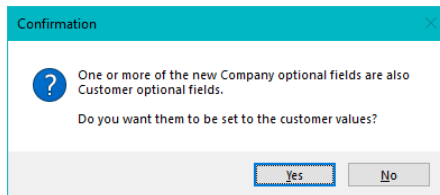
To use optional fields with CRM records:

- First, add optional fields to Sage 300 using **Common Services > Optional Fields**.  
You can also add a set of values for a Finder list when you add the fields.
- Second, add optional fields to TaiRox CRM using **TaiRox CRM > Setup > Optional Fields**.  
You can set the default value of an optional field by choosing Yes in the Value Set field and selecting the value in the Default Value field from values that were added in Common Services. Or you can enter a default value if no list of values were added.



### Notes:

- If the list is empty, just click the “Optional Field” column heading and select the first optional field from the list that appears.  
*If the list already contains optional fields, click the Insert key, and then click the Finder to select the new optional field from the list.*
- Double-click the Value Set field to set a default value for the field.
- Use the Finder in the Default Value field to select from values or enter a default value if no list of values exists.
- If you add an optional field to CRM that is already used for A/R customers, CRM will display the following message. Click Yes to update Companies with the optional field values from A/R.



CRM will continue to synchronize optional fields for companies unless you select the Suspend A/R Integration checkbox in CRM and Collections Options.

- Similarly, if you add an optional field to CRM that is already used for M/T Contacts, CRM and Collections will update CRM contacts with the optional field values from Sage 300, and will continue to synchronize optional fields for contacts unless you select the Suspend M/T Integration checkbox in [Setup Options](#).

## Set up Contacts and Companies

**If you have the Sage 300 Multiple Contacts module**, make sure that M/T Contacts is activated, then follow “**Step 6**” and “**Step 7**” to set up CRM contact and company records.

- If you previously used TaiRox Productivity Tools to add contacts in Extended Customers, **make sure that you update TaiRox Productivity Tools contacts to Sage 300 M/T Contacts before you continue.**

After updating TaiRox Productivity Tools contacts, run Sync Contacts to check that all contacts have been copied to TaiRox CRM and Collections.

**If you do NOT have the Sage 300 Multiple Contacts module, go directly to “Step 7”** to set up CRM company records.

## Step 6: Sync TaiRox Contacts with Sage M/T Contacts (if you use the Sage Multiple Contacts module)

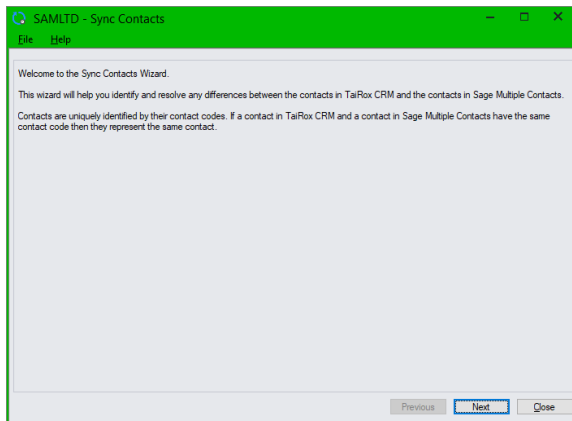
**If you have the Sage 300 Multiple Contacts module, activate the Sage 300 M/T Contacts module if you have not already done it.**

Use **Periodic Processing > Sync Contacts** to add the list of contacts maintained in Sage's M/T Contacts module to the list of contacts maintained by TaiRox CRM. After setting up CRM and Collections, you can use Sync Contacts to ensure that both lists of contacts match.

**The Sync Contacts icon will not appear in the Periodic Processing folder *unless* M/T Contacts is activated.**

**Note: Make sure that “Suspend M/T Integration” is NOT selected in Setup Options.**

The Sync Contacts program is disabled if you select the *Suspend M/T Integration* checkbox. Do not suspend M/T Integration while setting up CRM and Collections.



### Notes:

- Proceed through the wizard to copy all Sage contacts to TaiRox CRM and all CRM contacts to Sage M/T Contacts.
- See [Sync CRM Contacts with M/T Contacts](#) for details on using the program.

## Step 7: Sync Companies with Sage A/R Customers and Customer Contacts

Use **Periodic Processing > Sync Companies** to add all active A/R customers to TaiRox CRM and Collections as new company records. Sync Companies ensures that the list of companies maintained by TaiRox matches the list of customers in Accounts Receivable.

**Note regarding inactive customers:** Sync Companies only considers active customers when checking if a customer has a corresponding company in TaiRox CRM and Collections.

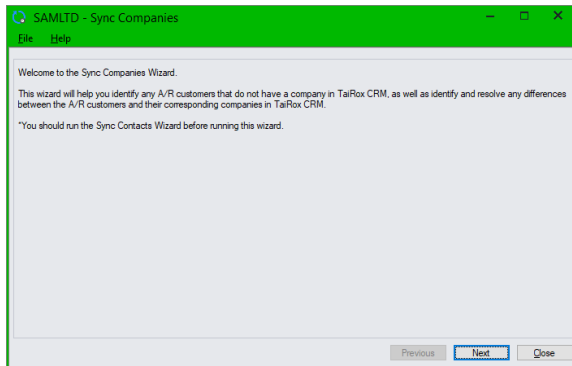
If you need to add an inactive customer to CRM and Collections:

- Open the inactive customer in the A/R Customers program.
- Make the inactive customer active, and save the change. CRM and Collections will automatically sync the record.
- Make the customer record inactive again, and save the change.

Generally, you will want to add all of your current Sage 300 A/R customers to CRM and Collections.

**Note:** Make sure that “Suspend A/R Integration” is **NOT** selected in Setup Options.

The Sync Companies program is **disabled** if you select the *Suspend A/R Integration* checkbox. Do not suspend A/R Integration while setting up CRM and Collections.



### Notes:

- Proceed through the wizard to copy all Sage A/R customers to TaiRox CRM and Collections.
- See [Sync CRM Companies with Sage 300 A/R Customers](#) for details on using the program.

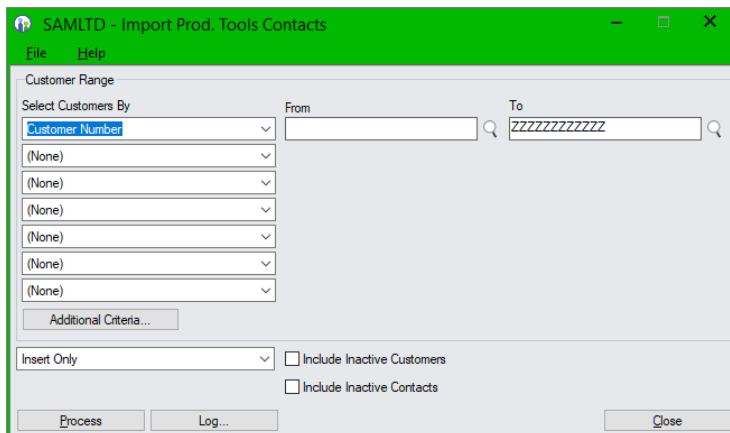
## Step 8: Run “Import Prod. Tools Contacts” if you use TaiRox Productivity Tools to add contacts to A/R Customers

The “Import Prod. Tools Contacts” icon will ***not*** appear in the CRM Setup folder ***if you use the Multiple Contacts module with Sage 300.***

The Import Prod. Tools Contacts program in the Setup folder lets you import contacts for A/R customers that are maintained by the Extended Customers program in TaiRox Productivity Tools – prior to the introduction of the Sage 300 Multiple Contacts module.

The TaiRox Productivity Tools User Guide provides instructions for updating contacts when you activate the M/T Contacts module.

The following “Import Prod. Tools Contacts” screen shows settings for importing all active contacts from TaiRox Extended Customers for all companies that are active. (These settings match the behavior of Sync Contacts and Companies.)



**Notes:**

- See [Appendix F: Exporting and Importing Companies, Contact, and Notes](#) for information on importing data from other accounting systems or contact management programs.

## Set up Territories, Users, and Security

### Company, user, and territory considerations for setting up

Each company in CRM must be assigned to a territory.

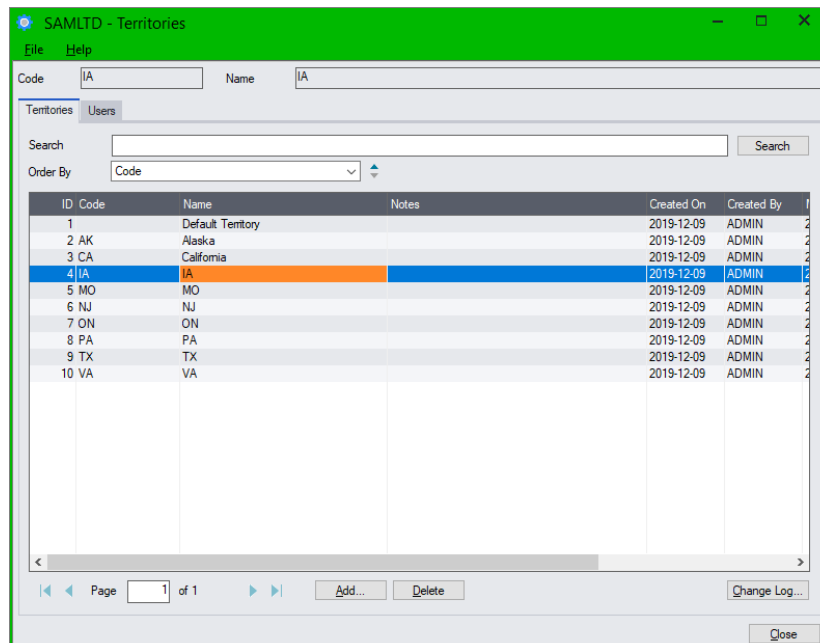
- Companies that are imported from A/R are assigned the territory code from A/R. If the territory code was blank in A/R, they are added to the Default (blank) group in CRM.
- Companies that are added in CRM are also assigned a territory code. You can choose a blank (default) code, or choose an existing territory from a dropdown list.
- Opportunities and cases are linked to companies and, therefore, are linked indirectly to a territory. Contacts that are linked to companies are also indirectly linked to the company's territory.

CRM users see companies, opportunities, cases, tasks, and notes based on the territories to which they belong.

- A CRM user can be granted the right to see all territories. CRM includes a switch that effectively turns off all territory restrictions for a user.
- Alternatively, a CRM user can be granted rights to see any number of specific territories. There is no hierarchy of territories.

For more information on CRM security, see [Appendix G: CRM Security](#).

### Step 9: Add descriptions to territory codes. You can also add new territory codes if you need them for new prospects

**Notes:**

- Double-click a row to display territory information and add a territory name.

You can also add notes – for example, to say who is assigned the territory, or to provide phone numbers and addresses.

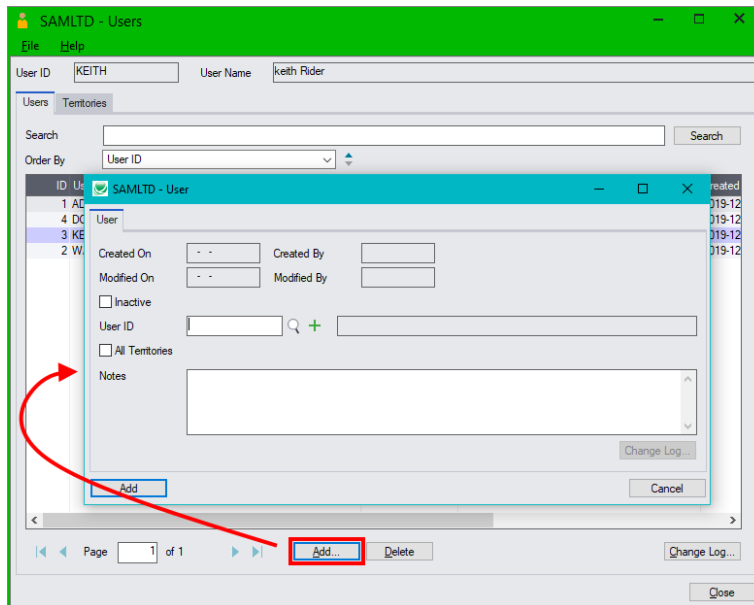
- Click the Add button to add new territories to CRM.

## Step 10: Add Sage 300 users to CRM and Collections

- First, add users to Sage 300 using **Administrative Services > Users**.

**Note:** You must add an email address to the Email 1 field in Sage 300 to send calendar events to assigned users for cases, opportunities, and tasks.

- Second, add Sage 300 users to TaiRox CRM using **TaiRox CRM > Setup > Users**.



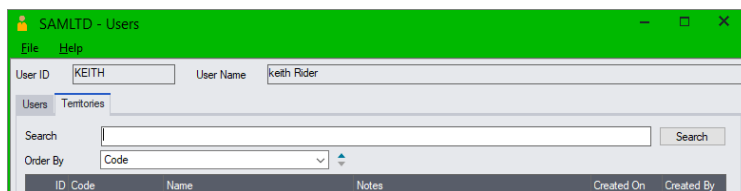
### Notes:

- Click the Add button on the Users screen.
- Enter the User ID or use the Finder to select the new CRM user.  
**Note:** the user *must* be added to Sage 300 first.
- Select the “All Territories” checkbox if you want the user to see opportunities, cases, and notes for all territories – not just territories to which they are assigned.
- Click the Add button on the User screen.

### To assign users to territories:

You do not have to assign users to individual territories if they have access to All Territories.

- Click the Territories tab on the Users screen:



Note that Collections users need access to all territories to run Overdue Payment Reminders and view all disputed invoices, overdue invoices, tracked invoices, and promised payments.

- Click the Link button at the bottom of the screen.
- Enter or select a territory code and click the Add button.
- Click the New button (+) on the Territory popup to add another territory.

## Step 11: Add new CRM and Collections security groups to Sage 300

Create security groups for different sets of users to allow different access rights for groups of users. See [Appendix G: CRM and Collections Security](#).

- Select **Administrative Services > Security Groups**
- Choose “TaiRox CRM and Collections” as the application

Collections users require access to the Collections security authorization and should have user access to all territories in order to run Overdue Payment Reminders and view all disputed invoices, overdue invoices, tracked invoices, and promised payments.

## Step 12: Add CRM and Collections users to security groups in Sage 300

After creating CRM and Collections security groups, add users in Sage 300 Administrative Services. See [Appendix G: CRM and Collections Security](#).

- Select **Administrative Services > User Authorizations**

## Specify Email Settings for Customer Documents

CRM and Collections lets you email invoices, statements, letters, overdue payment reminders, and payment due alerts to multiple recipients and create a communication record of each email for easy lookup.

- You specify all email message details for the Send A/R statements/Letters, Send A/R Invoices, and Send O/E Invoices programs using the [Accounting Documents](#) screen. These programs are replacements for Sage 300 programs that save copies of statements, letters and invoices as communications.
- You choose the email templates for overdue invoice reminders, payment due alerts and the Send Invoices program using the [Overdue Payment Reminders Setup](#), [Payment Due Alerts Setup](#), and [Send Invoices Setup](#) programs.

## Step 13: Add settings for emailing overdue payment reminders, payment due alerts, and invoices to customers

Note that CRM and Collections uses the “Preferred Language” setting in the Company window to send emails and attached invoices to customers in English, French, or Spanish. See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices](#) for details.

### Overdue Payment Reminders Setup

- Go to **TaiRox CRM and Collections > Setup > Overdue Payment Reminders**

The Overdue Payment Reminders screen has two tabs – Settings and Scheduling.

#### **Settings tab**

- **Overdue Payment Reminder settings** are used by the Overdue Payment Reminders program to send reminder emails to customers and to create phone tasks for users making collection calls. See [Overdue Payment Reminders](#) and [Overdue Payment Reminders Setup](#) for details.

See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices](#) for information on creating email templates.

Days Overdue	Label	Color	Action	Email Template
1	1 - Late	Yellow	Send Email	1Late.html
31	2 - Past Due	Orange	Send Email	2PastDue.html
61	3 - In Arrears	Red	Send Email	3InArrears.html
Over	4 - Delinquent	Dark Red	Send Email	4Delinquent.html

**Days Overdue:** The default settings provide standard 30-60-90 aging buckets, but you can change the number of days for each range.

CRM uses these aging buckets to assign overdue invoices to invoice stages when you click the Update button on the Overdue Payment Reminders form.

**Labels and Color:** You can change the labels and colors used for each overdue invoice stage. Labels appear on the Overdue Payment Reminders form.

**Action:** The program supports two actions:

- **Send Email** – to send payment reminders using the selected email template to company contacts when a company's oldest invoice reaches this overdue stage.
- **Create Task** – to create a collections task for calling up a customer when the company's oldest invoice reaches this overdue stage.

**Email Template:** Choose the default email message that you want to send to customers for each overdue invoice stage. You can edit the default template files or add your own.

Note the following points regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
 \<Sage300>\XQ61A\Templates\Overdue Payment Reminders
- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory  
 C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders
- The Setup program looks in the company directory for Overdue Payment Reminder templates:  
 C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders

**Preview:** Click the Preview button to view the body of the selected payment reminder email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.



**Attachments:** Click the Attachments button to add additional attachments to all of the overdue payment reminder emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.

**Install Current Templates button:** When you update CRM and Collections, you can get the most recent templates installed by program updates by clicking the “Install Current Templates” button. It will copy new templates from \XQ61A\Templates\Overdue Payment Reminders to the company folder.

**Minimum days overdue before creating an Overdue Payment Reminder** lets you specify the **default** minimum number of days that an invoice must be overdue before it will create an overdue payment reminder record.

You can change this setting for individual companies in the Company window. (For example, you may have customers whose payment is always late or who may have different payment terms.)

**Minimum number of days between Overdue Payment Reminders** ensures that you do not spam customers with too many payment reminders. If you do not specify a minimum (e.g. 7 or 14 days), the program will create a new reminder for all overdue invoices each time you update the overdue payment reminders list and process payment reminders. See [Overdue Payment Reminders](#) for details.

**Format:** Select Overdue Invoices to only list overdue invoices, debit notes and interest charges on overdue payment reminders, or select Account Summary to list all unpaid documents and unapplied credits.

**Email Subject:** Specify the subject line that you want to appear on all overdue payment reminder emails.

**From Email:** Specify the “From Email” address that you want to appear on all overdue payment reminder emails.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your overdue payment reminder emails.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

**Create a Communication When You Send an Email:** Select the “Create a Communication” checkbox to create a communication when overdue payment reminders are emailed to customers.

### ***Scheduling tab***

The Scheduling tab provides the user information that will be in effect when running the Overdue Payment Reminders program as a scheduled background task.

- **Send Email settings:** Apply to any selected customers that have a Send Email action.

**Attach Copies of the Invoices:** Select to include PDF copies of overdue invoices with emails.

**Substitution Variables:** Enter values for variables that appear in the email templates when reminders are sent from a Windows scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

- **Create Task settings:** These settings apply to customers that have a Create Task action.

You can specify a user name in the Task options to assign tasks for this set of companies to a single user.

Specify the number of days following run time that the call task should appear on the assigned user’s dashboard.

- **Exclude Customer settings:** Use the checkboxes to choose which invoices to exclude from emails or tasks.

## Payment Due Alerts Setup

- Go to **TaiRox CRM and Collections > Setup > Payment Due Alerts**

The Payment Due Alerts screen has two tabs – Settings and Scheduling.

### Settings tab

- Payment Due Alerts settings** are used by the Payment Due Alerts program to send reminder emails to customers about upcoming invoice payments. See [Payment Due Alerts](#) and [Payment Due Alerts Setup](#) for details.

**Number of days before due date to send a Payment Due Alert** lets you specify the number of days before payments are due to send reminders. This number applies to the invoice that is closest to being due.

You can change this setting for individual companies in the Company window. (For example, you may customers whose payment is always late or that may have different payment terms.)

**Minimum number of days between Payment Due Alerts** ensures that you do not send customers too many payment alerts. If you do not specify a minimum (e.g. 10 days), the program will let you create a new alert each time you run Update and process payment due alerts. This can result in spamming customers.

**Note:** The Minimum number of days between Payment Due Alerts **must be less** than the Minimum number of days before the due date to send Payment Due Alerts. This ensures that an alert will be sent for each invoice before it becomes due.

**Email Template:** Choose the default email message that you want to send to customers to remind them of invoice payments. You can edit the default template files or add your own – and you can override the default email message templates when you process payment due alerts.

Note the following points regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
 \<Sage300>\XQ61A\Templates\Payment Due Alerts
- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory  
 C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Templates\Payment Due Alerts
- The Payment Due Alerts Setup program looks in the company directory for Payment Due Alerts templates. Template files must be stored in the following folder to be selected by the program.  
 C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Payment Due Alerts

**Preview:** Click the Preview button to view the body of the selected payment due alert email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.

**Attachments:** You can add additional attachments to all of the payment due alert emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.

**Email Subject:** Specify the subject line that you want to appear on all payment due alert emails.

**From Email:** Specify the “From Email” address that you want to appear on all payment due alert emails.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your payment due alerts.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

**Create a Communication When You Send an Email:** Select the “Create a Communication” checkbox to create a communication when payment due alerts are emailed to customers.

### ***Scheduling tab***

The Scheduling tab provides the user information that will be in effect when running the Payment Due Alerts program as a scheduled background task.

- **Send Email settings**

**Attach Copies of the Invoices:** Select to include PDF copies of due invoices with emails.

**Substitution Variables:** Enter values for variables that appear in the email templates when reminders are sent from a Windows scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices](#) for information on creating email templates.

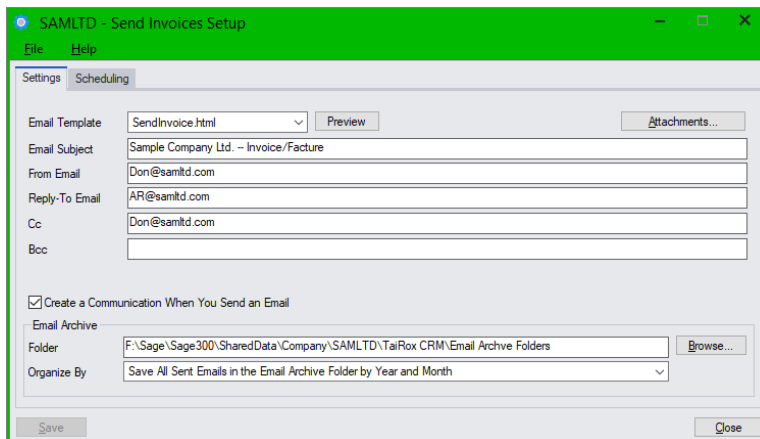
## **Send Invoices Setup**

- Go to **TaiRox CRM and Collections > Setup > Send Invoices**

The Send Invoices Setup screen has two tabs – Settings and Scheduling.

### ***Settings tab***

- **Send Invoices settings** are used by the Send Invoices program to send emails to customers with posted and unsent attached invoices. See [Send Invoices](#) and [Send Invoices Setup](#) for details.



**Email Template:** Choose the default email message that you want to send to customers with invoices. You can edit the default template files or add your own – and you can choose a different email message template when you send invoices.

Note the following regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
`\<Sage300>\XQ61A\Templates\Send Invoices`
- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory  
`C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Templates\Send Invoices`
- The Payment Due Alerts Setup program looks in the company directory for Payment Due Alerts templates. Template files must be stored in the following folder to be selected by the program.  
`C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Send Invoices`

You can get the most recent templates installed by program updates by copying the new templates from `\XQ61A\Templates\Send Invoices` to the company folder. Make sure that your current templates have a different name from the templates installed by CRM and Collections.

**Preview:** Click the Preview button to view the body of the selected Send Invoices email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.

You can get the most recent templates installed by program updates by copying the new templates from `\XQ61A\Templates\Send Invoices` to the company folder. Make sure that your current templates have a different name from the templates installed by CRM and Collections.

**Attachments:** Click the Attachments button to add additional attachments to all of the invoice emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.

**Email Subject:** Specify the subject line that you want to appear on all invoice emails.

**From Email:** Specify the “From Email” address that you want to appear on all invoice emails.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your invoice emails.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

**Create a Communication When You Send an Email:** Select the “Create a Communication” checkbox to create a communication when invoices are emailed to customers.

### ***Scheduling tab***

The Scheduling tab provides the user information that will be in effect when running Send Invoices as a scheduled background task.

See the CRM and Collections [Scheduler User Guide](#) for information on setting up Windows scheduled tasks for sending invoices.

- **Send Email settings**

**Substitution Variables:** Enter values for variables that appear in the email templates when invoices are sent from a Windows scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

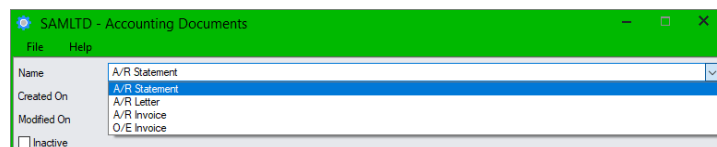
See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices](#) for information on creating email templates.

## **Step 14: Add settings for emailing invoices, statements and letters to customers**

- Open **TaiRox CRM and Collections > Setup > Accounting Documents** to specify properties for emails sent using Send Statements/Letters, Send A/R Invoices, and Send O/E Invoices.
- **Send Invoices, Overdue Payment Reminders, and Payment Due Alerts do not use this form for email settings.**
  - You select email templates for Overdue Payment Reminders and Payment Due Alerts in the [Overdue Payment Reminders Setup](#), [Payment Due Alerts Setup](#), and [Send Invoices Setup](#) screens.

### **Notes:**

- Select the document type from the Name dropdown at the top of the screen.



- The message details at the top of the screen let you specify a different reply-to email address, Cc, Bcc, email subject and email message body for each type of accounting document. The “From Email” will override the default From Email address specified on the Email tab in the [Options](#) program.

Separate multiple Cc and Bcc recipients' email addresses with commas or semicolons.

- The Attachment Limit is the maximum number for attachments for a single email. For example, if you specify 1, the program will generate a separate email for each invoice that's sent to the same company email address or contact.

Enter “0” for no limit on the number of attachments.

- Select “Create a Communication When You Send an Email” to store a copy of each email that CRM creates as a communication. You can look up past emails by communication or recipient.

- The Email Archive Folder field lets you specify a different archive folder for each type of accounting document. If you do not specify a folder, CRM will use the Email Archive Folder specified on the first tab in the [Options](#) form.
- Choose from the “Organize By” dropdown to save all communications in subfolders of the Email Archive Folder you specified, organized by Year (*ArchiveFolder\YYYY*), Year and Month (*ArchiveFolder\YYYYMM*) or Year, Month, and Day (*ArchiveFolder\YYYYMMDD*).
- Accounting documents use the server set up on the Email tab in [CRM and Collections Options](#).

## Step 15: Specify the email recipients of accounting documents on the Contacts tab for each company

The Contacts tab in the CRM and Collections Company window lets you:

- Add contacts to existing companies.
- Identify which contacts in each company will be emailed statements, letters, invoices, overdue invoice payment reminders, and payment due alerts.

Contact Code	Last Name	First Name	Email	A/R Invoices	A/R Statements	O/E Invoices	X/Q Payment Reminders
ANDREW MURREY00018	Murrey	Andrew	Andrew.Murrey@tairox.com	X		X	X
ANNEYALE00017	Yale	Anne	Anne.Yale@tairox.com				
CHARLESBLAIR00016	Blair	Charles	Charles.Blair@tairox.com	X	X	X	X
EDWARDCAVENDISH000	Cavendish	Edward	Edward.Cavendish@tairox.com	X			
RICHARDFUTOKWA00020	Futokwa	Richard	Richard.Futokwa@tairox.com	X	X	X	X

*If you already email statements, letters and invoices to customers from Sage 300*, CRM and Collections' Send Documents features will continue to email statements, letters and invoices to customers if their Delivery Method in A/R is set to Email or Contact's Email.

In addition, all Collections programs that email documents create a communication for each emailed invoice, statement, letter, or notice and attach it to the company record, so you can look up emailed documents to confirm them later.

**However, to use all email features** (such as sending different documents to different – and multiple – recipients), **you must:**

- For each company, specify the email recipients for each document type on the Contacts tab in the Company (or Companies) window.

Note – if you use M/T Contacts – that the documents shown on the Contacts tab in Sage 300 A/R and on the contacts tab in CRM are not the same.

For example, the CRM list does not include O/E Order Confirmations. However, if you selected contacts for Invoices in Sage 300 A/R, the contacts you selected there will appear in CRM.

You can specify any number of recipients from the list of CRM contacts for the company.

**Hint:** Right-click the column headings in the grid and choose “Hide Most Columns” to easily view the contact names and the email forms (as shown above). You can reset the columns after selecting email recipients, or choose the precise group of fields that you want to display – such as the email address field or the Address 1 field.

ID	Contact Code	Last Name	First Name	Job Title	Phone (Office)	Phone (Mobile)	Phone (Other)
13	BETHFRENCH00013	French	Beth		(703) 555-1069	(703) 555-1086	(703) 555-1036
14	ELIZABETHKERSHAW00014	Kershaw	Elizabeth	CFO	(305) 555-1040	(305) 555-1010	(305) 555-1085
12	JOENGLISH00012	English	Jo		(403) 555-1070	(403) 555-1065	(403) 555-1016
11	JOESLOAN00011	Sloan	Joe	COO	(250) 555-1076	(250) 555-1045	(250) 555-1045
10	JOSEPHVIPOND00010	Vipond	Joseph		(647) 555-1041	(647) 555-1092	(647) 555-1037
9	JOSETRUDEAU00009	Trudeau	Jose		(212) 555-1083	(212) 555-1067	(212) 555-1072

**Note:** If you do not set up recipients on the Contacts tab for each company, you cannot send documents to multiple recipients – or different recipients – for each type of accounting document.

See [Specify Email Addresses for Statements, Letters, Invoices, Overdue Payment Reminders, and Payment Due Alerts](#) for details.

## Step 16: Set up bulk email accounts

The [Bulk Email Accounts](#) Setup program stores the connection information for your bulk email provider's website.

This information is required if you want to use the Send Bulk Email program with a bulk email service provider such as MailChimp or SendGrid to send general announcements or sales and marketing emails to customers.

**Note:** Send Bulk Email is a CRM and Collections feature. It is not included in the Collections module without CRM.

### Note:

- You can send bulk emails using the email server specified in Setup > Options if you do not subscribe to a bulk emailing service.
- You do not need a bulk email provider to send invoices and other accounting documents from CRM and Collections to customers.

Open **TaiRox CRM and Collections > Marketing > Bulk Email Accounts** to specify the connection properties for your bulk email account. Note that the Marketing folder will not appear on the Desktop unless you have CRM and Collections.



The screenshot shows a window titled "SAMLTD - Bulk Email Accounts" with a green header bar. The window contains a form with the following fields and controls:

- Account:** A text field containing "SENDGRID" with navigation arrows and a search icon.
- Description:** A text field containing "SendGrid bulk mailing account".
- Created On:** A date field containing "2023-07-17".
- Created By:** A text field containing "ADMIN".
- Modified On:** A date field containing "2023-07-17".
- Modified By:** A text field containing "ADMIN".
- Inactive:** A checkbox that is currently unchecked.
- Provider:** A dropdown menu showing "SendGrid".
- API Key:** A text field containing a long alphanumeric string.
- API Url:** A text field containing "https://api.sendgrid.com/v3".
- Notes:** A text area containing "Account for sending bulk emails to customers".
- Buttons:** "Save", "Delete", "Close", and "Send Test Email".

### Notes:

- Choose the provider from the Provider dropdown list. CRM and Collections currently supports bulk emailing through MailChimp and SendGrid. More providers will be added in future.
- The API key is from your email provider. The Send Bulk Email program uses it to log in to the provider's website when you are performing a bulk email run.
- You can enter any notes with the account record.

See [Set Up Bulk Email Accounts](#) and [Appendix D: Sending Bulk Emails and Using Bulk Email Templates](#) for details.

## Add New Companies, Contacts, and Opportunities

You are now ready to add new prospects and contacts to CRM, and to add and track new opportunities.

For help on performing these tasks, see the following sections in this guide.

- **To add companies:** [Company – Add/Edit](#)
- **To add contacts:** [Contact – Add/Edit](#)
- **To add opportunities:** [Opportunity – Add/Edit](#)

See [Copying Opportunities](#), and also see [Create Opportunities](#) for information on generating opportunities for multiple companies in a single process.

Note that Opportunities are not available with the stand-alone Collections module (without CRM).

- **To add documents:** [Document – Add/Edit](#),

You can also drag and drop documents to company records, opportunities, cases, disputed invoices, and tracked invoices.

## Demonstrating TaiRox CRM and Collections

CRM and Collections has functions for creating and removing demonstration data. The data will be created for the 12 months preceding the current Sage 300 session date.

- Activate CRM and Collections for the database where you want to create demo data.
- Use **TaiRox CRM and Collections > Setup > Create Demo Data** to create CRM Opportunities, Contacts, Contact Groups, Cases, Notes, Documents, and Communications.



Different opportunities will have Won, Lost, Closed and Deferred statuses. The opportunity dates will be set relative to the session date (forward and backward).

Cases will have revisit dates as might be expected, and the resulting data will produce reasonable Charts.

- Use **TaiRox CRM and Collections > Setup > Remove CRM Data** to delete this data.

### Notes:

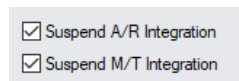
- Import Customers, Import Contacts and Sync Companies are part of the go-live and maintenance processes and do **not** create demonstration data.
- *The following programs will generate emails and communications in demo mode, but will **NOT** actually send emails:* Send Documents, Payment Due Alerts, and Overdue Payment Reminders.

Cases, opportunities and tasks will generate calendar events, but they will not send them either.

This means that you can demonstrate this functionality without setting up an email server.

### ***A/R and M/T Integration are suspended in CRM and Collections Demo Data:***

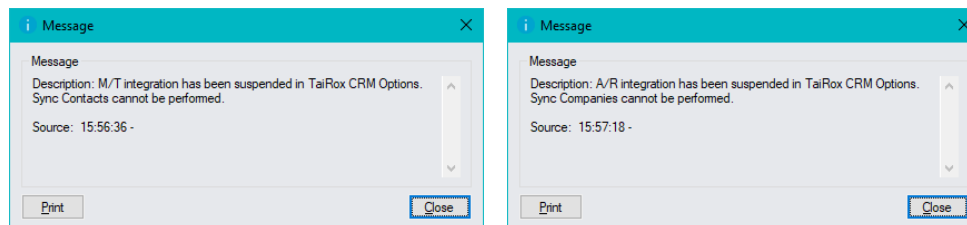
Note that A/R and M/T Integration are suspended when you create CRM and Collections Demo Data. If you look in [Setup Options](#), you will see that both “suspend integration” options are checked.



Suspend M/T Integration appears only if you are using Sage 300's Multiple Contacts module.

### ***Warning Messages when you select Sync Contacts or Sync Companies***

If you select Sync Contacts or Sync Companies, then following messages will appear.

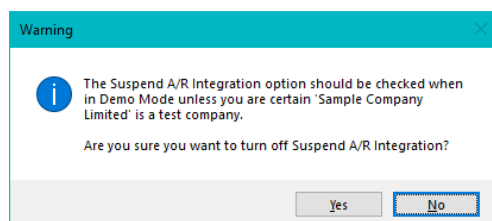


### ***Note that A/R and M/T Integration are suspended for your protection!***

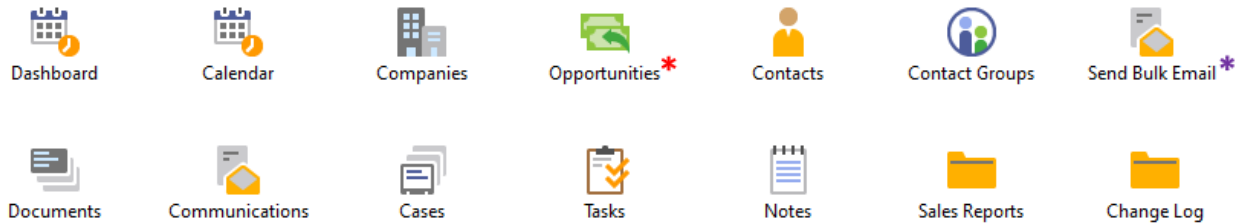
Integration is suspended to ensure that CRM and Collections does NOT update the Sage 300 Multiple Contacts and Accounts Receivable data for your company's database.

If you created Demo Data using SAMLTD or SAMINC – or with a copy of your company database – and want to see the results of A/R and M/T Integration, you can turn on integration in [Setup Options](#).

If you uncheck the “Suspend xx Integration” checkboxes, the program will display a message like this:



# Companies, Contacts, Cases, Tasks, Opportunities, and Communications



\* Opportunities are not available in the TaiRox Collections module (just in TaiRox CRM and Collections)

\* Send Bulk Email is in the Marketing folder, which does not appear in the TaiRox Collections module

## Dashboard

"What do I need to do today, this week, or this month?"

The Dashboard displays sales opportunities, cases, tasks, disputed invoices, tracked invoices, and promised payments with a revisit date for the currently selected day, week, or month that are assigned to you, to all users or to other users (*depending on your user permissions*), or that are unassigned.

Tasks also appear on the dashboard according to the Revisit Date until they are closed. The Due Date does not affect when they appear on the dashboard.

- You will not see opportunities on the dashboard with the stand-alone Collections module.
- See [Appendix G: CRM and Collections Security](#) for details on user security access.

**Double-click to display the details for a case, task, opportunity, disputed invoice, tracked invoice, or promised payment.**

Name	Company Name	Assigned To	Revisit On	Revisit At	Expected Close	Notes
Case - Needs Ready-to-Post training	Bargain Mart - San Diego	KEITH	2021-01-04	12:00:00 AM		Training took p
Case - Cannot run Day End	Frame-Up	WADE	2021-01-05	12:00:00 AM		Cannot run Day
Opportunity - Winter Sale	The House Doctors	DON	2021-01-05	12:00:00 AM	2021-03-05	Grade A
Case - Database issue - sending log files	J & Y Builders Ltd.	KEITH	2021-01-06	12:00:00 AM		Received on J
Opportunity - Winter Sale	The Yoshida Gardens	KEITH	2021-01-06	12:00:00 AM	2021-02-04	Grade C
Opportunity - Winter Sale	Astral Construction Co Ltd.	KEITH	2021-01-06	12:00:00 AM	2021-01-07	Grade C
Case - New activation code not working	CanAm Industries	KEITH	2021-01-06	10:00:00 AM		Sent out new c
Disputed Invoice - IN00000000000053	Coastal Electric Company	KEITH	2021-01-07	12:00:00 AM		Met with Coast
Task - Collection Call - The Yoshida Gardens	The Yoshida Gardens	DON	2021-01-07	12:00:00 AM	2021-01-08	
Case - Training for Check Approval	Mr. Ronald English	WADE	2021-01-08	12:00:00 AM		Will happen on
Case - Need to renew TPT license	The Courtyard	WADE	2021-01-08	12:00:00 AM		
Task - Draw up proposal for new office location	Astral Construction Co Ltd.	WADE	2021-01-11	12:00:00 AM	2021-01-14	
Task - Review spring sale website pages		KEITH	2021-01-12	12:00:00 AM	2021-01-14	
Promised Payment - 2	Mr. Stephen Kershaw	DON	2021-01-15	12:00:00 AM		- met with Stepi
Promised Payment - 1	Astral Construction Co Ltd.	KEITH	2021-01-19	12:00:00 AM		- Discussed pa
Opportunity - Summer Sale	Cash Transactions	WADE	2021-01-20	12:00:00 AM	2021-03-04	Grade A
Task - Meeting with Bargain Mart Stores - renovation	Bargain Mart Stores Inc.	DON	2021-01-21	10:00:00 AM	2021-01-23	
Opportunity - Winter Sale	Web customer sales	DON	2021-01-25	12:00:00 AM	2021-02-19	Grade B
Task - CanAm requirements list expected next week - keep in mind	CanAm Industries	WADE	2021-01-26	12:00:00 AM	2021-01-29	
Task - Collection Call - The Yoshida Gardens	The Yoshida Gardens	WADE	2021-01-26	12:00:00 AM		

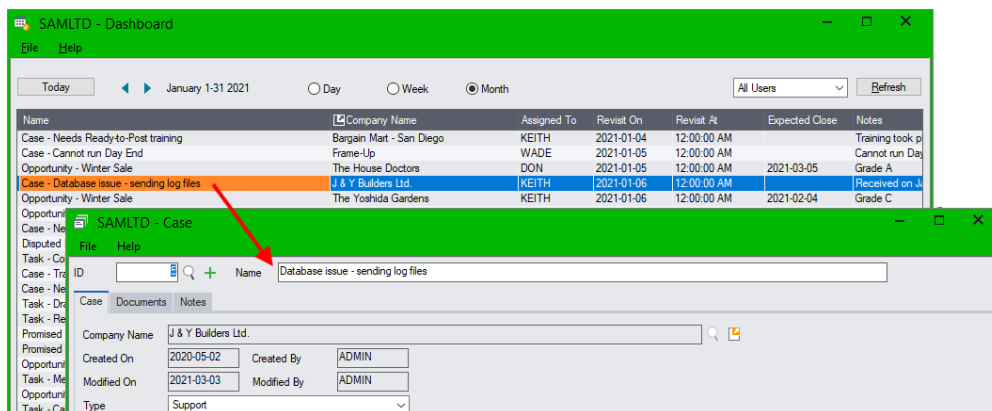
### Notes:

- The dashboard does **not** show cases, tasks, disputed invoices, tracked invoices or promised payments that are closed or deleted, or opportunities that are won/lost or deleted.

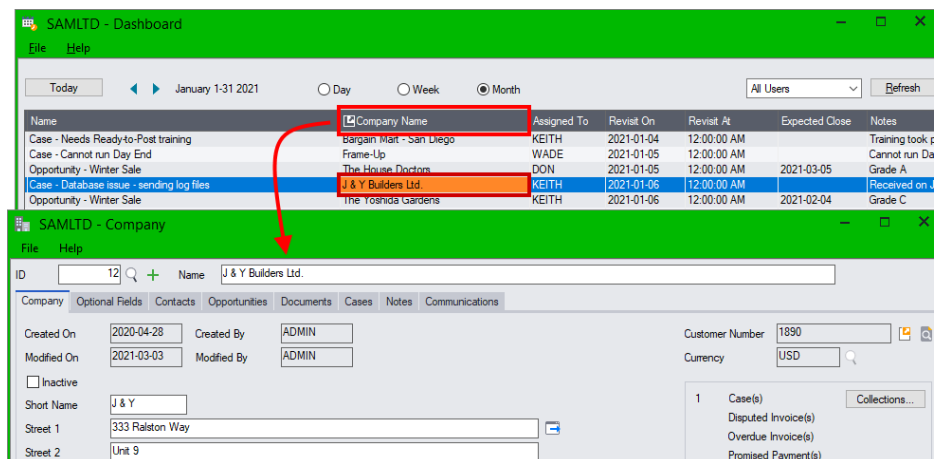
- **Today:** The session date is used by default on the Dashboard screen. If you change the date, click the Today button to quickly return to the session date, retaining the day-week-month state.
- **Navigation Arrows:** Use arrows to the right of the Today button to navigate to the previous or next day, week or month.
- **Day, Week or Month:** Choose to display items with a revisit date for the selected day, week or month. The grid includes a Revisit On Date and a Revisit On Time for scheduling appointments.
- **Me, All Users, Unassigned, or Other User:** “Me” displays items assigned to the logged in user. “All Users” shows all items the logged-in user is **allowed** to see, “Unassigned” shows opportunities, cases, tasks, tracked invoices, and promised payments that are not assigned to **any** users. You can also see items assigned to specific other users if you have permission to view them.
- **Refresh:** This button reloads the data from the database (changing states does not do this).
- The dashboard selects and sorts cases, opportunities, tasks, disputed invoices, tracked invoices, and promised payments by **Revisit Date**. Items without a **Revisit Time** display 12:00 AM.
- Users that are not assigned to “All Territories” will only see opportunities and cases that match the company territories to which they have access.

### Drill Down:

- Double-click a row to open the case, opportunity, task, tracked invoice, or promised payment.



- Click the **Company Name** column heading (as below) to open the Company details for the selected row. The following screen shot shows the company information for the highlighted item – J & L Builders Ltd.



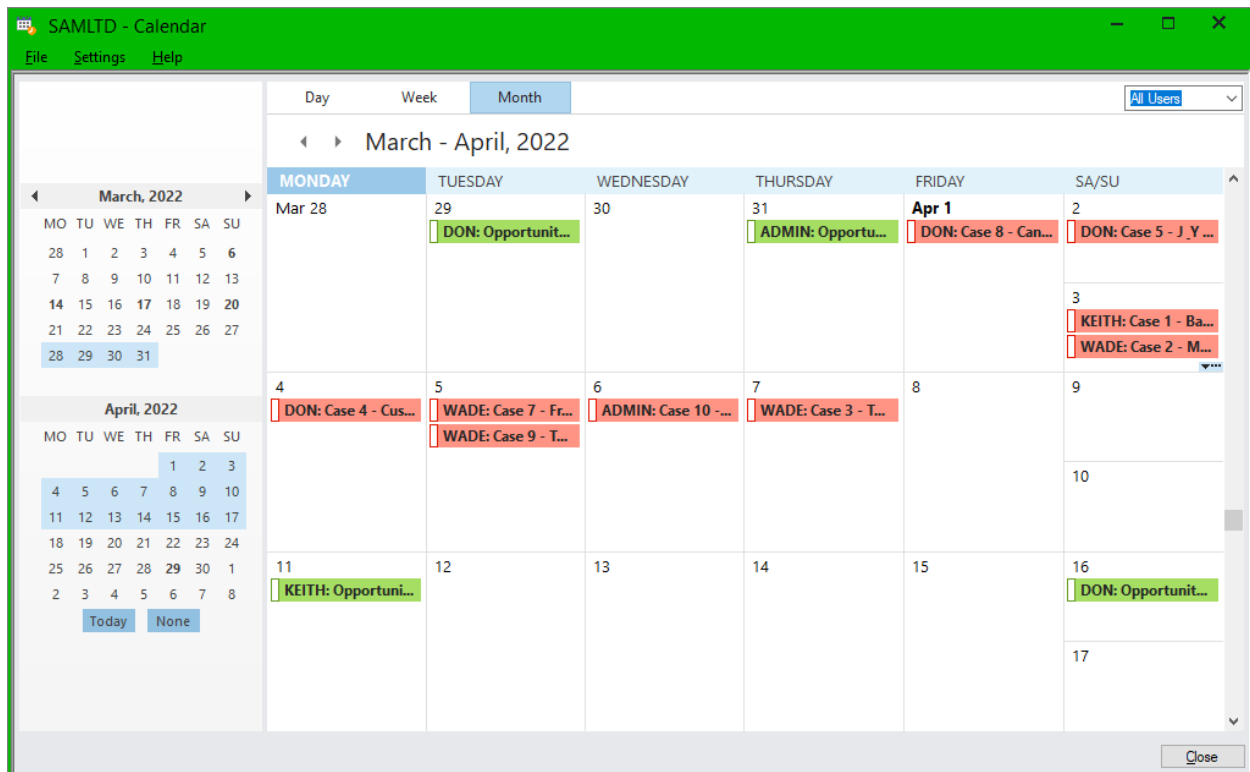
## Calendar

Like the Dashboard, the Calendar screen displays sales opportunities, tasks, cases, disputed invoices, tracked invoices, and promised payments according to their revisit dates.

- Double-click a calendar entry to display the details for a case, task, opportunity, disputed invoice, tracked invoice, or promised payment.

*You will not see opportunities on the dashboard if you are using the stand-alone Collections module.*

- Choose to see items for the currently selected day, week, or month.
- Choose items that are assigned to you, to another specific user, to all users, or that are unassigned. See [Appendix G: CRM and Collections Security](#) for details on user security access.

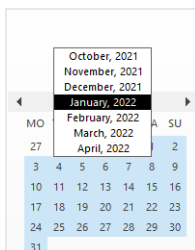


### Navigation:

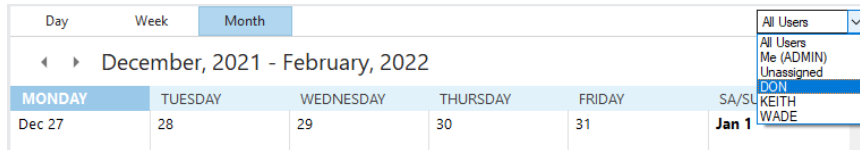
- Use the ◀ ▶ controls above the calendar to view calendar entries in previous and next days, weeks, or months.



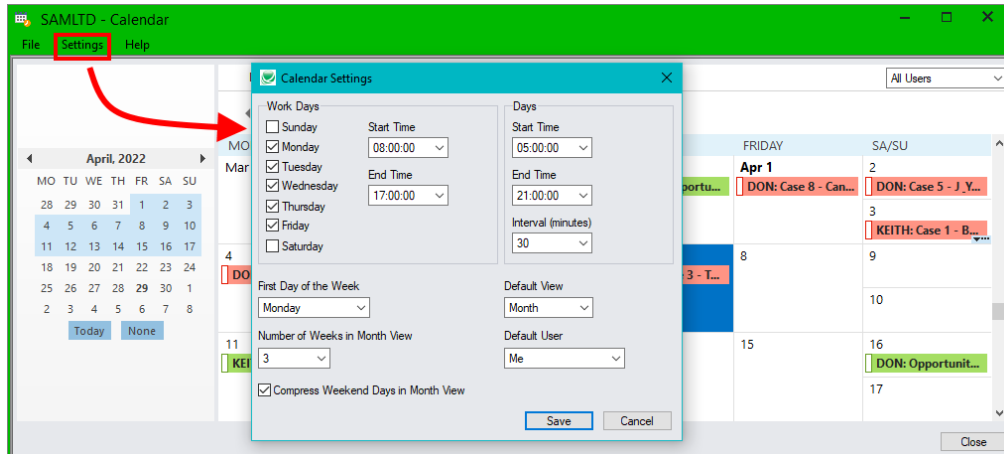
- Use the navigation controls in the left panel to quickly select a different day, week, or month.



- Choose the user from the dropdown list in the top-right corner of the calendar.

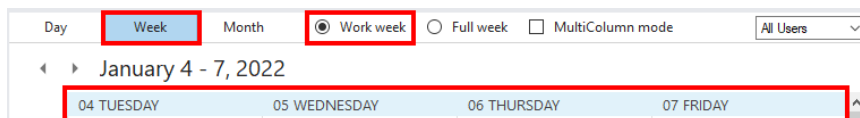


## Changing Default Calendar Settings



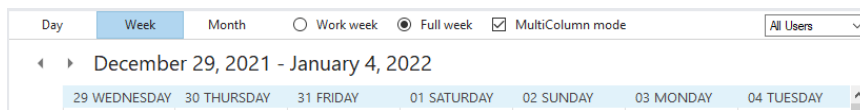
The Settings screen provides default settings for the calendar. Choose the settings that you want, and click the Save button.

- Select “Settings” from the Calendar menu at the top of the screen.
- Work Days** settings determine which days of the week are displayed when you choose the “work week” setting at the top of the calendar screen. The following example shows a 4-day work week.



You can also set the normal working hours in the day. Appointment times outside of normal hours are colored grey.


- Days** settings determine the time span displayed for each day, and the length of each appointment time – 15, 30 or 60 minutes.
- First Day of the Week** lets you choose which day appears first in work week and full week displays.



- Number of Weeks in Month View** can be from 2 to 6. You can also use the mouse to select the number of weeks from the left-side calendar navigation panel.
- Compress Weekend Days in Month View** splits a calendar cell in half to display Saturday and Sunday in a single cell.
- Default View** lets you select the view that appears when you open the calendar – Day, Week, or Month.
- Default User** lets you choose whose items appear when you open the calendar – your own or all users’.

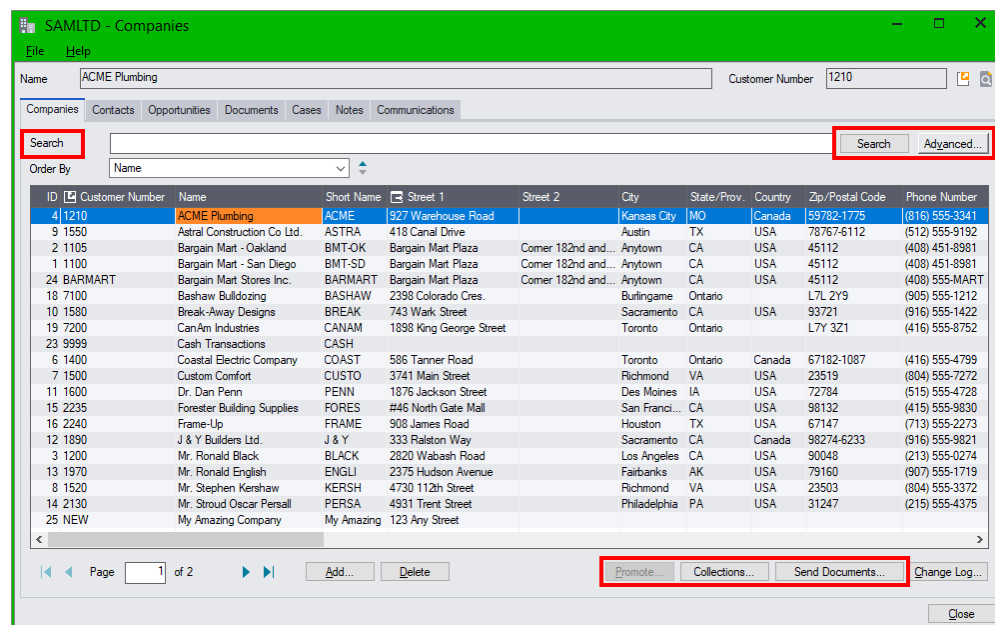
## Companies

The Companies screen provides a search field so you can quickly find company information.

- Enter partial name, short name, customer number, address information, phone number, email address, or company optional field information in the Search field.
- Press Enter, or click the Search button to find the company record.
  - Click the red X to remove search terms. 
- Click the Advanced button to search for companies using ranges for additional company fields.

Highlight the company you want, then click the additional tabs to view company Contacts, Opportunities, Documents, Cases, Notes, and Communications.

- Double-click a row to view or [edit company information](#).
- Click the **Collections** button at the bottom of the screen to view customer transactions, [cases](#), [notes](#), [communications](#), [disputed invoices](#), [overdue invoices](#), [tracked invoices](#), and [promised payments](#) for the highlighted company. For more details, see [Collections Information](#).
- Click the **Send Documents** button to resend documents to customers – such as outstanding invoices or recent receipts. See [Send Documents](#) under [Accounts Receivable and Collections](#).



The Opportunities Tab will not appear if you are using the standalone Collections module without CRM.

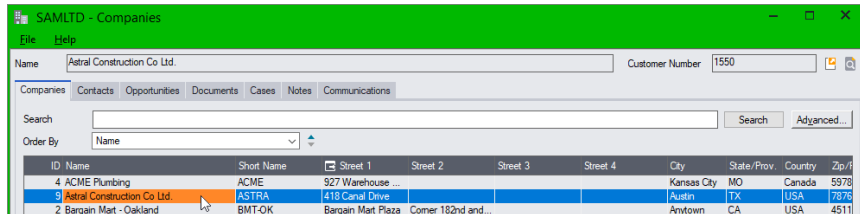
### Notes:

- Click the Add button to add a new company to CRM and Collections. The company will not be added as a customer in Accounts Receivable until you click the Promote button.
- You add new prospects by adding new companies to CRM and Collections that are not yet linked to A/R Customers.
  - You can add new contacts before adding companies using the Contacts program in CRM and Collections or using Sage M/T Contacts module (if activated).
  - You can then add new companies, and add new or existing contacts to the company records.
  - When you are ready, click the **Promote** button in the Companies window to add CRM companies to Accounts Receivable. See [Promoting Prospects to Customers in A/R](#).
  - If a customer account is added separately in A/R for the new company, you can **Link** the CRM and Collections company to the existing A/R company. For details, see [Linking Companies to Customers in A/R](#).

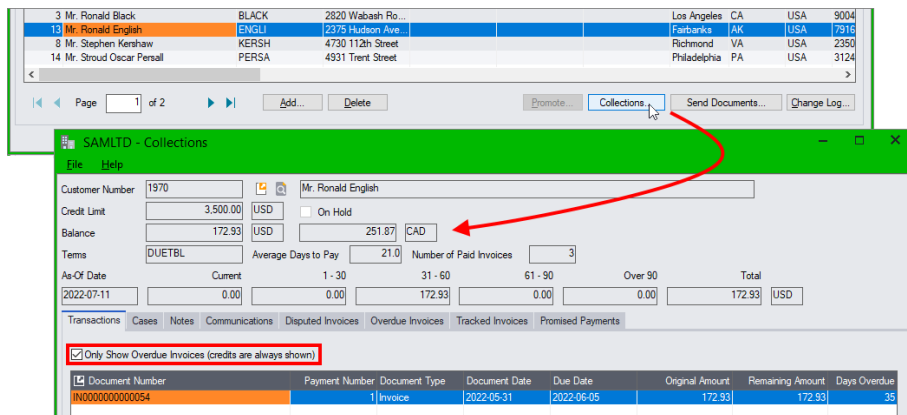
- New A/R Customer accounts are automatically added as companies in CRM and Collections unless you select the “Suspend A/R Integration” checkbox in [Setup Options](#).
- Users only see companies that match the company territories to which they have access.

### Drill Down:

- **Double-click a row** to open up the Company screen and edit company information.



- Highlight a row and click the **Collections** button at the bottom of the screen to view transactions, cases, notes, communications, disputed invoices, overdue invoices, tracked invoices, and promised payments for the highlighted company.



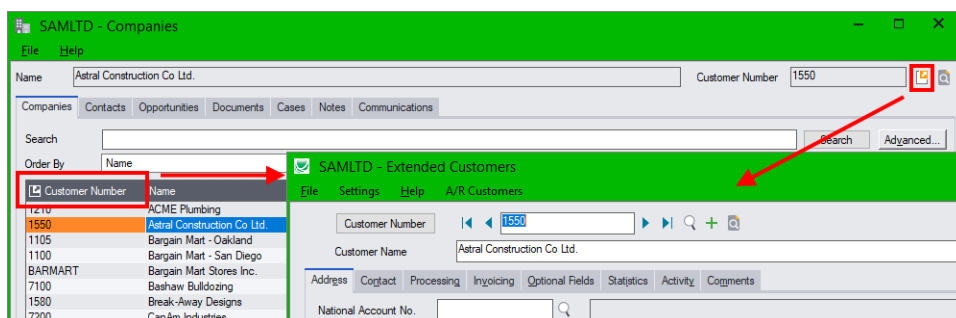
You can also double-click a company name to open the Company information screen, and then click the **Collections** button there.

**Note:** If you open the Collections screen from the Companies window, the program ages documents based on the default aging periods specified in Accounts Receivable.

If you open the Collections screen from the Customer Aging window, the program ages documents based on the settings that you specify on the Customer Aging screen.

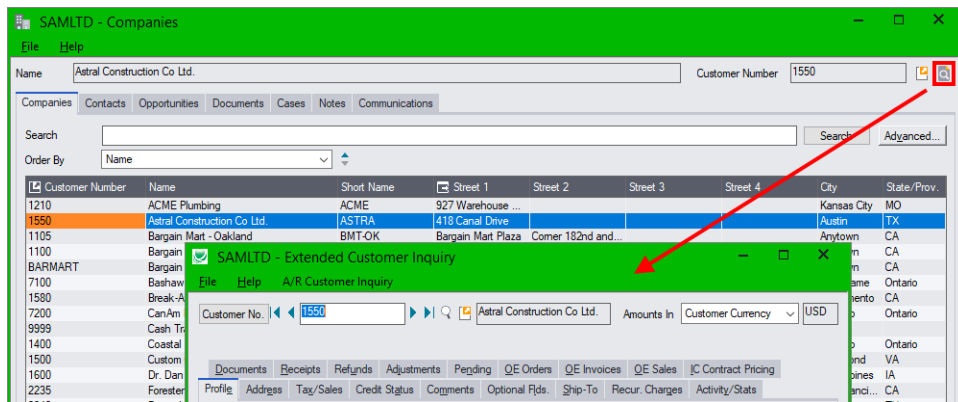
For more details on the Collections screen – and for information on adding new [cases](#), [disputed invoices](#), [tracked invoices](#) and [promised payments](#) – see [Collections Information](#).

- Click on the Customer Number column heading or on the icon to the right of the Customer Number (top-right-hand corner) to open the A/R Customers or the TaiRox Productivity Tools Extended Customers screen.



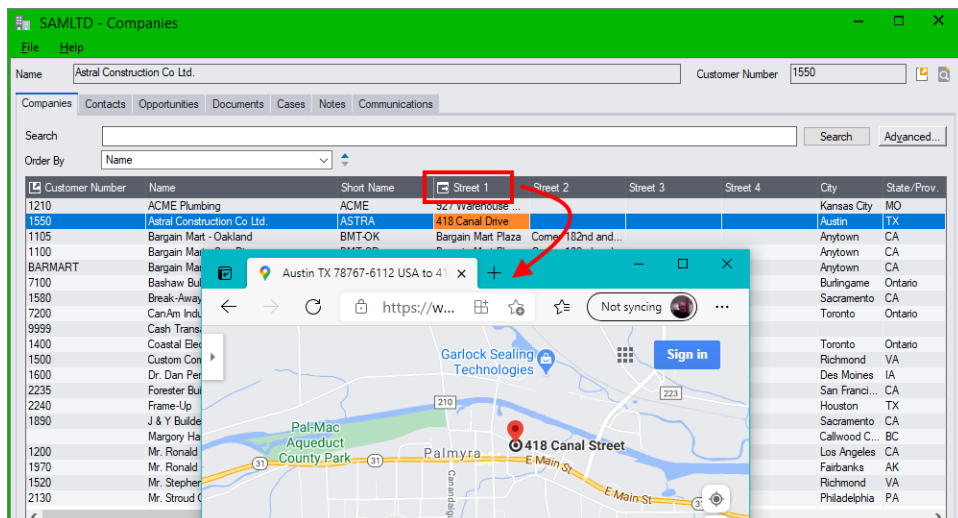


- Click the icon to the right of the Customer Number (top-right-hand corner) to open the A/R Customer Inquiry or TaiRox Extended Customer Inquiry screen.

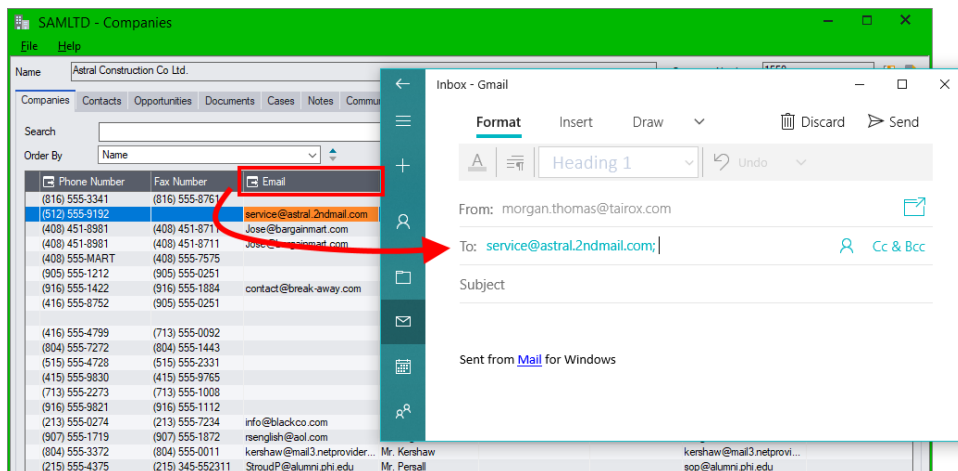


## Look up Customer Addresses and Contact the Customer

- Click on the Street1 column title to open a browser at the Google Maps site for that address.

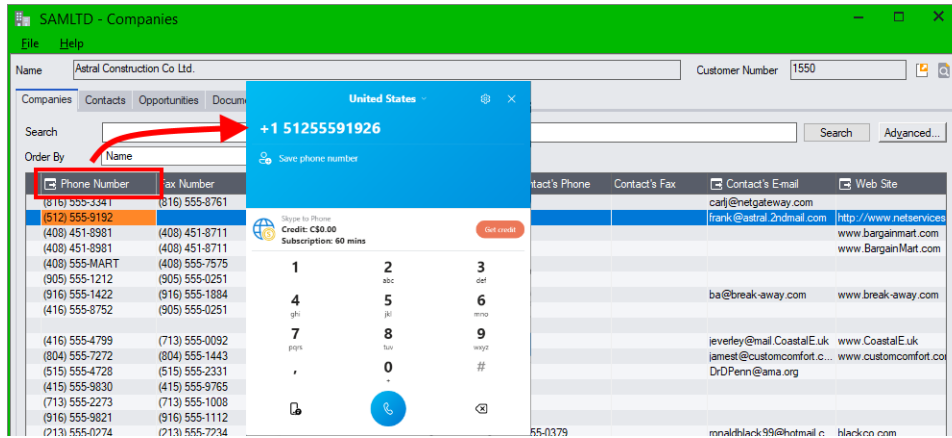


- Click the Email column heading to send an email to the main company email address.





- Click the Phone Number column heading to open the application associated with phone numbers.



**A/R and M/T Integration:** If you add a new company to A/R, it will automatically appear in CRM and Collections with all the A/R contacts – unless you select “Suspend A/R Integration in [Setup Options](#).”

Similarly, updating a company in one application – such as adding contacts – will update the company in the other application.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button information.

## Company – Add/Edit

The Company screen lets you add or change data for a company, add contacts, promote prospects to customers in A/R, and resend accounting documents to multiple company contacts.

**Access:** Double-click a row or click the Add button on the Companies screen.

The screenshot shows the 'SAMLTD - Company' window. Red arrows point from various fields and buttons to explanatory text on the right:

- Arrow to the ID field: Click the Drilldown button to view all customer data in Sage 300 A/R.
- Arrow to the 'Collections...' button: Click "Collections" to view account issues and outstanding amounts.
- Arrow to the Phone Number field: Click to call the number.
- Arrow to the Email field: Click to send an email.
- Arrow to the 'Send Overdue Payment Reminders' checkbox: Choose options for overdue payment reminders, payment due alerts and invoices (including language preferences for emails).
- Arrow to the 'Address...' button: Click for access to drag and dropped documents.
- Arrow to the 'Send Documents...' button: Resend A/R and O/E documents to customers.
- Arrow to the 'Change Log...' button: Click to edit the customer address and view location on Google Maps.

*The Opportunities tab won't appear if you are using the TaiRox Collections module without CRM.*

### Notes:

- Click the green Plus button beside the ID field (+) to add a new company.  
The field lengths and formatting on the Company window exactly match Sage A/R Customer fields, so data transferred between TaiRox and Sage 300 A/R is not truncated or reformatted.
- Click the Address button to edit the customer address or verify it on Google Maps.
- If you have a multilingual Sage 300 installation, you can use the "Preferred Language" setting in the Company window to send overdue payment reminders emails and invoices to customers in English, French, or Spanish. See [Appendix C](#) for details.
- You can disable overdue payment reminders, payment due alerts, and invoices or change the minimum days that payment is overdue before sending overdue payment reminders to the customer. By default, the program uses the setting in [Overdue Payment Reminders Setup](#).
- Use the Link button to link companies to A/R Customers. See [Linking Companies to Customers](#).
- Use the Send Documents button to resend accounting documents – or other documents – to multiple contacts. See [Send Documents](#) under [Accounts Receivable and Collections](#).
- Click the Documents Folder button to view drag and dropped documents in the Windows folder.
- Add as many contacts as you need on the Contacts tab. Contacts are fully integrated with the Sage 300 Multiple Contacts module if you use it.

### Drill Down:

- Click the **Collections** button to view transactions, cases, notes, communications, disputed invoices, overdue invoices, tracked invoices, and promised payments for the company.
- Click the icon beside Street 1 in the Address popup screen to open a browser and view the address location on Google Maps.
- Click the icons beside the company Email field or Contact's Email field to send an email.
- Click the icons beside the Phone Number field or Contact's Phone field make a phone call.
- Click the icon beside the Web Site field to open a browser using the customer's website URL.

**See Also:**

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

**Adding Company Contacts on the Company Contacts Tab**

The Contacts tab in the Company window lets you:

- Add contacts to existing companies.
- Identify which contacts in each company will be emailed statements, letters, invoices, and overdue payment reminders.

You can add as many contacts to the company as you need on the Contacts tab.

**Note:** Contacts can be independent of companies in CRM and Collections, or each one can be added to one or more companies.

**To add a contact to any company in CRM and Collections, you can:**

- Select the company in the Companies window.
- Select the Contacts tab.
- Click the “Add” button at the bottom of the form to add a **new** contact, or click the “Link” button to add an existing contact to this company.

**Or:**

- Open the Contacts window.
- Add a new contact or select an existing contact.
- Select the Companies tab.
- Click the “Link” button to add the contact to an existing company.

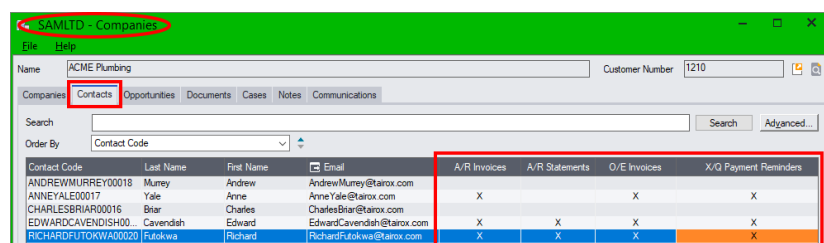
**Specifying the Recipients for Accounting Documents on the Contacts Tab**

If you already use Sage 300 to email accounting documents to customers, CRM and Collections' Send Documents features will continue to email statements, letters and invoices to customers if the Delivery Method for the customer in Accounts Receivable is set to Email or Contact's Email.

**However, to use all Send Documents features – and to send overdue payment reminders, payment due alerts, and invoices to customer contacts (using the Send Invoices program), you must:**

- For each company, specify the email recipients for each document on the Contacts tab in the Company (or Companies) window.

You can specify any number of recipients from the list of contacts for the company. Just double-click the row and column for the document that you want to add.



**Hint:** Right-click the column headings in the grid and choose “Hide Most Columns” to easily view the contact names and the email forms (as shown above). You can reset the columns after

*selecting email recipients, or choose the precise group of fields that you want to display – such as the email field or Address 1.*

ID	Contact Code	Last Name	First Name	Middle Name	Salutation	Job Title	Phone (Office)	Phone (Mobile)	Phone (Other)
1	SCLAIREWHITE0005	White	Dane				(332) 555-1087	(303) 555-1092	(800) 555-1045
4	DONTHOMSON00001	Thomson	Don			Purchasing Director	(416) 555-1056	(416) 555-1091	(416) 555-1024
70	JEFFSINGH00004	Singh	Jeff				(415) 555-1037	(415) 555-1088	(415) 555-1094
2	JOHNENGLISH00070	English	John				(212) 555-1025	(212) 555-1052	(212) 555-1005
3	KEITHSMITH00002	Smith	Keith				(212) 555-1039	(212) 555-1075	(212) 555-1006
3	WADEWONG00003	Wong	Wade				(800) 555-1073	(800) 555-1048	(800) 555-1004

#### Note:

- If you do not set up email recipients on the Contacts tab for each company, you cannot send documents to multiple recipients – or different recipients – for each type of form.
- CRM and Collections also uses the “Preferred Language” setting in the Company window to send overdue payment reminders, payment due alerts, and A/R and O/E invoices (using Send Invoices) emails and attached invoices to customers in English, French, or Spanish.

See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices](#) for details.

- Send Documents features create communications for emailed statements, letters, and invoices and attach them to company records, so you can look them up later.

## Promoting Prospects to Customers in Accounts Receivable

The Companies and the Company screens let you add companies in CRM and Collections to the Accounts Receivable module as customers.

Typically, the salesperson managing a prospect will email the receivables accounting group and ask them to promote a company to an Accounts Receivable customer – which will involve assigning a customer number, a customer group, payment terms, a salesperson and a tax group, and then conducting a credit check on the new customer.

The sales department should have additional customer onboarding procedures, such as welcoming the new customer, acquainting them with your services, introducing them to your support staff, documenting their company contacts, etc.

**Access:** Highlight the company that you want to promote and click the Promote button on the Companies screen to add prospects to Accounts Receivable – or open the Company screen and click the Promote button.

**Note:** The Promote button is active for all companies that are not linked to customer records in Sage 300 Accounts Receivable.

Once a company is linked to an A/R customer record, any changes in information in one module will automatically update information in the other module, unless you select the option to “Suspend A/R Integration” in [Setup Options](#).

You can see in the following screen that the TaiRox company does not yet have a customer number, and the Promote button is active.

Click the Promote button to display a screen for creating a linked A/R customer record.

SAMLTD - Companies

Name: Margory Hargreaves & Associates Customer Number: [ ]

Companies | Contacts | Opportunities | Documents | Cases | Notes | Communications

Search: [ ] Search Advanced...

Order By: Customer Number

ID	Customer Number	Name	Short Name	Street 1	Street 2	City	State/Prov.	Country	Zip/Postal Code	Phone Number
28		Margory Hargreaves & Asso	HARG	1208 Jordan Rd		Calwood C...	BC			
1	1100	Bargain Mart - San Diego	BMT-SD	Bargain Mart Plaza	Corner 182nd and...	Anytown	CA	USA	45112	(408) 451-8981
2	1105	Bargain Mart - Oakland	BMT-OK	Bargain Mart Plaza	Corner 182nd and...	Anytown	CA	USA	45112	(408) 451-8981
3	1200	Mr. Ronald Black	BLACK	2820 Wabash Road		Los Angeles	CA	USA	90048	(213) 555-0274
17	4030	The House Doctors	HOUSE	1215 13th Street E.		Newark	NJ	USA	37892	(201) 555-7374
18	7100	Bashaw Bulldozing	BASHAW	2398 Colorado Cres.		Burlingame	Ontario		L7L 2Y9	(905) 555-1212
19	7200	CanAm Industries	CANAM	1898 King George Street		Toronto	Ontario		L7Y 3Z1	(416) 555-8752

Page 1 of 2 Add... Delete Promote... Collections... Send Documents... Change Log... Close

SAMLTD - Promote Company

Customer Optional Fields

Customer Number: [ ]

Customer Name: Margory Hargreaves & Associates

National Account: [ ]

Group Code: [ ]

Terms: [ ]

Salesperson Code	Salesperson Name	Percentage
[ ]		

Tax Group: [ ]

Tax Authority	Tax Class	Registration Number
[ ]		

Promote... Cancel

- You must specify the A/R Customer that you want to use, along with the National Account number (if applicable), the Customer Group Code, Terms, Salesperson Code, and Tax Group.

### Before Promoting:

- Confirm the company currency before promoting the company to Accounts Receivable.

**Note:** You cannot change the currency once the customer has been added to A/R.

- Provide the accounting department with a customer contact that can provide the business registration number and email addresses for billing and payment queries.

The onboarding procedures should include documentation of credit policies, payment terms, preferential pricing, shipping methods, etc.

### Notes:

- The field lengths and formatting on the Company window exactly match A/R Customer fields, so data transferred between CRM and A/R is not truncated or reformatted.

## Linking Companies to Existing Customers in Accounts Receivable

If a customer account is added separately – or already exists – in Accounts Receivable, you can Link a CRM company record to the existing Accounts Receivable record.

Note that CRM automatically creates a CRM Company Record when you add a customer in Accounts Receivable – unless you select the option to “Suspend A/R Integration” in [Setup Options](#).

If you added a CRM company *and manually added an A/R Customer to match the CRM company*, you may have two CRM companies for the same customer – although only one will be linked to A/R.

You may need to:

- Find the CRM company that was automatically created.
- Unlink and delete the CRM company that was automatically created from the A/R customer.
- Link the CRM prospect company to the A/R customer record that was manually created.

**Access:** Open the company that you want to link, and click the Link button on the Company screen to link the CRM record to the existing customer record in Accounts Receivable.

**Note:** The Link button is active for all companies in CRM that are not linked to customer records in A/R. You can also see in the screen below that the CRM company does not yet have a customer number.

The screenshot shows the 'SAMLTD - Company' window for 'Bacchus Industries Ltd.'. The 'Link' button at the bottom is highlighted with a red box. A red arrow points from this button to a modal window titled 'Link company 'Bacchus Industries Ltd.' to an existing customer'. This modal window contains fields for 'Customer Number' (highlighted with a red box) and 'Customer Name'. The main window also shows various fields like 'Created On', 'Modified On', 'Short Name', 'Territory', 'Phone Number', 'Fax Number', 'Web Site', 'Email', 'Contact's Name', 'Contact's Email', 'Preferred Language', and checkboxes for 'Send Overdue Payment Reminders', 'Send Payment Due Alerts', and 'Send Invoices'.

### ***To Link the CRM prospect to an existing Accounts Receivable account:***

- Open the Company that you want to link and click the Link button at the bottom of the screen.
- Select the A/R customer number using the Finder on the form that appears.
- Confirm that the correct Customer Name appears, and then click the link button on the popup.
- Use the Unlink button to remove the connection between CRM and Accounts Receivable.

### **Dragging and Dropping Documents into the Company Documents Folder and Linking Documents to a Company**

CRM lets you attach any documents to a company record. You can use drag and drop to attach documents and copy them to the Company Documents folder defined in [Setup Options](#), or you can link any existing documents on your computer to a company record.

**Note the following methods for adding documents to companies:**

- **Use Drag and Drop on the Documents tab** to copy documents to the company document folder in CRM and Collections (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the company, they are copied to the company document folder, and they are added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list on the Documents tab.

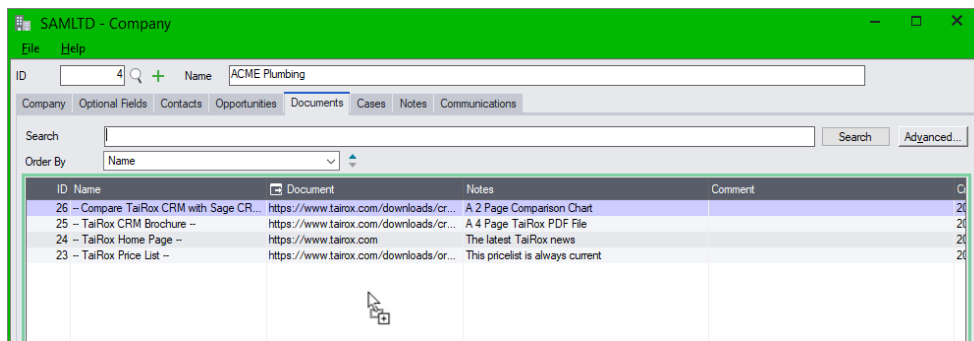
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the company folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list on the Document tab.

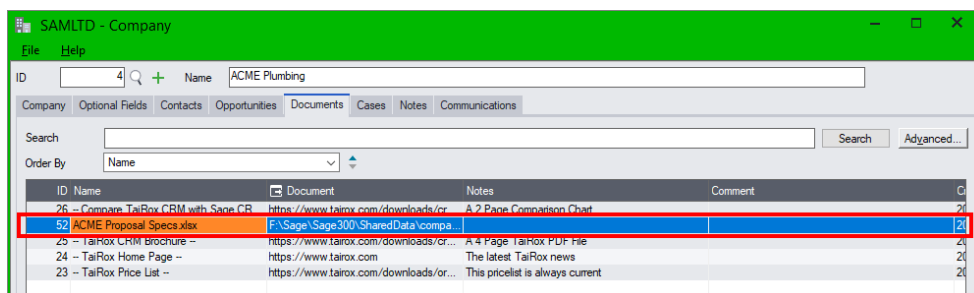
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the company's list. The document will NOT be moved to the company folder.

**To drag and drop documents and move them to the Company folder:**

1. Click the Documents tab.
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



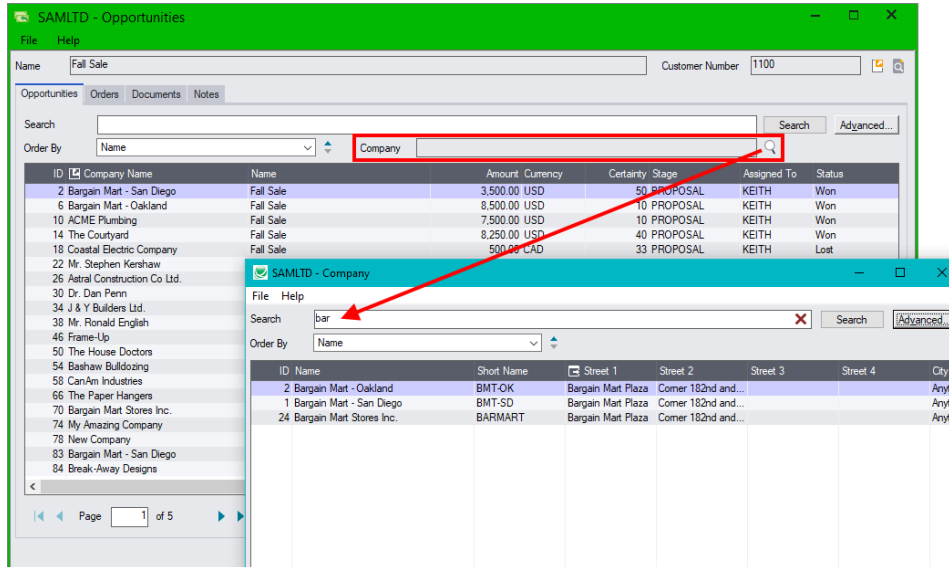
3. When you release the document, the grid displays the new document, showing the path to the documents folder – in this case *F:\Sage\Sage300\SharedData\company\SAMLTD\TaiRox CRM\Documents\COMP00004\ACME Proposal Specs.xlsx*




## Opportunities

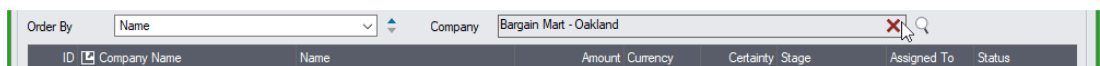
The Opportunities program presents a search field so you can search for opportunities. It also includes a Company search field to find opportunities by company. Double-click a row to open an opportunity record.

**The Opportunities program will not appear if you are using the Collections module without CRM.**



### Notes:

- You can look up opportunities by opportunity field ranges, as well as by Opportunity Stages, Opportunity Status, and Territories. Use the Advanced button for selection options.
  - Click the red X to remove Search terms.  Search
- Each opportunity belongs to one and only one company.
  - To look up all opportunities for a single company, click the Company Finder (shown above) and select the company you want.
  - Click the red X to remove the company filter.



- Opportunities must be assigned to a single user.
- CRM updates users' calendars when you change revisit dates and user assignments. See [Appendix E: Updating Calendars with .ics Event Files](#).
- Any number of Sage 300 quotes and orders can be linked to an opportunity.
- Users will only see opportunities that match the company territories to which they have access.
- See [Copying Opportunities](#) later in this section and see [Create Opportunities](#) for instructions on generating opportunities for multiple companies.

### Drill Down:

- Double-click a row to open the opportunity.
- You can also click the Company Name column heading to drill down to the Companies form, or click the Inquiry button to view customer information.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, and using tabs.



## Opportunity – Add/Edit

The Opportunity screen lets you add, change or copy an opportunity. If you are using the stand-alone Collections module, you will not see an icon for Opportunities.

**Access:** Click the Add button or double-click a row on the Opportunities screen or on the Opportunities tab on the Companies screen.

### Notes:

- To add a new opportunity, click the green Plus button beside the ID field (+), then click the Finder button (🔍) beside the Company Name field to select the company.
- To copy an opportunity, click the Copy button at the bottom of the screen. See [Copying Opportunities](#). The Copy button becomes active after you click the Add button – or the Save button if you changed the opportunity first.
- The Revisit On date is used to construct data for the Dashboard program. You can also enter a Revisit Time after the Revisit date. Enter time in 24-hour format (e.g. 13:00).

Opportunities show up for the revisit dates on the assigned employees' dashboards, and assigned users are sent calendar event files when you click the Save button, so revisit dates appear in their email calendars.

- The list of opportunity stages is maintained by the [Opportunity Stages](#) setup program.
- The status can be Open, Won, Lost, or Deferred.
- Besides the Name and Comment fields, all other fields are used in one or more Charts. Charts provide weighted or un-weighted estimates of the pipeline value categorized in various ways. A Time to Close Chart provides an assessment of past performance.
- The Notes field can be up to 250 characters long.
- The Comment field can be up to 2,500 characters long.
- Select the Orders tab to create new Quotes and Orders in Sage 300 Order Entry.
- Click the Documents Folder button to view drag and dropped documents in the Windows folder.
- Click the Change Log button to view past changes to the opportunity.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Dragging and Dropping Documents into the Opportunity Documents Folder and Linking Documents to an Opportunity

CRM and Collections lets you add any documents to an opportunity. You can use drag and drop to attach documents and copy them to the Opportunity Documents folder defined in Setup Options, or you can link any existing documents on your computer to an opportunity record.

### Note the following methods for adding documents to opportunities:

- **Use Drag and Drop on the Documents tab** to copy documents to the opportunity document folder in CRM and Collections (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the opportunity, they are copied to the opportunity document folder, and they are added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list on the Documents tab.

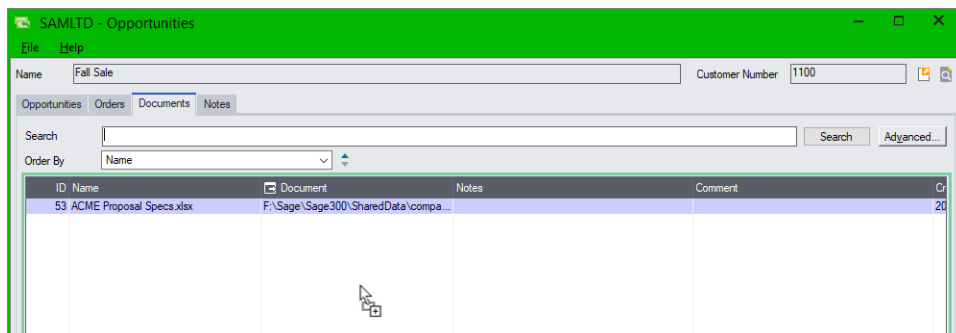
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the opportunity folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list on the Document tab.

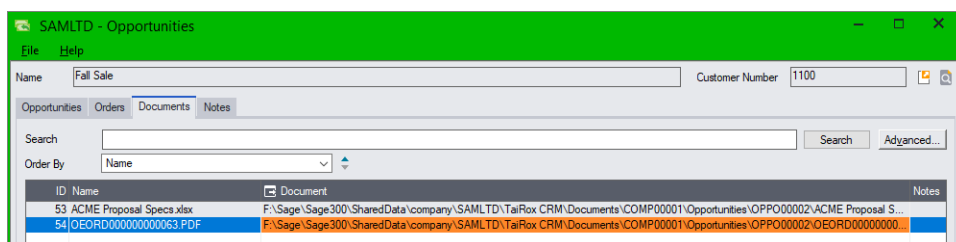
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the opportunity's list. The document will NOT be moved to the opportunity folder.

### To drag and drop documents and move them to the Opportunity folder:

1. Click the Documents tab.
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



3. When you release the document, the grid displays the new document, showing the path to the documents folder – in this case *F:\Sage\Sage300SharedData\company\SAMLTD\TaiRox CRM\Documents\COMP00001\Opportunities\OPPO00002\OEORD000000000063.PDF*



## Copying Opportunities

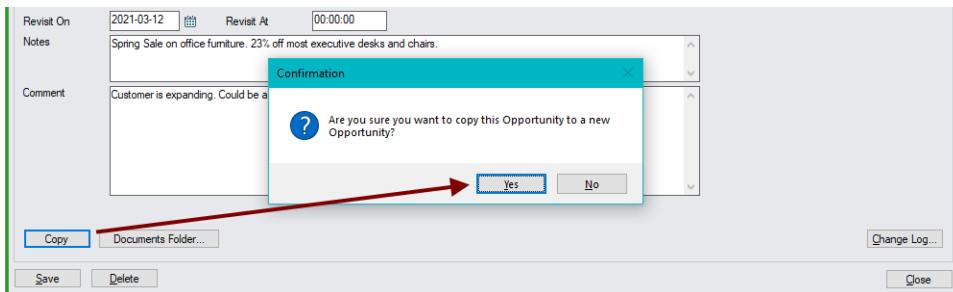
CRM lets you copy an open opportunity to the current company or to a different company.

This means you can:

- Create standard opportunities for sales or services and apply them to particular companies.
- Duplicate past opportunities to quickly add new opportunities with similar requirements.

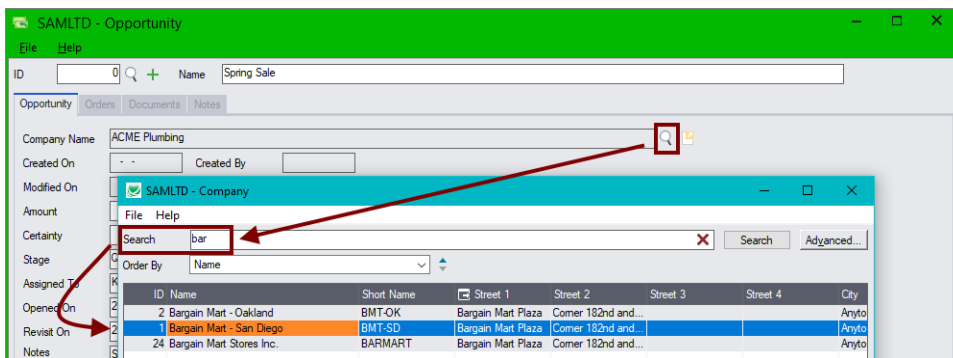
### To copy an opportunity:

1. Open the opportunity that you want to copy.
2. Click the Copy button at the bottom of the screen, and click Yes when prompted.



- The program will display a message stating that the copy was successful. Click OK.
  - By default, the new opportunity will be assigned to the current company.
3. To change the company for the opportunity, click the Finder button beside the Company Name field, and use the Search field to find the new company.

In this case, we are using “bar” to find and select “Bargain Mart – San Diego.”



4. Select the new company and edit the new opportunity as required, then click the Add button at the bottom of the screen.

## Adding New Quotes and Orders on the Orders Tab for Opportunities

CRM and Collections provides direct access to Sage 300's Order Entry program from the Orders tab in Opportunities. It lets you:

- Add new quotes and orders and link them to opportunities.  
The program lists all quotes and orders added in CRM on the Orders tab for the opportunity.
- Link existing quotes and orders to the Orders tab to include quoted and orders that were entered from the Order Entry module.

This makes it easy to look up opportunity details and each customer's order history.

**To add a new quote or order to the Orders tab:**

SAMLTD - Opportunity

File Help

ID: 6 + Name: Fall Sale

Opportunity Orders Documents Notes

Search: [ ] Search Advanced...

Order By: Order Number

ID	Order Number	Order Description	Customer Number	Order Total	Created By	Modified By	Bill-To Name	Bill-To Address Line 1	Cre
3	ORD0000000000010	Jan 2020	1105	687.82	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202
4	ORD0000000000024	Spring 2020 - Ship asap please	1105	173.09	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202
5	ORD0000000000027	Summer 2020	1105	687.82	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202
6	ORD0000000000039	Fall 2020	1105	4,282.53	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202
7	ORD0000000000061	Dec 2020 - No backorder please	1105	1,035.57	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202
8	ORD0000000000063	Jan 2021 - No backorder	1105	645.93	KEITH	KEITH	Bargain Mart - Oakland	Bargain Mart Plaza	202

Page 1 of 1



New Quote New Order Link... Uplink

Save Delete Close

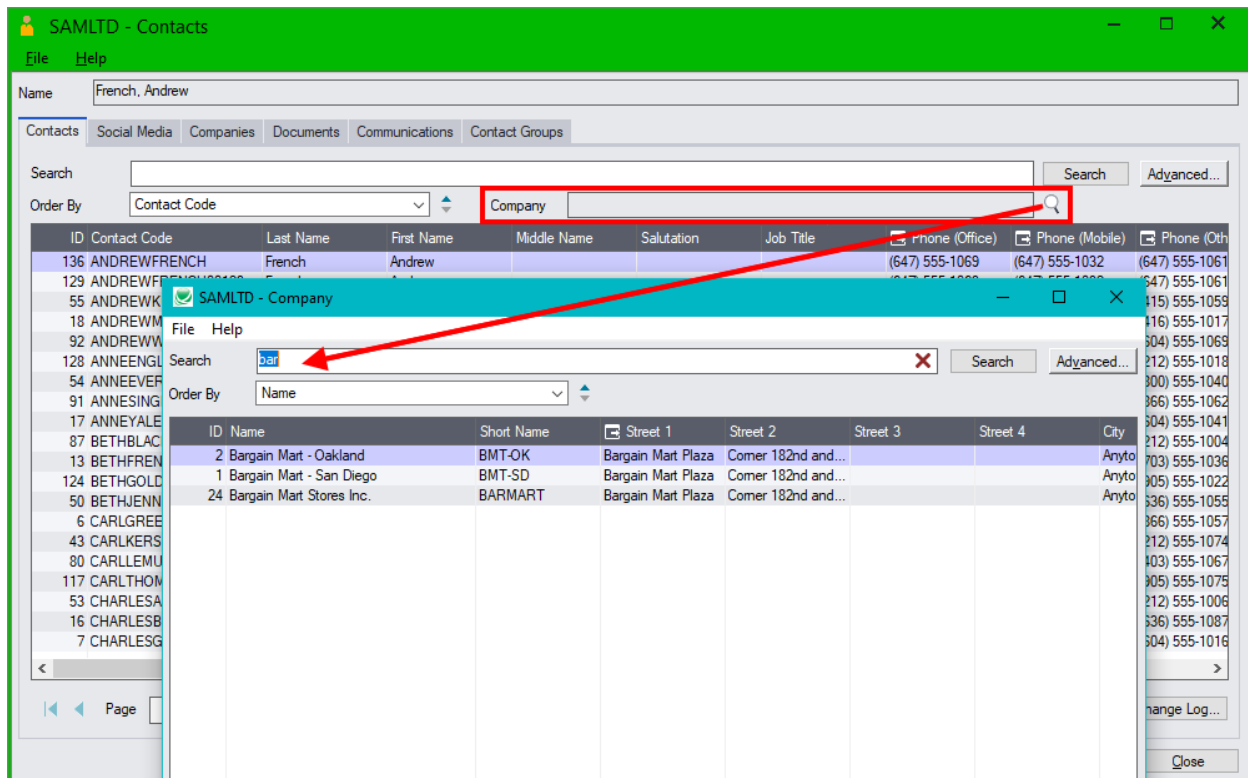
1. Open the customer opportunity.
2. Choose the Orders tab.
3. Click the New Quote or New Order button to add a quote or order and display it on the Orders tab.  
Click the Link button to add an existing order to the Order tab.
4. Select a quote or order from the grid to look up or edit order details.

## Contacts

The Contacts program provides a search field so you can immediately find contacts. It also includes a Company search field to list contacts by company (shown below).

- Click the red X that appears to remove Search terms. 
- Click the Finder button beside the Company field to select a company name. 
- Double-click a row to open a contact record.
- Use the “Advanced...” button to search by specific field values and ranges.

**Note:** The Contacts program lists all contacts added in TaiRox CRM and Collections or with the Sage 300 Multiple Contacts module (if you use it).

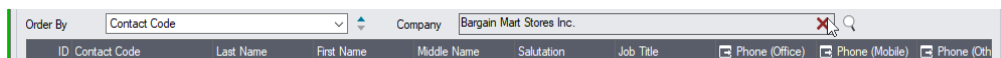


### Notes:

- Contacts can belong to more than one company – or they can be unaffiliated contacts that are not linked to any companies.

For example, you can add a new contact and link it to Bargain Mart Oakland and to Bargain Mart San Diego.

- To find contacts for a single company, click the Company Finder (shown above) and select the company you want. If you are looking for a particular contact, use the top Search field on the form to refine your search.
- Click the red X to remove the company filter.



- You can also view all contacts that you add in TaiRox CRM and Collections using the Finder in the Sage 300 M/T Contacts module – if you use it Sage Multiple Contacts.

**Note: Contacts are permanently deleted if you use the Delete button!**

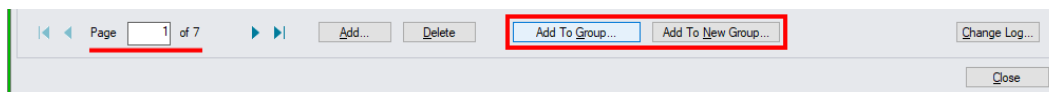
If you do **not** want to permanently delete a contact, edit the contact record and select the Inactive checkbox.

- Contacts added to an Accounts Receivable customer record will appear automatically on the Contacts tab for the corresponding (linked) CRM company.

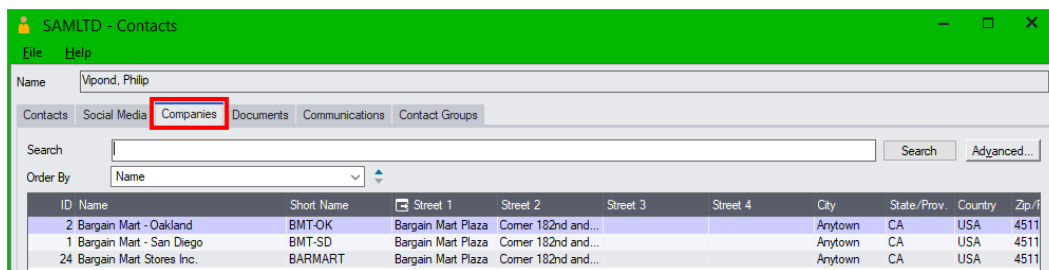
Note, however, that you still need to edit the contact information on the Contacts tab for the company record to specify any emailed accounting documents that the contact should receive. See [Specifying the Recipients for Accounting Documents on the Contacts Tab](#).

- Contacts can belong to any number of Contact Groups.

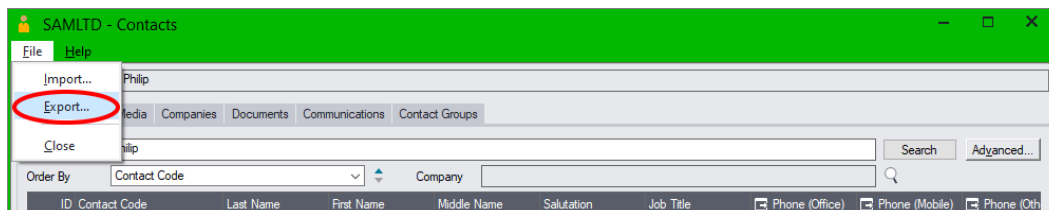
The Add To Group and Add To New Group buttons will add **all filtered contacts in the search results** to the group you specify (i.e. all contacts displayed on all current pages of contacts – 7 pages in the example below).



- Contacts can also belong to any number of companies. Click the **Companies** tab to see all companies linked to the contact.



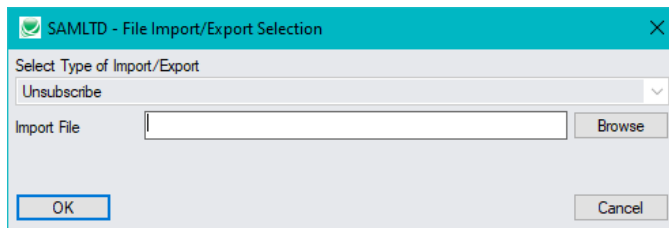
- Choose **File > Export** to create a file containing all pages of contacts in the search results.



You can select four export file formats – MailChimp, Swiftpage, generic Sage 300 Contacts format, and generic Sage 300 Contacts format with optional fields.



- To export to MailChimp or Swiftpage, the contact must have an email address, a first and last name, and must have “Yes” in the “Contact consents to receive emails” column. In addition, they must not be inactive or belong to an inactive or deleted company.
- If exporting to the generic Sage 300 Contacts format with optional fields, the optional fields appear in a separate workbook.
- Use **File > Import** to import an “Unsubscribe” list – a file that contains a list of email addresses (i.e. a single column of email addresses).



All contacts with those email addresses will have their “Contact consents to receive emails” setting unchecked (turned off).

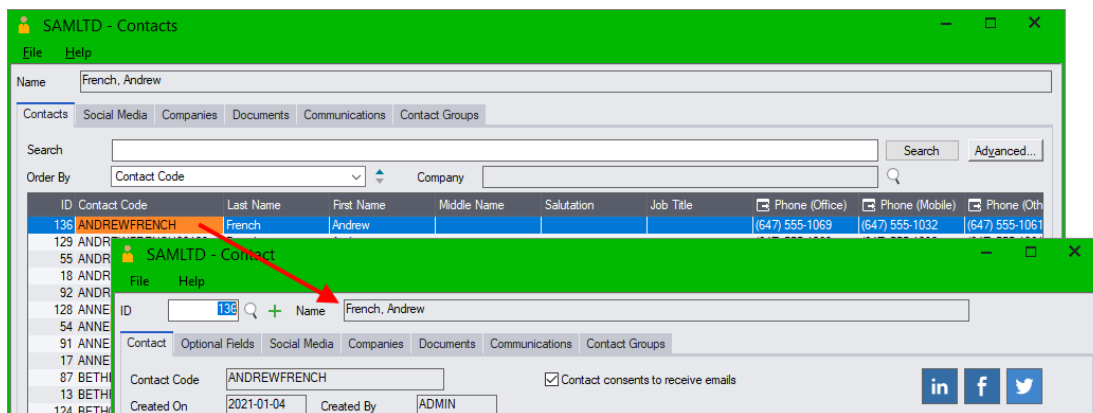
- You can add any contacts you like to CRM – either unattached or attached to a company.

For example, you can add your own company to CRM, add your own employees as contacts, and include them in contact groups. This lets you create contact groups for departments, marketing projects, etc.

For more information on contact groups, see [Contact Groups](#).

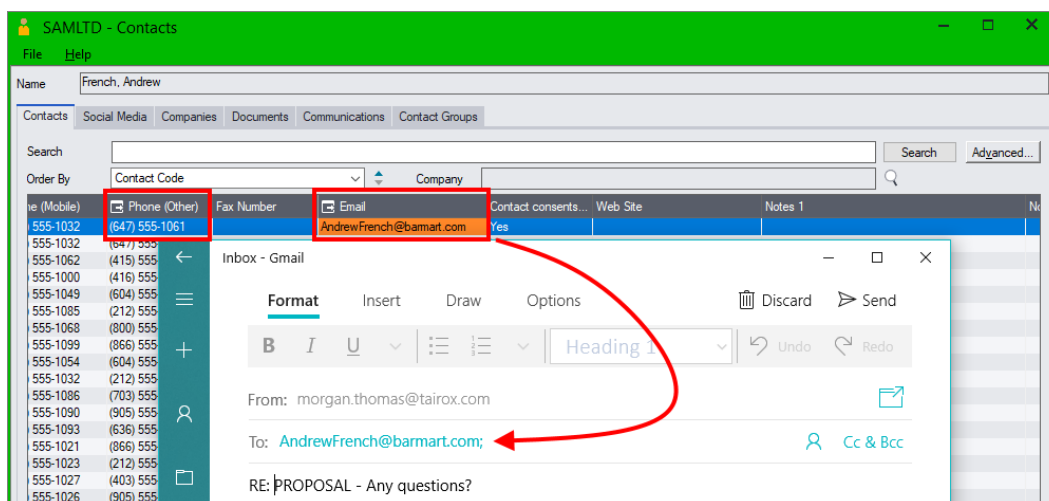
### Drill Down:

- Double-click on a row to open up the contact record.



This lets you see and edit all the information for the contact.

- Click the Email column heading to send an email to the selected contact.



- Click a Phone number column heading to call the selected contact.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Contact – Add/Edit

The Contact screen lets you add contacts, change contact information, and link or unlink contacts from companies.

To select which company contacts are emailed invoices and other accounting documents, see [Specifying the Recipients for Accounting Documents](#) – under “Companies.”

**Access:** Click the Add button or double-click a row on the Contacts screen or on the Contact tab on the Companies screen.

### Notes:

- For a new record, click the green Plus button beside the ID field (+).
- Social Media links are provided for information that a contact maintains themselves and is likely to be current. Choose the Social Media tab to add links to social media sites, such as Facebook, LinkedIn, Instagram, Twitter, YouTube – or to add a Skype address or telephone number.
- The “Contact consents to receive emails” checkbox must be checked in order to export the contact email address to MailChimp or Swiftpage.
- Click the Address button to add contact address information.
- Click the Companies tab to link or unlink contacts from existing companies – and to drill-down on company information.

### Drill Down:

- Click a social media icon to open a browser at the contact's social media page. A Phone icon will initiate a call.
- Click the Go button (→) beside a phone number to call the contact or click the Go button beside the Email field to send a new email to the contact.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

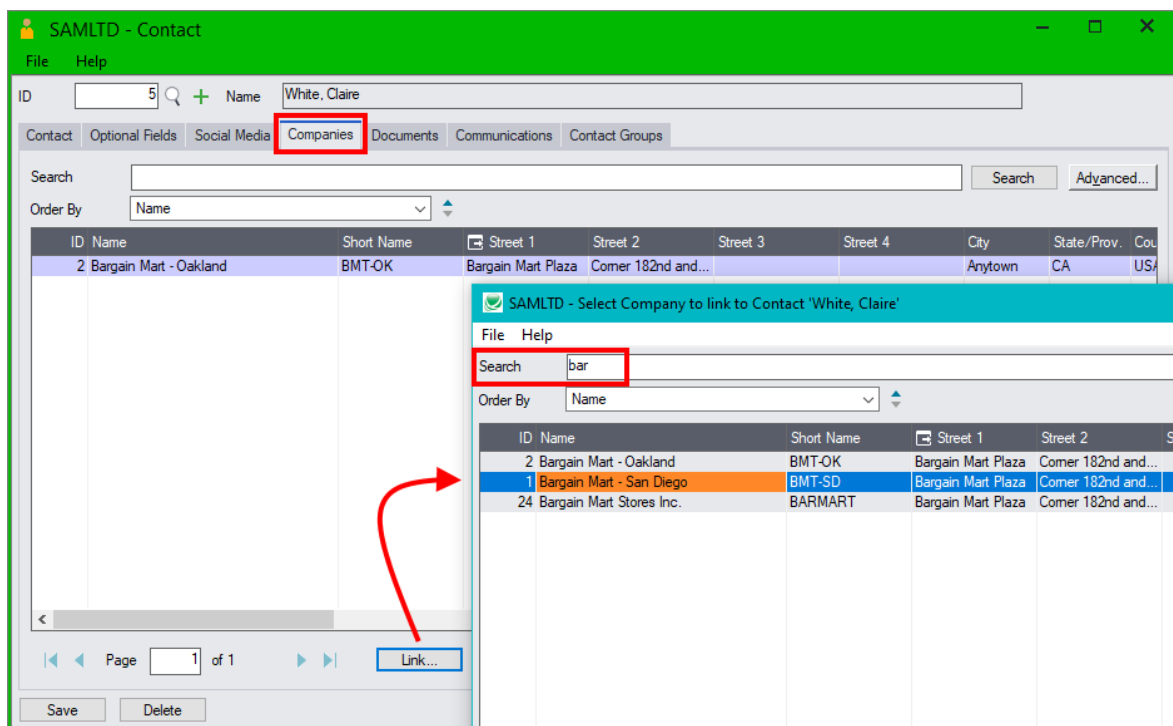


## Linking Contacts to Existing Companies

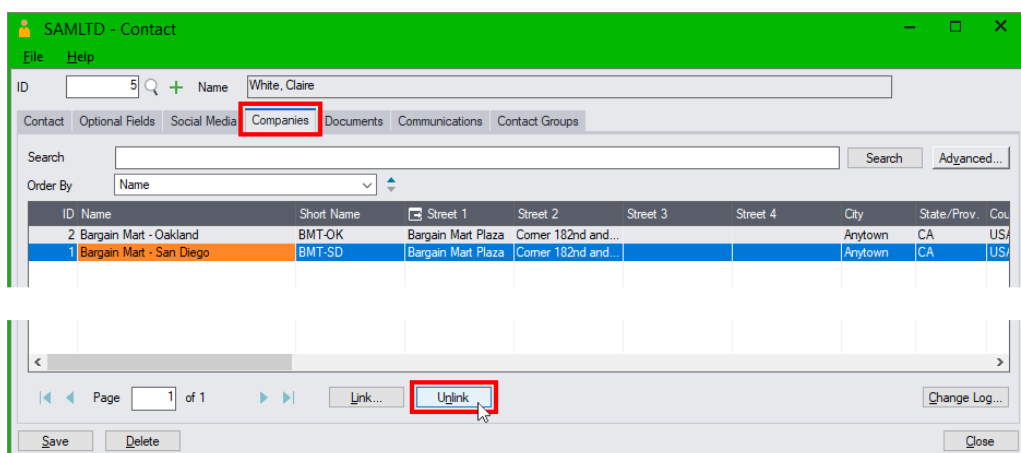
Once you add a contact, you can link it to one or more companies. For example, a contact might be a buyer for one or more outlets – such as Bargain Mart San Diego and Bargain Mart Oakland.

**To Link a contact to a company:** Select the Companies tab and click the Link button (see below).

Search for the company you want (in this case, we are adding another Bargain Mart outlet), and double-click the company to add it to the list.



**To Unlink a contact from a company:** Select the Companies tab, select the company from the grid, and click the Unlink button at the bottom of the screen.



### See Also:

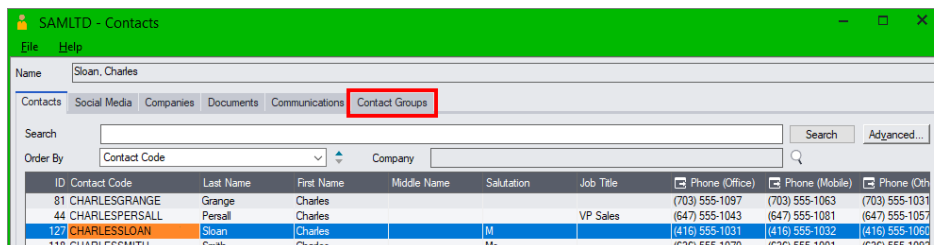
[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Adding One Contact to an Existing Contact Group

Once you add a contact, you can add it to one or more contact groups – such as “Alaska Customers” or “Newsletter Recipients” – and send them group emails.

**To add a new contact to an existing contact group:**

- Select the Contact from the grid on the Contacts screen.
- Click the Contact Groups tab.



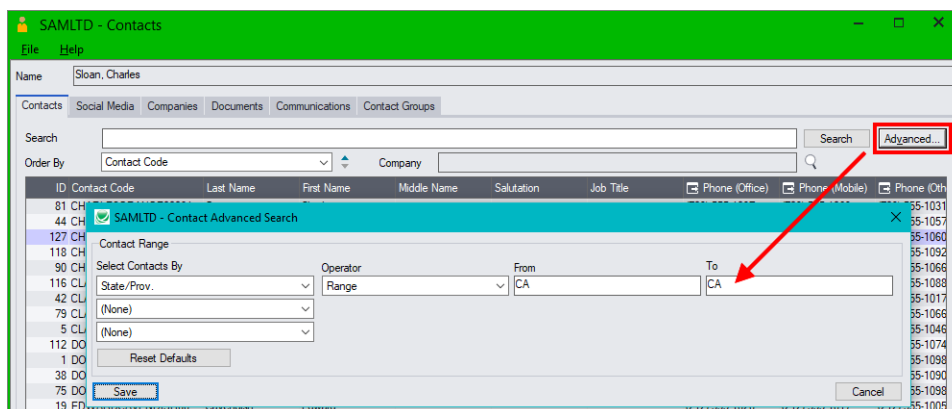
- Click the Link button on the Contact Groups screen.
- Select the group where you want to add the contact.

## Adding Multiple Contacts to a New or Existing Contact Group

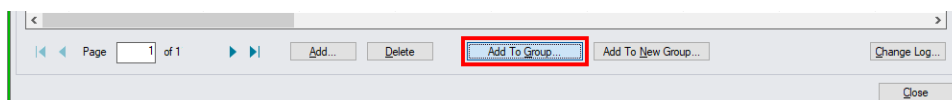
You can just as easily add multiple contacts to an existing contact group or to a new one.

**To add multiple contacts to a contact group:**

- Open the Contacts screen and use Search or Advanced Search to select a set of contacts.



- Click the Save button to perform the search / selection
- Select the Contact from the grid on the Contacts screen.



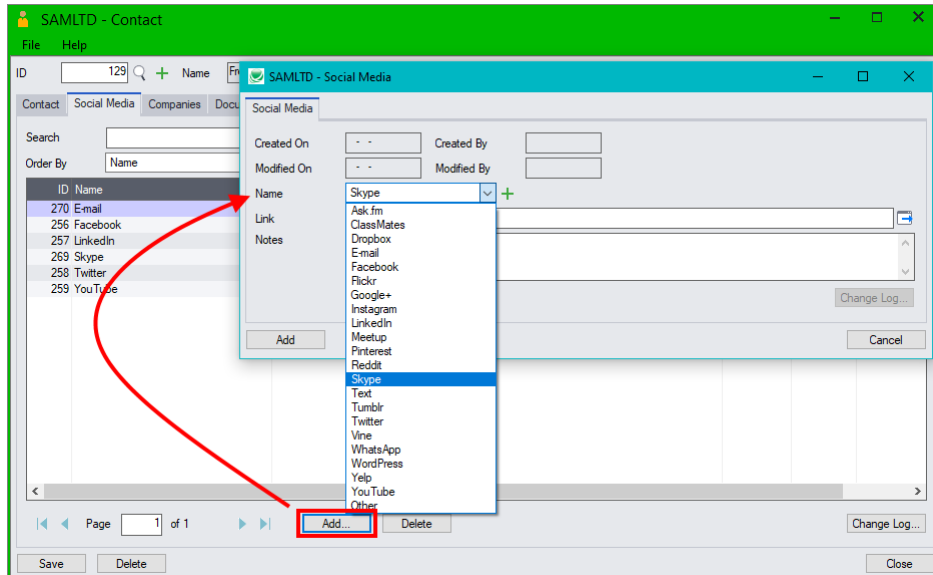
- Click the Add to Group or Add to New Group button.
- Select the existing group or specify a name for the new group to add the contacts.

## Adding Social Media Links on the Social Media Tab

You can add social media links to your contacts to keep your contact information up to date. Social media links can include links to social media sites, such as Facebook, LinkedIn, Instagram, Twitter, YouTube – as well as Skype addresses and contact telephone numbers, or FTP servers and Web servers.

### To add a new social media link:

- Click the Social Media tab.
- Click the Add button on the bottom of the screen to add a link.
- Click the Name dropdown to select the type of link.



**Note:** The Name dropdown selection determines the social media icon that appears on the Contact tab for this link.

- Enter the link information in the Link field – such as skype:555-777-8888
  - The Link field **must** include the application protocol so Windows will know which program to use for launching the link. Windows will use the default application that has been associated with the protocol. You can change associations in Windows Settings > Apps > Default Apps.
  - Do not include a space between the protocol name and the link.

For example, type  
skype:5559897777

Not  
skype: 5559897777

- If the link includes a space, you must enclose the link text in quotes.

For example, type:  
skype:"fred winkler"

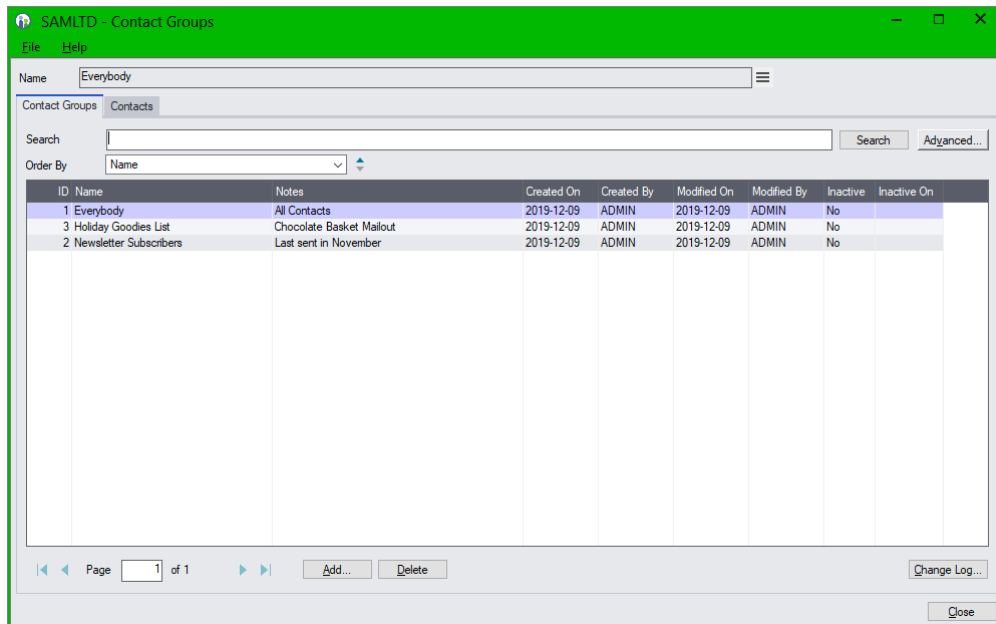
### Common protocols are:

- https: hypertext transfer protocol with secure communication
- http: hypertext transfer protocol
- tel: uses whatever program has been associated with the tel protocol (such as the MS telephone app) with a telephone number – e.g. tel:5559897777
- skype: to launch skype with a telephone number or contact name – e.g. skype:5559897777 or skype:"fred winkler"
- ftp: to launch an FTP program to transfer files from a server
- mailto: to send an email to an email address – e.g. mailto:rblack@rblack.com

## Contact Groups

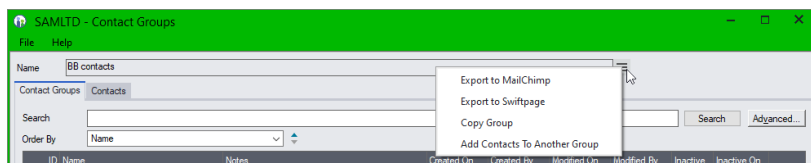
The Contact Groups program presents a search field so you can immediately find contact groups.

**Access:** Open from the CRM and Collections Desktop.  
or Open the Marketing folder, then open Contact Groups.



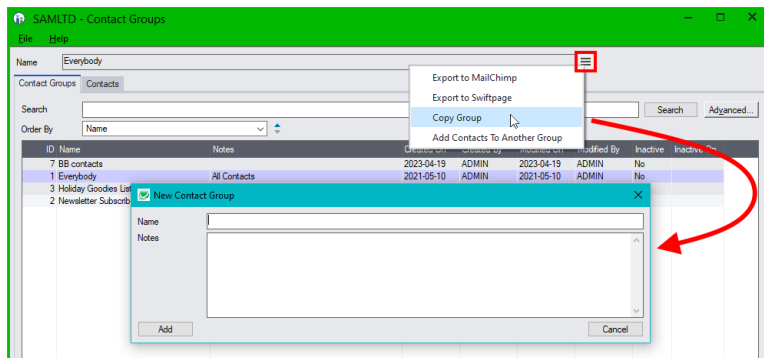
### Notes:

- Contact Groups lets you create a list of contacts and give it a name – such as “Alaska Customers” or “Newsletter Recipients”.
- Contacts can belong to any number of contact groups.
- You can add your own company to CRM, add contacts, then create contact groups for company departments, sales teams, or projects.
- See [Adding Multiple Contacts to a New or an Existing Contact Group](#) for instructions on adding multiple contacts to groups.
- Click the Actions button (≡) at the top of the screen by the Name field and choose Export to MailChimp or Export to Swiftpage to create a CSV file containing the Contacts for the selected contact group that you can import into MailChimp or Swiftpage email programs.

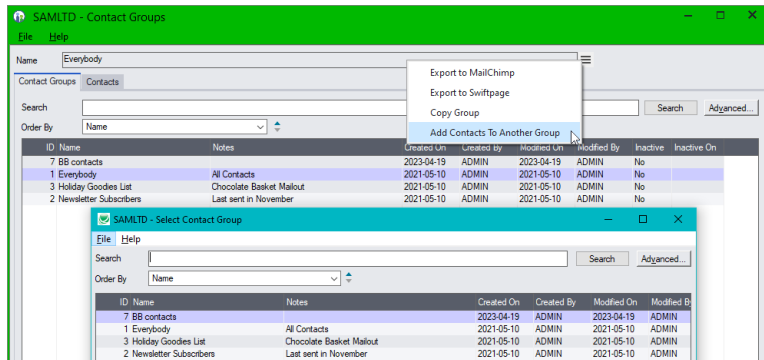


To export to MailChimp or Swiftpage, contacts must have email addresses, a first and last name, must consent to receiving emails (this is a checkbox on the contacts screen), and must not be inactive or belong to inactive or deleted companies.

- To copy an existing group to a new group with a new name, highlight the group in the grid that you want to copy, select Copy Group from the Actions menu (≡), and fill in the New Contact Group form – as below:



- To add the contacts in one group to an existing group, highlight the group in the grid that you want to copy, select Add Contacts To Another Group from the Actions menu (≡), then select the target group in the form that appears.



### Drill Down:

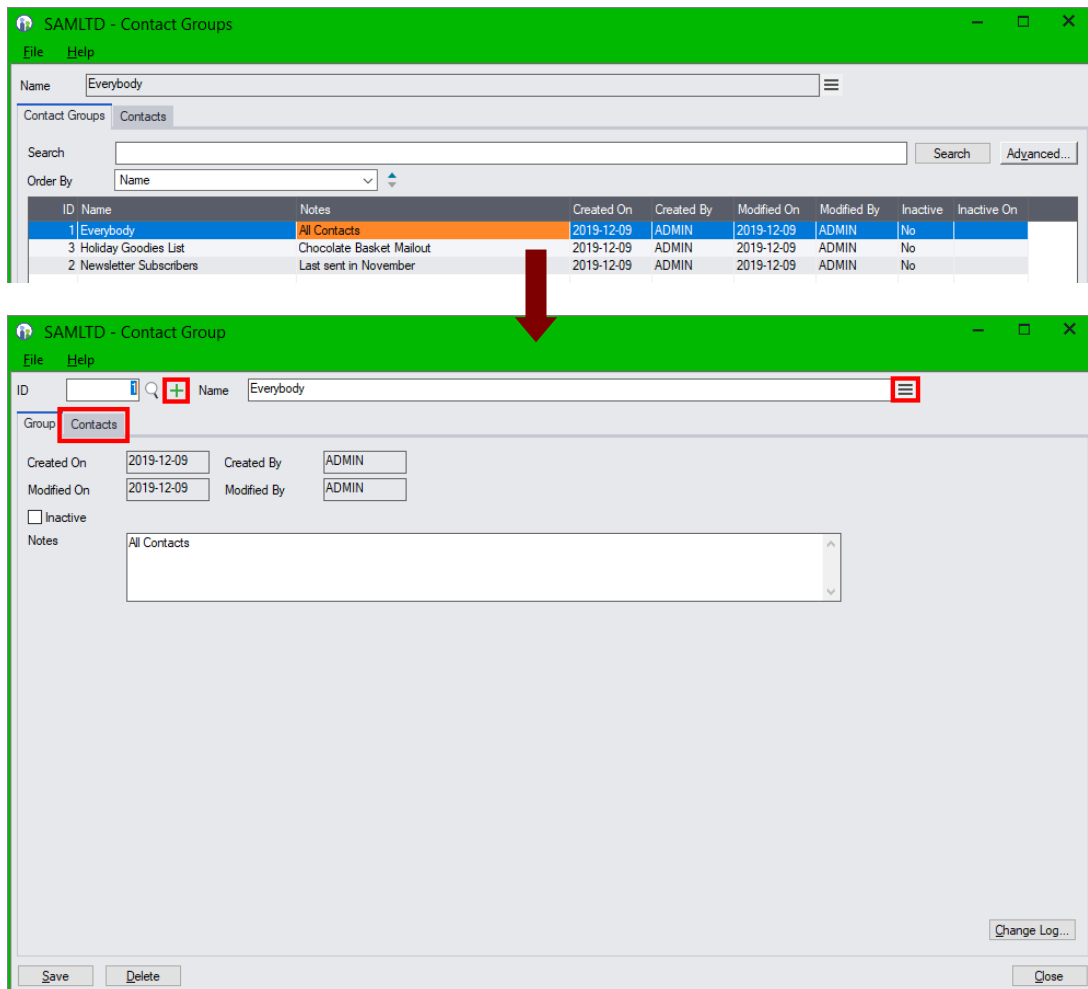
- Double-click on a row to open up the Contact Group program.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

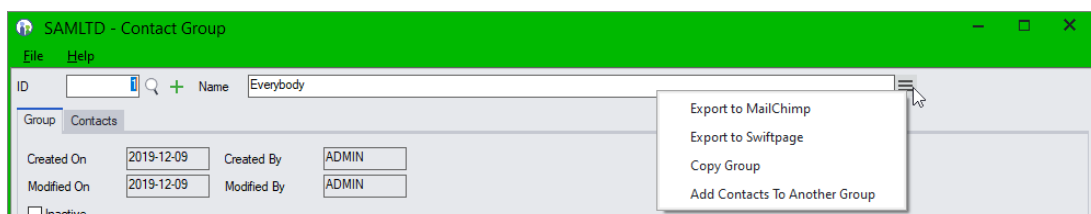
## Contact Group – Add/Edit

The Contact Group screen lets you add new contact groups and edit existing ones.



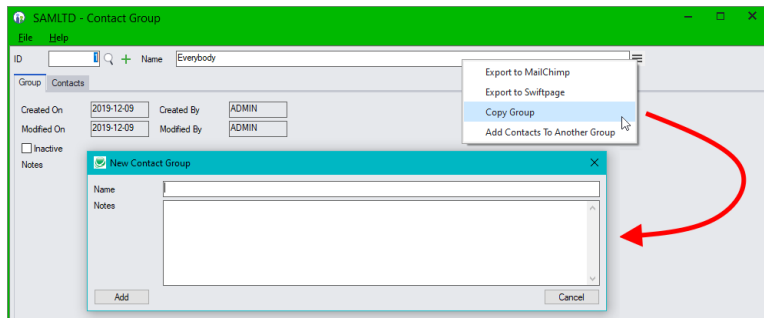
### Notes:

- To create a new group record, click the green Plus button beside the ID field (+).
- Contact Groups lets you create a list of contacts and give it a name – such as “Alaska Customers” or “Newsletter Recipients”.
- The Notes field can be up to 250 characters long.
- Choose the Contacts tab to view existing contacts and to link new contacts to this group.
- Click the Actions button (≡) at the top of the screen by the Name field and choose Export to MailChimp or Export to Swiftpage to create a CSV file containing the Contacts for this contact group that you can import into MailChimp or Swiftpage email programs.

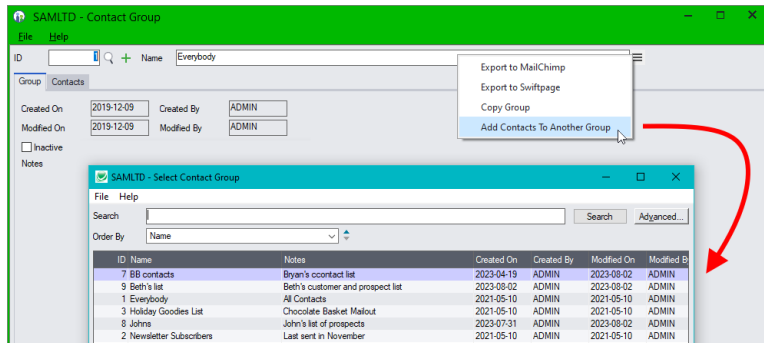


To export to MailChimp or Swiftpage, contacts must have email addresses, a first and last name, must consent to receiving emails (this is a checkbox on the contacts screen), and must not be inactive or belong to inactive or deleted companies.

- To copy the existing group to a new group with a new name, select Copy Group from the Actions menu (≡), and fill in the New Contact Group form – as below:



- To add the contacts in this group to another existing group, select Add Contacts To Another Group from the Actions menu (≡), then select the target group in the form that appears.



- See [Contact Groups - Contacts Tab](#) for information on adding contacts to a contact group using the Link button.

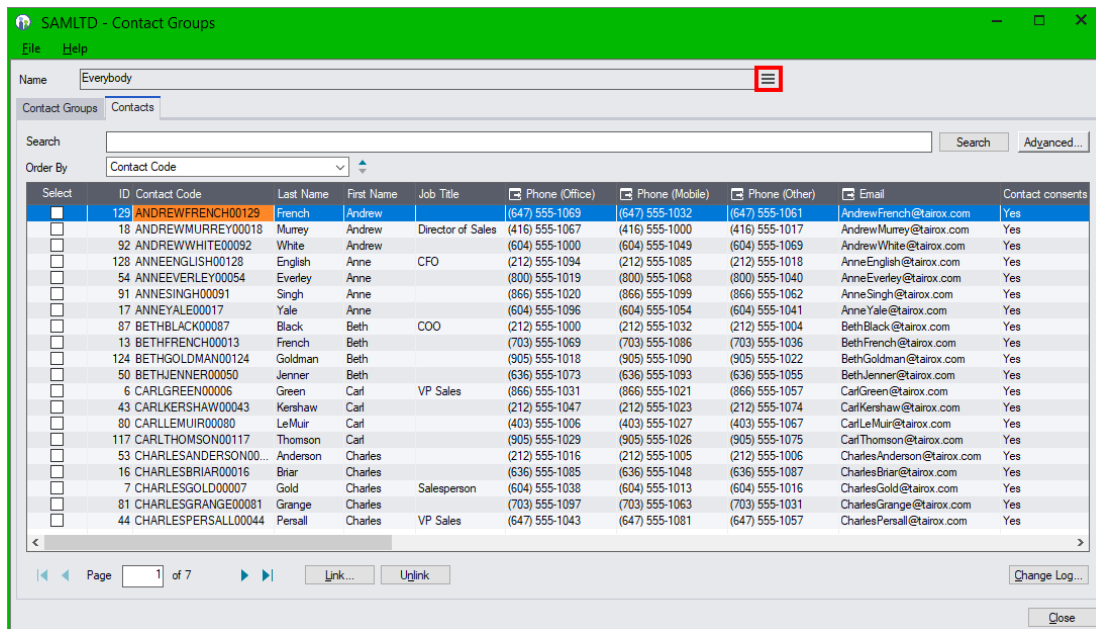
## See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Contact Groups - Contacts Tab

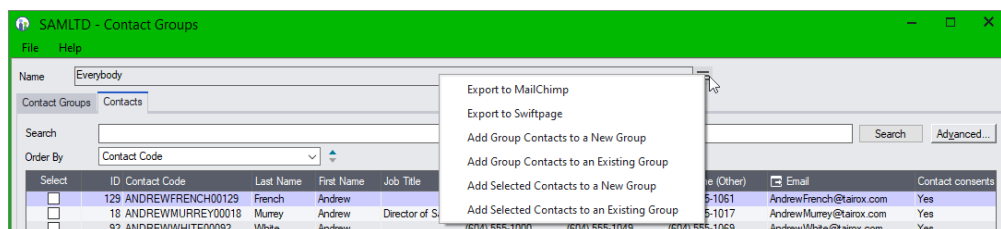
The Contacts tab on the Contact Groups screen shows contacts that belong to the group selected on the Contact Groups tab – and displayed in the Name field at the top of the form. It also lets you add new contacts or remove contacts from the group, as well as export contacts and copy them to other contact groups.

- Use the Search field on this tab to find particular contacts in the list.
  - Click the red X that appears to remove Search terms.

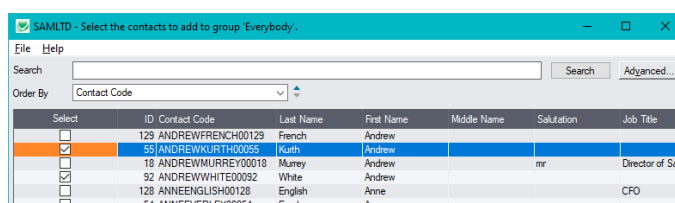


### Notes:

- Contact groups are useful for creating email lists.
- Click the Actions button (≡) highlighted in red to perform the following tasks:



- Choose Export to MailChimp or Export to Swiftpage to create a CSV file containing the Contacts for the current contact group.
- Add **all** of the group contacts to a new group.
- Add **all** of the group contacts to an existing group.
- Add **all selected** group contacts to a new group.
- Add **all selected** group contacts to an existing group.
- Click the **Link** button to search for and add additional contacts to the displayed contact group.





- Use the checkboxes to select all contacts from the list that you want to add, then click the Select button at the bottom of the form.
- Use Advanced Search to list all contacts in a particular city, state, or country.

You can also filter contacts based on job title or on contact notes fields.

Note that this form can have multiple pages and that you can select contacts on each page before clicking the Select button.

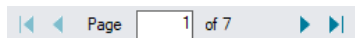
- Click the **Unlink** button to unlink ***all selected*** contacts from the currently selected contact group.

**Note regarding multi-page contact selection:**

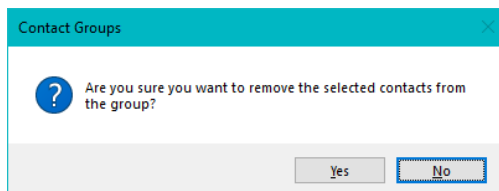
- Click the “Select” column heading to select or deselect all contacts on the current page.

Select	ID	Contact Code	Last Name	First Name	Job Title	Phone (Office)	Phone (Mobile)	Phone (Other)	Email	Contact consents
<input checked="" type="checkbox"/>	129	ANDREWFRENCH00129	French	Andrew		(647) 555-1069	(647) 555-1032	(647) 555-1061	Andrew.French@tairox.com	Yes
<input checked="" type="checkbox"/>	18	ANDREW MURREY00018	Murrey	Andrew	Director of Sales	(416) 555-1067	(416) 555-1000	(416) 555-1017	Andrew.Murrey@tairox.com	Yes
<input checked="" type="checkbox"/>	92	ANDREWWHITE00092	White	Andrew		(604) 555-1000	(604) 555-1049	(604) 555-1069	Andrew.White@tairox.com	Yes
<input checked="" type="checkbox"/>	128	ANNEENGLISH00128	English	Anne	CFO	(212) 555-1094	(212) 555-1085	(212) 555-1018	Anne.English@tairox.com	Yes

- Use the navigation buttons at the bottom of the screen to move from page to page to make your selections.



- Click the Unlink button at the bottom of the screen when you have selected all contacts that you want to remove from the contact group. The program displays the following warning.



## Send Bulk Email

The Send Bulk Email program lets you send bulk emails from CRM and Collections using bulk email providers such as MailChimp and SendGrid or using the email server specified in CRM Options.

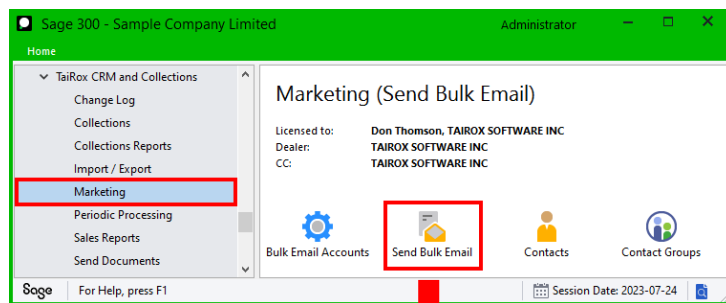
Send Bulk Email is a *CRM and Collections* feature. The program will not appear on the Sage 300 Desktop if you are using the Collections module without CRM.

To send bulk emails, you must set up your email server in [Options](#) or subscribe to a bulk email provider and set up your bulk email account using the [Bulk Email Accounts](#) program.

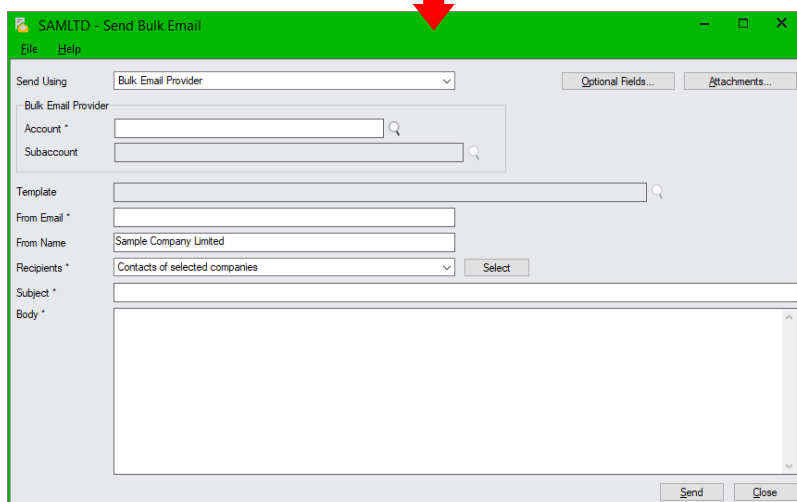
The program lets you take advantage of dedicated bulk email provider features, such as:

- Email template editors and pre-built templates for sales and marketing campaigns.
- Subscriber preferences and unsubscribe lists for different audiences and types of emails.
- Email forms and custom landing pages.
- Stats for email opening and click tracking.
- Email response handling.
- Customer surveys.

Note that email features vary by provider. These features may not be available from your provider.



The Marketing folder does not appear on the TaiRox Collections Desktop



### Notes

- You can use templates on a bulk email provider website or stored on your Sage 300 server, or you can compose emails on-the-fly using Send Bulk Email.

This lets you quickly send out a new price list to contacts or let customers know that their sales rep has changed.

- You can select email recipients from CRM contact groups, A/R customer accounts, or CRM companies and use unsubscribe lists and email templates stored on a bulk email provider's website.
- You can add optional fields to the communication generated by each bulk email batch. The communication will be linked to all contacts that the email is sent to as well as all companies if the contacts were derived from selected companies or customers.
- You can add attachments to emails.
- Bulk emails are typically non-transactional and might include newsletters, sales brochures, general business announcements, or notices of sales manager changes. They provide the same communication to all recipients, and often have to follow local opt-in or opt-out regulations.

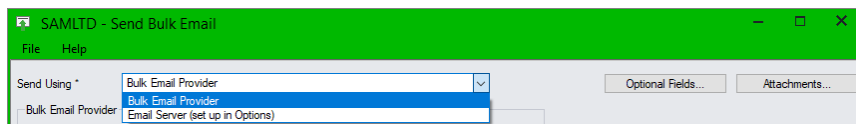
Transactional emails contain information about business transactions – such as a quote, order confirmation, shipment confirmation, or invoice.

If you have CRM and Collections, you can export contact information and upload it to a bulk email provider for bulk emails (see [Contact Groups](#)), and you can use the [Send Statements/Letters](#) to send informational letters to your customers.

**Access:** Open the *Marketing* folder, then open Send Bulk Email.  
(The Marketing folder does not appear on the TaiRox Collections Desktop.)

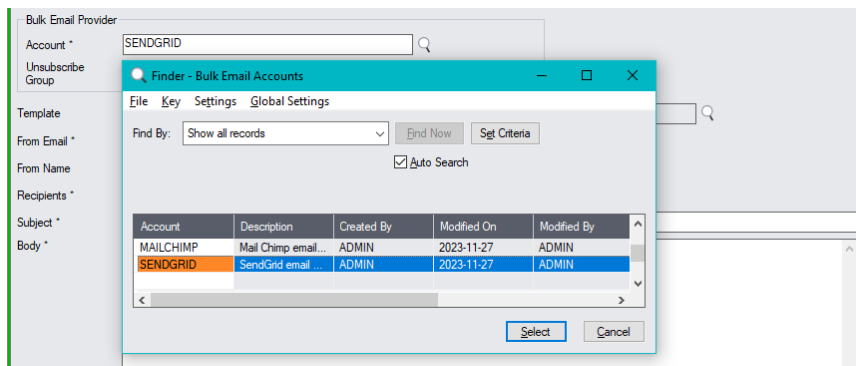
## Using the Send Bulk Email Program

1. Choose between sending emails using a bulk email provider such as MailChimp or SendGrid or sending them using the email server set up in CRM Options.



If you send emails using a provider, the process will be faster and may include more features – allowing you to personalize emails and use multiple unsubscribe lists for different types of emails.

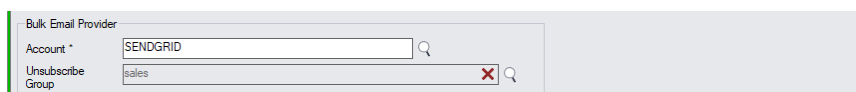
2. Select the bulk email account if you are using a bulk email provider. The account must already be set up using the Bulk Email Accounts program in the CRM Marketing folder.



If you selected “Email Server (set up in Options)” instead of a provider, the Bulk Email Provider fields will not be available. Skip to the “Template” field.

Click the Finder to change your choice of bulk email provider.

3. If you selected a bulk email provider, select the Unsubscribe Group/Subaccount for your email batch. The group must already be created on the bulk email provider's website. The type of unsubscribe list should match the type of email that you are sending.



For example, if you created a NEWSLETTER unsubscribe list, you would choose that group each time you sent out the newsletter.

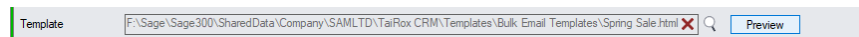
Any newsletter recipients that unsubscribe (by clicking the Unsubscribe button or link at the bottom of the newsletter) will be added to NEWSLETTER unsubscribe list.

Each time you send a newsletter using the NEWSLETTER unsubscribe list, the program will remove unsubscribed contacts from the recipient list. Other unsubscribe lists will be unaffected.

4. Select the email template that you want to use.

*If you are using a bulk email provider, the template must be on the bulk email providers website.*

*If you are using your own email server, the templates are normally stored in the Sage 300 Company folder: Sage300\SharedData\Company\SAMLTd\TaiRox CRM\Templates. You can use the Preview button to view the selected template on the Sage 300 server.*



See [Appendix D: Sending Bulk Emails and Using Bulk Email Templates](#) for details.

Alternatively, you can leave the Template field blank and enter the Subject and Body of the email that you are sending at the bottom of the form.

5. Enter the "From" name and email address that will appear on the email.

6. Select the method for choosing email recipients.

**Contacts for selected customers** lets you specify ranges of A/R customer record fields to select the list of A/R customers. The program sends emails to all contacts that are associated with the selected A/R customers. This choice lets you select records by salesperson.

**Contacts for selected companies** lets you specify ranges of CRM company record fields to select the list of CRM companies. The program sends emails to all contacts that are associated with the selected CRM companies. This choice let you select prospects as well as existing customers.

**Members of a contact group** lets you choose a group of contacts as email recipients. Use the Contact Groups program in CRM to create new contact groups.

Note that you can choose only one contact group and that you cannot filter members of the group. If you need to select members from a group, use Search or Advance Search to select recipients, then add the selected contacts to a new group.

7. Click the Select button to choose recipients using the method chosen in the dropdown.

To select a contact group, double-click the group you want:

ID	Name	Notes	Created On	Created By	Modified On	Modified By
7	BB contacts		2023-04-19	ADMIN	2023-04-19	ADMIN
1	Everybody	All Contacts	2021-05-10	ADMIN	2021-05-10	ADMIN
3	Holiday Goodies List	Chocolate Basket Mailout	2021-05-10	ADMIN	2021-05-10	ADMIN
2	Newsletter Subscribers	Last sent in November	2021-05-10	ADMIN	2021-05-10	ADMIN

To select contacts for selected customers or customer groups:

In the above example, we chose “Contacts for Selected Customers”, and then chose all A/R customers that have salesperson “BB”.

The number of contacts in your selection (therefore, the number of email recipients) appears beside the Select button.

In the following example, this is 8 customers with 43 contacts – all of whom will get an email *unless they are on the unsubscribe list*.

8. Click the Attachments button in the upper-right corner to attach other documents to this email – such as a price list that you want to attach to the email.
9. Click the Optional Fields button to add optional fields for the communication that is created by this bulk email.

The communication will be linked to all contacts to which the email is sent, as well as all companies if the contacts were derived from selected companies or customers.

***If you are not using a template, and are composing the email on this screen***

10. Type the Subject and Body of your email in the last two fields.

Use the Attachments button to add a standard item for all recipients – like a new price list.

11. Click the Send button when ready, then choose Yes to confirm that you want to continue.


## Viewing Communications Created by Bulk Emails in the Communications Window

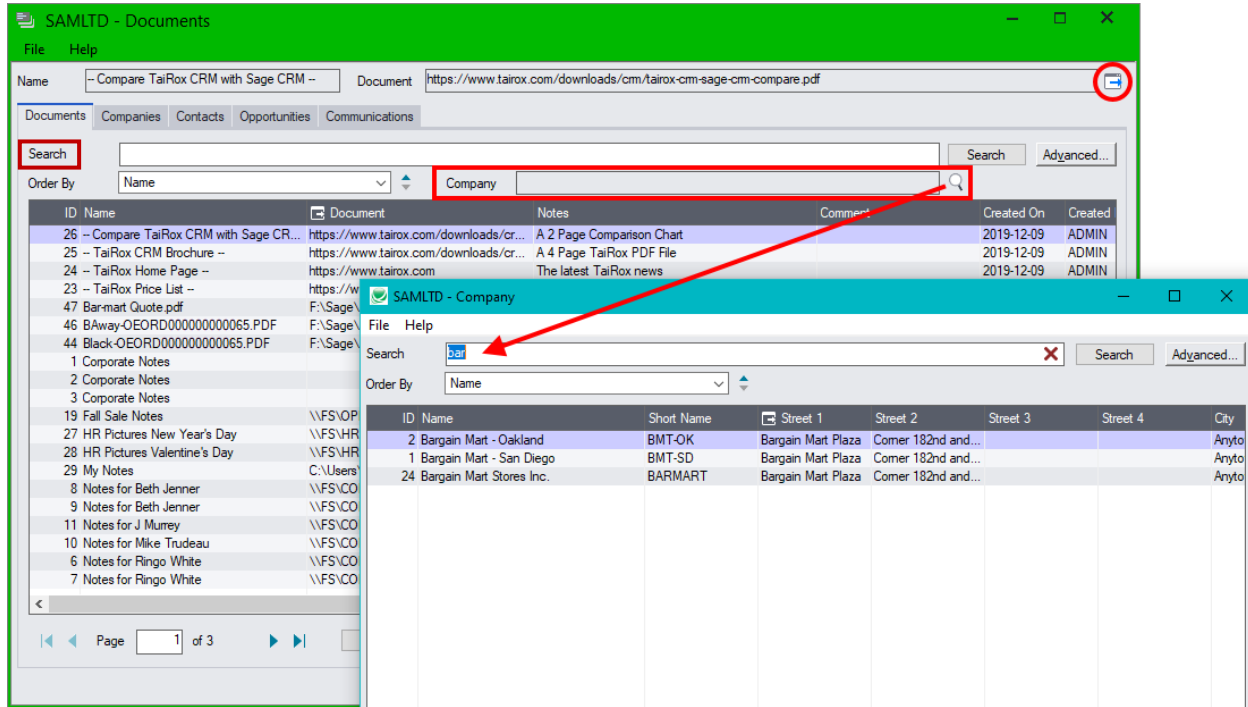
All email communications generated by the Send Bulk Email program appear in the Communications window – letting you maintain a complete trail of all customer communications.

For more information, see [Communications](#).

## Documents

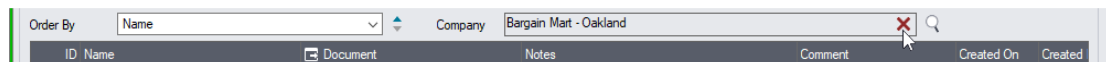
The Documents program provides a search field so you can immediately find documents. It also includes a Company search field to restrict documents by company. Double-click a row for document details.

- Click the red X that appears to remove Search terms.  Search



### Notes:


- Documents can be linked to Companies, Contacts, Communications, Cases, Opportunities, and Tracked Invoices. (You can also add documents for Tracked Invoices using the Overdue Invoices program and the Disputed Invoices program.)
  - To see all documents added to a single company record, click the Company Finder (shown above) and select the company you want. You can use the top Search field on the form to refine your search.
  - Click the red X to remove the company filter.



- To link an existing document to a Company, Contact, Opportunity or Communication:
  - Select the document that you want to link.
  - Click the appropriate tab.
  - Click the Link button.
  - Select the Company, Contact, Opportunity or Communication from the Finder.
- To attach documents to Cases and Tracked Invoices:
  - Open the Case or Tracked Invoice using the Case or Tracked Invoice program.
  - Select the Case or Tracked Invoice.
  - Select the Documents tab, and click the Link button (or click the Add button to add a new document).

- Document files are not stored in the database. Instead, documents reference various document storage repositories. Drilling down will open the referenced file.
  - Document references can be to Web site URLs.
  - Document references can be to local network drives and folders.
  - Document references can be to local drives (can only be opened by one user).

***Drill Down:***

- Double-click a row in the grid to view the document details.
- Click on the Document column heading – or click the “Go” button in the upper-right corner of the screen () – to open the highlighted document in the grid.

***See Also:***

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and button explanations.

## Document – Add/Edit

Double-click a row in the Documents window to open the Document program and view document details.

The Document screen lets you add links to new documents and edit existing document information.

The screenshot shows the 'SAMLTD - Document' window. It has a green title bar with 'File' and 'Help' menus. Below the title bar is a search bar with a magnifying glass icon and a green plus icon. The main area has tabs for 'Document', 'Optional Fields', 'Companies', 'Contacts', 'Opportunities', 'Communications', 'Cases', and 'Tracked Invoices'. The 'Document' tab is active, showing fields for 'Created On' (2021-05-10), 'Created By' (ADMIN), 'Modified On' (2021-05-10), and 'Modified By' (ADMIN). There is a 'Document' field with a URL: 'https://www.tairox.com/downloads/order/TaiRox-PriceList.pdf'. Below it is a 'Notes' field with the text 'This pricelist is always current'. At the bottom is a large 'Comment' field. There are 'Save', 'Delete', and 'Close' buttons at the bottom right.

### Notes:

- Click the green Plus button beside the ID field (+) to add a new document.
- Click the Finder button (🔍) beside the Document field to select or view the document location if on a local or network drive.
- Copy and paste a browser URL to store a web site address.
- The Notes field can be up to 250 characters long.
- The Comment field can be up to 2,500 characters long.
- Click the Delete button to delete the document record. Delete does not delete the document – just the record with the document link.
- The Optional Fields tab appears if you use the Optional Fields module and assigned optional fields to documents.

### Drill Down:

- Click the drilldown icon (“Go” button ➡) to open the document or web page.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.



## Communications

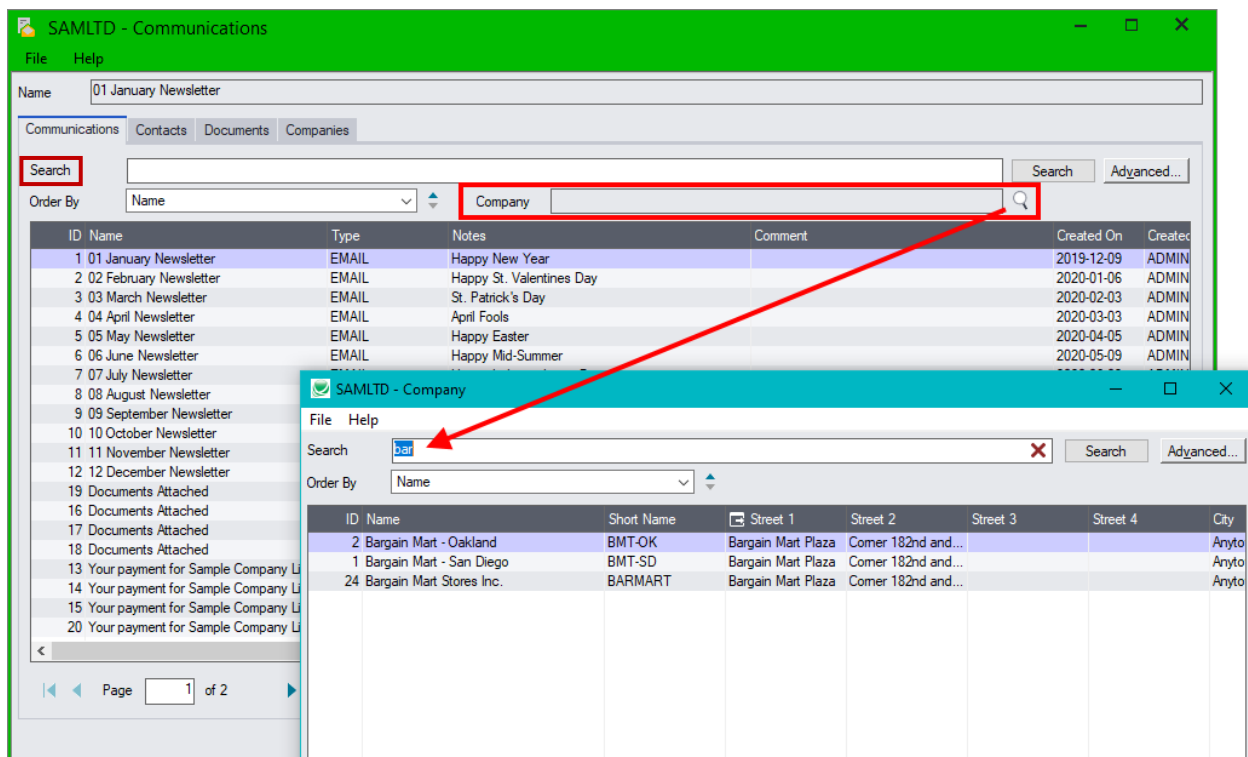
Communications record all interactions between your company and your customers. You can manually add any type of communication, including phone calls, text messages, letters, or emails.

Additionally, CRM and Collections records all emails sent to customers by the Send Documents, Payment Due Alerts, Overdue Payment Reminders, and Send Bulk Email programs as communications – including statements, invoices, letters, payment due alerts emails, overdue payment reminders, and newsletters.

The Communications program provides a search field so you can immediately find communications. It also includes a Company search field to restrict communications by company.

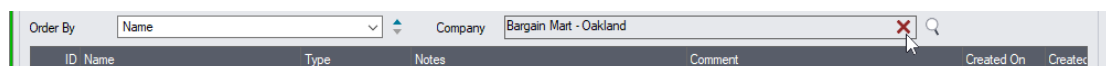
- Click the red X that appears to remove Search terms. 

Double-click a row in the grid to open a communication record.



### Notes:

- Communications are associated with Contacts, Documents, and Companies. For example:
  - A newsletter communication may be sent to all contacts.
  - A statement may be emailed to two contacts at a particular company.
  - An overdue payment reminder may be sent to the contacts for a company.
  - A FAX may be sent to the company number.
- To see communications for a single company:
  - Click the Company Finder (shown above) and select the company you want. You can use the top Search field on the form to refine your search.
  - Click the red X to remove the company filter.

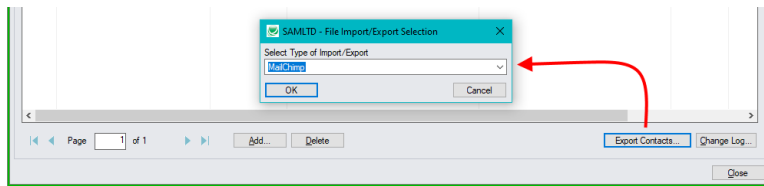


- CRM and Collections creates email communications when you resend accounting documents from the Companies window, send statements, letters and invoices, and when you send overdue

payment reminders, payment due alerts, and bulk emails. Just click the View Email button on the communication record to view emails and attachments.

- The Export Contacts button will create a file containing the contacts previously used for the selected communication, either in MailChimp or Swiftpage format.

This allows you to follow up a previous mailout to the same group of contacts.



**Note:** In order to export to MailChimp or Swiftpage, contacts must have email addresses, first and last names, must consent to receiving emails (this is a checkbox on the Contact screen), and must not be inactive or belong to inactive or deleted companies.

### ***Drill Down:***

- Double-click on a row in the grid to open up the Communication program and view communication details.
- Select a communication and click the Contacts tab to see recipients of emails sent by CRM.
- Click the Documents tab to view documents that were linked to the communication.

### ***See Also:***

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Communication – Add/Edit

The Communication screen lets you add new communications or edit existing information. It also lets you view emails sent to customers by the Send Documents, Payment Due Alerts, Overdue Payment Reminders, and Send Bulk Email programs.

### Notes:

- Click the green Plus button (+) beside the ID field to add a new record.
- If adding a new communication, click the Finder button (Q) beside the Type field to choose the communication type.  
The list of communication types is maintained by the [Communication Types](#) setup program. You must choose from the list.
- Click the View Email button to view emails created when you resend accounting documents from the Companies window, send statements, letters and invoices, and when you send overdue payment reminders from the Overdue Payment Reminders program, or emails from the Payment Due Alerts program and Send Bulk Email program.
- The Notes field can be up to 250 characters long.
- The Comment field can be up to 2,500 characters long.
- Click the Export Contacts button to create a file containing the contacts previously used for the selected communication, either in MailChimp or Swiftpage format.  
This allows you to follow up a previous mailout to the same group of contacts.
- The Optional Fields tab appears if you use the Optional Fields module and assigned optional fields to communications.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Viewing Emails in the Communications Window

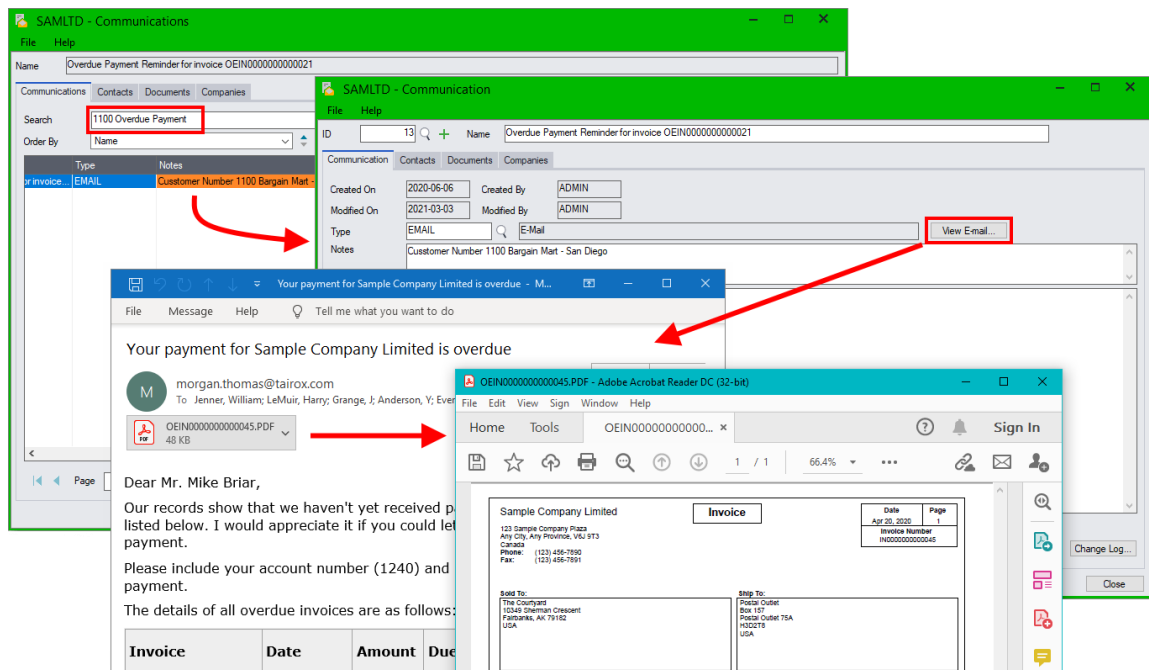
All email communications generated by the Send Documents, Overdue Payment Reminders, Payment Due Alerts, and Send Bulk Email programs appear in the Communications window – letting you maintain a complete trail of all customer communications.

CRM also keeps copies of all emails that are generated by CRM and Collections, such as overdue payment reminders, payment due alerts, and emails created by the Send Documents program.

**Note:** Emails sent using Send Bulk Email are *not* captured and cannot be viewed in communications. (In other words, you can view the communication record listing all recipients on the Contacts tab, but you cannot view the actual email sent to recipients.)

### To view emails:

1. Open the Communications window and search for the communication that you want.  
In this case, we searched for an “Overdue Payment” for customer 1100.
2. Double-click the communication, then click the View Email button in the Communication window.



You can then double-click the attachments to see the original documents.

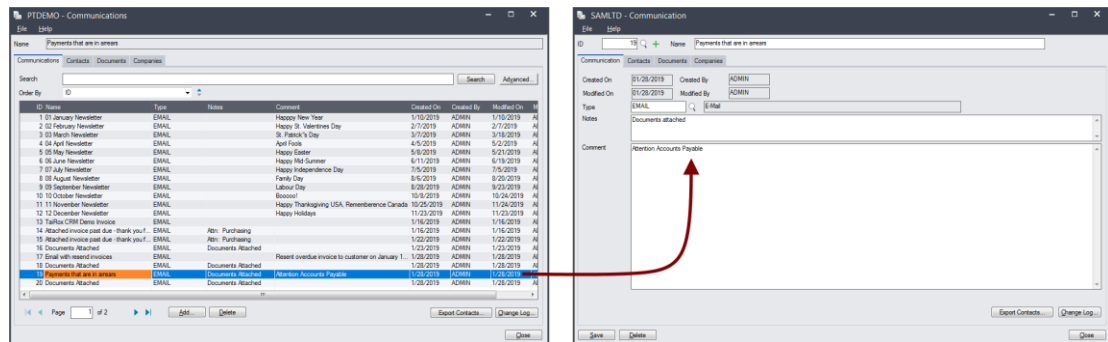
**Note:** *older emails (prior to January 2020) were stored differently in CRM.*

Older emails resent from the Company window or generated by CRM for statements, letters, invoices appear on the documents tab.

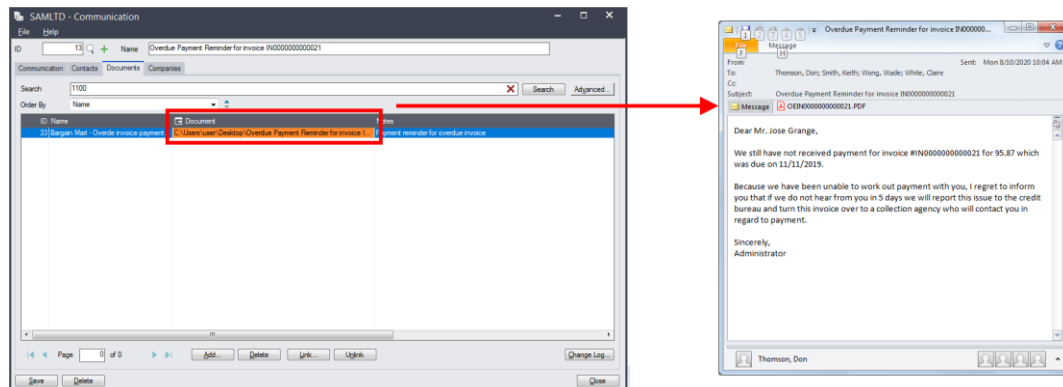
And, emails that are manually attached to a communication also appear on the Documents tab.

### To access older emails and emails manually added to communications:

- Select the company in the Companies window and click the Communication tab (or open the Communications window from the Sage desktop – as shown below).

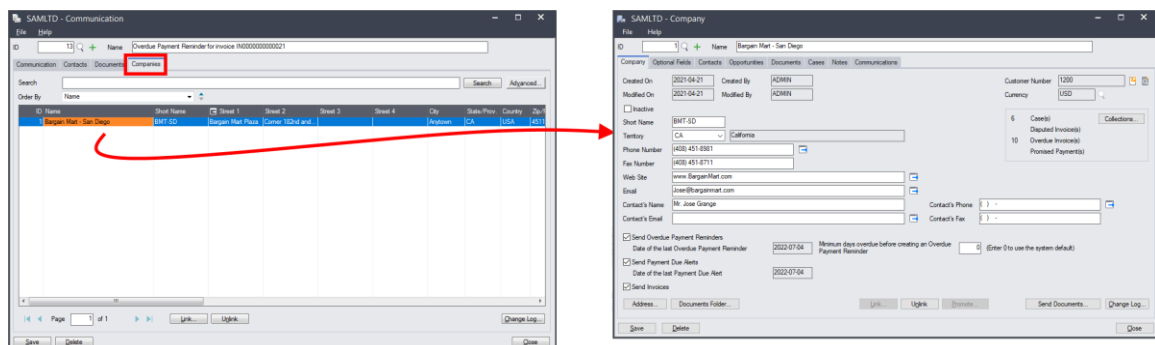


- To view the email with attachments, select the Documents tab, and click the Document column heading.



## Viewing Company information from the Communication Window


- Click the Companies tab, then double-click the row with the company name.

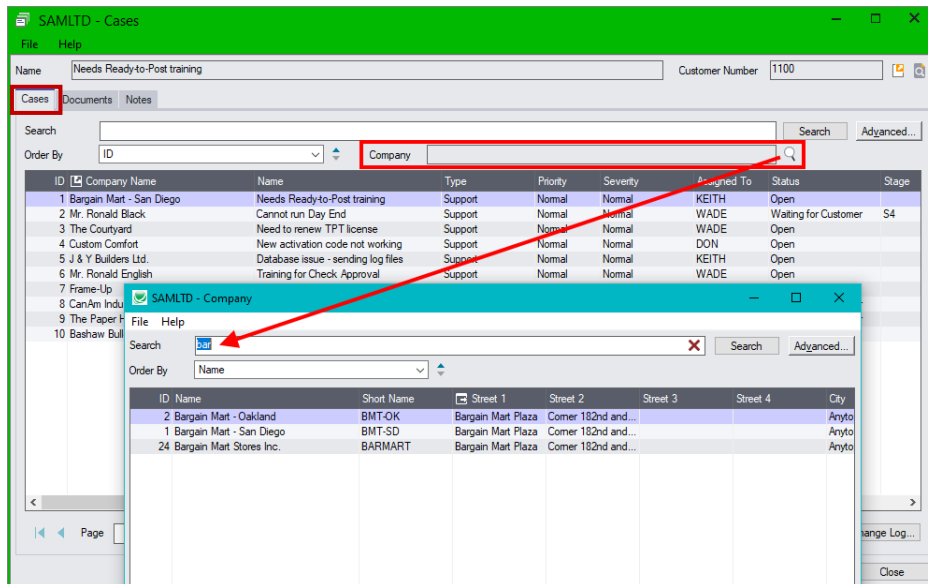


## Cases

Cases let you track collections issues, support issues, customer appointments, or other situations. You can also categorize cases by priority and by stage. (See [Case Stages](#) for more details.)

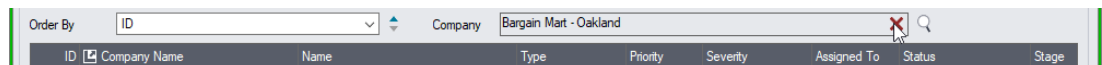
The Cases program provides a search field so you can immediately find cases. It also includes a Company search field to restrict cases by company (shown below). Double-click a row to open the case.

- Click the red X that appears to remove Search terms.  Search



### Notes:

- Cases include a “Type” field, which can be Collections, Support, Appointment, or Other.
- Use the Advanced... button to filter cases by field ranges (including Severity, Priority and Stage), as well as by Case Type, Case Status, and Territories.
  - To search cases for a single company, click the Company Finder (shown above) and select the company you want. You can use the top Search field on the form to refine your search.
  - Click the red X to remove the company filter.



- Cases can be assigned to a user or be left for assignment at a later time. Users will only see cases that match the company territories to which they have access.
- To copy a case, click the Copy button at the bottom of the screen. See [Copying Cases](#). The Copy button becomes active after you click the Add button – or the Save button if you changed the case.
- CRM and Collections updates users’ calendars when you change revisit dates and user assignments. See [Appendix E: Updating Calendars with .ics Event Files](#).

### Drill Down:

- Double-click a row to open up the Case program and display the case information.
- Click on the icons to the right of the Customer Number (top-right-hand corner) to open the A/R Customer program or the A/R Customer Inquiry program.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Dragging and Dropping Documents into the Case Documents Folder and Linking Documents to a Case

CRM and Collections lets you add any documents to a case. You can use drag and drop to attach documents and copy them to the Case Documents folder defined in Setup Options, or you can link any existing documents on your computer to a case record.

### Note the following methods for adding documents to cases:

- **Use Drag and Drop on the Documents tab** to copy documents to the case document folder in CRM (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the case, they are copied to the case document folder, and they are added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list on the Documents tab.

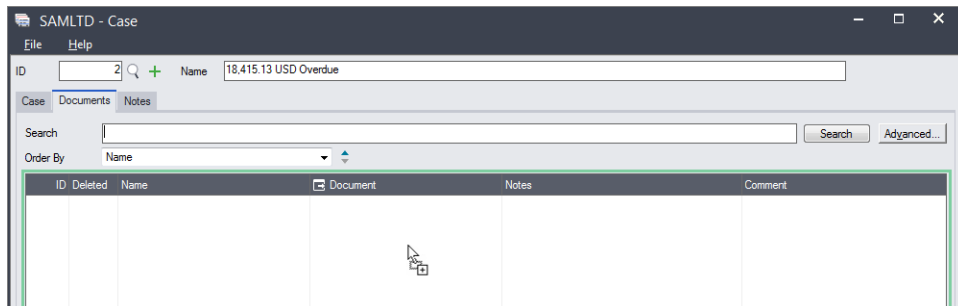
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the case folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list on the Document tab.

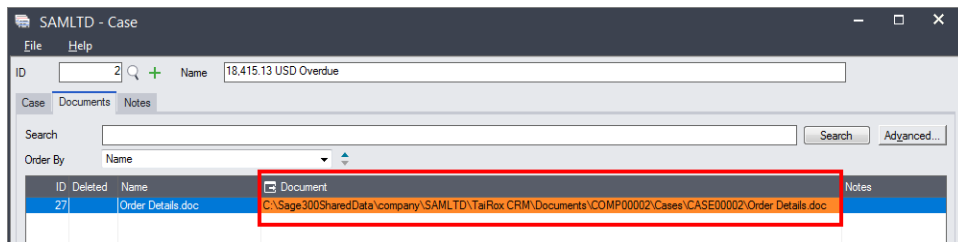
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the case's list. The document will NOT be moved to the case folder.

### To drag and drop documents and move them to the Case folder:

1. Click the Documents tab.
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



3. When you release the document, the grid displays the new document, showing the path to the documents folder – in this case *C:\Sage300SharedData\company\SAMLTD\TaiRox CRM\Documents\COMP00002\Cases\CASE00002\Order Details.doc*



## Case – Add/Edit

The Case program lets you add, edit, and copy a case.

**Access:** Click the Add button or double-click an existing row on the Cases screen or on the Cases tab on the Companies screen.

- On the blank Case screen, click the Finder button (🔍) on the right side of the Company name field to choose the Company Name for the case. When you save a case, the Drill Down button (📁) becomes active so you can drill down to company data.

### Notes:

- Click the green Plus button (+) beside the ID field to add a new case record, then click the Finder button (🔍) beside the Company Name field to select the company.
- Click the Copy button at the bottom of the screen to copy a case. See [Copying Cases](#).
- Revisit On date is used to construct data for the Dashboard program. You can also enter a Revisit Time after the Revisit date. Enter time in 24-hour format (e.g. 13:00).  
Cases show up for the revisit dates on the assigned employees' dashboards and calendars, and assigned users are sent calendar event files so revisit dates appear in their email calendars. The program sends the calendar updates to assigned users when you click the Save button.
- Cases may be of type Collection, Support, Appointment, or Other.
- Stages are user-defined. See [Case Stages](#).
- Use the Appointment case type and the Revisit Time to schedule on-site calls.
- The Notes field can be up to 250 characters long.
- The Comment field can be up to 2,500 characters long.
- Click (📁) to drill down to Company data.
- Click the Documents Folder button to view case documents in the Windows folder.
- Click the Change Log button to view past changes to the case.
- The Optional Fields tab appears if you use the Optional Fields module and assigned optional fields to cases.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.



## Copying Cases

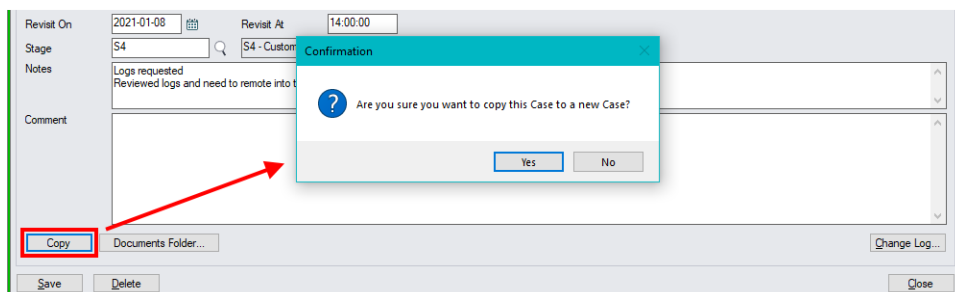
CRM and Collections lets you copy an open case to the current company or to a different company.

This means you can:

- Create standard cases for service and support calls and apply them to particular companies.
- Quickly duplicate a past collection case for a company.

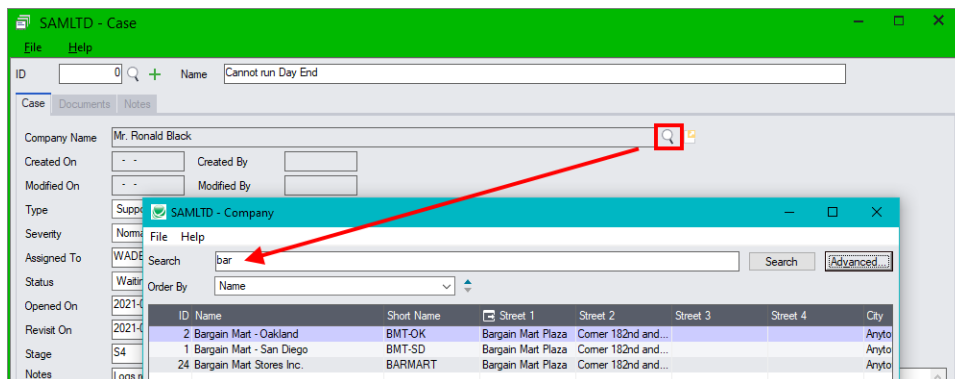
### To copy a case:

1. Open the case that you want to copy.
2. Click the Copy button at the bottom of the screen, and click Yes when prompted.



- The program will display a message stating that the copy was successful. Click OK.
  - By default, the new case will be assigned to the current company.
3. To change the company for the case, click the Finder button beside the Company Name field, and use the Search field to find the new company.

In this case, we entered “bar” to find and select “Bargain Mart – Oakland.”



4. Select the new company and edit the new case as required, then click the Add button at the bottom of the screen to add the new case.

## Tasks

The Tasks screen lets you:

- Track collection phone call tasks generated by the [Overdue Payment Reminders](#) program.


Overdue Payment Reminders lets you send out overdue payment reminder emails to customers or create collection call tasks so users can easily follow up with customers.

Collection call tasks appear on the dashboard according to revisit dates, provide overdue invoice information, and generate phone communications to track the outcome of collection calls.

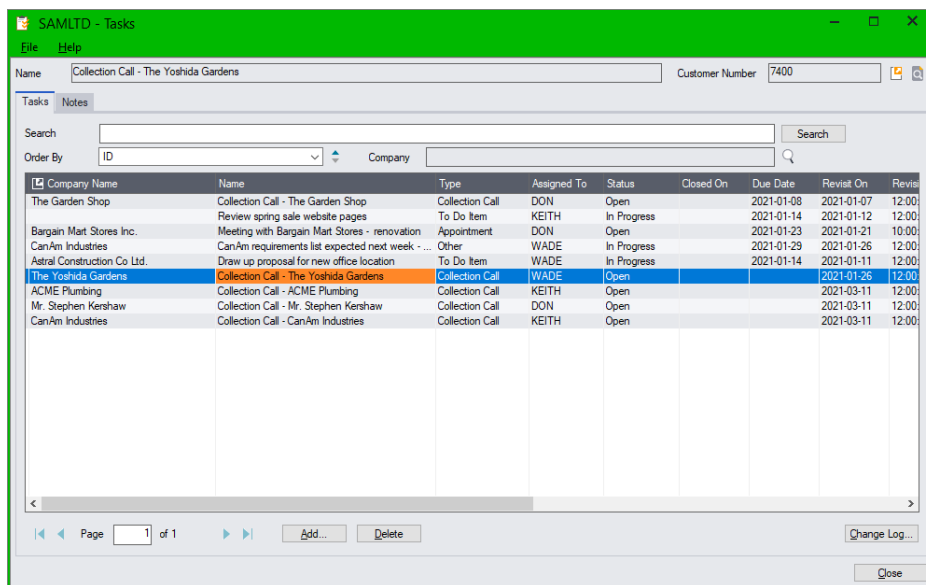
- Manually create tasks for tracking other activities.

Manually created tasks are optionally associated with customer accounts, and can track collections calls, appointments, to do items, or other CRM and Collections activities.

The Tasks program provides an internet browser-like search field so you can immediately find any tasks – for example, type “Open” in the Search field to view all open tasks.

- Click the red X that appears to remove Search terms. 

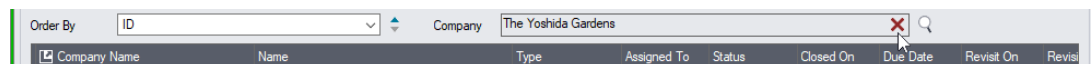
You can also order the task list by task name, task type, status, revisit date, company name, assigned user, territory, customer number, and various task dates.



Company Name	Name	Type	Assigned To	Status	Closed On	Due Date	Revisit On	Revisi
The Garden Shop	Collection Call - The Garden Shop	Collection Call	DON	Open		2021-01-08	2021-01-07	12:00
Bargain Mart Stores Inc.	Review spring sale website pages	To Do Item	KEITH	In Progress		2021-01-14	2021-01-12	12:00
CanAm Industries	Meeting with Bargain Mart Stores - renovation	Appointment	DON	Open		2021-01-23	2021-01-21	10:00
Astral Construction Co Ltd.	CanAm requirements list expected next week - ...	Other	WADE	In Progress		2021-01-29	2021-01-26	12:00
	Draw up proposal for new office location	To Do Item	WADE	In Progress		2021-01-14	2021-01-11	12:00
The Yoshida Gardens	Collection Call - The Yoshida Gardens	Collection Call	WADE	Open			2021-01-26	12:00
ACME Plumbing	Collection Call - ACME Plumbing	Collection Call	KEITH	Open			2021-03-11	12:00
Mr. Stephen Kershaw	Collection Call - Mr. Stephen Kershaw	Collection Call	DON	Open			2021-03-11	12:00
CanAm Industries	Collection Call - CanAm Industries	Collection Call	KEITH	Open			2021-03-11	12:00

### Notes:

- To display tasks for a single company, click the Company Finder button and select the company you want. Click the red X beside the Company field to remove the company filter.



- Tasks include a “Type” field, which can be Collections, To Do, Appointment, or Other. Tasks created by the Overdue Payment Reminders program have a “Collection Call” type.
- Tasks can be assigned to a company or be unassigned, and they can be assigned to a user or be left for assignment at a later time.
- Tasks can include a due data and a revisit date, and can be Open, In Progress, or Closed.
- Tasks with revisit dates appear on assigned users’ dashboards. Users will only see tasks that match the company territories to which they have access.

- CRM and Collections updates users' calendars when you change revisit dates and user assignments. See [Appendix E: Updating Calendars with .ics Event Files](#).

The program sends the calendar update emails when you click the Save button.

### **Drill Down:**

- Double-click a row to open up the Task program and display the task information.
- Click on the icons to the right of the Customer Number (top-right-hand corner) to open the A/R Customer program or the A/R Customer Inquiry program.
- Overdue Payment Reminders can automatically create payment reminder tasks for calling customers. See [Overdue Payment Reminders](#) and [Overdue Reminders Setup](#).

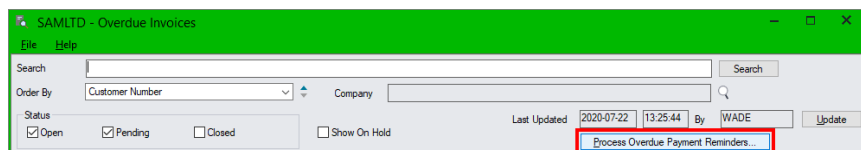
## **Collection Call Tasks Generated by the Overdue Payment Reminders Program**

The [Overdue Payment Reminders](#) program lets you send out overdue payment reminder emails **or** create phone call tasks for calling customers concerning overdue invoices.

- You use the [Overdue Reminders Setup](#) program to select which action you want to perform for each overdue invoice aging stage.  
For example, you might generate tasks for calling customers with an invoice that's overdue by more than 60 days.
- System-generated call tasks with a revisit date appear on the CRM and Collections Dashboard and provide summary overdue invoice information and drill-down invoice details and customer and contact information.
- The Overdue Payment Reminders program lets you set a revisit date and assign a user when you generate a group of payment reminder tasks.

### **A typical procedure for using Overdue Payment call tasks looks like this:**

- Open the [Collections](#) folder on the Sage 300 desktop, then open the Overdue Payment Reminders program.
- Click the Update button on the Overdue Payment Reminders screen. The Update button checks for invoices that have become overdue – or have been paid – since an update was last run.
- Select particular customers that you want to process – for example, choose all customers with overdue invoices that you want to assign to a particular staff member.
- Click the Process Overdue Payment Reminders button to continue.



- Specify a user ID and task revisit date for this group of customers, then click the Process button.
- Users find Collection Calls assigned to them on the CRM and Collections Dashboard – or they can open the Tasks program and filter for their user names in the Search field.
- Users document Collections Calls with a communication which they create directly from the task.

### **See Also:**

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Add Manual Tasks and Update Tasks Created by the Overdue Payment Reminders Program

The Task program lets you track and update tasks generated by the Overdue Payment Reminders program and create new tasks for collections, to-do items, appointments, and other CRM and Collections activities.

**Access:** Click the Add button at the bottom of the Tasks grid or double-click an existing task row.

The following screen illustrates a Collection Call task generated by the Overdue Payment Reminders program. Note that buttons for displaying invoice details and creating a communication appear **only** for tasks generated by Overdue Payment Reminders. They do not appear on manually-created Call Tasks.

### Notes:

- Click the green Plus button (+) beside the ID field to create a new task record.
- Click the Finder button (🔍) beside the Company Name field to link the task to a company.
  - Click 📁 to drill down to Company data. The button becomes active when you save a task.
  - Skip the Company Name field to create a task that is **not** associated with a company.
- Tasks may be of type Collection, Support, Appointment, or Other.
- The Assign To user field is optional – allowing you to create a group of tasks, and then assign them to individual users.
- Collection calls created by the Overdue Payment Reminders program have an “Overdue Payment Reminder” label and buttons for displaying invoice details and creating a communication.
  - Click the Create Communication button to add a new communication. The button name will change to “View Communication” when you save the communication.
  - Click the View Communication button to view or edit the communication.
- The Due Date and the Revisit Date are optional.

The Revisit Date determines when a task appears on the assigned user’s Dashboard. Optionally enter a Revisit Time after the Revisit date in 24-hour format (e.g. 13:00).

- The Comment field can be up to 2,500 characters long.
- Click the Notes tab to add a note that can also be searched in the Notes program.
- Click the Change Log button to view past changes to the task.
- The program sends calendar update emails to assigned users when you click the Save button.

**See Also:**

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

**View Overdue Payment Reminder Details and Drill Down to Collections Data**

Overdue Payment Reminders – Collection Call tasks created by the Overdue Payment Reminders program – provide a Details button that displays summary data on overdue customer accounts.

Created On: 2021-06-30 Created By: ADMIN  
 Modified On: 2021-06-30 Modified By: ADMIN  
 Type: Collection Call

Overdue Payment Reminder  
 Details... Create Communication...

Click the Details button to display the Overdue Payment Reminder Details:

Overdue Payment Reminder

Total Overdue: 2,233.80 USD

Invoice Number	Date	Amount	Due	Balance	Days Overdue
IN0000000000044	2020-04-20	1,761.82	2020-04-25	471.97	88
IN0000000000050	2020-05-28	1,623.48	2020-06-05	1,623.48	47
IN0000000000056	2020-05-31	138.35	2020-06-05	138.35	47

Close

The pop-up shows all outstanding invoices – excluding invoices on hold – when the task was created.

Click the Drill-Down button by the Company Name field to view all customer and collections data:

**SAMLTD - Task**  
 ID: 1 Name: Collection Call - The Garden Shop  
 Task Notes  
 Company Name: The Yoshida Gardens  
 Created On: 2020-06-06 Created By: ADMIN  
 Modified On: 2021-03-03 Modified By: ADMIN  
 Type: File Help  
 Assigned ID: 21 Name: The Yoshida Gardens  
 Due Date: Company Optional Fields Contacts Opportunities Documents Cases Notes Communications  
 Status: Created On: 2020-08-28 Created By: ADMIN Customer Number: 7400  
 Revisit On: 2021-03-03 Modified By: ADMIN Currency: JPN  
 Comment: ☐ Inactive  
 Short Name: Yoshida  
 Territory: Default Territory  
 Phone Number: Case(s): Collections...  
 Fax Number: Disputed Invoice(s):  
 Web Site: Overdue Invoice(s):  
 Email: Customer Number: 7400 The Yoshida Gardens  
 Credit Limit: 2,000,000 JPN On Hold  
 Contact's Name: Balance: 17,214 JPN 193.70 CAD  
 Contact's Email: Terms: N30 Average Days to Pay: 9.0 Number of Paid Invoices: 1  
☒ Send Overdue Date of the la: Current 1 - 30 31 - 60 61 - 90 Over 90  
☒ Send Payment Date of the la: 0 0 0 0 17,214 JPN  
☒ Send Invoices  
☐ Only Show Overdue Invoices (credits are always shown)

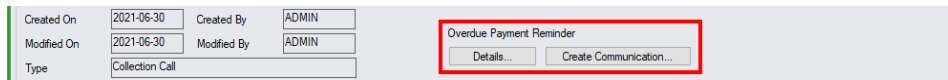
**SAMLTD - Collections**  
 Customer Number: 7400 The Yoshida Gardens  
 Credit Limit: 2,000,000 JPN On Hold  
 Contact's Name: Balance: 17,214 JPN 193.70 CAD  
 Contact's Email: Terms: N30 Average Days to Pay: 9.0 Number of Paid Invoices: 1  
☒ Send Overdue Date of the la: Current 1 - 30 31 - 60 61 - 90 Over 90  
☒ Send Payment Date of the la: 0 0 0 0 17,214 JPN  
☒ Send Invoices  
☐ Only Show Overdue Invoices (credits are always shown)

Document Number	Payment Number	Document Type	Document Date	Due Date	Original Amount	Remaining Amount	Days Overdue
IN0000000000035	1	Invoice	2020-03-03	2020-03-15	116,490	17,140	359
TR-INV-010.2	1	Invoice	2019-02-04	2019-02-06	812	74	762

- Click the Contacts tab on the Company screen to see the list of company contacts.
- Click the Collections button on the Company screen to view outstanding invoices, payments, cases, notes, past communications, as well as disputed invoices, tracked invoices, and promised payments.

## Creating Communications from Overdue Payment Reminder Tasks

CRM and Collections makes it easy to document all overdue payment calls – just click the Create Communication button to create an update for your call summary.



Created On	2021-06-30	Created By	ADMIN
Modified On	2021-06-30	Modified By	ADMIN
Type	Collection Call		

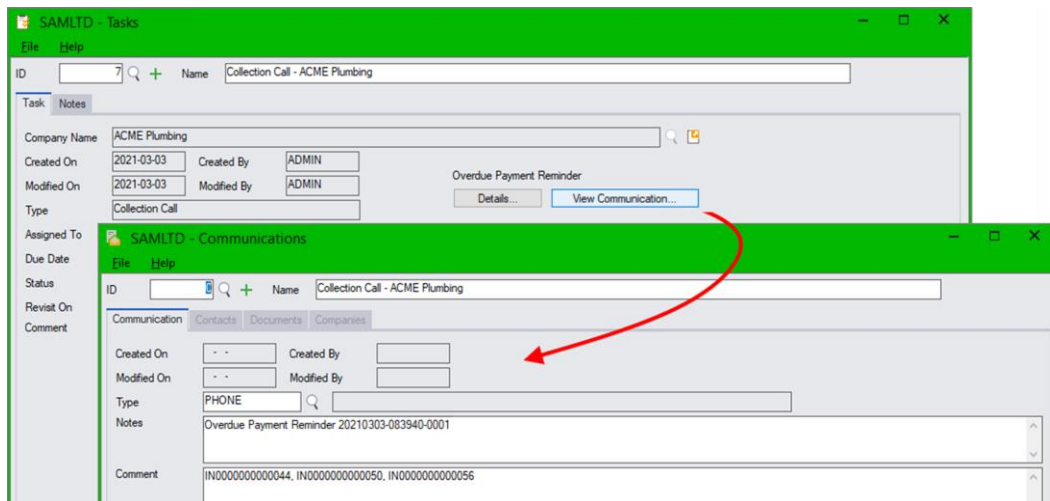
Overdue Payment Reminder  
 Details...   Create Communication...

**Click the Create Communication... button to display the Communication screen:**

CRM and Collections creates a communication the first time you click the Create Communication... button and click the Save button on the Communication screen. The button name changes to View Communication when you save, so you can see that a communication exists.

- Click the View Communication... button to update the same communication.

Note that the new communication includes a few default pieces of information – such as the communication name, the type, starting notes, and a list of the overdue invoices in the comment field.



**SAMLTD - Tasks**

ID: [ ] Name: Collection Call - ACME Plumbing

Task Notes

Company Name: ACME Plumbing

Created On: 2021-03-03 Created By: ADMIN

Modified On: 2021-03-03 Modified By: ADMIN

Type: Collection Call

Assigned To: [ ]

Due Date: [ ]

Status: [ ]

Revisit On: [ ]

Comment: [ ]

Overdue Payment Reminder

Details... View Communication...

**SAMLTD - Communications**

ID: [ ] Name: Collection Call - ACME Plumbing

Communication

Created On: [ ] Created By: [ ]

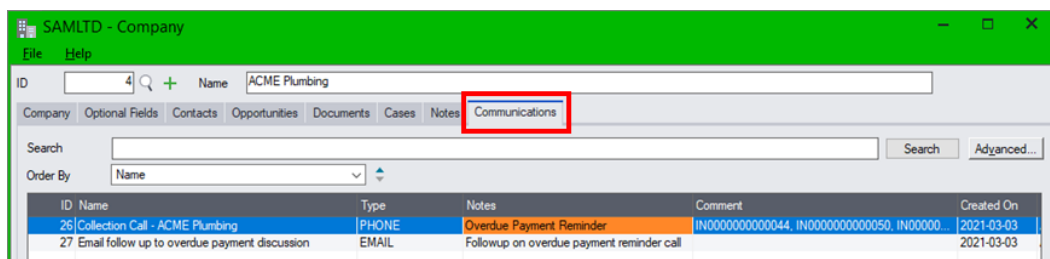
Modified On: [ ] Modified By: [ ]

Type: PHONE

Notes: Overdue Payment Reminder 20210303-083940-0001

Comment: IN00000000000044, IN00000000000050, IN00000000000056

You can look up all Collections Call communications in the Communications window – and you can also see them on the Communications tab in the Company window, along with email messages sent by the Overdue Payment Reminders program – as below:



**SAMLTD - Company**

ID: [ ] Name: ACME Plumbing

Company Optional Fields Contacts Opportunities Documents Cases Notes **Communications**


Search: [ ] Search Advanced...

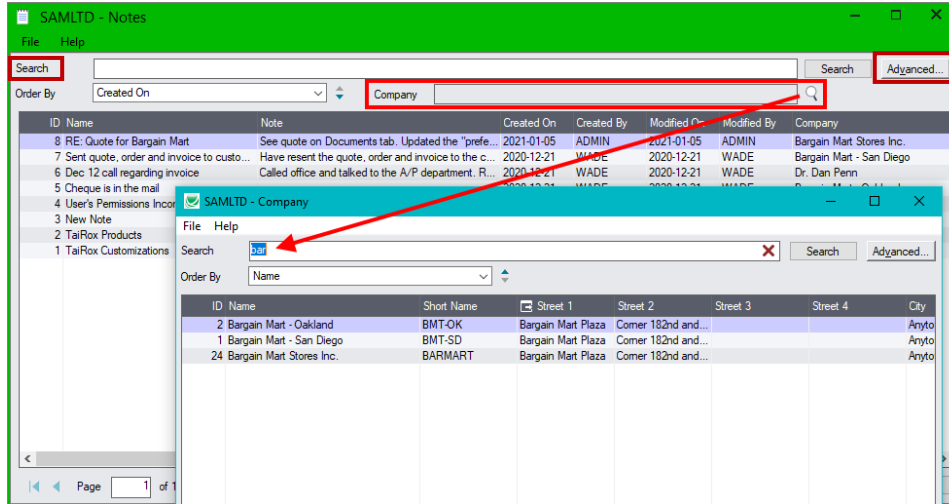
Order By: Name

ID	Name	Type	Notes	Comment	Created On
26	Collection Call - ACME Plumbing	PHONE	Overdue Payment Reminder	IN00000000000044, IN00000000000050, IN00000000000056	2021-03-03
27	Email follow up to overdue payment discussion	EMAIL	Followup on overdue payment reminder call		2021-03-03

## Notes

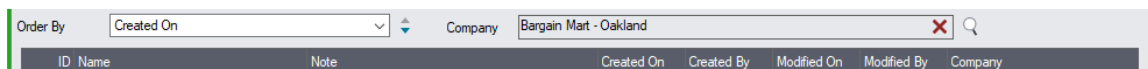
The Notes program provides a search field so you can immediately find notes, and it includes a Company search field to restrict notes by company (shown below). Double-click a row to open a note.

- Click the red X that appears to remove Search terms.  Search



### Notes:

- Notes can be attached to Companies, Tasks, Promised Payments, Opportunities, and Tracked Invoices. (You can also add notes for Tracked Invoices using the Overdue Invoices program and the Disputed Invoices program.)
- To add a note, click the Add button and select the type of entity the note is for.  
*Typically, you add notes by opening the company, disputed invoice, overdue invoice, promised payment, opportunity, or case, and then go to the Notes tab and click the Add button.*
- Notes can be several thousand characters in length.
- To search notes for a single company, click the Company Finder (shown above) and select the company you want. You can then use the top Search field on the form to refine your search.
- Click the red X shown below to remove the company filter.



- Users can only see notes that match the company territories or opportunities/cases/invoices/promised payments to which they have access.
- Use the “Advanced” search button to view notes for companies, tasks, tracked invoices, promised payments, or opportunities.

### Drill Down:

- Double-click on a row to open the Note window to see the contents.
- Click the “For” column heading in the grid to drill down to the entity to which the note is attached – either a company, case, tracked invoice, promised payment, or opportunity.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, and common operations.

## Note – Add/Edit

The Note program provides maintenance functionality.

### Notes:

- Notes are always linked to a single entity – a company, case, tracked invoice, promised payment, or opportunity. (Invoices that have notes added using the Overdue Invoices program and the Disputed Invoices program appear as tracked invoices.)
- Click the Add button (+) beside the Name field to add another note for the same entity.
- Notes may be several thousand characters in length.

### To add a note for a company, case, tracked invoice, promised payment or opportunity:

- Click the Add button at the bottom of the Notes grid, and select the type of entity to which you are attaching the note – for example, “Company”.

- Choose the entity from the Finder. In this case, we entered “bar” as the search term in order to select Bargain Mart – San Diego.

- Enter the information for the Note, and click the Add button.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.



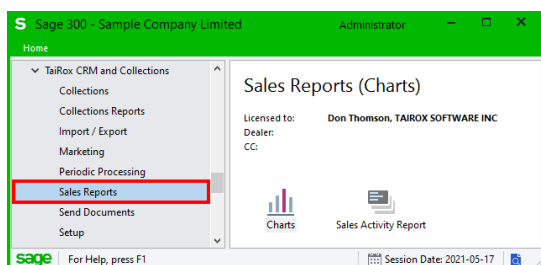
## Sales Reports and Charts

TaiRox CRM and Collections includes sales reports and charts to provide a quick overview of your company's sales performance.

- [Charts show the Sales Pipeline, Open Opportunities, or Time to Close.](#)
- [The Sales Activity Report](#) shows the number of new opportunities, quotes, orders and communications for a range of users and range of dates.

The Sales Activity Report uses the Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.

**Access:** Open the [Sales Reports](#) folder, then select the charts or the report that you want to see.



**Note:** The Sales Reports do not appear if you are using the TaiRox Collections module without CRM.

CRM and Collections also includes a set of collections charts and reports. See [Collections Reports and Performance Charts](#) for details.

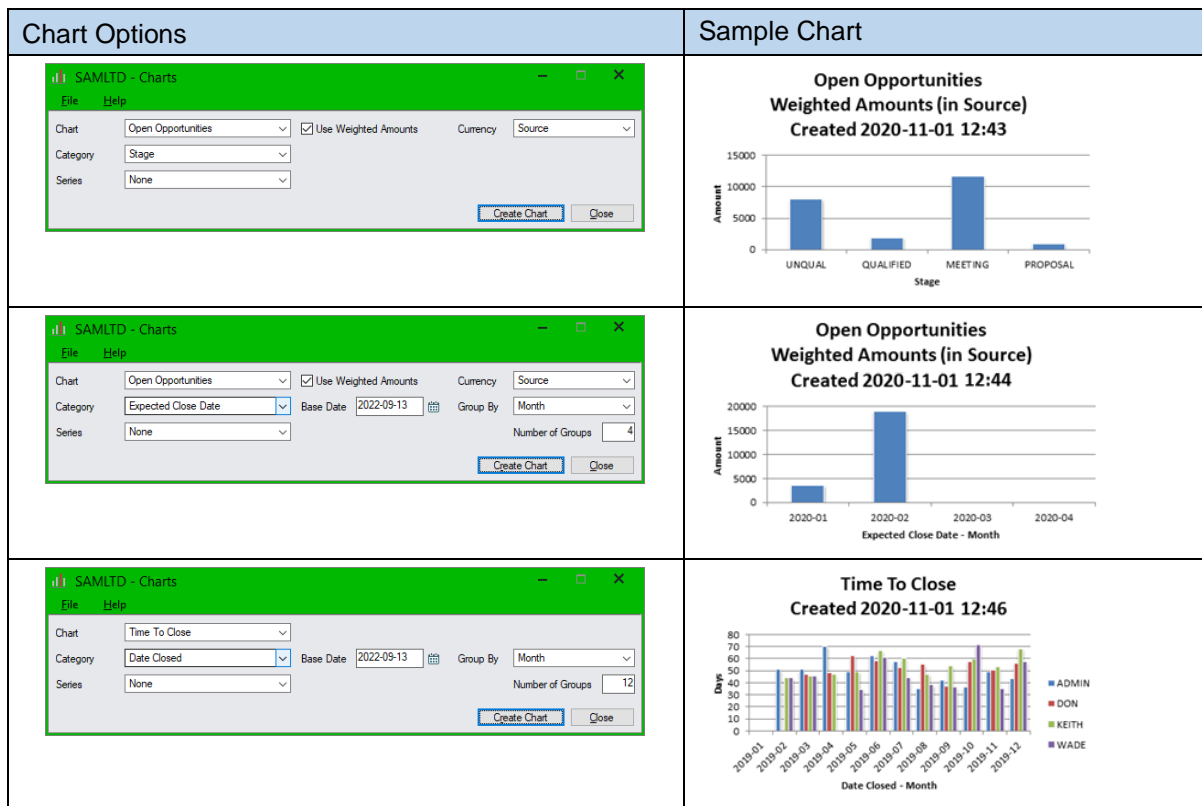
### Charts

The Charts program quickly presents opportunity data in various forms.

- Select **TaiRox CRM and Collections > Sales Reports > Charts**.
- Select the chart that you want to view – Sales Pipeline, Open Opportunities, or Time to Close.
- Choose charting options.
- Click the Create Chart button.

The Charts program creates a completely editable Excel spreadsheet containing the consolidated data and the chart. The terms “Category” and “Series” are consistent with their use in Excel.





## Sales Activity Report

The report shows the number of new opportunities, quotes, orders and communications for a range of users for a specified time period.

### To print the Sales Activity report:

1. Select **TaiRox CRM and Collections > Sales Reports > Sales Activity Report**.
2. Specify a date range for the report and the range of users that you want to include, then click the Print button.

SAMLTD - Sales Activity Report

File Help

Date: 2021-05-01 To: 2021-05-31

User: ADMIN To: ZZZZZZZZ

Print Close

The Sales Activity Report appears as follows:

2021-05-31 11:05:57AM

Sample Company Limited

Page 1

Sales Activity

Date [2021-05-01] To [2021-05-31]

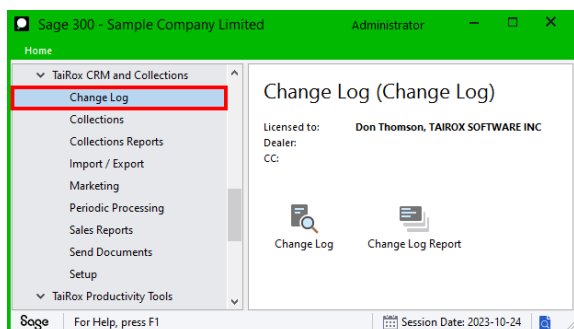
Users [ADMIN] To [ZZZZZZZZ]

User ID	User Name	New Opportunities	New Quotes	New Orders	Communications
ADMIN	Administrator	1	1	6	12
DON	Don Fenske	12	11	10	18
KEITH	keith Rider	10	12	13	20
WADE	Wade Woodsman	8	15	11	16

4 Users printed

## Change Log and Change Log Report

CRM logs every change to every field for each key entity, and lets you view all record changes on-screen and print comprehensive change log reports.



**Access:** Open the Change Log folder, then select the Change Log icon to view log changes on the screen, or choose the Change Log Report icon to print summary change log reports.

You can also view change logs for individual entity records by clicking the Change Log button at the bottom of each entity screen – such as Companies, Contacts, Tasks, or Promised Payments screens.

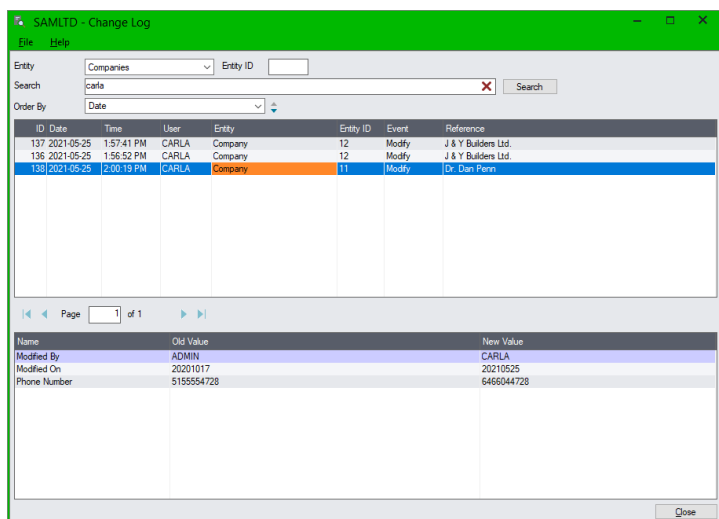
### Viewing Change Logs

**Access:** Open the Change Log folder, then select the Change Log icon.

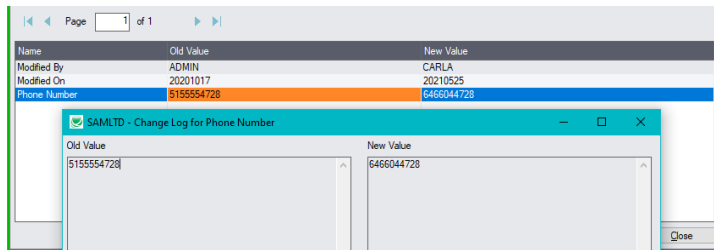
**To view log entries:**

- Choose the entity you want to view, or choose All in the first field to list all entities.
- Enter an ID for an entity in the Entity ID field to filter the list. In this example below, enter Entity ID “12” to list only the changes for the Company ID 12 – J & Y Builders.
- Enter a search term to find changes fast – like “ADMIN promise” to view all promised payments added or changed by the ADMIN user.
- Select a row in the top grid to display all changes for the selected record in the bottom grid.

The following example shows company record changes made by Carla. The row for Dr Dan Penn has been highlighted in the top grid, and you can see the old and new field values in the lower grid.



- Double-click a row in the bottom grid to open a window for side-by-side comparisons. This is particularly useful for comparing Notes.



## Printing Change Log Reports

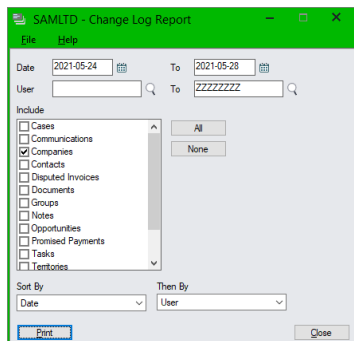
The printed log provides a summary of all record changes, listing the CRM use and the changed record. To see change details, use the change log viewer.

**Access:** Open the Change Log folder, then select the Change Log Report icon.

The Change Log Report lets you select a range of dates and users to report, choose each of the entities that you want to include in the report, and choose whether to order the report by date or by user.

### To print the Change Log Report:

1. Select **TaiRox CRM and Collections > Change Log > Change Log Report**.



2. Specify a date range for the report and the range of users that you want to include.
3. Choose the entities for the report.
4. Specify the report sort order.
5. Click the Print button.

2021-05-25 2:18:59PM

Sample Company Limited

Change Log - Summary

Date

[2021-05-24] To [2021-05-28]

User ID

[ ] To [ZZZZZZZZ]

Sort By

[Date, User ID]

Include

[Companies]

Date	User ID	Entity	Entity ID	Event	Reference
2021-05-25	CARLA	Company	12	Modify	J & Y Builders Ltd.
		Company	12	Modify	J & Y Builders Ltd.
		Company	11	Modify	Dr. Dan Penn
2021-05-25	KEITH	Company	2	Modify	Bargain Mart - Oakland
		Company	5	Modify	The Courtyard
		Company	7	Modify	Custom Comfort
		Company	13	Modify	Mr. Ronald English
		Company	19	Modify	CanAm Industries
		Company	20	Modify	The Royal Cavendish Co.
		Company	21	Modify	The Yoshida Gardens

# Accounts Receivable and Collections

## Dashboard and Calendar Views of Assignments

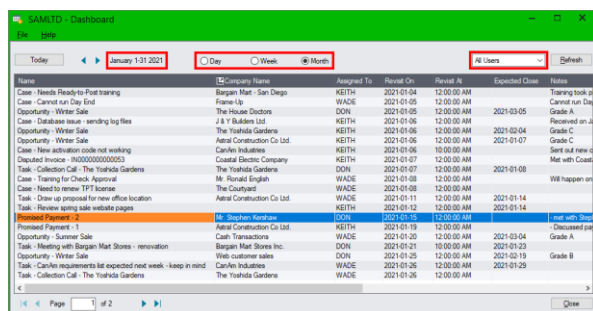
The Dashboard and Calendar provide two different views of all open tasks, opportunities, cases, tracked invoices, disputed invoices, and promised payments for the selected day, week, or month that are assigned to you, all, or no users.

**Note:** Opportunities will not appear on the dashboard if you are using the standalone Collections module.

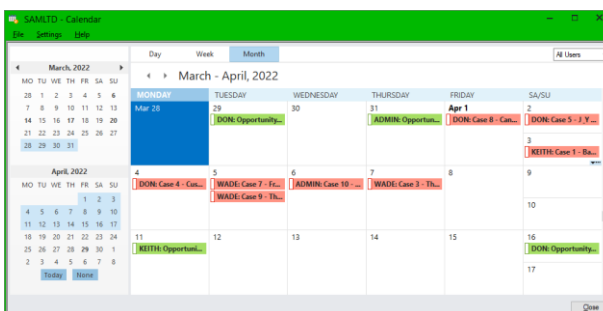
These views do not display closed cases, tasks, tracked invoices, or promised payments, or opportunities that are won/lost. (Tracked invoices includes all invoices – overdue and disputed – with a revisit date.)

For details, see the [Dashboard](#) and [Calendar](#) sections earlier in this User Guide.

### Dashboard view



### Calendar view



Double-click an item to open a case, task, opportunity, disputed invoice, tracked invoice, or promised payment.

- Click on the Company Name column heading on the dashboard to open the Company program for the selected company and view company information.

### Notes:

- Today:** The session date is used by default on the Dashboard and Calendar screens. If you change the date, click the Today button to quickly return to the session date, retaining the day-week-month state.
- Navigation Arrows:** Use arrows to the top of the screen to navigate to the previous or next day, week or month.
- Day, Week or Month:** Display items with a revisit date for the selected day, week or month.
- Me, All Users, Unassigned, or Other User:** “Me” displays items assigned to the logged in user. “All Users” shows all items the logged-in user is **allowed** to see, “Unassigned” shows cases, tasks, disputed invoices, overdue invoices, and promised payments that are not assigned to **any** users. You can also see items assigned to specific other users if you have permission to view them.
- Refresh button on the Dashboard:** This button reloads the data from the database (changing states does not do this).
- All displayed tasks, cases, opportunities, tracked invoices, and promised payments on the dashboard are selected and sorted by their **Revisit Date**. Items without a specific Revisit Time display 12:00 AM.

See [Appendix G: CRM and Collections Security](#) for details on dashboard and calendar security settings.

## Customer Aging

The Customer Aging program *in the Collections folder* provides a lightning-fast way to see customer aging information, print a quick report, and drill down to overdue and disputed invoices, tracked invoices, communications, collection cases, promised payments, and notes for the displayed customers.

**SAMLTD - Customer Aging**

As-Of Date: 2022-04-01  
Cut-Off Date: 2022-04-01  
Currency: Source  
Display: Summary

Customer Range  
Select Customers By: Customer Number  
Billing Cycle: BILLMT  
Group Code: WHL  
Territory Code: ZZZZZZ

Age Unapplied Credit Notes and Debit Notes: As Current  
Age Receipts, Unapplied Cash and Unapplied Prepayments: By Date

☒ Include Current  
☒ Exclude Disputed Invoices  
☒ Only Show Documents Overdue by: 1 or More Days

Customer Number	Company Name	Flags	Currency	Customer Group	Days Overdue	Current	1 - 30	31 - 60	61 - 90
1100	Bargain Mart - San Diego	!	USD	WHL	81	-92.56	0.00	92.69	1,848.62
1105	Bargain Mart - Oakland		USD	WHL	81	7,322.84	7,783.29	0.00	1,016.48
1240	The Courtyard	!	USD	WHL	46	0.00	0.00	4,648.44	0.00
1400	Coastal Electric Company	\$7+	CAD	WHL	57	501.90	978.68	-23,159.71	0.00
1500	Custom Comfort	!	USD	WHL	23	0.00	67,456.45	0.00	0.00
1550	Astral Construction Co Ltd.		USD	WHL	41	0.00	0.00	-20,512.13	0.00
1580	Break-Away Designs		USD	WHL	58	0.00	0.00	178,443.95	0.00
7100	Bashaw Buildings		CAD	WHL	24	0.00	350.57	0.00	0.00
7300	The Royal Cavendish Co.	!	GBP	WHL	48	14,558.53	4,448.96	17,804.09	0.00
7400	The Yoshida Gardens	\$	JPN	WHL	56	0	-11,900	-87,376	0

Page 1 of 1

Export... Print Close

Select "Summary" or "Detail" from the Display dropdown and click the Go button to view outstanding accounts. You can also print the data on the screen and export it to an Excel spreadsheet.

### Notes:

The above screen provides a "Summary" display with one summary line for each customer that matches the selection criteria.

- You can select options to match the Sage 300 aging calculations.
  - The As-Of Date lets you specify the date on which to report the receivables.
  - Enter a Cut-Off Date to only include transactions that are on or before the date you specify.
  - Use the "Include Current" checkbox to display or exclude the current amounts. Note that you can set the number of days overdue to include as "current".
  - Select all or a range of customer numbers, national accounts, customer groups, billing cycles, short names, account sets, territory codes, currency codes, current customer currency balance, current functional currency balance, customer name, salesperson code, on-hold status, start date, or customer optional fields.
  - Age unapplied documents as current or by date.
  - Select "Exclude Disputed Invoices" to ignore disputed invoices. (See [Disputed Invoices](#).)
  - Only show documents overdue by x Days or more. (*This is a display option only.* It does not affect aging totals, and it does not affect aging reports or exported data.)
- Each line shows the collection buckets for a customer on the As Of Date. This date defaults to the session date, but you can change it with the pop-up calendar.

- Totals for each aging period are displayed at the top of the screen. Note that aging totals only include the amounts for customers that are included in the selection criteria.
- The Flags column shows if the customer account in A/R is on hold (\*), or has unapplied credit (\$), and whether the company has open cases (!), disputed invoices (?), or promised payments (+).

Choose "Detail" from the Display dropdown, and click the Go button, to view outstanding documents – as below.

- The Customer Aging Detail grid shows unpaid documents.

Customer Number	Company Name	Flags	Currency	Customer Group	Document Number	Document Type	Document Date	Document Amount	Due Am
1100	Bargain Mart - San Diego	!	USD	WHL	TR-INV-001	Invoice	2022-01-01	1,397.20	1.84
1100	Bargain Mart - San Diego	!	USD	WHL	TR-INV-011	Interest	2022-02-07	92.69	9
1105	Bargain Mart - Oakland	!	USD	WHL	TR-INV-002	Invoice	2022-02-01	1,126.51	1.01
1105	Bargain Mart - Oakland	!	USD	WHL	TR-INV-008	Invoice	2022-03-01	7,322.84	7.78
1240	The Courtyard	!	USD	WHL	TR-INV-004.1	Invoice	2022-02-02	5,419.59	4.64
1400	Coastal Electric Company	!	CAD	WHL	TR-INV-005	Invoice	2022-01-15	1,139.62	97
1400	Coastal Electric Company	!\$+	CAD	WHL	UC00000000000000000000	Unapplied Cash	2022-02-03	-25,632.23	-23.15
1500	Custom Comfort	!	USD	WHL	TR-INV-004.2	Invoice	2022-02-02	68,006.48	67.45
1550	Astral Construction Co Ltd.	!	USD	WHL	PY00000000000000000000	Receipt	2022-02-21	-568,284.49	-19.81
1550	Astral Construction Co Ltd.	!	USD	WHL	UC00000000000000000000	Unapplied Cash	2022-02-19	-696.16	-69
1580	Break-Away Designs	!	USD	WHL	PP00000000000000000000	Prepayment	2022-02-19	-1,942.81	-10
1580	Break-Away Designs	!	USD	WHL	TR-INV-005.1	Invoice	2022-01-30	178,007.33	178.55
7100	Bashaw Building	!	CAD	WHL	TR-INV-005.2	Invoice	2022-02-06	28,442.32	35
7300	The Royal Cavendish Co.	!	GBP	WHL	TR-CRE-004.2	Invoice	2022-02-27	133.65	13
7300	The Royal Cavendish Co.	!	GBP	WHL	TR-INV-005.3	Invoice	2022-02-09	19,058.97	17.80
7400	The Yoshida Gardens	!	JPN	WHL	PP00000000000000000000	Prepayment	2022-02-04	-93,298	-87
7400	The Yoshida Gardens	!	JPN	WHL	TR-INV-010.2	Invoice	2022-02-04	812	87
7400	The Yoshida Gardens	!	JPN	WHL	UC00000000000000000000	Unapplied Cash	2022-03-10	-12,638	-11

- The Flags column for documents shows disputed invoices (@) and invoices with payment schedules (#), and shows if the company has promised payments (+), unapplied credit (\$), open cases (!), or other disputed invoices (?), and whether the customer account in A/R is on hold (\*).

### Drill Down:

- Click the Customer Number column heading to open the A/R Customers window (or A/R Extended Customers if you have TaiRox Productivity Tools).
- Click the Customer Name column heading to open the CRM and Collections Company window.
- Click the Document Number column heading on the Detail grid to display the original document in A/R or O/E.
- Double-click a row to open the Customer Information window – to view customer invoices, case information, documents, notes, communications, disputed invoices, overdue invoices, tracked invoices, and promised payments.

### Adding a New Collection Case, Disputed Invoice, Tracked Invoice, or Promised Payment for a Customer

- Double-click the customer row to open the Collections window.
- Go to the Tasks tab, Disputed Invoices tab, Tracked Invoices tab, or Promised Payments tab.

Document Number	Document Type	Document Date	Due Date	Original Amount	Remaining Amount	Days Overdue
IN000000000000019	Invoice	2022-04-03	2022-04-15	3,846.69	434.21	87
IN000000000000020	Invoice	2022-04-04	2022-04-15	631.80	94.39	87
IN000000000000042	Invoice	2022-04-05	2022-04-15	2,445.80	660.76	87

- Click the Add button at the bottom of the tab.

You can also add notes and communications by choosing the appropriate tab and clicking Add.

- Fill in the case, disputed invoice, tracked invoice or promised payment information, assigning the employee and the revisit dates for cases, disputed invoices, and promised payments.

This example shows the screen for adding a new case.

## Printing an Aged Trial Balance

To print customer the aging results on the screen:

- Select the criteria for the customer aging report, and click the Go button.
- Click the Print button at the bottom of the screen to print the results.

2022-12-05 9:15:38AM Sample Company Limited Page 1

A/R Aged Trial Balance by Due Date (ARTBAL)

From Customer Number [1 To 9999]  
 From Group Code [RTL] To [RTL]  
 Account Type [All Customers]  
 Age Transaction As Of [2022-10-01]  
 Cutoff By Document Date [2022-10-01]  
 Print Transaction In [Detail by Document Number]  
 Transaction Type [Debit, Credit Note, Credit Note, Interest, Unapplied Cash, Prepayment, Receipt, Refund, Adjustment]  
 Include Customer Phone Credit Link [No]  
 Include Space For Comments [No]  
 Include Only Customers Over Their Credit Limit [No]  
 Include Zero-Balance Customers [No]  
 Show Applied Details [No]  
 Show Fully Paid Transaction [No]  
 From Document Date [1]  
 Sort Transaction by Transaction Type [No]  
 Print Amounts In [Customer Currency]

Customer Number/Name/ Document Type/Number	Doc. Date	Due Date or Check/Receipt No.	Current	1 to 30 Days	31 to 60 Days	61 to 90 Days	Over 90 Days	Total
1200 Mr. Ronald Rick								
DN IN00000000000013	2022-09-04	2022-10-04		1,428.06				1,428.06
DN TR-CRE-006	2022-02-02	2022-02-15				264.61		264.61
DN TR-DIV-003	2022-01-01	2022-01-15				105,967.65		105,967.65
<b>Customer Total</b>			USD	0.00	1,428.06	0.00	106,232.26	107,660.32
1520 Mr. Stephen Kershaw								
DN IN00000000000019	2022-08-09	2022-08-15		3,296.69				3,296.69
DN IN00000000000020	2022-08-09	2022-08-15		631.80				631.80
<b>Customer Total</b>			USD	0.00	3,928.49	0.00	0.00	3,928.49
1600 Dr. Dan Penn								
DN TR-DIV-001	2022-02-03	2022-02-15				10,090.12		10,090.12
UC UC0000000000000005	2022-03-06	00049-021		-101.42				-101.42
<b>Customer Total</b>			USD	-101.42	0.00	0.00	10,090.12	9,988.70
<b>Report Total</b>			USD	-101.42	5,356.55	0.00	116,322.38	121,571.51

CR: Credit Note DB: Debit Note IN: Invoice IT: Interest Charge PI: Prepayment UC: Unapplied Cash MC: Miscellaneous Range  
 AD: Adjustment CF: Applied Credit (fsm) DF: Applied Debit (fsm) ED: Earned Discount Item  
 GL: Gain or Loss (multicurrency ledger) PF: Receipt WFO: Write-Off RD: Rounding RF: Refund

**Note:** The program matches rules for the Aged Trial Balance reports in Sage 300 A/R. This means:

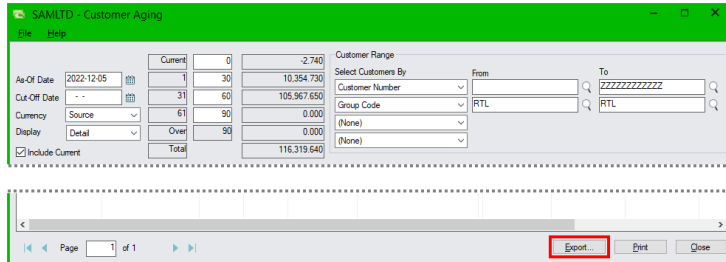
- It ignores options to “Exclude Disputed Invoices” and “Only show documents overdue by x days”.
- It also ignores the “Age Unapplied Credit Notes and Debit Notes” and the “Age Receipts, Unapplied Cash and Unapplied Prepayments” options.



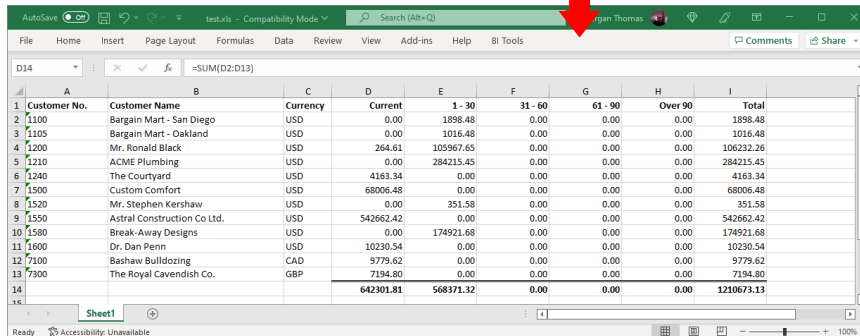
## Exporting an Aged Trial Balance to a Spreadsheet

To export the customer aging results displayed on the screen:

- Select the criteria for the customer aging report, and click the Go button.
- Click the Export button at the bottom of the screen to export the results to an Excel spreadsheet.
- Choose the path and filename for the spreadsheet file.



### Summary Spreadsheet:



### Detail Sheet:

A		B	C	D	E	F	G	H	I	J	K	L
1	Customer No.	Customer Name	Currency									
2	1100	Bargain Mart - San Diego	USD									
3	Document Type	Document No.	Document Date	Due Date Ship-To Loc.	PO Number	Current	1-30	31-60	61-90	Overs 90	Total	
4	Invoice	TR-INV-001	2022-01-01	2022-01-10	8888271	0.00	1,898.48	0.00	0.00	0.00	1,898.48	
5						0.00	1,898.48	0.00	0.00	0.00	1,898.48	
6		Date User ID	Note									
7		2022-01-10 ADMIN	Customer claims excess shipping charges on invoice.									
8												
9	Customer No.	Customer Name	Currency									
10	1105	Bargain Mart - Oakland	USD									
11	Document Type	Document No.	Document Date	Due Date Ship-To Loc.	PO Number	Current	1-30	31-60	61-90	Overs 90	Total	
12	Invoice	TR-INV-002	2022-01-01	2022-01-10	27463	0.00	1,016.48	0.00	0.00	0.00	1,016.48	
13						0.00	1,016.48	0.00	0.00	0.00	1,016.48	
14		Date User ID	Note									
15		2022-01-10 ADMIN	Let Keith know if there are any issues with collections. The customer may have some cash-flow issues.									
16												
17	Customer No.	Customer Name	Currency									
18	1200	Mr. Ronald Black	USD									
19	Document Type	Document No.	Document Date	Due Date Ship-To Loc.	PO Number	Current	1-30	31-60	61-90	Overs 90	Total	
20	Invoice	TR-CRE-006	2022-02-02	2022-02-15		264.61	0.00	0.00	0.00	0.00	264.61	
21	Invoice	TR-INV-003	2022-01-01	2022-01-15	2022-7821	0.00	105,967.65	0.00	0.00	0.00	105,967.65	
22						264.61	105,967.65	0.00	0.00	0.00	106,232.26	
23												
24	Customer No.	Customer Name	Currency									
25	1210	ACME Plumbing	USD									
26	Document Type	Document No.	Document Date	Due Date Ship-To Loc.	PO Number	Current	1-30	31-60	61-90	Overs 90	Total	
27	Invoice	TR-INV-007	2022-01-01	2022-01-21		0.00	284,215.45	0.00	0.00	0.00	284,215.45	
28						0.00	284,215.45	0.00	0.00	0.00	284,215.45	

**Note:**

- If “Include Current” is not selected, the Current column will not be included in the export.
- Document details include the ship-to location and the PO number.
- Notes on the detail report appear following customer summary lines.
- An Aging Summary includes the totals of each exported currency in multicurrency systems.

--- SUMMARY ---						
Currency	Current	1 - 30	31 - 60	61 - 90	Over 90	Total
USD	17,145.27	67,456.45	193,648.25	108,832.75	0.00	387,082.72
CAD	-21,208.46	978.68	0.00	0.00	0.00	-20,229.78
	-4,063.19	68,435.13	193,648.25	108,832.75	0.00	366,852.94

## Collections Information – Drilling Down from Customer Aging

- Double-click a row in the Customer Aging grid to view the Collections screen.

The Collections screen displays collections-related information, including the transactions, cases, notes, communications, disputed invoices, overdue invoices, tracked invoices, and promised payments for the customer, along with the customer credit limit, balance, terms, average days to pay, balance, terms, average days to pay and number of paid invoices.

- You can also access the Collections screen from the Company window, Overdue Invoices, Overdue Payment Reminders, and Payment Due Alerts.**

See [Companies](#), [Overdue Invoices](#), [Overdue Payment Reminders](#), and [Payment Due Alerts](#).

### Note:

- If you open the Collections screen from the Customer Aging window, the program ages documents based on the settings that you specify on the Customer Aging screen.
- If you open the Collections screen from the Companies window, the program ages documents based on the default aging periods specified in Accounts Receivable.

### Transactions tab:

Click the buttons between the Customer Number and Customer Name to drill down to the A/R Customer record and to Customer Inquiry.

Click the Checkbox to show only overdue invoices.

Click the Document Number column heading to view the entry details for the selected document in A/R or O/E – such as the invoice or receipt.

### Cases tab:

Click the buttons between the Customer Number and Customer Name for customer information.

Select “Show Closed” to see closed cases.

Double-click a case in the grid to open the Case window and view case details.

**Click the Add button to add a new case**, or click the Delete button to delete the selected case.

For more information, see [Cases](#).

### Notes tab – for notes added to the company:

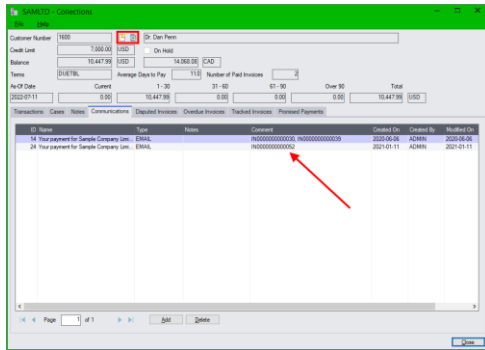
Click the buttons between the Customer Number and Customer Name for customer information.

Double-click a note in the grid to open the Note window and view the note details.

**Click the Add button to add a new note**, or click the Delete button to delete the selected note.

For more information on notes, see [Notes](#).

## Communications tab – for all company communications:



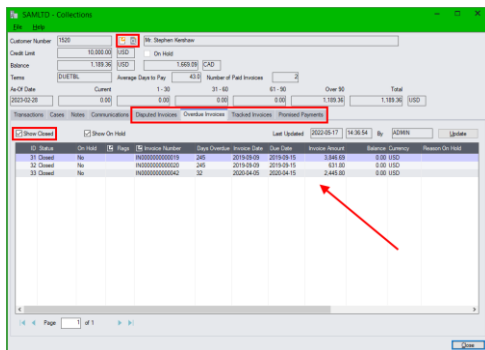
Click the buttons between the Customer Number and Customer Name for customer information.

Double-click a communication in the grid to open the Communication window and view the details.

**Click the Add button to add a new communication**, or click the Delete button to delete the currently selected communication.

For more information on notes, see [Communications](#).

## Disputed Invoices, Overdue Invoices, Tracked Invoices & Promised Payments tabs:



These tabs show disputed invoices, all overdue invoices, tracked invoices, and promised payments for the current company.

Select “Show Closed” to see closed disputed invoices, overdue invoices, or promised payments.

Choose a tab, then double-click an item in the grid to view the details. **Click the Add button for disputed invoices, tracked invoices, or promised payments to add a new item.**

For more information, see:

- [Disputed Invoices](#)
- [Overdue Invoices](#)
- [Tracked Invoices](#)
- [Promised Payments](#)

## Note the following points:

- Disputed Invoices lets you track invoices that are being disputed by a customer. See [Disputed Invoices](#).
- Overdue invoice records are created and displayed on the [Overdue Invoices](#) screen and on the [Overdue Payment Reminders](#) screen.

The Flags column shows disputed invoices (@) and invoices with payment schedules (#), and shows if the company has promised payments (+), unapplied credit (\$), open cases (!), or other disputed invoices (?), and whether the customer account in A/R is on hold (\*).

- [Promised Payments](#) document the special arrangements for payment from customers with overdue or disputed invoices.
- [Tracked Invoices](#) are all invoices with attached notes or documents, or have an assigned user or revisit date, or are on hold.

If you add a note or document to a disputed invoice or overdue invoice, that invoice *becomes* a tracked invoice and will also appear on the Tracked Invoices tab, along with all notes and documents.

- All notes and documents on these tabs are also accessible through the [Notes](#) and [Documents](#) programs.

## Disputed Invoices

Disputed Invoices lets you track invoices that are being disputed by a customer.

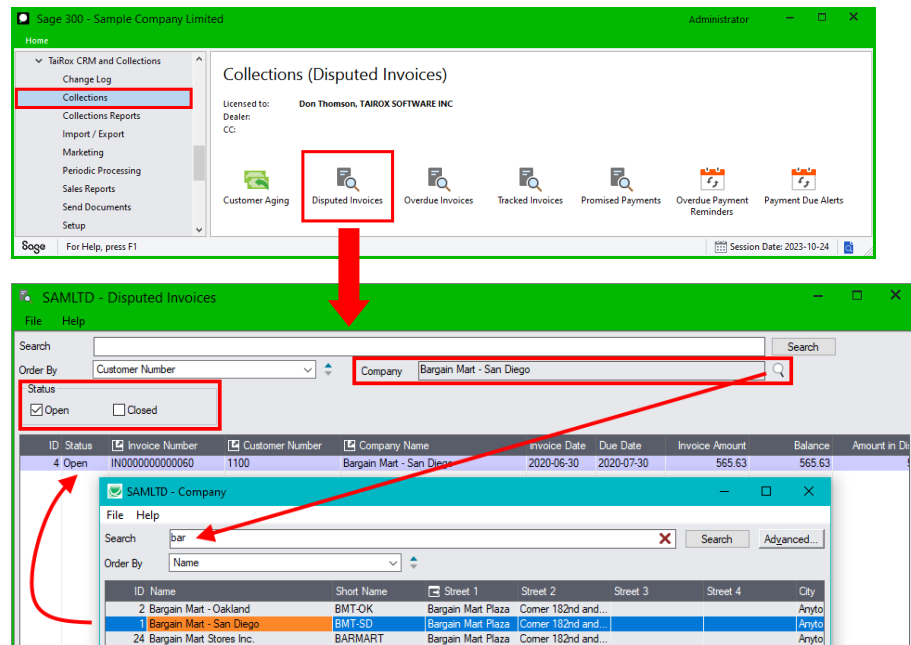
If you add documents or notes to a disputed invoice, the disputed invoice will also appear on the [Tracked Invoices](#) screen, where you can also see the attached documents and notes.

- You can assign disputed invoices to a specific user or leave them unassigned.
- Disputed invoices appear on the [Dashboard](#) and [Calendar](#) according to the revisit date you specify.


Assigned disputed invoices appear on the assigned user's dashboard. Unassigned invoices appear on the dashboard when you view items for All users.

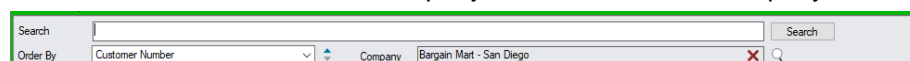
- An option on the [Customer Aging](#) screen lets you include or ignore invoices in dispute.
- Disputed invoices are flagged on the [Overdue Invoices](#) and [Overdue Payment Reminders](#) screen, so you can hold reminder emails.
- You can add as many documents and notes as you want to disputed invoices to track activity.

**Access:** Open the [Collections](#) folder, then open Disputed Invoices.



### To Search for disputed invoices:

- Use the top Search field on the form to find disputed invoices.
  - Enter a partial invoice number, customer number, or company name in the Search field at the top of the screen, and press the Enter key.  
You can also enter values for company optional fields, so if you have a “sales rep” company optional field, you can search quickly for disputed invoices for a particular sales rep.
  - Click the red X that appears to remove Search terms. 
- Use the Company Finder (shown above) to search for a single company.
  - Click the Finder button (🔍) at the end of the Company field (shown below) and enter part of the company name to restrict disputed invoices to a single company.
  - Click the red X beside the Company field to remove the company filter.

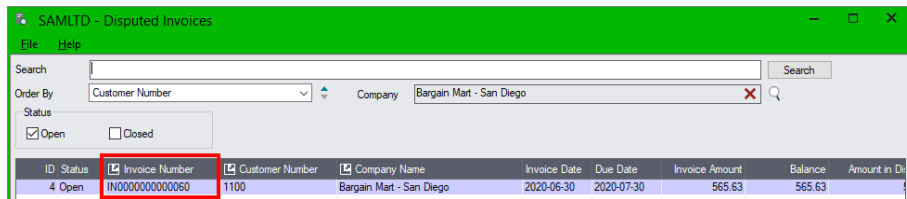


**Notes:**

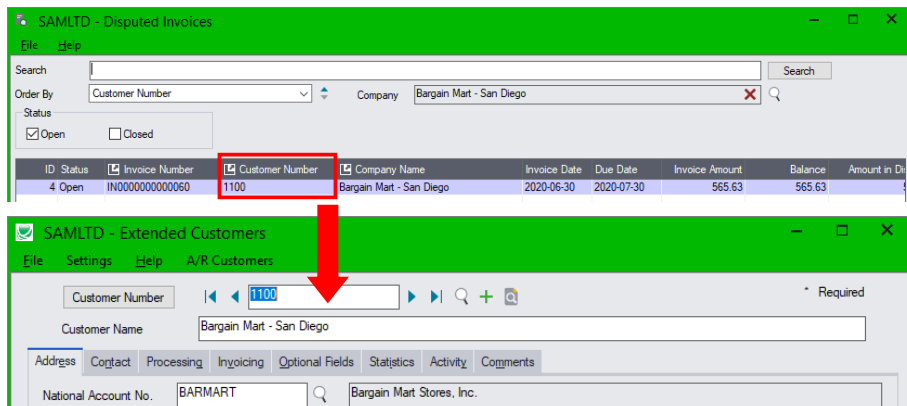
- Click the Status checkboxes to display both Open and Closed disputed invoices.
- Double-click a disputed invoice in the grid to view the disputed invoice information.
- Click the Add button at the bottom of the screen to add a new disputed invoice.
- Disputed invoices include a “Documents” tab and a “Notes” tab where you can add the details for disputed invoices.
- Use the [Disputed Invoices Report](#) to view the status of disputed invoices.

**Drill Down:**

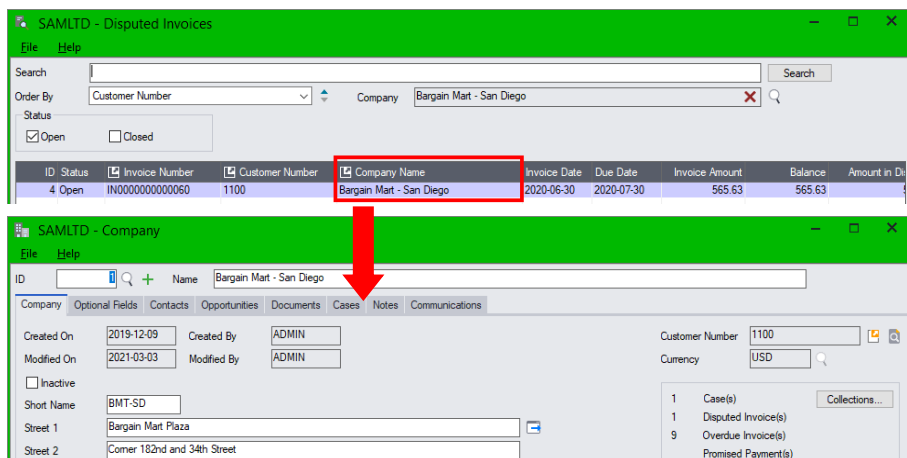
- Double-click a row in the grid to open up the Disputed Invoice information screen.
- Click the Invoice Number column heading to drill down on the invoice.



- Click the Customer Number column heading to drill down to the A/R Customer (or Extended Customers form if you have TaiRox Productivity Tools).



- Click the Company Name column heading to drill down to the CRM company information.

**See Also:**

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Disputed Invoices – Add/Edit

**Access:** Click the Add button on the Disputed Invoices screen to add a new disputed invoice or double-click an existing row to view the disputed invoice record.

### Notes:

- Click the green Plus button beside the ID field (+) to add a new disputed invoice record.
- Click the Finder button (🔍) beside the Company name field to choose the company with the disputed invoice. (The Finder becomes inactive after you add the invoice.)
- Select the disputed invoice using the Finder beside the Invoice Number field.
- Enter a disputed amount. You can order disputed invoices by disputed amount on the Disputed Invoices screen, helping you focus on larger disputes.
- Enter a Revisit On date. This determines when disputed invoices appear on the Dashboard. You can also enter a Revisit Time after the Revisit date. Enter time in 24-hour format (e.g. 13:00).
- Assign the disputed invoice to an employee so it will appear on their dashboard. If you do not assign the invoice to a particular employee, it will appear when you view items for “All.”
- Days Open shows how long the dispute has been open – or was open before it was closed.
- Change the status to Closed once the invoice dispute is resolved.
- The Notes field can be up to 250 characters long. Click the Notes tab to add notes up to 2,500 characters long for the disputed invoice.
- Click the Change Log button to see the details for recent changes.

### Drill Down:

- Click the Drill-Down button (📄) by the Company Name to drill down to Collections company data.
- Click the Drill-Down button (📄) by the Customer Number field to view A/R customer data with the Extended Customers screen.

### Items on the Documents and Notes tabs appear with Tracked Invoices:

- All disputed invoices with attached notes or documents appear in the [Tracked Invoices](#) program with the same list of documents and notes.

You can attach and view documents and notes for invoices using Disputed Invoices, [Overdue Invoices](#), and Tracked Invoices programs. The attached items are displayed on the tabs of all three programs.

When you add a note or document to an invoice using the Disputed Invoices or Overdue Invoices program, the invoice will appear in the Tracked Invoices program.

- All documents added to the Documents tab are also accessible through the [Documents](#) program.
- All notes added to the Notes tab are also accessible through the [Notes](#) program.

## Dragging and Dropping Documents into the Invoice Documents Folder and Linking Documents to a Disputed Invoice

CRM and Collections lets you link any documents to a disputed invoice. You can use drag and drop to attach documents and copy them to the Tracked Invoices Documents folder defined in [Setup Options](#), or you can link any existing documents on your computer to a disputed invoice record.

Drag and drop copies documents for Tracked Invoices, Overdue Invoices, and Disputed Invoices to the **Tracked Invoices folder** specified in CRM and Collections [Setup Options](#).

### Note the following methods for adding documents to disputed invoices:

- **Use Drag and Drop on the Documents tab** to copy documents to the tracked invoice document folder for CRM and Collections (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the disputed invoice, and you can view them on the Documents tab for Tracked Invoices. They are also copied to the tracked invoice document folder, and added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list on the Documents tab.

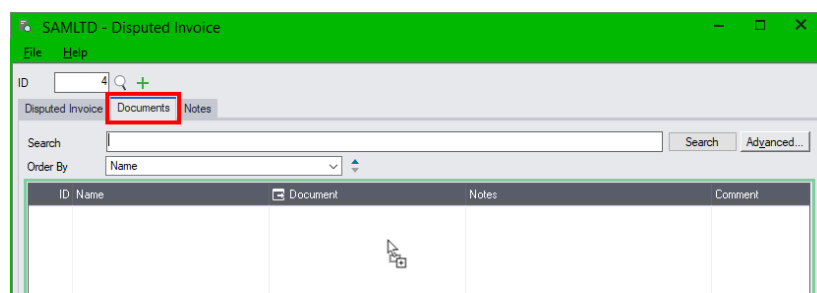
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the tracked invoices document folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list on the Document tab.

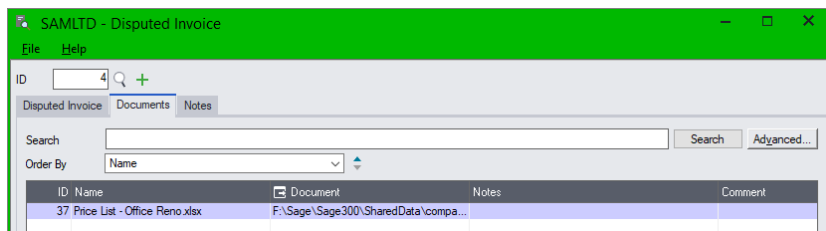
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the disputed invoice's list. The document will NOT be moved to the tracked invoices document folder.

### To drag and drop documents and move them to the Tracked Invoices document folder:

1. Click the Documents tab on the Disputed Invoice screen (see below).
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



- When you release the document, the grid displays the new document, showing the path to the documents folder.

**See Also:**

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.



## Overdue Invoices

The Overdue Invoices program displays a selectable and sortable list of overdue invoice records.

- Click the Update button to recalculate the list of overdue invoices using today's date.

The program creates new overdue invoice records, updates existing records for overdue invoices, and closes records for paid invoices.

- Double-click an invoice to open the “tracked invoice” record for the invoice.
  - You can attach documents and notes to overdue invoice records to track activity.  
If you add documents or notes to an overdue invoice record, the overdue invoice will also be listed on the [Tracked Invoices](#) screen.
  - You can put invoices on hold and select a reason for the hold.  
CRM will not send overdue payment reminders to customers for “on hold” invoices.  
Use the “Show On Hold” checkbox to include/exclude on hold invoices from the list.
  - You can display prior overdue invoices by selecting the Closed checkbox.
  - You can assign overdue invoices to a specific user and set a revisit date.

Assigned overdue invoices appear on the assigned user's [Dashboard](#) and [Calendar](#) according to the revisit date you specify.

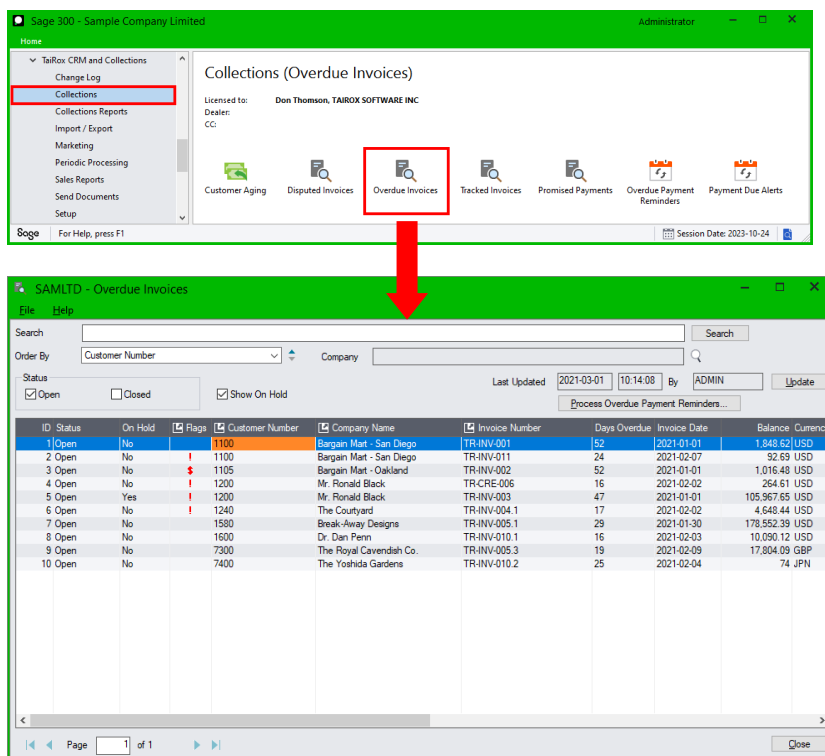
If you set a revisit date, but do not assign the invoice to a specific user, the invoice appears on the dashboard when you view items for All users.

Use the [Overdue Payment Reminders](#) program to assign user tasks for overdue invoices.

- Click the “Process Overdue Payment Reminders” button to go directly to the Overdue Payment Reminders program to send emails to customers and to create tasks for following up on overdue payments. See [Overdue Payment Reminders](#).

You can also view overdue invoices and overdue accounts on the [Customer Aging](#) screen.

**Access:** Open the [Collections](#) folder, then open Overdue Invoices.

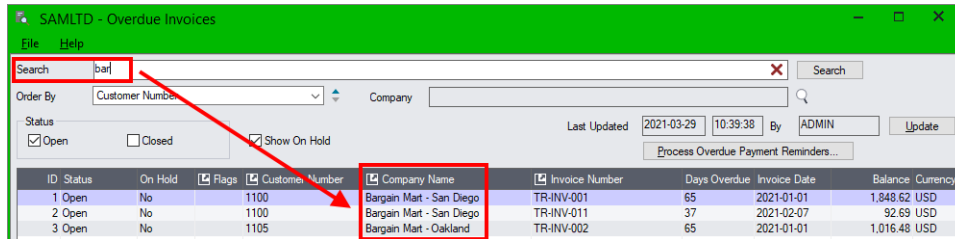


- The Flags column shows disputed invoices (@) and invoices with payment schedules (#), and shows if the company has promised payments (+), unapplied credit (\$), open cases (!), or other disputed invoices (?), and whether the customer account in A/R is on hold (\*).
- Additional grid columns show on hold status for the invoice, assigned users, and revisit dates.
- Click the Invoice Number heading to drill down to invoice details.

## Using the Search Field and the Company Field to Look Up Overdue Invoices

Use the Search field and the Company field to restrict the display of overdue invoices to a group of companies or to a single company.

- **Use the Search field at the top of the screen to filter your overdue invoice selection.**



In this example, we entered “bar” as the search string to look up overdue invoices for all branches of Bargain Mart. You can also use the Company field to look up invoices for a single company.

- Click the red X at the end of the Search field to remove search terms.

**Search using company optional field values:** You can also enter values for company optional fields in the Search field. For example:

- If you have a “sales rep” company optional field, you can search quickly for overdue invoices for a particular sales rep.
- If you have a “terms” optional field, you could do a special run for a particular group of customers.

- **Use the Company field at the top of the screen to list overdue invoices for a single company.**



- Use the Company field to view overdue invoices for the selected company only.
- Click the Red X to remove the company filter.

In this example, in the above example, we are listing all invoices for Ronald Black.

Overdue aging periods are specified in [Setup Options](#).

## Double-Click an Invoice to Add Notes, Track the Invoice, and Change the Invoice Status

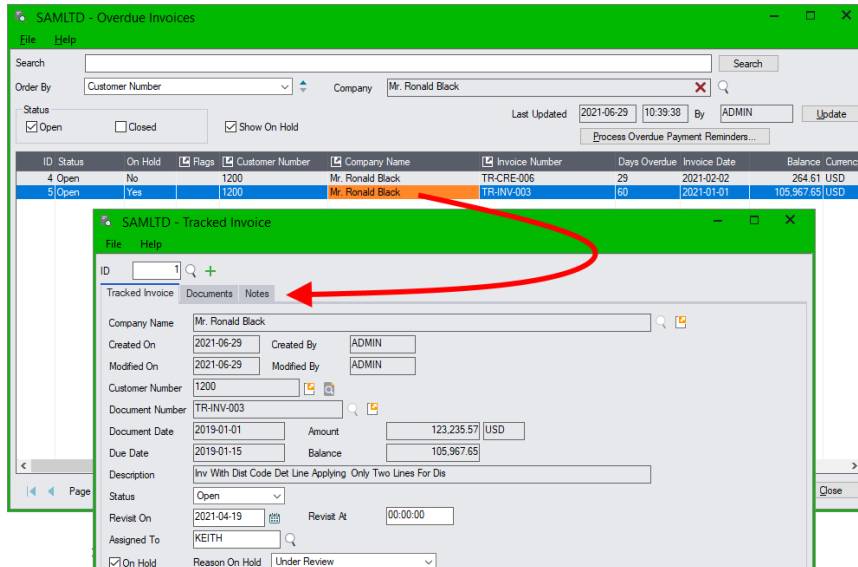
The program opens the Tracked Invoice screen when you double-click an invoice, allowing you to attach additional invoice information and change the status of the invoice. You can:

- View summary invoice information and drill down to customer and invoice details.
- Add the invoice as a new Tracked Invoice.

- Assign the invoice to a user and add a revisit date so it appears on the user's dashboard.
- Add notes and documents to the invoice.
- Put the invoice on hold.

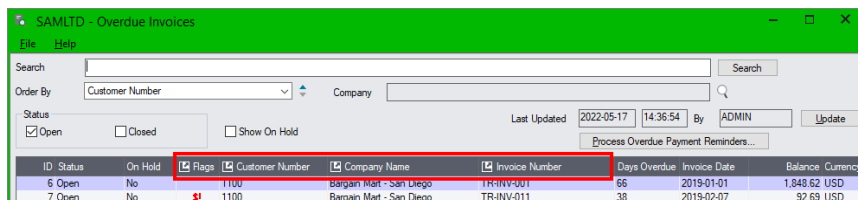
**Note:** All on-hold invoices, assigned invoices, and invoices with attached notes or documents are *Tracked Invoices*.

**You create a tracked invoice when you click the Add button on the Tracked Invoices form.**



- You can attach documents and notes for any overdue invoice on the Documents and Notes tabs. You can attach and view documents and notes for invoices using the Overdue Invoices program, [Disputed Invoices](#) program, and [Tracked Invoices](#) program. The attached items are displayed on the tabs of all three programs.
- You can assign invoices to users – to Keith, in the above example.
- You can put invoices on hold and select a reason for the hold.
- All documents added to the Documents tab are also accessible through the [Documents](#) program.
- All notes added to the Notes tab are also accessible through the [Notes](#) program.

## Drill Down to the Original Invoice, Collections Data, CRM Company Record, and A/R Account Record



- Select the invoice/company that you want to view data for, then click the column heading to drill down to the data you want.
  - Click the Invoice column heading to view the original invoice information.
  - Click the Flags column heading to view collection data. See [Collections Information](#).
  - Click the Company Name column heading to view company information maintained by CRM and Collections.
  - Click the Customer Number column heading to view the A/R Customer record.

## Dragging and Dropping Documents into the Documents Folder and Linking Documents to an Overdue Invoice

- Use drag and drop to attach documents to tracked invoices and copy them to the Documents folder defined in Setup Options.

**OR**

- Use the Add or Link buttons to link documents on your computer to an overdue invoice record.

**Note the differences in the following methods for adding documents to tracked invoices:**

- **Use Drag and Drop on the Documents tab** to copy documents to the invoice document folder in CRM and Collections (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the invoice. They are also copied to the invoice document folder, and they are added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list.

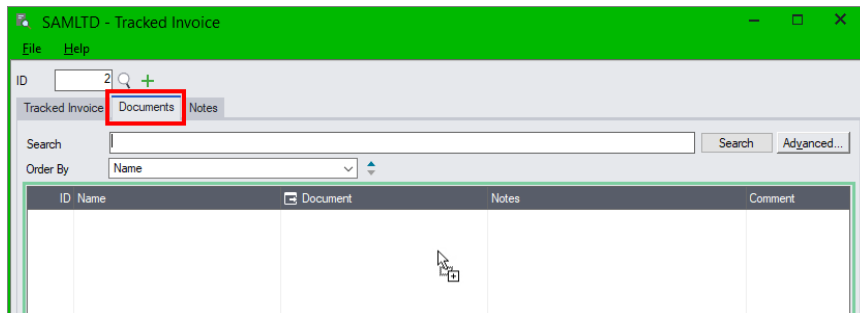
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the tracked invoices document folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list.

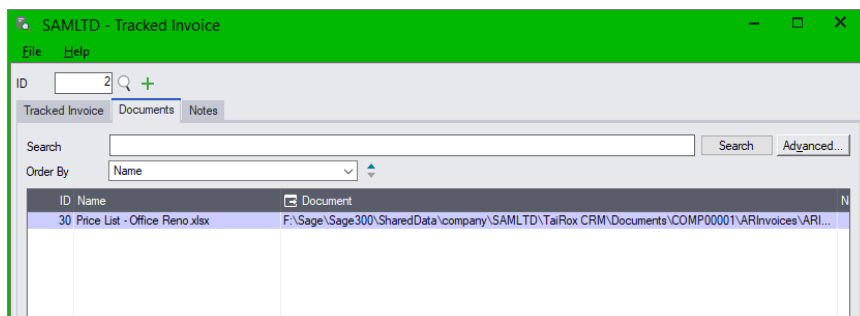
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the invoice's list. The document will NOT be moved to the invoices document folder.

**To drag and drop documents and move them to the Invoices document folder:**

1. Click the Documents tab on the Overdue Invoice screen (see below).
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



3. When you release the document, the grid displays the new document, showing the path to the documents folder.



## Tracked Invoices

The Tracked Invoices program lists all invoices that have notes or documents attached, are on hold, are assigned to users, or have a revisit date.

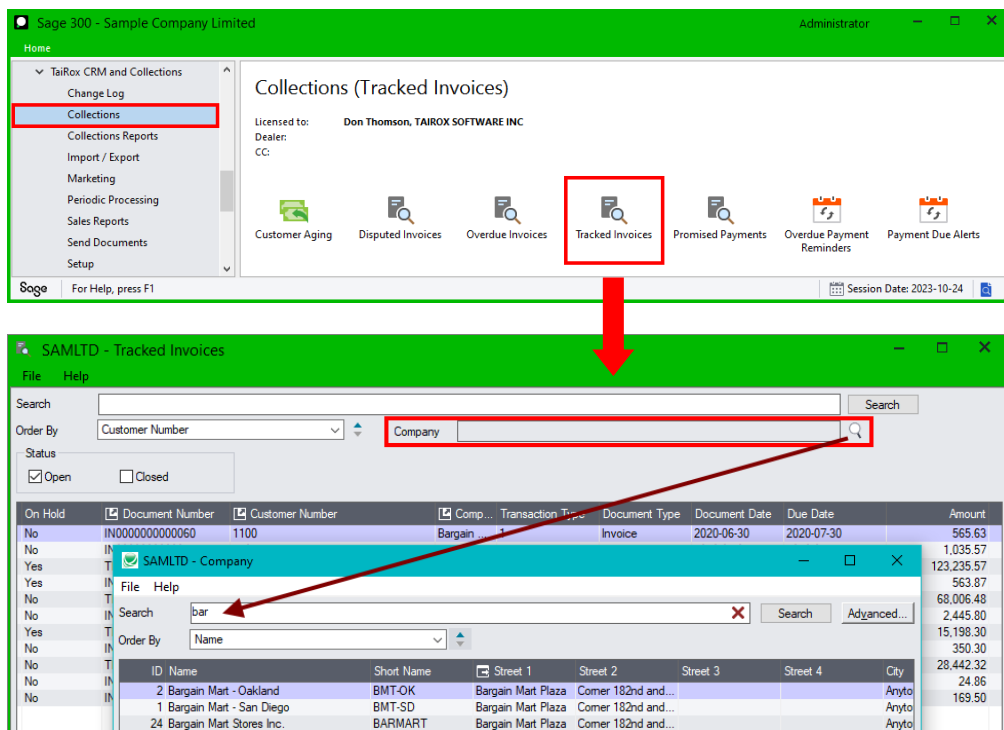
When you add a note or document to any invoice – using the Tracked Invoices program, Disputed Invoices program or Overdue Invoices program – or assign the invoice to a user or put it on hold – that invoice becomes a tracked invoice and will also appear on the Tracked Invoices screen.

- Assigned tracked invoices appear on the assigned user's [Dashboard](#) and [Calendar](#) according to the revisit date you specify.

Unassigned invoices appear on the dashboard when you view items for All users.

- All tracked invoices appear in the grid on the Tracked Invoices screen.
- The Tracked Invoices program also lets you add notes and documents for payments and credit notes, which will also appear in the list on the Tracked Invoices screen.

**Access:** Open the [Collections](#) folder, then open Tracked Invoices.



### To Search for tracked invoices:

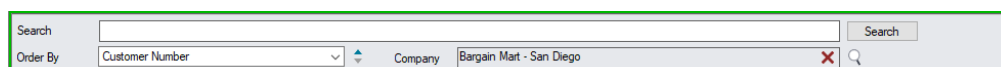
- Open the Tracked Invoices program and enter a partial invoice number, customer number, or company name in the Search field and press the Enter key.

You can also enter values for company fields and company optional fields, so if you have a “sales rep” company optional field, you can search quickly for tracked invoices for a particular sales rep.

- Click the red X at the end of the Search field to remove search terms.

**Or** Click the Finder button (🔍) at the end of the Company field and enter part of the company name to restrict tracked invoices to a single company (as shown below).

- Click the red X beside the Company field to remove the company filter.



- The following example shows a tracked credit note. The program also lets you track credit/debit notes and payments.

SAMLTD - Tracked Invoices

Search: [ ] Search

Order By: Customer Number Company: Bargain Mart - San Diego

Status: ☒ Open ☐ Closed

On Hold	Document Number	Customer Number	Company Name	Transaction Type	Document Type	Document Date	Due Date	Amount
No	CN0012	1100	Bargain Mart - San Diego	3	Credit Note	2020-06-05	2020-06-05	-78.1
No	IN00000000000060	1100	Bargain Mart - San Diego	1	Invoice	2020-06-30	2020-07-30	565.1

Page 1 of 1 Add... Delete Close

- Click the Add button at the bottom of the screen to add a new tracked invoice.

### Notes:

- Use the Status checkboxes to display Open and Closed tracked invoices in the grid.
- Double-click a tracked invoice in the grid to view the tracked invoice information.
- Tracked Invoices include a “Documents” tab and a “Notes” tab where you can add the details for tracked invoices.
- Assigned tracked invoices appear on the assigned user’s [Dashboard](#) according to the revisit date.

### Drill Down:

- Double-click a row in the Tracked Invoices grid to display the Tracked Invoice information.

SAMLTD - Tracked Invoice

ID: 3 +

Tracked Invoice Documents Notes

Company Name: Bargain Mart - Oakland

Created On: 2021-06-29 Created By: ADMIN

Modified On: 2021-06-29 Modified By: ADMIN

Customer Number: 1105

Document Number: IN00000000000059

Document Date: 2021-06-05 Amount: 1,035.57 USD

Due Date: 2021-06-15 Balance: 1,035.57

Description: No backorder please




Status: Open

Revisit On: 2021-07-15 Revisit At: 00:00:00

Assigned To: DON

☒ On Hold Reason On Hold: Disputed Invoice

Documents Folder... Change Log... Save Close

- Click the green Plus button beside the ID field (+) to add a new tracked invoice record.
- Click the “Documents” tab and “Notes” tab to view or attach documents and notes.
- Click the Documents Folder button to view documents in Windows File Manager.
- Click the Drill-Down button  by the Company Name field to drill down to CRM company data.
- Click the Drill-Down button  by the Customer Number field to view A/R customer data with the A/R Customers screen or Extended Customers screen (if you have TaiRox Productivity Tools).
- Click the Drill-Down button  by the Document Number field to view the original invoice.

## Drill down from the Tracked Invoices grid:

- Click the Document Number column heading to drill down to the original document.

**SAMLTD - Tracked Invoices**

Search: [ ] Search

Order By: Customer Number Company: Bargain Mart - Oakland

Status: ☒ Open ☐ Closed

On Hold	Document Number	Customer Number	Company Name	Transaction Type	Document Type	Document Date	Due Date	Amount
Yes	IN00000000000059	1105	Bargain Mart - Oakland	1	Invoice	2020-06-05	2020-06-15	1,035.
No	PY0000000000000000	1105	Bargain Mart - Oakland	11	Receipt	2020-03-10	2020-03-10	-499.

**SAMLTD - O/E Invoice Entry**

Invoice No. [IN00000000000059] Entered By: ADMIN

Customer No. [1105] Bargain Mart - Oakland

Invoice Customer Taxes Optional Fields Sales Split Rates Totals

- Click the Customer Number column heading to drill down to the A/R Customers screen – or to the TaiRox Extended Customers screen if you use TaiRox Productivity Tools.

**SAMLTD - Extended Customers**

Customer Number [1105] \* Required

Customer Name: Bargain Mart - Oakland

Address Contact Processing Invoicing Optional Fields Statistics Activity Comments

National Account No. [BARMART] Bargain Mart Stores, Inc.

- Click the Company Name column heading to drill down to the company information kept by CRM and Collections.

**SAMLTD - Company**

ID [ ] Name: Bargain Mart - Oakland

Company Optional Fields Contacts Opportunities Documents Cases Notes Communications

Created On: 2018-03-23 Created By: ADMIN

Modified On: 2021-06-29 Modified By: ADMIN

☐ Inactive

Short Name: BMT-OK

Territory: CA

Phone Number: (408) 451-8981

Customer Number: 1105

Currency: USD

Case(s): 1 Disputed Invoice(s) Overdue Invoice(s) Promised Payment(s)

Collections...

## See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Add Notes and Documents, Assign Users and Revisit Dates, Put Invoices on Hold

**Access:** Click the Add button on the Tracked Invoices screen to add notes or documents to a new invoice, to assign users and revisit dates, and to put invoices on hold.

Double-click a row in the grid to view the status and attachments for an existing tracked invoice.

### Notes:

- Click the green Plus button beside the ID field (+) to add a new tracked invoice record.
- Click the Finder button (🔍) beside the Company Name field to choose the company with the tracked invoice. (The Finder becomes inactive after you add the tracked invoice.)
- Select the tracked document using the Finder beside the Document Number field. (The program actually lets you tracked any A/R document – not just invoices.)
- Assign a user and a revisit date to display the tracked invoice on the dashboard.
- Select the On Hold checkbox to place an invoice on hold. Use the dropdown to select a reason.
- Click the Documents Folder button to view documents in Windows File Manager.
- Click the drilldown buttons (📁) to see CRM and Collections company information, A/R customer and account information, and invoice details.
- When finished tracking a document, change the Status to “Closed” to remove the tracked invoice from the Tracked Invoices grid.
- Click the Change Log button to see the details for recent changes.

### Documents and Notes Tabs

- Click the Documents tab to link documents to the tracked invoice.  
Documents listed on the Documents tab are also accessible through the Documents program.
- Click the Documents Folder button to view drag and dropped documents in the Windows folder.
- Click the Notes tab to add notes for the tracked invoice. Notes listed on the Notes tab are also accessible through the Notes program.
- You can also access notes and documents for disputed or overdue invoices using the Disputed Invoices and Overdue Invoices programs.



## Dragging and Dropping Documents into the Documents Folder and Linking Documents to a Tracked Invoice

- Use drag and drop to attach documents to tracked invoices and copy them to the Documents folder defined in Setup Options.

**OR**

- Use the Add or Link buttons to link documents on your computer to a tracked invoice record.

**Note the differences in the following methods for adding documents to tracked invoices:**

- **Use Drag and Drop on the Documents tab** to copy documents to the tracked invoice document folder in CRM and Collections (see [Document Folders tab](#) in Setup Options).

Documents that you drag and drop are added to the Documents tab for the tracked invoice. They are also copied to the tracked invoice document folder, and they are added to the list of documents maintained by the Documents program in CRM and Collections.

- **Use the Add button on the Documents tab** to link to a document and add it to the list.

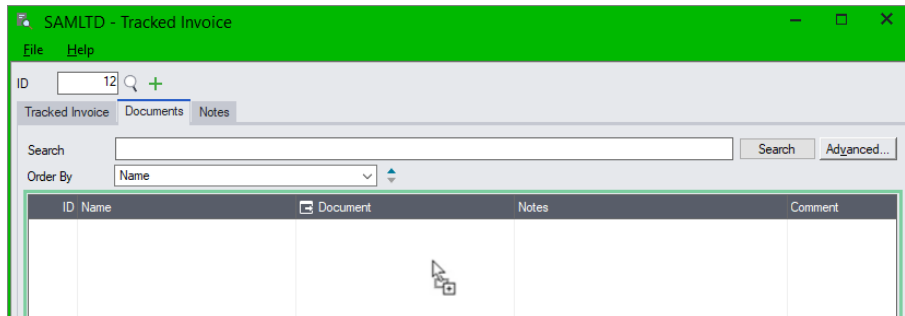
When you use the Add button, the document will be added to the list maintained by the Documents program in CRM and Collections, but the document will NOT be moved to the tracked invoices document folder.

- **Use the Link button on the Documents tab** to link to a document and add it to the list.

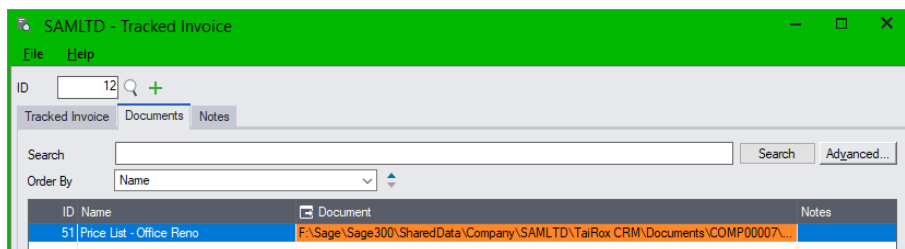
When you use the Link button, the program displays the list of documents maintained by the Documents program in CRM and Collections, letting you choose a document to add to the tracked invoice's list. The document will NOT be moved to the tracked invoices document folder.

**To drag and drop documents and move them to the Tracked Invoices document folder:**

1. Click the Documents tab.
2. Drag and drop a document onto the Documents tab. (The grid border turns green, and the pointer shows that you are dragging a document.)



3. When you release the document, the grid displays the new document, showing the path to the documents folder.



**See Also:**

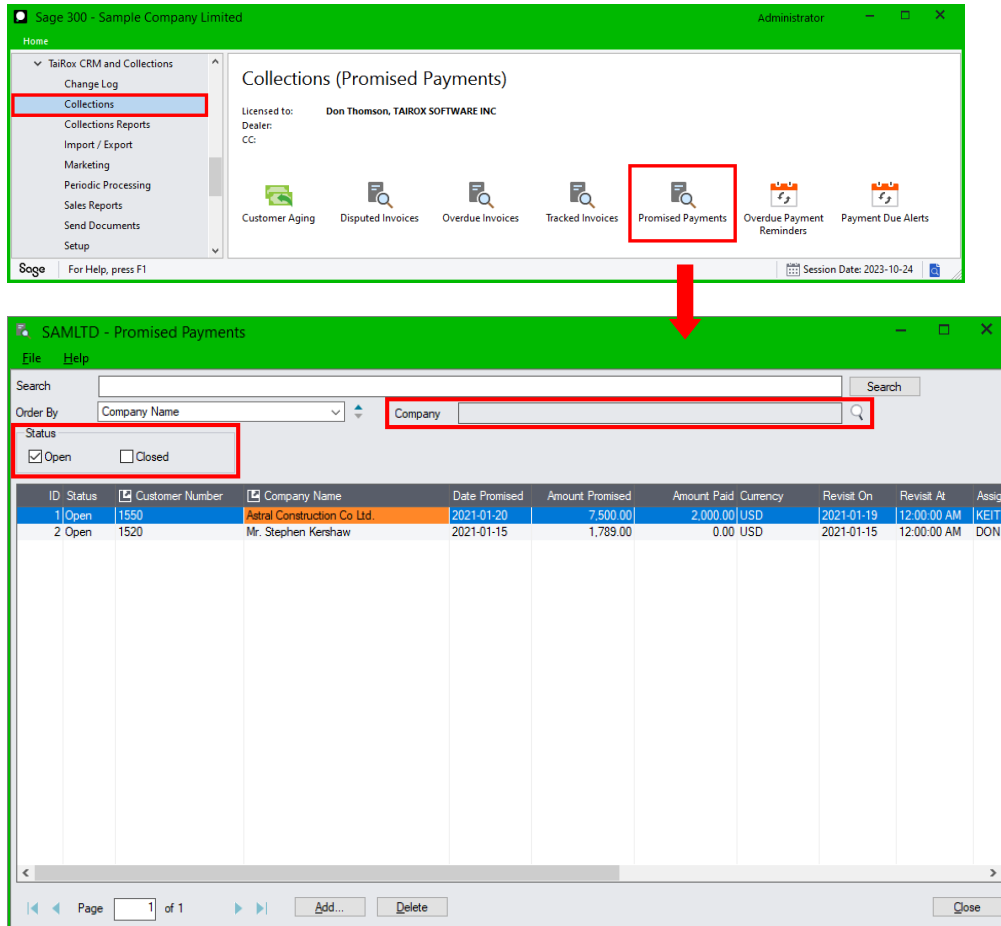
[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Promised Payments


Promised Payments lets you track promises made by customers for the settlement of accounts.

Promised Payments with a revisit date appear on the dashboard for assigned employees – or for All employees if the promised payment has not been assigned.

**Access:** Open the Collections folder, then open Promised Payments.



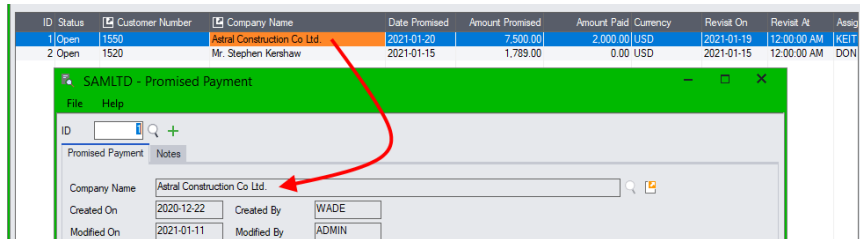
### Notes:

- Enter a customer number, partial company name, or assigned user in the Search field.  
You can also enter values for company optional fields, so if you have a “sales rep” company optional field, you can search quickly for promised payments for a particular sales rep.
  - Click the red X at the end of the Search field to remove search terms. 
  - Use the Finder button (🔍) beside the Company field to restrict promises to one company.
- Use the Order By field to view promises by Date Promised, Amount Promised or Revisit Date.
- Use the Status checkboxes to display Open and Closed promised payments.
- Assign promised payments to a specific user or leave them unassigned.
  - Promised payments appear on the [Dashboard](#) and [Calendar](#) according to the revisit date you specify. Assigned promises appear on the assigned user’s dashboard. Unassigned promises appear on the dashboard when you view items for All users.
- You can add as many notes as you want to promised payments to track activity.

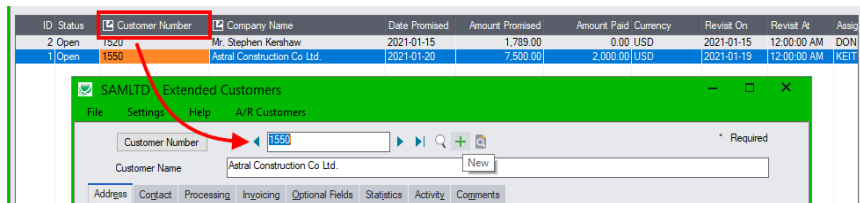
- Promised payments are flagged on the [Customer Aging](#), [Overdue Invoices](#), and [Overdue Payment Reminders](#) screens.
- Use the [Promised Payments Report](#) to view the status of promised payments.

### Drill Down:

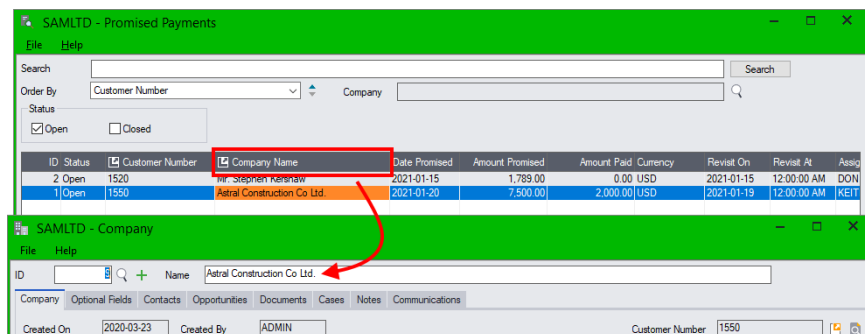
- Double-click a row in the grid to display the promised payment information.



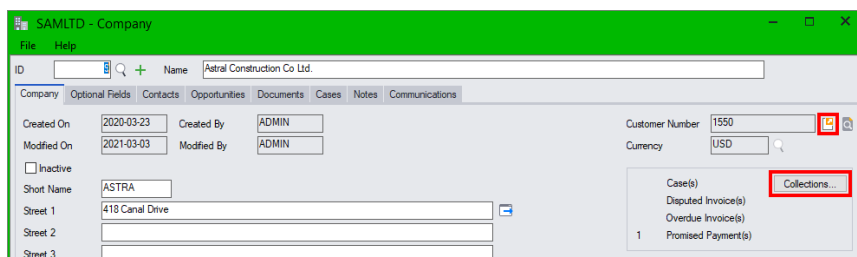
- Click the Company Number column heading to drill down to the A/R Customer record for the highlighted promised payment.



- Click Company Name column heading to drill down to the TaiRox CRM and Collections company information for the highlighted promised payment.



- You can drill down from the TaiRox Company screen to the A/R Customer record and to all collections data.
  - Click the icon to the right of the Customer Number (top-right-hand corner) to open the A/R Customer program.
  - Click Collections button to view all Collections information for the customer.



### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

## Promised Payments – Add/Edit

**Access:** Click the Add button on the Promised Payments screen ([shown in the previous section](#)) to add a new promised payment.

### Notes:

- Click the green Plus button beside the ID field (+) to add a new promised payment record.
- Click the Finder button (🔍) beside the Company name field to choose the company with the promised payment. (The Finder button becomes inactive after you add the promised payment.)
- Enter the date promised and the promised amount. You can sort promised payments by promised amount and date on the Promised Payments.
- Enter a Revisit On date. This determines when promises appear on the Dashboard. You can also enter a Revisit Time after the Revisit date. Enter time in 24-hour format (e.g. 13:00).
- Assign the promised payment to an employee so it will appear on their dashboard. If you do not assign the promise to a particular employee, it will appear when you view items for “All.”
- Change the status to Closed once the promised payment has been received.
- Use the Notes field to list invoices covered by the payment and receipt information when payment is received. The Notes field can be up to 250 characters long.  
Click the Notes tab to add notes up to 2,500 characters long for the promised payment. Notes listed on the Notes tab are also accessible through the Notes program.
- Click the Change Log button to see the details for recent changes.

### Drill Down:

- Click the Drill-Down button (📄) by the Company Name field to drill down to TaiRox company data.
- Click the Drill-Down button (📄) by the Customer Number field to view A/R customer data.

### See Also:

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Overdue Payment Reminders

The Overdue Payment Reminders program:

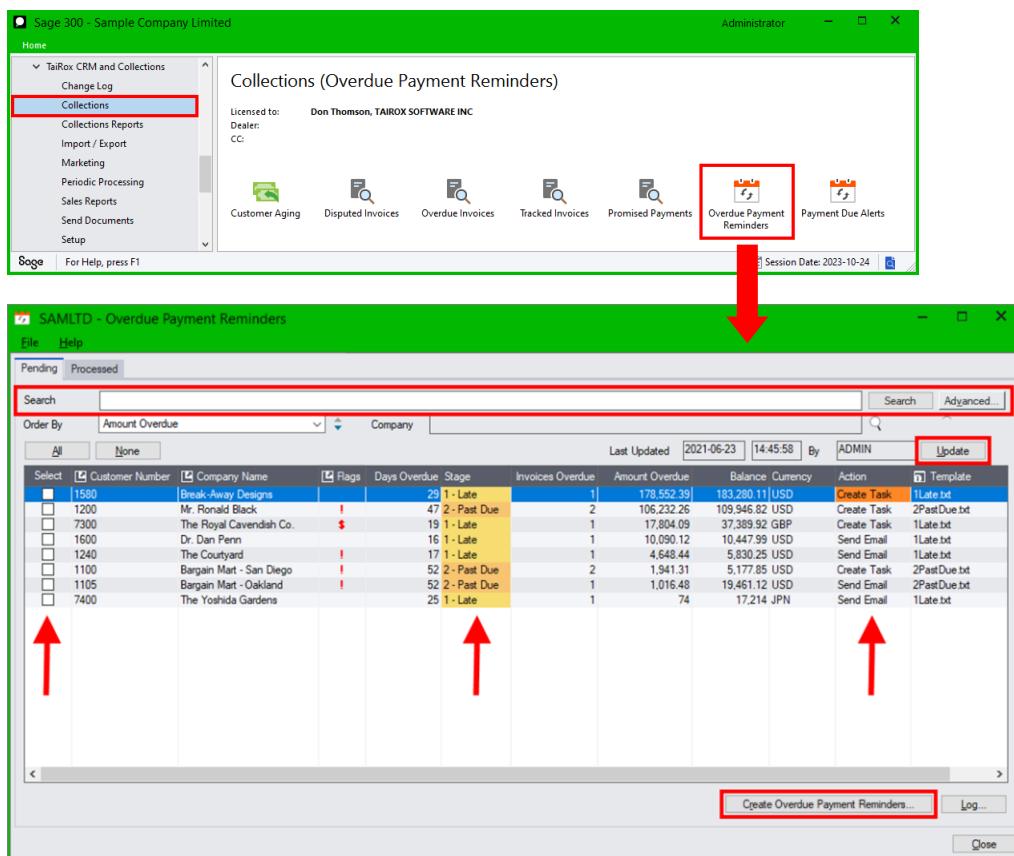
- **Emails overdue payment reminders** to customers with overdue accounts  
The program generates different reminder emails for different overdue aging stages. It lists all overdue customer invoices in each email, lets you attach the overdue invoices as PDF files, and sends emails to multiple company contacts. Emails are kept as communications.
- **Creates dashboard tasks for users** to call customers concerning overdue invoices  
Tasks appear on the CRM and Collections Dashboard and provide overdue invoice information required for following up on overdue invoices.

You can run the program interactively from the Sage 300 Desktop or run the program as a Windows Scheduled Task. See [Overdue Payment Reminders Setup](#) and refer to the [Scheduler User Guide](#).

Use [Payment Due Alerts](#) to send reminder emails to customers about upcoming invoice payments.

Use the [Overdue Invoices](#) program to view overdue invoices, assign overdue invoices to users, put invoices on hold, and to attach documents and notes to document the collections process.

**Access:** Open the [Collections](#) folder, then open Overdue Payment Reminders.



CRM and Collections lets you specify four overdue color-coded invoice stages and specify an action for each aging stage – either Send Email or Create Task – which you can change at runtime.

You specify the aging period details, the default action (Send Email or Create Task), and the email default template for each Email aging stage in the [Overdue Payment Reminders Setup](#) program in the CRM and Collections Setup folder.

Note also that you can specify From Email and Reply To Email addresses for payment reminders with the [Overdue Payment Reminders Setup](#) program.

- Double-click a row on the Overdue Payment Reminders screen to view summary information for a company's overdue invoices.

Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency	Action
Break-Away Designs		42	2 - Past Due	1	178,552.39	183,280.11	USD	Send Email
Custom Comfort	!	7	1 - Late	1	67,456.45	69,593.35	USD	Send Email
The Royal Cavendish Co.		32	2 - Past Due	2	22,218.58	37,389.92	GBP	Send Email

Invoice Number	Date	Amount	Due	Balance	Days Overdue
TR-INV-005.3	2021-02-09	19,058.97	2021-02-12	17,804.09	32
TR-INV-010.4	2021-02-06	7,194.80	2021-03-08	4,414.49	8

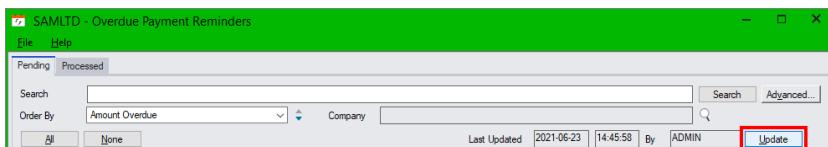
**Note:** CRM and Collections also uses the “Preferred Language” setting in the Company window to send overdue payment reminders emails and invoices to customers in English, French, or Spanish. See [Appendix C](#) for details.

## Procedure for Sending Overdue Payment Reminders and Creating Tasks

You can run Overdue Payment Reminders daily, bi-weekly, or weekly – whatever works best for you.

- Open the **Collections** folder, then open the **Overdue Payment Reminders** program.  
Note that Overdue Payment Reminders can only be run by collections users, who must have access to all territories and be assigned “Collections” security rights if Sage 300 security is in use.
- Click the **Update** button to check for new overdue accounts, close paid invoices, and to recalculate invoice aging.

Update also checks how much time has elapsed since the last payment reminders were generated to see which overdue accounts are eligible for new reminders, and it checks if invoices have been put on hold.



### Note:

- The program lists overdue customer accounts. Double-click a line in the grid to see the customer's overdue invoices.
    - Accounts appear if at least 1 invoice exceeds the “[Minimum days overdue before creating an Overdue Payment Reminder](#)” for the customer, and is **not** on hold.
  - Days Overdue is the number of days for the most overdue invoice.
  - Aging Stages are defined on the [Overdue Payment Reminders Setup](#) program in the Setup folder. They determine the default Action.
  - Customers will not appear if the minimum number of days between payment reminders has not elapsed.
  - Customers will not appear if their overdue invoices are on hold.
- Click the **All** button to send emails or generate call tasks for all companies with outstanding accounts, and use the checkboxes in the Select column to cherry-pick customers.

Select	Customer Number	Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency	Action
<input type="checkbox"/>	1580	Break-Away Designs		29	1 - Late	1	178,552.39	183,280.11	USD	Create Task
<input type="checkbox"/>	1200	Mr. Ronald Black	!	47	2 - Past Due	2	106,232.26	109,946.82	USD	Create Task
<input type="checkbox"/>	7300	The Royal Cavendish Co.	\$	19	1 - Late	1	17,804.09	37,389.92	GBP	Create Task
<input type="checkbox"/>	1600	Dr. Dan Penn		16	1 - Late	1	10,090.12	10,447.99	USD	Send Email
<input type="checkbox"/>	1240	The Courtyard	!	17	1 - Late	1	4,548.44	5,830.29	USD	Send Email
<input type="checkbox"/>	1100	Bargain Mart - San Diego	!	52	2 - Past Due	2	1,941.31	5,177.85	USD	Create Task
<input type="checkbox"/>	1105	Bargain Mart - Oakland	!	52	2 - Past Due	1	1,016.48	19,461.12	USD	Send Email
<input type="checkbox"/>	7400	The Yoshida Gardens		25	1 - Late	1	74	17,214	JPN	Send Email

**How to assign phone call tasks to different users:**

- Select all the customers with a Phone Call action that you want assigned to the same user.
- Click the Create Overdue Payment Reminders button at the bottom of the screen.
- Specify a user for the new tasks, select a revisit date, and click the Process button.
- When all emails and tasks have been processed, select the next group of customers that you want assigned to a different user.

4. Double-click the Action to switch between sending emails and creating tasks.

The Action column shows you whether the program will send an email or create a collection task for this customer. The default settings come from the [Overdue Payment Reminders Setup](#) program.

Select	Customer Number	Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency	Action	Template
<input type="checkbox"/>	1580	Break-Away Designs		29	1 - Late	1	178,552.39	183,280.11	USD	Create Task	1Late bit
<input checked="" type="checkbox"/>	1200	Mr. Ronald Black		47	2 - Past Due	2	106,232.26	109,946.82	USD	Create Task	2PastDue bit
<input type="checkbox"/>	7300	The Royal Cavendish Co.		19	1 - Late	1	17,804.09	37,389.92	GBP	Create Task	1Late bit
<input type="checkbox"/>	1600	Dr. Dan Penn		16	1 - Late	1	10,090.12	10,447.99	USD	Send Email	1Late bit
<input type="checkbox"/>	1240	The Courtyard		17	1 - Late	1	4,648.44	5,830.25	USD	Send Email	1Late bit
<input checked="" type="checkbox"/>	1100	Bargain Mart - San Diego		52	2 - Past Due	2	1,941.31	5,177.85	USD	Create Task	2PastDue bit
<input checked="" type="checkbox"/>	1105	Bargain Mart - Oakland		52	2 - Past Due	1	1,016.48	19,461.12	USD	Send Email	2PastDue bit
<input type="checkbox"/>	7400	The Yoshida Gardens		25	1 - Late	1	74	17,214	JPN	Send Email	1Late bit

5. Double-click the email template file name select a different template.

- Highlight the email filename and click the Template column heading to display the email.

6. Click the “Create Overdue Payment Reminders” button at the bottom of the form when you are ready to continue.

The program will warn you if the overdue invoice data wasn’t updated today.

Overdue Payment Reminders

?

The overdue invoice data has not been updated for today. Since the overdue payment reminders are based on this data it is strongly recommended that you update the data before proceeding.

Do you want to continue?

Yes No

Click the Yes button to continue.

7. Select options for emails and tasks in the form that appears.

Create Overdue Payment Reminders

Email

☒ Attach copies of the invoices

Attachments...

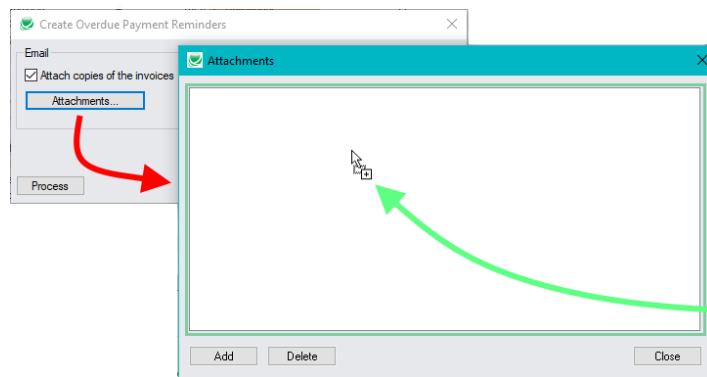
Task

Assign To: WADE

Revisit On: 2024-01-25

Process Cancel

- If any selected customers have a Send Email action, you can:
  - Select “Attach Copies of the Invoices” to include PDF copies of overdue invoices with emails.
  - Click the Attachments button to add additional attachments to all of the payment reminder emails – such as your policy on overdue accounts.

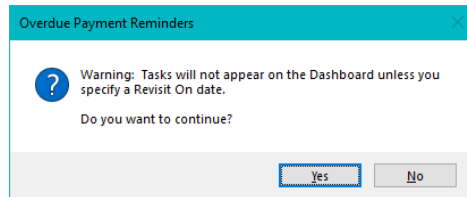


Use “drag and drop” to add attachments, or click the Add button to search for attachments using Windows File Explorer.

- If any selected customers have a Create Task action, you can specify a user name in the Task options to assign tasks for this set of companies to a single user.

Specify a Revisit Date to ensure that the call appears on the assigned user’s dashboard.

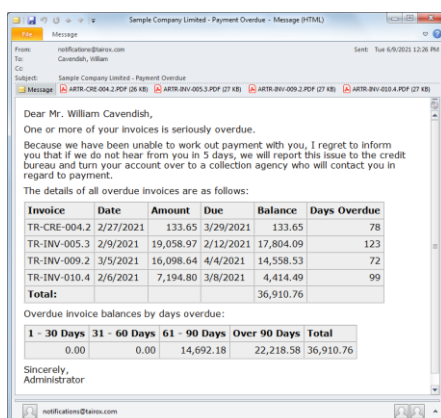
- **If you click the Process button without specifying a revisit date for tasks**, the program displays a warning to let you know that the task will not appear on the Dashboard.



8. **Click the Process button on the popup options screen** to send the reminder emails or create tasks for the selected companies.
  9. **When processing is finished, select another set of customers to email or to create more call tasks and assign them to a different user:**
    - Select one or more companies from the remaining list of companies.
    - Choose who to assign the next group of tasks, and specify a revisit date.
    - Click the Process button again to send the reminder emails and/or generate tasks for the new set of selected companies.
- **Click the Processed tab to see past payment reminders.**

## Typical Email Sent for “Delinquent” Accounts

The email can include a summary of the overdue invoices, a summary of all invoices, an aging summary, and PDF attachments. The following example shows overdue invoices and an aged overdue summary.





**Note:** To create payment reminders using the Overdue Payment Reminders program, you must:

- Set up Overdue Payment Reminders using the [Overdue Payment Reminders Setup](#) program
- Edit email templates for overdue invoice stages in the [Overdue Payment Reminders Setup](#) program.
- Select the recipients for overdue payment reminders on the [Contacts tab](#) for companies.

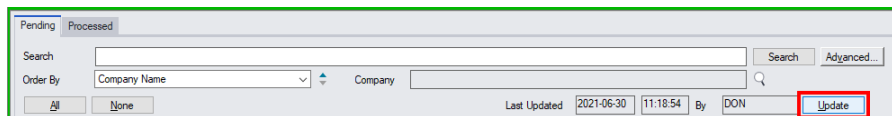
## Setting a Minimum Number of Days Overdue Before Creating Payment Reminders and a Minimum Number of Days Between Payment Reminders

CRM and Collections lets you set a minimum number of days (for example, 7 or 14 days) between payment reminders in the [Overdue Payment Reminders Setup](#) program. The program **will not** send an email message to a customer – or create a Collection Call task – until the minimum number of days has elapsed.

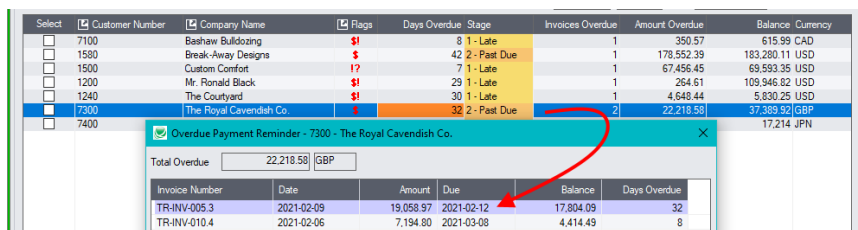
The program also lets you set a minimum number of days that an invoice must be overdue before creating an overdue payment reminder –so you won't send a reminder as soon as the due date passes. You can change the default number of days overdue before creating an overdue payment reminder for individual customers on the [Company](#) screen for the customer.

## Using the Update Button to Create, Update and Close Pending Reminder Records

The Update button creates new pending overdue payment reminder records for overdue invoices according to the aging periods specified in [Overdue Payment Reminders Setup](#) – unless you specified a minimum number of days **before** creating an overdue payment reminder for individual companies.



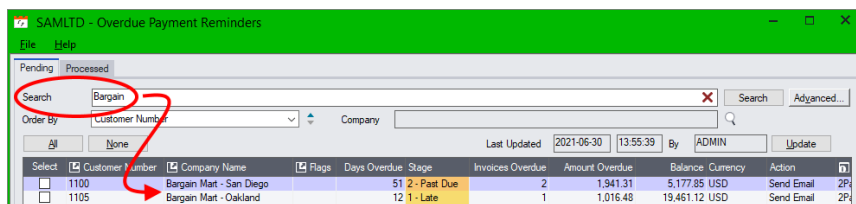
## Double-click a row in the Overdue Payment Reminders grid to see the overdue invoices



## Using the Search Field and Company Field to Filter Overdue Payment Reminders

You can restrict the display of customers with pending overdue payment reminders to make it easier to select a subset of customers for processing.

- **Use the Search field at the top of the screen to filter your overdue account selection.**



In this case, we searched for “Bargain” to get all Bargain Mart stores. The Company field would have restricted us to one location.

You can also search by Stage – for example, to create reminders for all “Delinquent” customers.

- Click the red X at the end of the Search field to remove search terms.
- Use the Advanced... button to filter cases by different customer field ranges.

**Filter using company optional field values:** You can also enter values for company optional fields in the Search field.

In the following example, we filtered on the “Salesperson” optional field to create phone call tasks for a single salesperson.

Select	Customer Number	Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency
<input type="checkbox"/>	1580	Break-Away Designs		56	2 - Past Due	1	178,552.39	183,280.11	USD
<input type="checkbox"/>	1200	Mr. Ronald Black		43	2 - Past Due	1	264.61	109,946.82	USD
<input type="checkbox"/>	7400	The Yoshida Gardens		52	2 - Past Due	1	74	17,214	JPN

- In our example, the “KW” letter combination doesn’t appear in any company names. Consider adding a non-alphabetic character to any optional fields that you want to use for filtering – for example, use \*KW as the Salesperson code instead of “KW”.
- If you have a “terms” optional field, you could do a special run for a particular group of customers.
- **Use the Company field at the top of the screen to filter for a single company.**

Select	Customer Number	Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency	Action
<input type="checkbox"/>	1200	Mr. Ronald Black		15	1 - Late	1	264.61	109,946.82	USD	Send Email

- Use the Company field to send reminder emails or to create call tasks for the selected company only. The Company field provides a SmartFinder to quickly find the company.
- Click the Red X to remove the company filter.

## More Details on Creating Overdue Payment Reminders

- Click the Update button to update the list of customers with pending overdue payment reminders based on the aging stages that you defined in [Overdue Payment Reminders Setup](#).

The program takes into account the time elapsed since payment reminders were last created for customers to see which customers are eligible for new reminders.

- Customers will not receive reminders unless the Send Overdue Payment Reminders checkbox is selected in their company records.
- Customers will not receive reminders for invoices that are on hold.
- **For each company**, you can set the minimum number of days that a payment must be overdue before **creating** an overdue invoice record. See the [Company window](#) to change the minimum number of days. The default number of days is set in [Overdue Payment Reminders Setup](#).

The program will not create an overdue invoice record for an invoice until the minimum number of days specified for the company is reached.

You can also turn off overdue payment reminders by unchecking the “Send” option for individual companies on the Company screen.

<input checked="" type="checkbox"/> Send Overdue Payment Reminders	Date of the last Overdue Payment Reminder	2024 02-04	Minimum days overdue before creating an Overdue Payment Reminder	0 (Enter 0 to use the system default)
--	---	------------	--	---------------------------------------

- **You can put invoices “On Hold” using the Overdue Invoices and Tracked Invoices programs.**

For example, you might put an invoice on hold because it's being disputed or if the invoice is for a good customer who is always a little late with payments.

- **Select options for creating payment reminder on the Create Overdue Payment Reminders popup screen.**

The following screen appears when you click “Create Overdue Payment Reminders:

**Select “Attach copies of the invoices” to attach a PDF of each overdue invoice** to payment reminder emails.

You select the report formats for A/R and O/E invoices on the Overdue Payment Reminders Setup screen.

**Click the Attachments button to add additional attachments** to all of the overdue payment reminder emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.

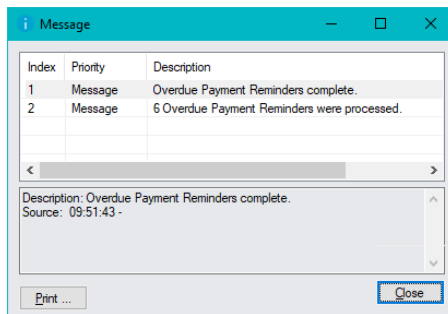
**Specify a user for tasks and specify a revisit date to add the task to the user’s dashboard.**

The program sends 1 email per customer or creates 1 call task listing all overdue invoices. *Invoices that are on hold will **not** be listed in emails or on call tasks.*

- **Click the Process button to generate emails or tasks** for all customers with an “X” in the Select column.

The program will display status messages as it generates each payment reminder.

- When all payment reminder emails and tasks have been generated, TaiRox Collections will display a message that includes the number of payment reminders generated (sent emails and new tasks) and whether any errors occurred.



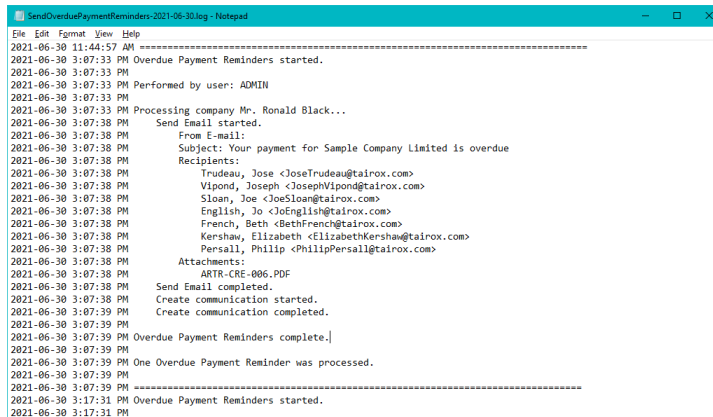
When you close the message window, TaiRox Collections will update customer records with the date of the last overdue payment reminder.

☒ Send Overdue Payment Reminders

Date of the last Overdue Payment Reminder: **2024-02-04** Minimum days overdue before creating an Overdue Payment Reminder:  (Enter 0 to use the system default)

- **Click the Log button** on the Overdue Payment Reminders screen to see the list of all successful email transmissions and tasks. The log also lists all email recipients.

You will see an error in the log file if no email recipients were defined for a company. You can add contacts, then run the email program again to send the reminders.



The Log file lists all email recipients for companies that got emails and all tasks created for reminder phone call.

## Additional Features on the Overdue Payment Reminders Grid

SAMLTD - Overdue Payment Reminders

FileHelp

PendingProcessed

Search

Order ByCustomer NumberCompany

AllNone

Last Updated2021-06-3013:55:39ByADMINUpdate

Select	Customer Number	Company Name	Flags	Days Overdue	Stage	Invoices Overdue	Amount Overdue	Balance	Currency	Action	Template
<input checked="" type="checkbox"/>	1100	Bargain Mart - San Diego	!	51	2 - Past Due	2	1,941.31	5,177.85	USD	Send Email	2P
<input type="checkbox"/>	1100	Bargain Mart - Unandun	!	51	2 - Past Due	1	1,016.48	19,461.12	USD	Send Email	2P
<input type="checkbox"/>	1200	Mr. Ronald Black	!	15	1 - Late	1	264.61	109,946.82	USD	Send Email	1L
<input type="checkbox"/>	1240	The Courtyard	!	16	1 - Late	1	4,648.44	5,830.25	USD	Send Email	1L
<input type="checkbox"/>	1580	Break-Away Designs	!	28	1 - Late	1	178,552.39	183,280.11	USD	Send Email	1L
<input type="checkbox"/>	7300	The Royal Cavendish Co.	!	18	1 - Late	1	17,804.09	37,389.92	GBP	Send Email	1L
<input type="checkbox"/>	7400	The Yoshida Gardens	!	24	1 - Late	1	74	17,214	JPN	Send Email	1L

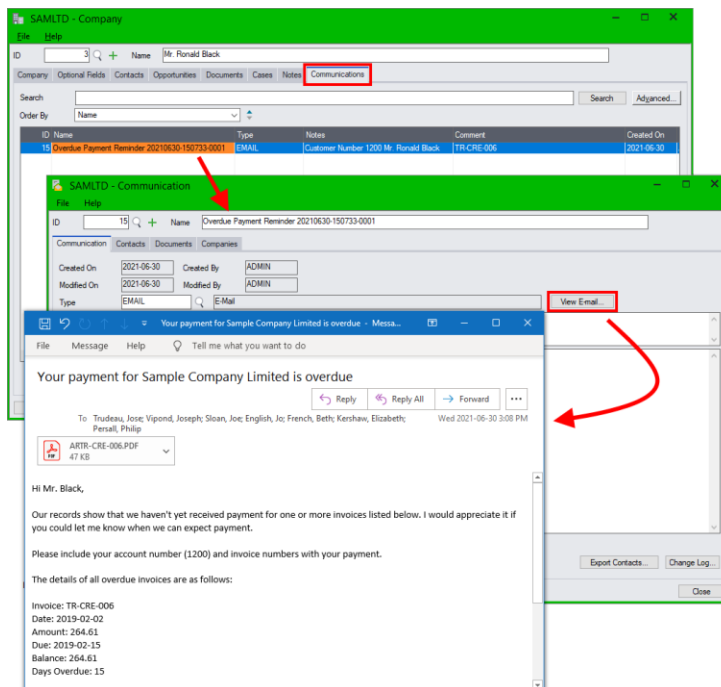
**Note the following features on the Overdue Payment Reminders screen and grid:**

- Displays the date when the list was last updated, along with the ID of the user who ran the update. The date will be updated again when you click the Update button.
- Shows the number of days overdue of the oldest overdue invoice, the total amount overdue, the account balance and currency, the default action for the reminder, and the default template if the type is an email.

- Flags A/R customers that are on hold (\*), and companies with promised payments (+), unapplied credit (\$), open cases (!), or disputed invoices (?).
- Provides drilldown to overdue invoices, A/R customer information (click the Customer Number column heading), CRM and Collections customer data (click the Company Name column heading) and Collections information (click the Flags column heading).
- Double-click a line in the grid to see a list of overdue invoices.
- Click the Processed tab to see past payment reminders.

## Viewing Overdue Payment Reminders Communications and Sent Emails

- Select the Communications tab on the Company screen to view payment reminder email communications.
- Double-click the email communication entry, then click the View Email button to see the email with all attachments.



## Payment Due Alerts

The Payment Due Alerts program sends payment reminder emails to company contacts before their invoices are due. Payment due emails list all unpaid – but not overdue – customer invoices in each email.

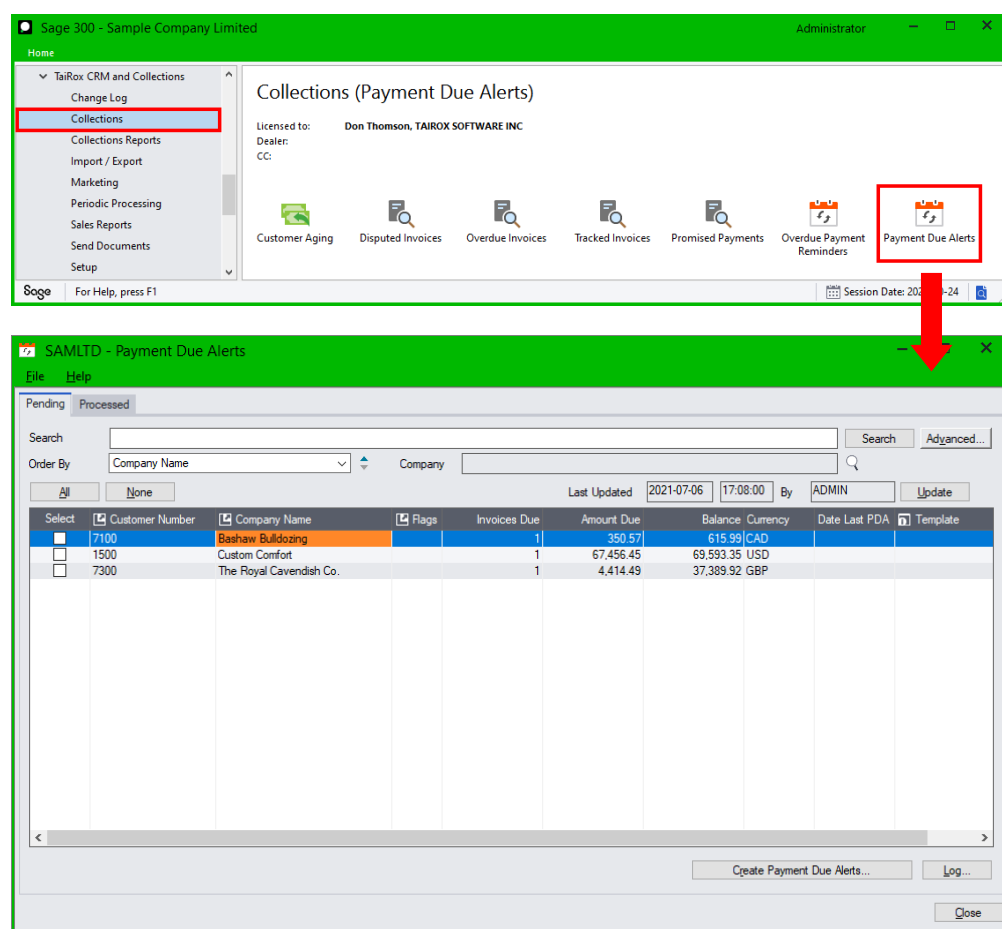
You can run the program interactively from the Sage 300 Desktop, or you can run the program as a Windows Scheduled Task. See [Payment Due Alerts Setup](#) and refer to the [Scheduler User Guide](#).

The program lets you attach due invoices as PDF files, and sends emails to multiple company contacts. Sent emails are kept as communications.

See [Overdue Payment Reminders](#) to send emails and create tasks for following up on overdue invoices.

CRM uses the same contact list for each company for payment due alerts and for overdue payment reminders. You select the recipients for both types of reminders on the [Contacts tab for each company](#).

**Access:** Open the [Collections](#) folder, then open Payment Due Alerts.

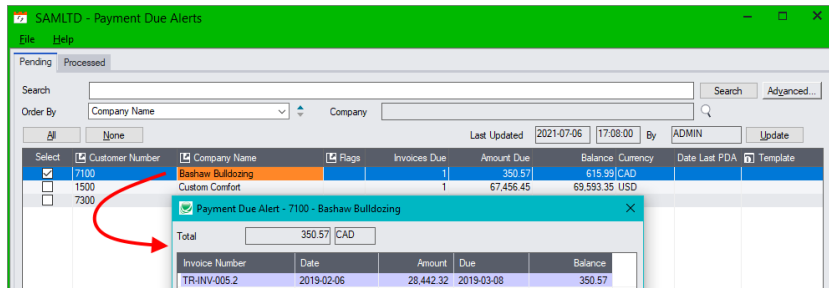


You specify the email template for payment due alerts, along with Email subject, From Email, Cc and Bcc settings on the [Payment Due Alerts Setup](#) program in the CRM Setup folder.

### Notes:

- The program includes invoices on payment due alerts that are within the number of days before the due date that is set in [Payment Due Alerts Setup](#).
- Invoices will appear on only one payment due alert.** After that, the program ignores them.
- Invoices that are past the due date will not appear on a Payment Due Alert.

- If you do not send payment due alerts frequently, some invoices could be skipped.
- Double-click a row on the Payment Due Alerts screen to view summary information for a company's upcoming invoices.



**Note:** CRM also uses the “Preferred Language” setting in the Company window to send payment due alerts emails and invoices to customers in English, French, or Spanish. See [Appendix C](#) for details.

## Procedure for Sending Payment Due Alerts

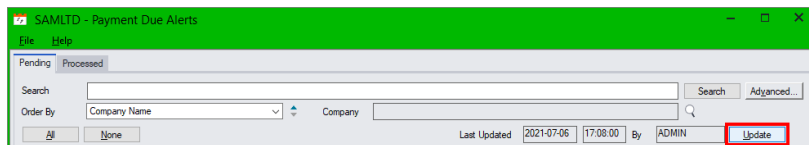
You can run Payment Due Alerts daily, bi-weekly, or weekly – whatever works best for you.

1. **Open the Collections folder, then open the Payment Due Alerts program.**

Note that Payment Due Alerts can only be run by collections users, who must have access to all territories and be assigned “Collections” security rights if Sage 300 security is in use.

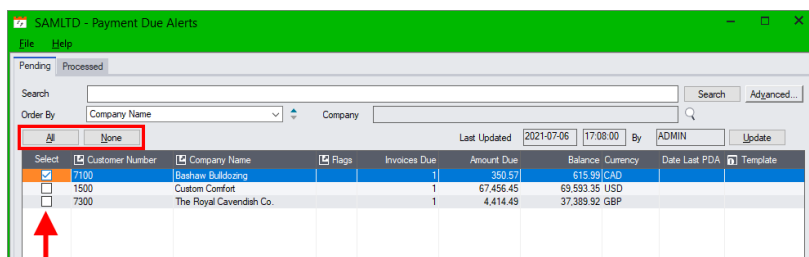
2. **Click the Update button to check for eligible customer accounts.**

Update also checks how much time has elapsed since the last payment due alerts were generated to see which customer accounts are eligible for new reminders. It also checks if invoices have been put on hold.



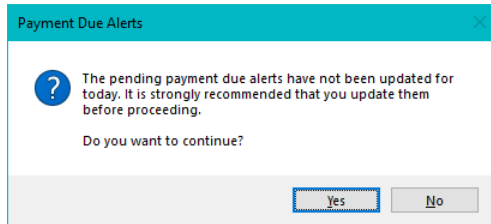
### Note:

- The program lists customer accounts with invoices that are due within the [Minimum number of days before due date to send a Payment Due Alert](#). (This is a [Payment Due Alerts Setup](#) setting.)
  - Double-click a line in the grid to see the customer's due invoices.
    - Accounts appear if at least 1 invoice is within the “[Minimum number of days before due date to send a Payment Due Alert](#)” for the customer, and is **not** on hold.
  - Customers will not appear if the [Minimum number of days between Payment Due Alerts](#) has not elapsed.
  - Customers will not appear if their invoices are on hold.
3. **Click the All button to send emails for all companies with due invoices, and use the checkboxes in the Select column to cherry-pick customers.**



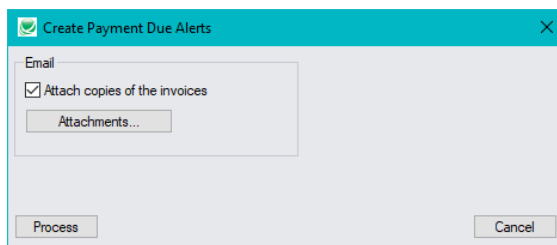
4. **Double-click the email template file name select a different template.**
  - Highlight the email filename and click the Template column heading to display the email.
5. **Click the “Create Payment Due Alerts” button** at the bottom of the form when you are ready to continue.

The program will warn you if the “payment due” data wasn’t updated today.

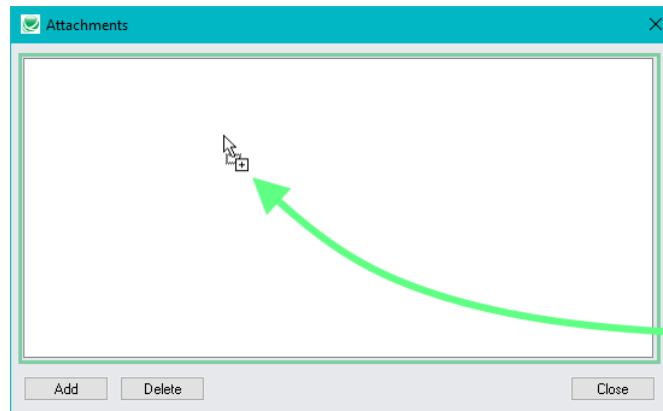


Click the Yes button to continue.

6. **Select options for emails** in the form that appears.



- You can select “Attach Copies of the Invoices” to include PDF copies of due invoices with emails.
- Click the Attachments button to add additional attachments to all of the payment reminder emails – such as your policy on overdue accounts.

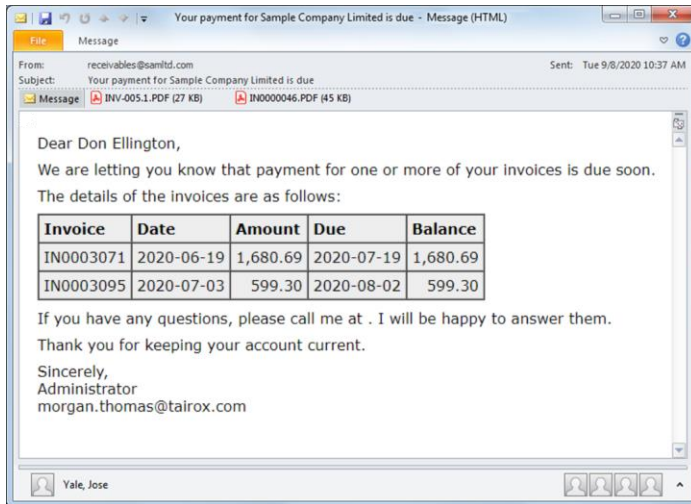


7. **Click the Process button on the email options screen** to send the payment due reminder emails for the selected companies.
8. **When processing is finished, companies that were sent emails are removed from the list.** You can:
  - Close the Payment Due Alerts program, or select one or more companies from the remaining list of companies to send emails.
  - Use “drag and drop” to add attachments, or click the Add button to search for attachments using Windows File Explorer.



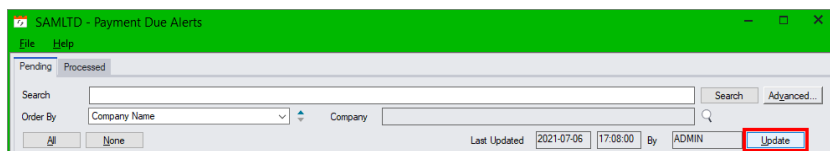
## Sample Reminder Email for Pending Invoice Payments

The email can include a summary of pending invoices, as well as PDF attachments.

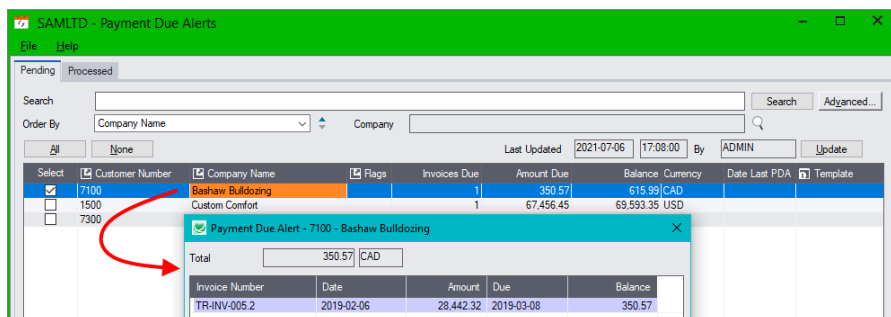


## Using the Update Button to Create, Update and Close Pending Reminder Records

The Update button creates new pending payment reminder records for invoices according to the setting for [Minimum number of days before due date to send a Payment Due Alert](#) specified in [Payment Due Alerts Setup](#).



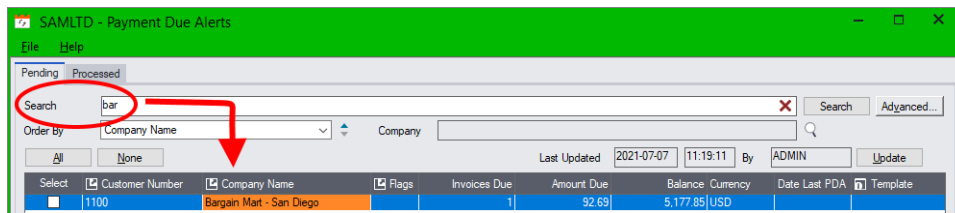
**Double-click a row in the Payment Due Alerts grid to see the pending invoices**



## Using the Search Field and Company Field to Filter Payment Due Alerts

You can restrict the display of customers with pending payment due alerts to make it easier to select a subset of customers for processing.

- **Use the Search field at the top of the screen to filter your account selection.**

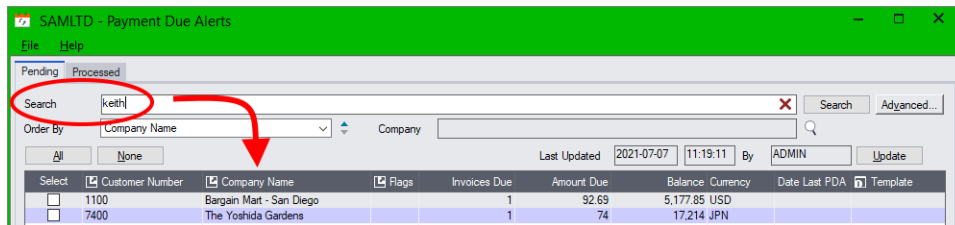


In this case, we search for “bar” and came up with one Bargain Mart store. The Company field would have restricted us to one location.

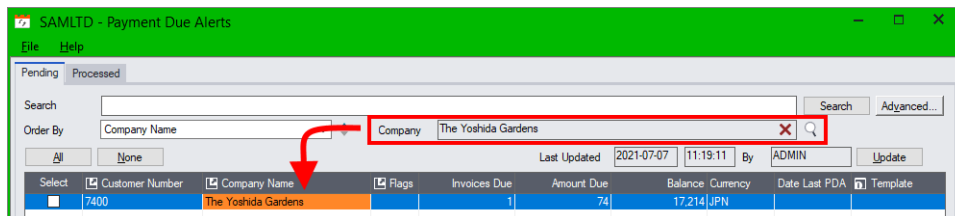
- Click the red X at the end of the Search field to remove search terms.

**Search using company optional field values:** You can also enter values for company optional fields in the Search field.

In the following example, we filtered on a “Salesperson” optional field to send emails to the customers for a salesrep. You could also use an optional field to filter by region or customer type.

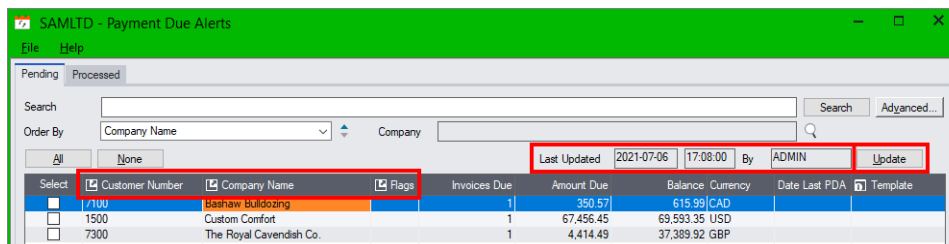


- Consider adding a non-alphabetic character to any optional fields that you want to use for filtering – for example, use “\*keith” as the code instead of “KEITH”.
- If you have a “terms” optional field, you could do a special run for a particular group of customers.
- **Use the Company field at the top of the screen to filter for a single company.**



- Use the Advanced... button to filter cases by different customer field ranges.
- Use the Company field to send reminder emails for the selected company only.
- Click the Red X to remove the company filter.

## Additional Features on the Payment Due Alerts Grid



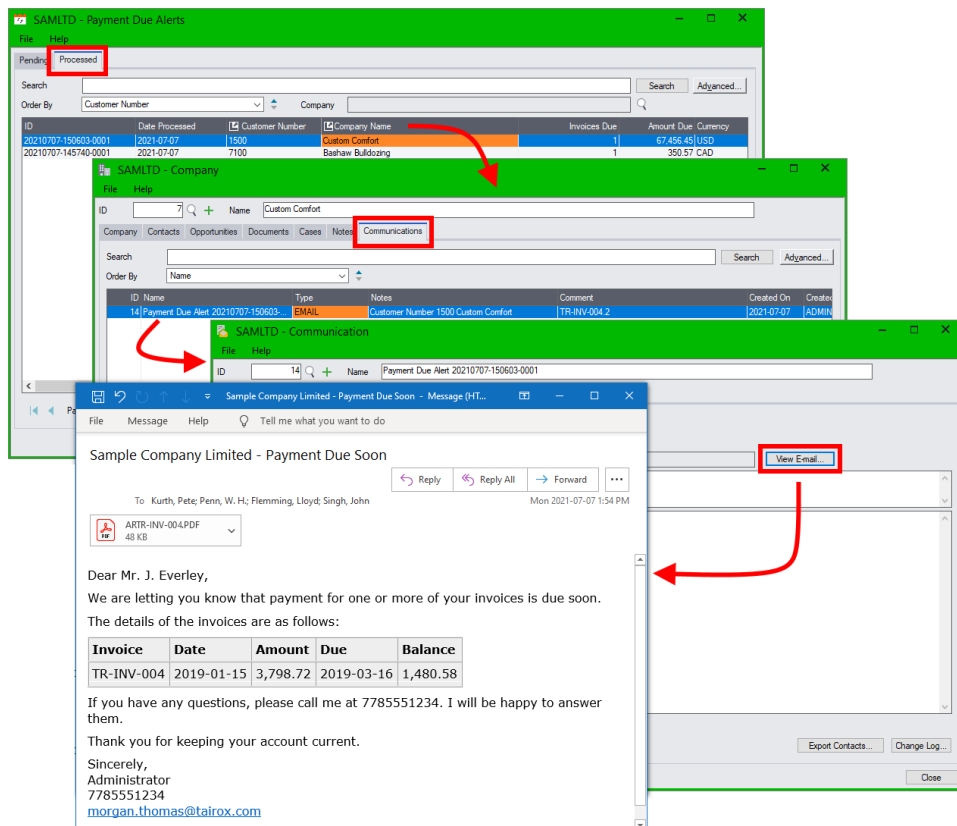
**Note the following features on the Payment Due Alerts screen and grid:**

- Displays the date when the list was last updated, along with the ID of the user who ran the update. The date will be updated again when you click the Update button.

- Shows the number of invoices due, the total amount due, the account balance and currency, and the default email template.
- Flags companies with promised payments (+), unapplied credit (\$), open cases (!), or disputed invoices (?).
- Provides drilldown to the A/R customer information (click the Customer Number column heading), CRM and Collections customer data (click the Company Name column heading) and Collections information (click the Flags column heading).
- Double-click a line in the grid to see a list of due invoices.
- Click the Processed tab to see past payment due alerts.

## Viewing Payment Due Alerts Communications and Sent Emails

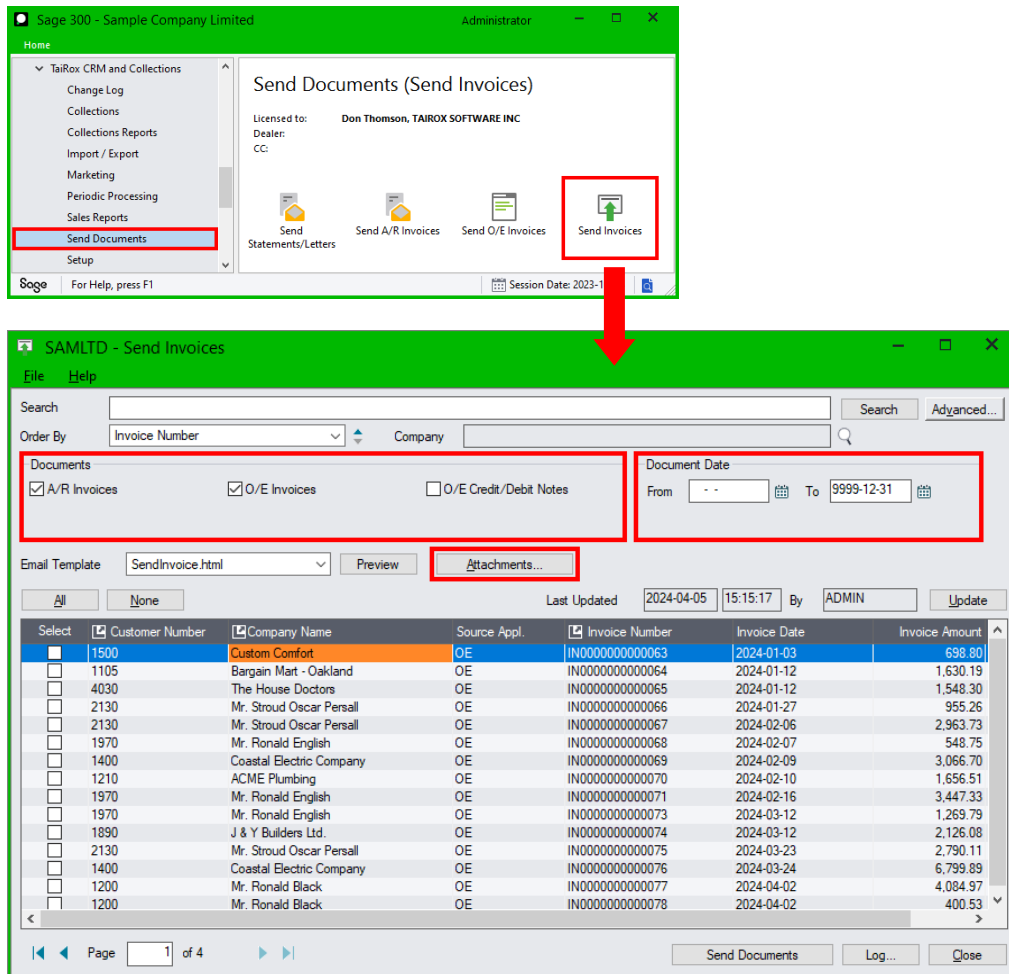
- Select the **Processed** tab on the **Payment Due Alerts** screen.
- Highlight the alert that you want to view, and click the **Company Name** column heading to drill down to the Company data.
- Select the **Communications** tab on the **Company** screen to view payment due alert email communications.
- Double-click the email communication entry.
- Click the **View Email** button to see the emails.



## Send A/R and O/E Invoices to Multiple Customer Contacts

The Send Invoices program is a powerful and flexible replacement for Sage 300 programs that email A/R Invoices and O/E Invoices to customers.

You can run the program interactively from the Sage 300 Desktop, or you can run the program as a Windows Scheduled Task. See [Send Invoices Setup](#) and also refer to the [Scheduler User Guide](#).



The Send Invoices program lets you:

- Quickly select all unsent A/R and O/E invoices and email them to multiple customer contacts per company, then use the checkboxes to cherry-pick the invoices that you want to send.
- Find individual customers using the SmartFinder or use Advanced Search to select customers by up to 4 customer record fields or optional fields – such as the customer number, national account, customer group, currency, salesperson, or territory. Then use the checkboxes to refine your list.
- Select and preview email templates at run time – letting you tailor your message for different customer groups, sales regions, countries, etc.
- Send emails that match each invoiced company's preferred language. See [Sending Emails and Invoices Using the "Preferred Language" Company Setting](#).
- Add additional attachments to each email – such as your overdue payment policies.
- Click the Preview button to view the body of the selected Send Invoices email template.

If you have a multi-lingual Sage 300 system, the preview appears in the user's language, if you are running in French or Spanish and you created French or Spanish email templates.

- Send invoices and credit notes created by Service Manager, a Technisoft product that integrates with Sage 300. Note that the program does not print invoices.  
The program treats invoices from other 3<sup>rd</sup> party programs as if they originated in A/R.
- Log all email activity and creates a separate communication for each recipient to document the emails, so you can view all past emails and attachments in the communications window.

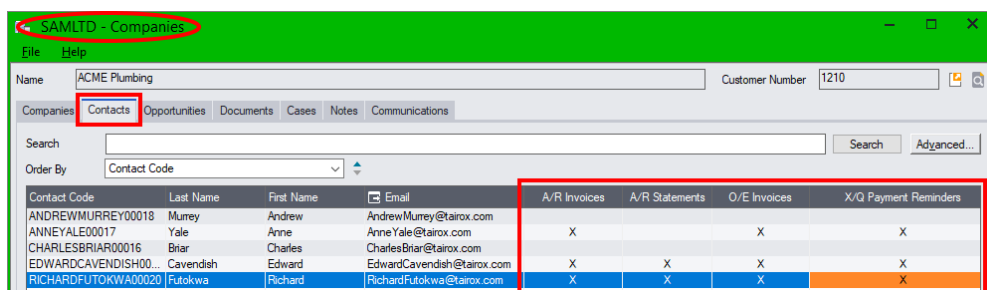
**Note:** Send Invoices does not resend invoices that have already been sent. Use the [Send Documents](#) function in the Companies window to resend invoices to customers.

**To email invoices to customers, you must set up recipient email addresses:**

Either provide an email address for each company or principle company contact on the A/R Customer Address tab and choose Email or Contact's Email as the Delivery Method in the A/R Customer record (on the Processing tab).

**AND/OR**

For each CRM company, select the company contacts that should receive A/R and O/E invoices on the Contacts tab of the CRM Company screen.



The program sends emails to email addresses specified by the customer's delivery method in A/R as well as to all contacts set up as invoice recipients in CRM (as shown above).

See [Select Recipients for Emailed Invoices, Statements, Letters, Payment Reminders and Payment Due Alerts](#) for details.

**Note:** CRM also uses the "Preferred Language" setting in the Company window to send emails and invoices from the Send Invoices program in English, French, or Spanish. See [Appendix C](#) for details.

Also note that you must set up the email settings in the Send Invoices Setup program before you can send documents. See [Send Invoices Setup](#) for details.

## Delivery Method Must be "Email" in the A/R Customer Record to Email the Company or the Main Contact Email Addresses

If the Delivery Method set in the A/R Customer Record (on the Processing tab) is Email (Customer) or Email (contact), TaiRox Collections will send to that email address IN ADDITION TO the contact email addresses defined on the company's Contacts tab (shown above).

**If you do NOT want to Email invoices** to some customers, specify "Mail" as the Delivery Method in A/R on the Address tab of the A/R Customer Record AND deselect A/R and O/E invoices for all contacts on the company's contacts tab.

You can then do a print run for unsent invoices using the [O/E Invoices](#) or [A/R Invoices](#) functions in the Send Documents window.

## Using the Send Invoices Program

1. Choose the Send Invoices program from the Send Documents folder.
2. Click the **Update** button to update the grid with all unsent, selected documents (in this case A/R and O/E invoices) in the selected date range.

If you use Service Manager V/M – Technisoft's Service and Maintenance software – you will see two additional checkboxes in the Documents section for selecting V/M invoices and credit notes.

3. Click the **All** button to select all checkboxes for the current page of the grid.

Note that this is page 1 of 4 in the grid. You can lengthen the window by dragging the bottom border, and you can use the page navigation buttons to move to each new page.

Click the **All** button on each grid page to include all unsent documents.

Select	Customer Number	Company Name	Source Appl.	Invoice Number	Invoice Date	Invoice Amount
<input checked="" type="checkbox"/>	1500	Custom Comfort	OE	IN00000000000063	2024-01-03	698.80
<input type="checkbox"/>	1105	Bargain Mart - Oakland	OE	IN00000000000064	2024-01-12	1,630.19
<input checked="" type="checkbox"/>	4030	The House Doctors	OE	IN00000000000065	2024-01-12	1,548.30
<input checked="" type="checkbox"/>	2130	Mr. Stroud Oscar Persall	OE	IN00000000000066	2024-01-27	955.26
<input checked="" type="checkbox"/>	2130	Mr. Stroud Oscar Persall	OE	IN00000000000067	2024-02-06	2,963.73
<input type="checkbox"/>	1970	Mr. Ronald English	OE	IN00000000000068	2024-02-07	548.75
<input type="checkbox"/>	1400	Coastal Electric Company	OE	IN00000000000069	2024-02-09	3,066.70
<input type="checkbox"/>	1210	ACME Plumbing	OE	IN00000000000070	2024-02-10	1,656.51
<input type="checkbox"/>	1970	Mr. Ronald English	OE	IN00000000000071	2024-02-16	3,447.33
<input type="checkbox"/>	1970	Mr. Ronald English	OE	IN00000000000073	2024-03-12	1,269.79
<input type="checkbox"/>	1890	J & Y Builders Ltd.	OE	IN00000000000074	2024-03-12	2,126.08
<input checked="" type="checkbox"/>	2130	Mr. Stroud Oscar Persall	OE	IN00000000000075	2024-03-23	2,790.11
<input type="checkbox"/>	1400	Coastal Electric Company	OE	IN00000000000076	2024-03-24	6,799.89
<input type="checkbox"/>	1200	Mr. Ronald Black	OE	IN00000000000077	2024-04-02	4,084.97
<input type="checkbox"/>	1200	Mr. Ronald Black	OE	IN00000000000078	2024-04-02	400.53

In the screen above, we are sending O/E invoices to customers 1500, 4030, and 2130 on page 1 of the grid.

4. You can select a different email template from the dropdown list.
  - The Template dropdown lists all "html" and "txt" type messages stored the following folder:  
C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Send Invoices

Click the **Preview** button to see the email template with sample customer data.

See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Invoices](#) for information on creating email templates.
5. Click the Send Documents button to send the emails.

- Choose Yes when asked to confirm that you want to "send documents". If you click No, you can continue to edit the Send Invoices fields or close the program.
- The program will show progress bars as it generates PDF attachments and sends the emails.

## Viewing “Send Invoices” Emails on the Communications tab

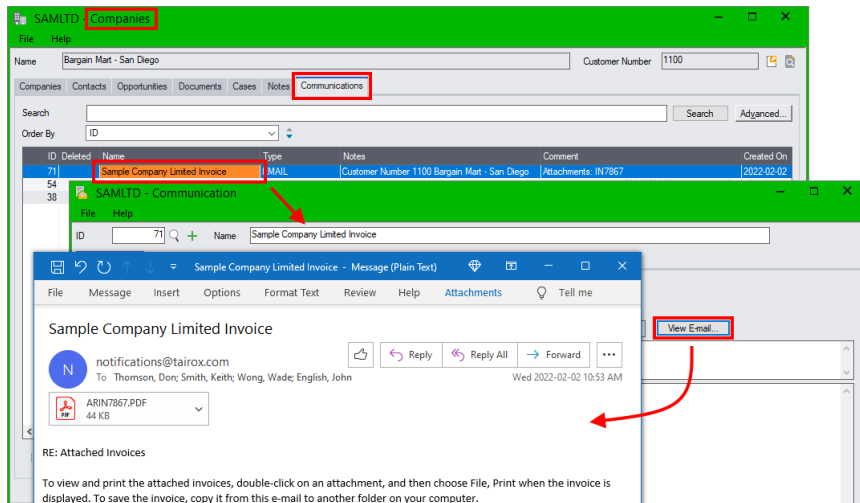
You can view all email communications generated by Send Invoices on the Communications tab for the company (or contact) or by opening the Communications window from the Sage desktop.

### To view emails from the Companies window:

1. Select the company in the Companies window and click the Communications tab.

You can also click the Communications tab for individual contacts or open the Communications window from the Sage desktop to see communications.

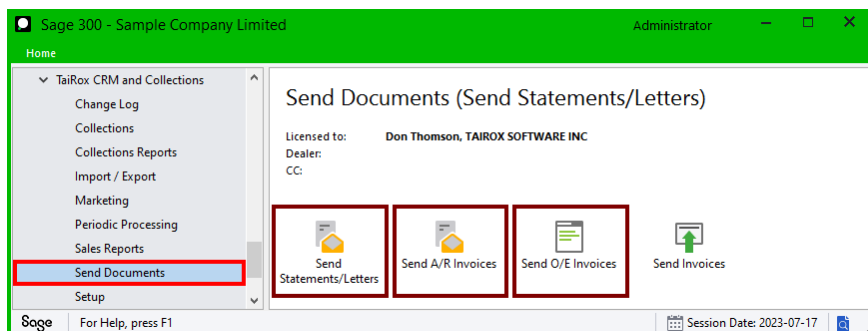
2. Double-click the communication you want to view, then click the View Email button in the communication window. You can double-click the attachments to see the invoices.



See [Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Invoices](#) for information on creating and editing email templates.

## Send Statements, Letters, and Invoices to Multiple Recipients

CRM provides three programs for emailing and printing statements, letters, and invoices to multiple recipients, logging all email activity, **and** creating communications for each recipient to document the emails.



The following CRM programs effectively replace three standard Sage 300 programs:

**Send Statements/Letters:** Replaces Sage 300 A/R Statements / Letters / Labels (in the A/R Customer Reports folder).

**Send A/R Invoices:** Replaces Sage 300 A/R Invoices (in the A/R Transaction Reports folder)

**Send O/E Invoices:** Replaces Sage 300 Invoices (in the O/E Forms folder)

Use the [Send Invoices](#) program to email all new A/R and O/E invoices to groups of customers.

**Note:** Before you can email accounting documents with these programs, you must use the Accounting Documents Setup program to specify the contents of your emails.

You must also make sure that each company record includes an email account or contact's email account, **or** has additional company contacts set up as email recipients for each document.

### **To email documents to customers, you must:**

1. Select the "Customer" Delivery Method when you print Statements, Letters, or Invoices from CRM – just like in A/R.

If the Print function Delivery Method is set to "Print Destination", CRM will NOT send emails.

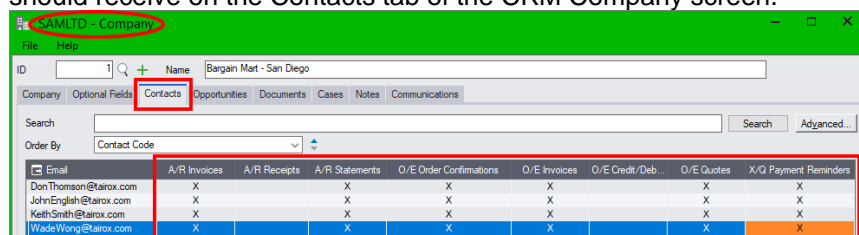
### **AND have the recipient email addresses set up**

2. Either provide an email address for each company or principle company contact on the A/R Customer Address tab and and choose Email or Contact's Email as the Delivery Method in the A/R Customer record (on the Processing tab).

CRM uses the email templates set up in the Accounting Documents Setup function.

### **AND/OR**

For each CRM company, select the accounting documents that each company contact should receive on the Contacts tab of the CRM Company screen.





**Using Email or Contact's Email addresses after you set up accounting documents:**

If the Delivery Method set in the A/R Customer Record (on the Processing tab) is Email or Contact's Email, CRM will send to that email address IN ADDITION TO the contact email addresses defined on the company's Contacts tab (shown above).

If you do NOT want to send to the Email or Contact's Email addresses, specify "Mail" as the Delivery Method in A/R on the Address tab of the A/R Customer Record.

See [Select Recipients for Invoices, Statements, Letters, Payment Reminders and Payment Due Alerts](#).

**Communications are not created if the Delivery Method in A/R is "Mail" and accounting documents are not set up:**

If the Delivery Method set in the A/R Customer Record is Mail, CRM will not create a communication.

**Mixing print and email delivery methods**

If some of your statements, letters or invoices are emailed to customers, and others are printed using the "Mail" delivery method, please note the following points:

- Emailing is performed first, and then the program prints accounting documents which will be sent out by mail.
- Depending on the Sage 300 Print Destinations, some user intervention may be required when emailing is complete. For example, if your Sage 300 print destination is Preview, several print preview windows may appear that you will need to deal with.

**Sending Statements/Letters**

This program lets you email statements and letters to multiple contacts per customer and record each email as a communication. The screen is almost identical to the A/R Statements/Letters/Labels screen.

CRM's Send Statements/Letters uses the emails defined with the CRM [Accounting Documents](#) Setup program.

You should set up the email recipients for your customers (on the Contacts tab in the CRM Company window) **before** using this program to send out accounting documents.

SAMLTD - Send Statements/Letters

File Help

☒ Statement ☐ Letter Use Statement ARSTMT11.RPT Browse...

Delivery Method Customer

☒ National Account Statements

Run Date 2021-03-09 Cutoff Date 2021-03-09 Age By Due Date

Select Criteria

Account Type All Customers

Select By National Account From To

Sort By (None) Then By (None) Then By (None) Then By (None)

Send Documents Resend Statement... Log... Close

**Notes:**

- You **MUST** set the Delivery Method on this screen to “Customer” in order to send emails. If you select “Print Destination”, all statements will be printed to the Sage 300 print destination.
- Statements and letters are added as PDF attachments to the customer email.
- Specify email messages for statements and letters with the [Accounting Documents](#) program. The “From Email” setting in [Accounting Documents](#) overrides the email setting in [CRM Options](#).
- Specify the recipients for statements and letters on the Contacts tab for each company. See [Specify Email Addresses for Statements, Letters, Invoices, and Payment Reminders](#).  
Depending on the Delivery Method set in A/R for each company, the program will also send emails to the company email address or the primary contact’s email address listed on the Company tab.
- If you have set up one or more contacts to receive accounting documents in the CRM Company window, and you set the Delivery Method in the A/R Customer record to Mail, CRM will send emails only to the recipients listed in the Company window – not to the Company or Primary Contact email address.  
All company contacts **with** accounting documents set up will get statements or letters emailed to them – no matter which Delivery Method is set in the A/R Customer record.
- If some statements or letters are printed, all emails will be processed first, and then printed documents.

**Resend Statements**

- Click the Resend Statements button to reprint or resend a range of statements selected by date and customer number.
- Choose a reason – either because of an incomplete statement run or to print or send an additional copy.
- Use the [Send Documents](#) function in the Companies window to resend A/R and O/E documents – including past statements – to individual customers.

**Sending A/R Invoices**

This program lets you email A/R Invoices to multiple contacts per customer and record each email as a communication. The screen is almost identical to the A/R Invoices screen in the A/R Transaction Reports folder.

The program sends one email to each email address and attaches up to the maximum number of invoices specified by the Attachment Limit setting on the Accounting Document tab for the specific company. If you have more invoices, it will attach them to a subsequent email.

Specify 1 for the Attachment Limit setting to send 1 invoice per email to customers, if they request it.

You can also choose to have a single attachment that includes ALL invoices up to the maximum, or send separate attachments for each invoice.

You define Emails for Send A/R Invoices using the CRM [Accounting Documents](#) Setup program.

### Notes:

- You MUST set the Delivery Method on this screen to “Customer” in order to send emails. If you select “Print Destination”, all invoices will be printed to the Sage 300 print destination.
- Specify email messages for invoices using the CRM [Accounting Documents](#) Setup program.  
The “From Email” setting in [Accounting Documents](#) overrides the email setting in [CRM Options](#).
- Invoices are added as PDF attachments to the customer email.  
You can include all invoices in a single PDF for each customer (this is the default Sage 300 setting), or you can create a separate PDF for each invoice.
- Emails for companies with Accounting Documents set up are sent to all contacts specified on the [Contacts tab in the CRM Company window](#) for each company.  
Depending on the [Delivery Method set in A/R for each company](#), the program will also send emails to the company email address or the primary contact's email address listed on the Company tab.
- If you have set up one or more contacts to receive accounting documents in the CRM Company window, and you set the Delivery Method in the A/R Customer record to Mail, CRM will send emails only to the recipients listed in the Company window – not to the Company or Primary Contact email address.  
All companies **with** accounting documents set up will get invoices emailed to them – no matter which Delivery Method is set in the A/R Customer record. (The invoice printing function must use the “Customer” Delivery Method.)
- If some invoices are printed, all emails will be processed first, and then printed documents. (The program will print [not email] invoices for customers that have no email recipients set up.)
- Like the Sage 300 Send A/R Invoices program, there is no way to skip the summary invoices that originate in OE. Use the [Send Invoices](#) program to email A/R invoices and detailed O/E invoices.

### Resend Invoices

- Select “Reprint Previously Printed Invoices” to resend them to customers.
- Use the [Send Documents](#) function in the Companies window to resend documents and statements to individual customers.

## Sending O/E Invoices

This program lets you email Order Entry Invoices to multiple contacts per customer and record the emails as communications. The screen is almost identical to the O/E Invoices screen in O/E Forms.

The program sends one email to each email address and attaches up to the maximum number of invoices specified by the Attachment Limit setting on the Accounting Document tab for the specific company. If you have more invoices, it will attach them to a subsequent email.

Specify 1 for the Attachment Limit setting to send 1 invoice per email to customers, if they request it.

Send O/E Invoices emails are defined using the CRM [Accounting Documents](#) Setup program.

### Notes:

- You MUST set the Delivery Method on this screen to “Customer” in order to send emails. If you select “Print Destination”, all invoices will be printed to the Sage 300 print destination.
- Specify email messages for invoices using the CRM [Accounting Documents](#) Setup program. The “From Email” setting in [Accounting Documents](#) overrides the email setting in [CRM Options](#).
- Invoices are added as PDF attachments to the customer email.
- Emails for companies with Accounting Documents set up are sent to all contacts specified on the [Contacts tab in the CRM Company window](#) for each company.

Depending on the [Delivery Method set in A/R for each company](#), the program will also send emails to the company email address or the primary contact’s email address listed on the Company tab.

- If you have set up one or more contacts to receive accounting documents in the CRM Company window, and you set the Delivery Method in the A/R Customer record to Mail, CRM will send emails only to the recipients listed in the Company window – not to the Company or Primary Contact email address.

All companies **with** accounting documents set up will get invoices emailed to them – no matter which Delivery Method is set in the A/R Customer record. (The invoice printing function must use the “Customer” Delivery Method.)

- If some invoices are printed, all emails will be processed first, and then printed documents.
- Use the [Send Invoices](#) program to email A/R invoices and detailed O/E invoices.

## Resend Invoices

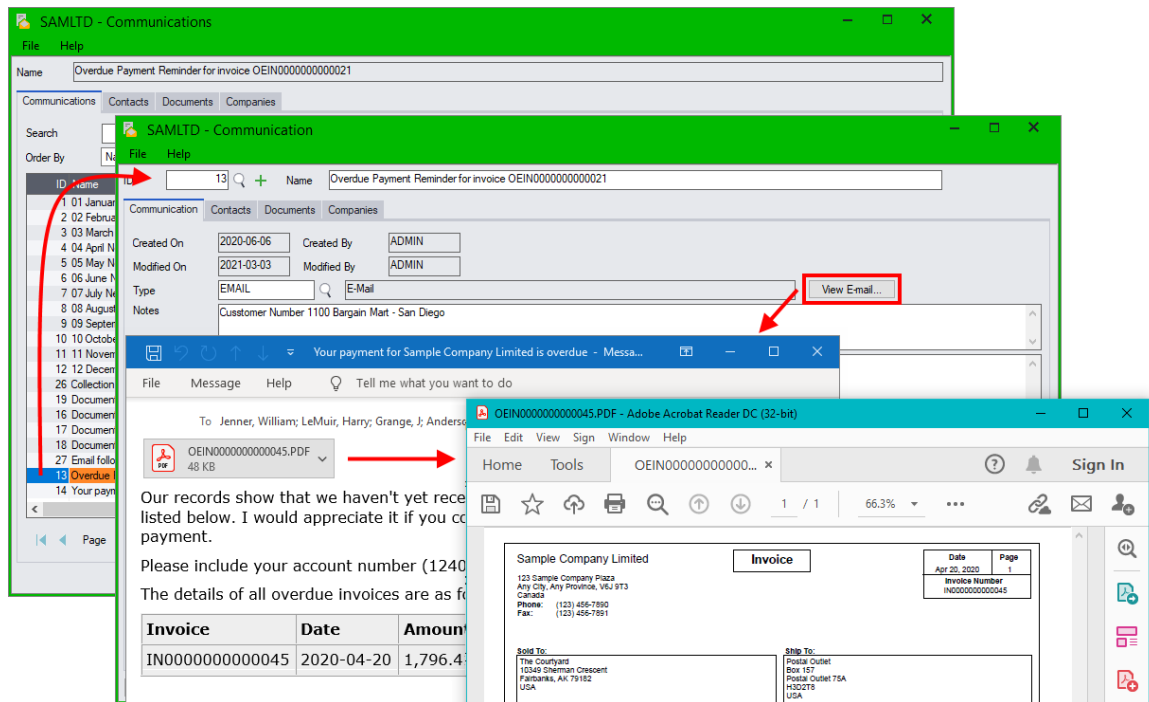
- Select “Include Invoices Already Printed” to resend them to customers.
- Use the [Send Documents](#) function in the Companies window to resend documents and statements to individual customers.

## Viewing Emails in the Communications window

All email communications generated by Send Documents programs and overdue payment reminders created by Overdue Payments are available in the Communications window – letting you maintain a complete trail of all customer communications.

### To view emails:

1. Open the Communications window.
2. Double-click the communication that you want to view. (Use Company Search to view communications for a single company.)



3. Click the View Email button in the communication window to display the email.

You can then open the attachments to see the original documents.

**Note that older emails generated by Send Documents programs (prior to January 2020) were stored differently in CRM.**

See [Open older emails](#) for more information.

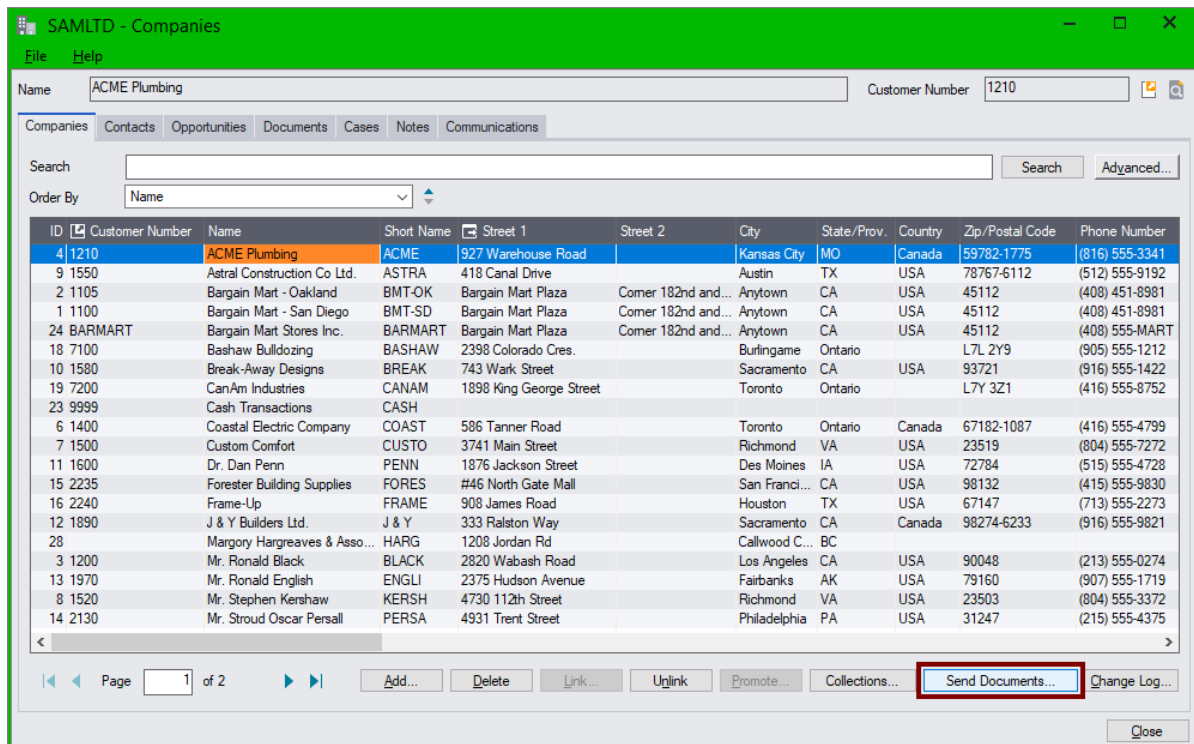
## Resend Individual Documents from the Companies Window

The Send Documents button lets you quickly and easily resend existing A/R or O/E documents (invoices, orders, receipts, statements, etc.) or other attachments to any customer or contact email address directly from CRM.

- Type the body of the email on a standard email form or use a previously-saved email template.
- Select any of the company and contact email addresses in CRM. Cc and Bcc values can default to prior values (see [user settings](#)).
- Select any prior A/R and O/E documents to add as attachments.
- Click the Send button to generate and attach PDF'd documents and send the email.
- View all past emails and attachments in the communications window.

To start, click the Send Documents button in the CRM Companies window.

**Note:** You must set up the email settings in Setup Options before you can send documents. See [Options](#) for details.



### Creating New Email Communications with A/R and O/E Document Attachments

Send Documents lets you send or resend A/R and O/E documents or miscellaneous attachments to customer contact email addresses maintained in CRM and Collections.

#### To compose and send emails:

1. Open the Companies window, select the customer that you want to contact (click the row in the grid), and click the "Send Documents..." button. Or double-click a company name to open a company record, and then click the "Send Documents..." button on the Company screen.

2. Check that you have the correct name and customer number at the top of the screen.

- Fill in the email subject and the body of the email message or choose a message template from the Finder beside the Email Message field. The Finder displays all “Letter” type messages stored with Accounts Receivable.

See [Email Message Templates and Variables Supported by “Send Documents” Emails](#).

**Note:** The email body can be up to 2,500 characters long.

- Click the Attachments button to attach miscellaneous documents from your computer or network to this email. See [Sending Miscellaneous Emails and Email Attachments to Contacts](#) for more information.
- Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.
- Add a Reply To email address to handle customer queries.

**Note:** The Reply To address overrides the “From Email” address specified on the Email tab in [CRM Options](#).

3. Click the Recipients tab and select the recipients from the list of company contacts:

ID	Contact Code	Last Name	First Name	Middle Name	Salutation	Job Title	Phone (Office)	Phone (Mobile)	ID
18	ANDREW	MURREY	Andrew			Director of Sales	(416) 555-1067	(416) 555-1000	(41)
17	ANNE	YALE	Anne				(604) 555-1096	(604) 555-1054	(60)
16	CHARLES	BRIAR	Charles				(636) 555-1085	(636) 555-1048	(63)
19	EDWARD	CAVENDISH	Edward				(212) 555-1020	(212) 555-1017	(21)
20	RICHARD	FUTOKW	Richard		Ms	Purchasing Director	(800) 555-1038	(800) 555-1037	(80)

**To add a company recipient that is *not* in the contact list.**

- Double-click a recipient to open the Contact window, and then click the New button (+) beside the Contact Code field.
  - Fill in the contact information, and click the Add button. The new contact will be automatically linked to the current company.
4. Select the A/R and O/E documents that you want to attach to the email from the tabs at the top of the screen. For A/R invoices, you can include or exclude fully paid invoices from the list.

Attach	Document Type	Document Number	Document Date	Due Date	Fully Paid	Invoice Description	Amount Due	Batch/Entry No	Posting Date	Fiscal Year	Fiscal Period
<input type="checkbox"/>	Credit Note	CR0000000000000000	2021-03-09	2021-03-09	No		-1,070.59	66 - 1	2021-03-09	2021	03
<input type="checkbox"/>	Invoice	IN0000000000000000	2020-07-30	2020-08-29	Yes	Onsite Installation	0.00	61 - 1	2020-07-30	2020	07
<input checked="" type="checkbox"/>	Invoice	IN7870	2020-06-05	2020-07-04	No		355.20	23 - 1	2020-06-05	2020	06
<input type="checkbox"/>	Invoice	INVCORP003	2020-05-18	2020-06-17	Yes		0.00	57 - 1	2020-05-18	2020	05
<input type="checkbox"/>	Credit Note	TR-CRE-002	2019-02-03	2019-02-03	Yes	Cred Note Appl To I...	0.00	49 - 1	2019-02-03	2019	02
<input type="checkbox"/>	Credit Note	TR-CRE-005	2019-03-27	2019-03-27	Yes	Cred Note Appl To I...	0.00	52 - 1	2019-03-27	2019	03

Add miscellaneous attachments using the Attachments button on the Communication tab.



If you have use Service Manager V/M – Technisoft's Service and Maintenance software – you will see two additional tabs for selecting Invoices and credit notes.

The screenshot shows the 'Accounts Receivable' window with several tabs at the top: Communication, Recipients, A/R Invoices, A/R Receipts, O/E Orders, O/E Invoices, O/E Credit/Debit Notes, A/R Statements, V/M Invoices, and V/M Credit Notes. The 'V/M Invoices' and 'V/M Credit Notes' tabs are highlighted with a red rectangle. Below the tabs, there is a search bar and a table of transactions.

Attach	Posting Number	Site Number	Reference	Description	Job Type Code	Date Posted
<input type="checkbox"/>	INV000000003	1210	PO.2020A1B4	General Sales	SALE	1/5/2020
<input type="checkbox"/>	INV000000016	1210		Maintenance Works...	MAINT	1/15/2020

5. Click the Options button on each accounting document tab to choose the A/R or O/E forms that you want to use for creating PDF attachments. Each form also provides a set of printing options:

The screenshot shows the 'Accounts Receivable' window with the 'A/R Invoices' tab selected. An 'Options' dialog box is open, showing the 'Use Invoice' field with 'JRDINV01.RPT' selected. A red arrow points from the 'Options' button in the bottom right corner of the window to the 'Options' dialog box.

**A/R Invoice options**  
Choose the Crystal report for emailing A/R invoices.

The screenshot shows the 'Options' dialog box for A/R Receipts. It has a 'Use Receipt' field with 'ARRCPT.RPT' selected. There are radio buttons for 'Detail' (selected) and 'Summary'. There are 'OK' and 'Cancel' buttons at the bottom.

#### A/R Receipts options

Choose the Crystal report for emailing, and choose a detail or summary report format.

The screenshot shows the 'Options' dialog box for Quote options. It has a 'Use Quote' field with 'DEQUOT01.RPT' selected. There are checkboxes for 'Use Custom Form', 'Print Kit Component Items', and 'Print Bills Of Material Component Items'. There are 'OK' and 'Cancel' buttons at the bottom.

#### Quote options

Choose the Crystal report for emailing quotes, and select report options.

The screenshot shows the 'Options' dialog box for Order Confirmation options. It has a 'Use Confirmation' field with 'DECONF01.RPT' selected. There are checkboxes for 'Print Serial/Lot Numbers', 'Use Custom Form', 'Print Kit Component Items', and 'Print Bills Of Material Component Items'. There are 'OK' and 'Cancel' buttons at the bottom.

#### Order Confirmation options

Choose the Crystal report for emailing quotes, and select report options.

The screenshot shows the 'Options' dialog box for O/E Invoice options. It has a 'Use Invoice' field with 'OEINV01.RPT' selected. There are checkboxes for 'Print Serial/Lot Numbers', 'Include Backordered Items', 'Use Custom Form', 'Print Kit Component Items', 'Print Bills Of Material Component Items', and 'Retainance'. There are 'OK' and 'Cancel' buttons at the bottom.

#### O/E Invoice options

Choose the Crystal report for emailing quotes, and select report options.

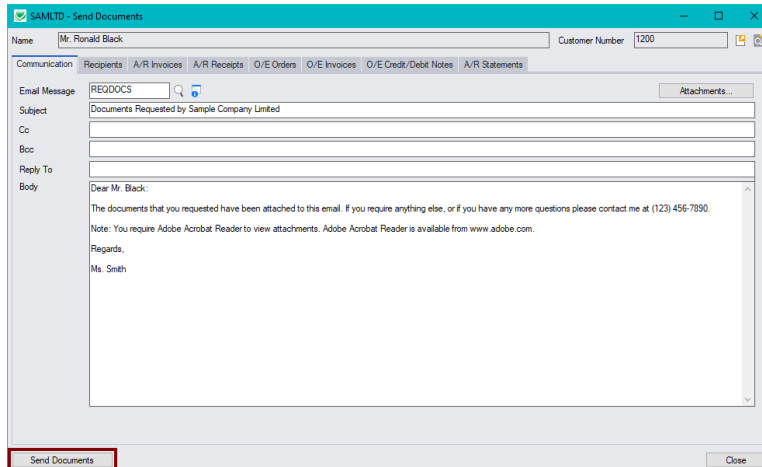
The screenshot shows the 'Options' dialog box for O/E Credit/Debit Note options. It has a 'Use Credit Note' field with 'OEARN01.RPT' selected. There are checkboxes for 'Print Serial/Lot Numbers', 'Use Custom Form', 'Print Kit Component Items', 'Print Bills Of Material Component Items', and 'Retainance'. There are 'OK' and 'Cancel' buttons at the bottom.

#### O/E Credit/Debit Note options

Choose the Crystal report for emailing credit/debit notes, and select report options.



6. Click the Send Documents button to send the email.



- Choose Yes when asked to confirm that you want to “send documents”. If you click No, you can continue to edit the email content.
- The program will show progress bars as it generates PDF attachments and sends the email.
- The program will display a message when the email is sent, and then return to the Companies window when you acknowledge it.

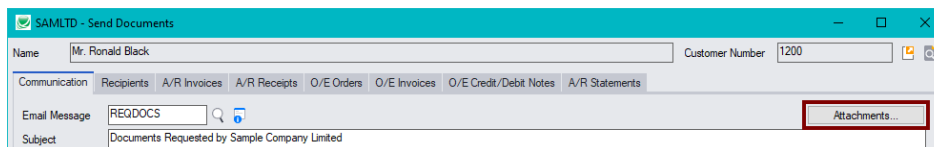
## Sending Miscellaneous Emails and Email Attachments to Contacts

Send Documents also lets you attach any documents on your computer (or on the network) to the email and send it to multiple company contacts.

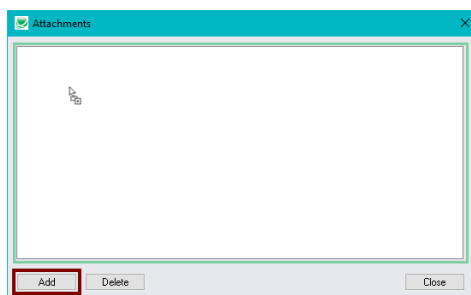
You can also send emails that do not have any attachments. CRM will save the email as a communication, maintaining a complete contact email history.

### To attach documents:

1. Click the Attachments button on the Communication tab.



2. Drag and drop attachments into the Attachments window.



Or click the Add button on the Attachments window to browse to the documents that you want to add.

- To delete a document from the list, select the document and click the Delete button or press the Delete key on your keyboard.

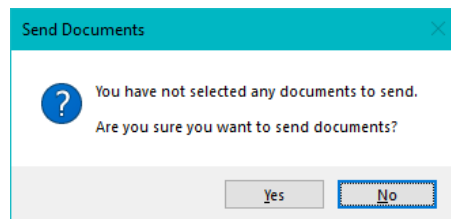
- Click the Close button when you have added all your attachments.

When you close the window, the Attachments button will show you the number of attached documents. Click the button to open the Attachments window and edit the list.

Attachments (2)...

- Edit the email and select email recipients from the Recipients tab, and then click the Send Documents button to send the email.

The following message will appear **if you did not select any accounting documents** to resend to recipients.



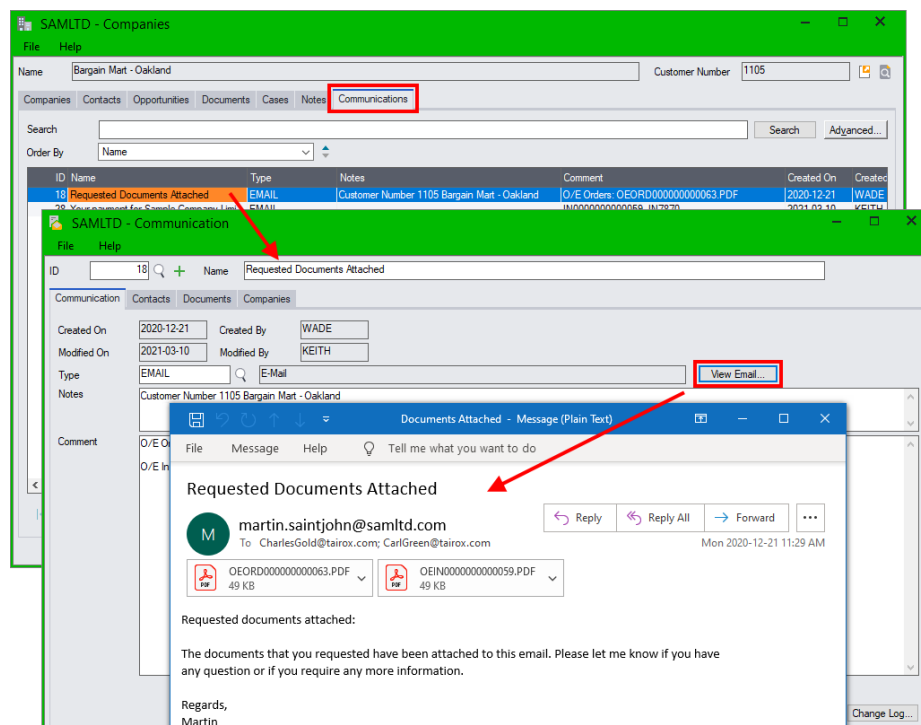
- Click Yes to send the email with only the miscellaneous attachments.

## Viewing “Send Documents” Emails on the Communications tab

All email communications generated by Send Documents are available on the Communications tab for the company (or contact) or by opening the CRM and Collections Communications window from the Sage desktop – letting you maintain a complete trail of all customer communications.

### To view emails from the Companies window:

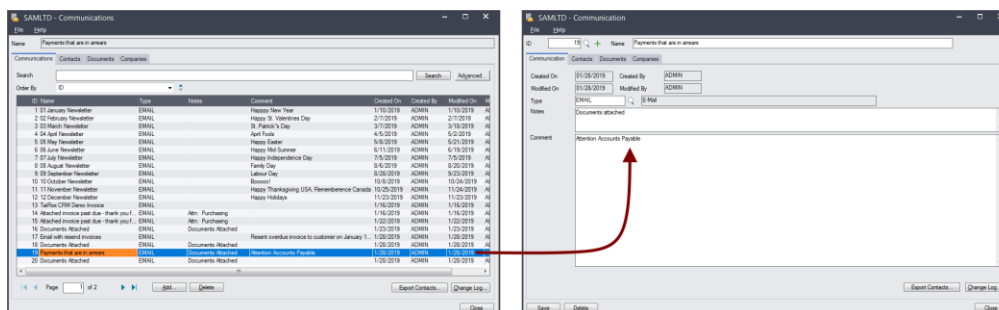
- Select the company in the Companies window and click the Communication tab (or open the Communications window from the Sage desktop).
- Double-click the communication you want to view, then click the View Email button in the communication window. You can double-click the attachments to see the original documents.



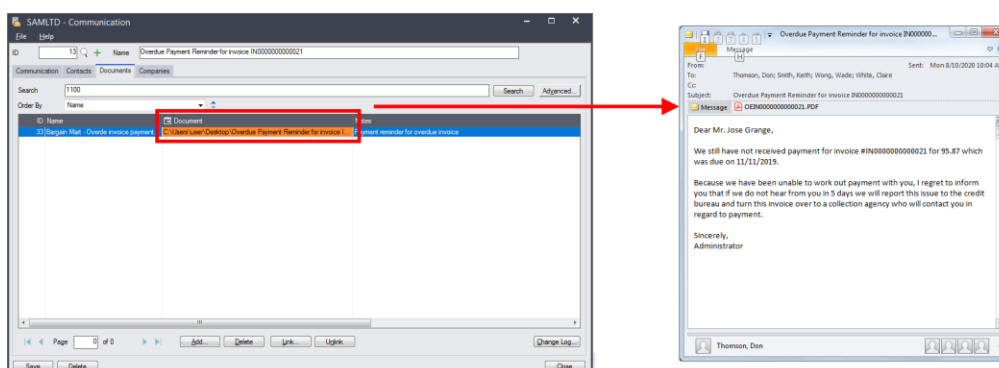
**Note that older emails (prior to January 2020) were stored differently in CRM.**

**To access older emails:**

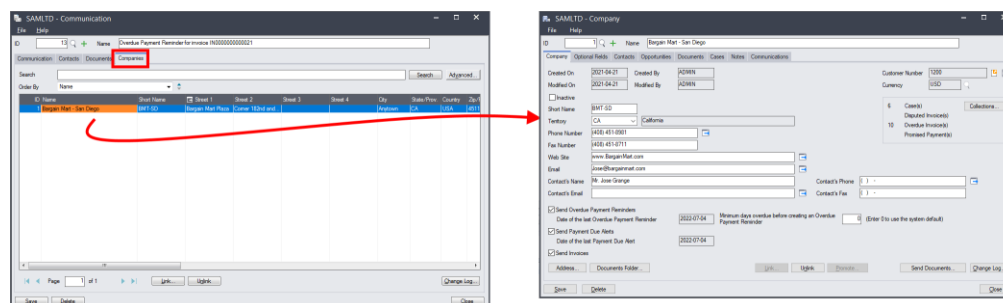
- Open the Communications window from the Sage desktop – as shown below – or select the company in the Companies window and click the Communication tab.



- To view the email with attachments, select the Documents tab, and click the Document column heading.

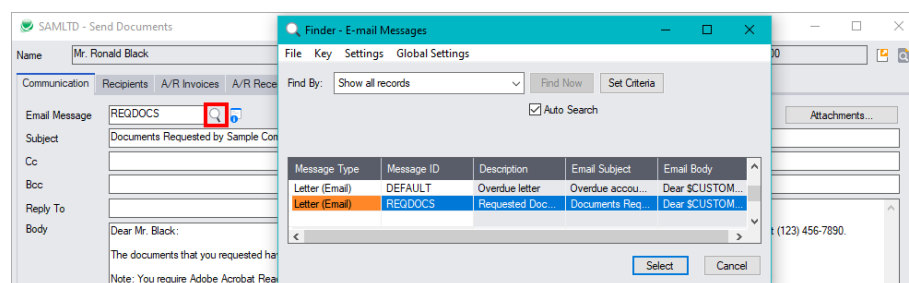


3. To view Company information from the Communication window, click the Companies tab, then double-click the row with the company name.



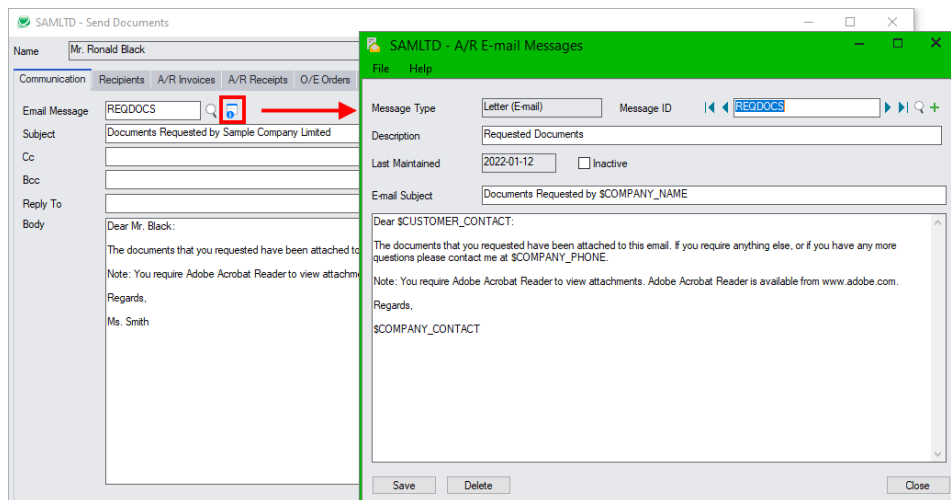
## Email Message Templates and Variables Supported by “Send Documents” Emails

You can create and save standard email messages to use with the Send Documents program. Use the Finder to select existing message templates. The Finder displays all “Letter” type messages stored with Sage 300 Accounts Receivable.



**To create and save a new message:**

1. Click the Zoom button beside the Email Message field to display the A/R Messages form.



2. Click the New button (+) on the right side of the Message ID field.
3. Enter a name for the new email template (the Message ID), and enter a Description and Email Subject.
4. Compose the message using any of the variables listed below.
5. Click the Add button.

**Email Variables**

You can use the following variables in all email messages:

Email Message Variable	Value to Insert
\$COMPANY_CONTACT	Company Contact from CRM & Collection's Company record
\$COMPANY_NAME	Company Name from CRM & Collection's Company record
\$CUSTOMER_ID	A/R Customer ID
\$CUSTOMER_CONTACT	Customer Contact from the A/R Customer record
\$CUSTOMER_NAME	Customer Name from the A/R Customer record
\$COMPANY_FAX	Company Fax Number from CRM & Collection's Company record
\$COMPANY_PHONE	Company Phone Number from CRM & Collection's Company record

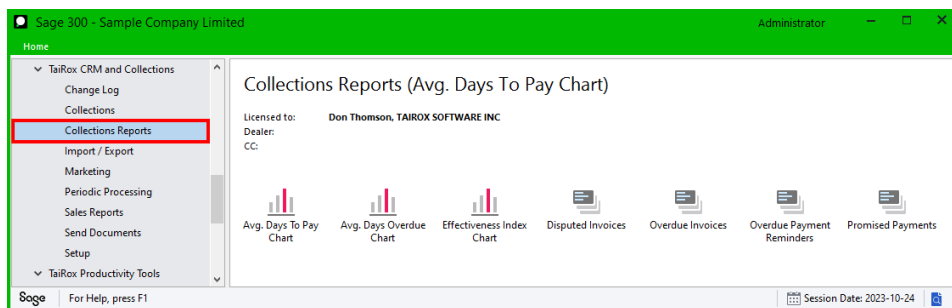
## Collections Reports and Collections Performance Charts

TaiRox collection charts and reports cut through surplus data to provide a quick overview of your company's collections performance. Along with the Customer Aging program, they help you monitor and manage your company's receivables.

TaiRox Collections provides two kinds of reports:

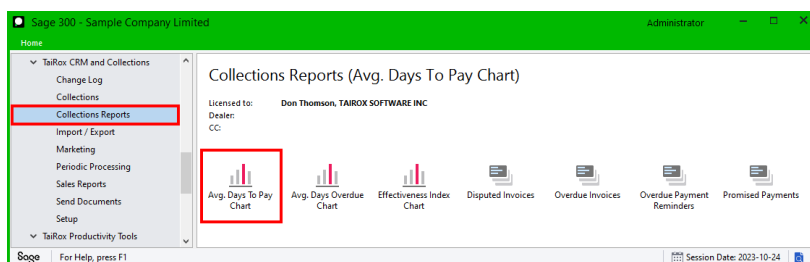
- Charts that show the effectiveness of your company's credit and collection policies.  
Charts create Excel spreadsheets containing the consolidated data and the chart. The spreadsheet is completely editable.
- Reports that show the current status, details, and currency totals for all or a selection of your company's disputed invoices, overdue invoices, payment reminders, and promised payments.  
Reports use the standard Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.

**Access:** Open the Collections Reports folder, then select the chart or report that you want to display.



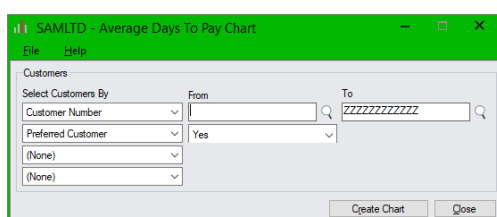
### Average Days to Pay

The program charts the average number of days clients take to pay their bills, indicating the effectiveness of your company's credit and collection policies, and allowing you to see the effectiveness over time of policy changes.



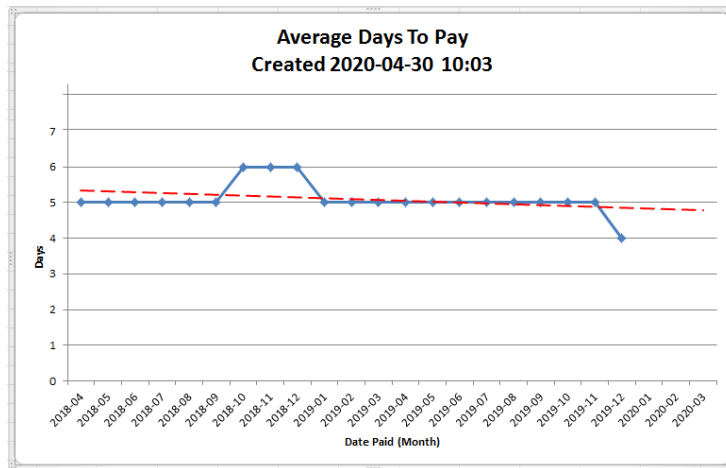
**To chart Average Days to Pay:**

1. Select **TaiRox CRM and Collections > Collections Reports > Avg. Days to Pay Chart**.
2. Select customers using a range of customer record and customer optional fields.



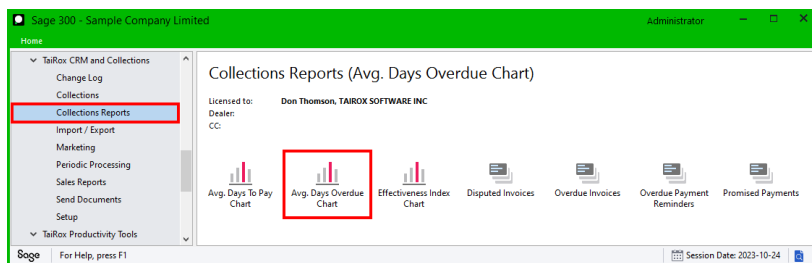
### 3. Click Create Chart.

The program will display the chart and data in separate worksheets in an Excel workbook.



## Average Days Overdue

The program charts the average number of days that invoices are overdue before being paid. This is also a measure of your company's credit and collection policies, and allows you measure their effectiveness over time.

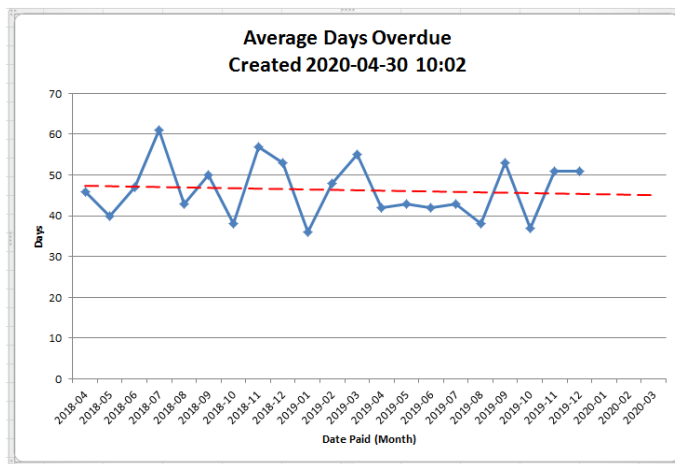


### To chart Average Days Overdue:

1. Select **TaiRox CRM and Collections > Collections Reports > Avg. Days Overdue Chart**.
2. Select customers using a range of customer record and customer optional fields.

### 3. Click Create Chart.

The program will display the chart and data in separate worksheets in an Excel workbook.



## Collections Effectiveness Index

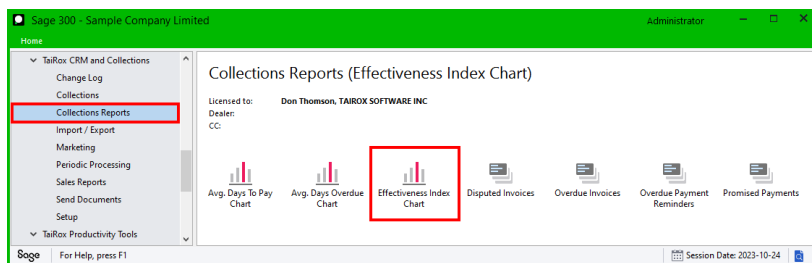
The Collections Effectiveness Index (CEI) show the percentage of receivables that have been collected in each month over the past year. It compares the amount that was collected in each month during the year to the receivables that were available for collection.

Essentially, this metric shows how quickly your company collects outstanding receivables. An effectiveness index near 80% or above indicates a very effective collections process, while an index of 50% and below is low and should be investigated.

The formula for the effectiveness index includes the total **credit** sales for each month. Because Sage does not differentiate between credit sales and cash sales, this program considers invoices paid on or the day after the invoice date to be cash sales, and all other invoices to be credit sales.

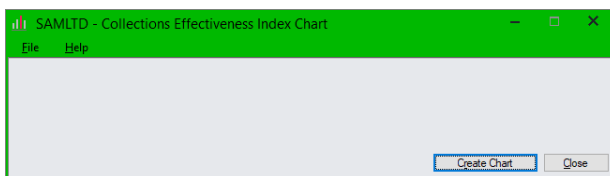
$$\frac{\text{Beginning Receivables} + \text{Monthly Credit Sales} - \text{Ending Total Receivables}}{\text{Beginning Receivables} + \text{Monthly Credit Sales} - \text{Ending Current Receivables}} \times 100$$

The program includes invoices, debit notes, and interest in the sales total.

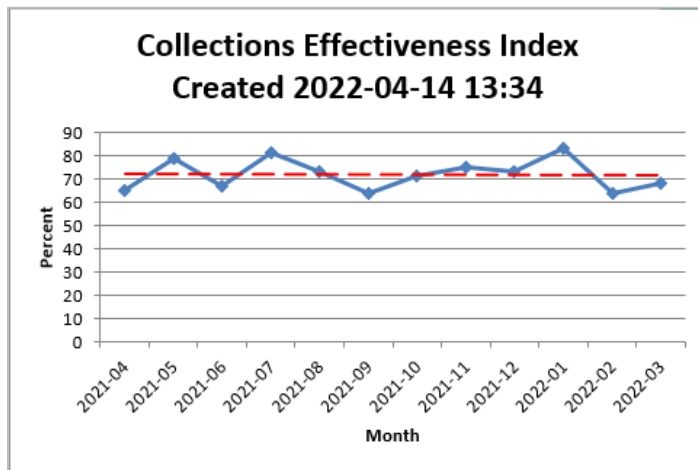


### To chart the Effectiveness Index:

1. Select **TaiRox CRM and Collections > Collections Reports > Effectiveness Index Chart**.
2. Click Create Chart.



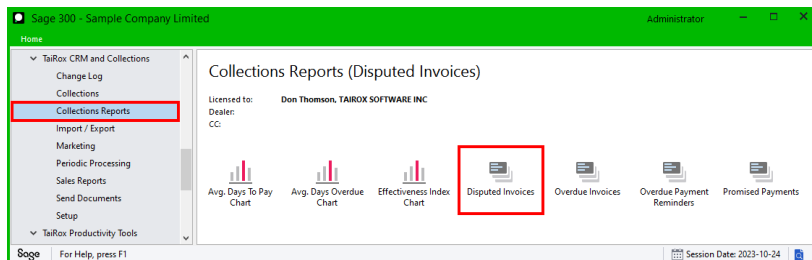
The program will display the chart and data in separate worksheets in an Excel workbook.



## Disputed Invoices

This report that let you review the current status, details, and currency totals for all or a selection of your company's disputed invoices. You can print the report for all assigned disputed invoices, for unassigned invoices, or for invoices assigned to a specific user.

Reports use the standard Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.



### To print the Disputed Invoices report:

1. Select **TaiRox CRM and Collections > Collections Reports > Disputed Invoices**.
2. Specify the contents of the report using the options on the following screen, then click the Print button.

**Range Fields:** The program lets you select disputed invoices using a range of invoice numbers, customer numbers, customer groups, and creation dates.

**Include Open/Closed/Notes:** Use the checkboxes to print open and/or closed records and to print all Notes that are attached to the Notes tab for disputed invoices.



The contents of the Notes field on the Disputed Invoices tab always appear on the report. (See example below.)

**Assigned To:** Select this checkbox and use the Finder to print all disputed invoices assigned to a single user. Leave the field blank to print all unassigned disputed invoices.

**Sort By:** You can choose two levels of sorting – by invoice number, customer number, customer group, currency, assigned user, creation date, number of days open, and revisit date. For example, you can group all disputed invoices by assigned to user, then list by currency within each group.

**Days Open:** This is the number of days that the disputed invoice record has been Open – calculated as Days Open = Current Date – Created On Date. If the record has been closed, the calculation is Days Open = Closed On Date – Created On Date

The program will print or display the disputed invoices report using the Sage 300 print destination that you selected.

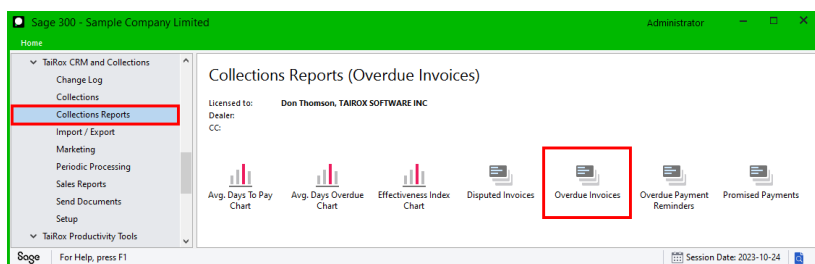
ID	Customer No.	Customer Name	Invoice Number	Days	Amt. In Dispute	Curr.	Assigned To	Revisit On	Created On	Created By	Status
1	1210	ACME Plumbing	IN0000000000000056	8	138.00 USD	FRED	6/24/2020	5/26/2020	ADMIN	Open	
		<b>Inv. Date</b>	<b>Due Date</b>	<b>Inv. Amount</b>	<b>Balance</b>						
		5/31/2020	6/5/2020	138.35	138.35						
Refer to the Notes tab for details on dispute and meetings with customer.											
ID: 16      Created On: 5/26/2020      Created By: ADMIN      Name: June 11 meeting with customer											
Met with customer regarding dispute on June 11											
Issue:											
- Delivery was late. Customer required delivery by May 8											
- Order was incomplete because customer rejected item substitution											
- Following up with sales to verify customer story											
2	1105	Bargain Mart - Oakland	IN0000000000000059	8	250.00 USD	FRED	6/23/2020	5/26/2020	ADMIN	Open	
		6/5/2020	6/15/2020	1,035.57	1,035.57						
Have not yet met with the sales about this order because rep is on sick leave -- meeting Friday June 19.											
<b>Summary</b>											
<b>Currency</b>		<b>Total In Dispute</b>									
USD		388.00									
2 Disputed Invoices printed											

- This example includes a note added to the Notes tab for the first disputed invoice for ACME Plumbing.  
The other freeform text is from the Notes field on the Disputed Invoice tab.
- The program prints a summary of the total amount of disputed invoices for each currency at the end of the report.

## Overdue Invoices

This report that let you review the current status, details, and currency totals for all or a selection of your company's overdue invoices. You can print the report for all assigned overdue invoices, for unassigned invoices, invoices that are on hold, or for overdue invoices assigned to a specific user.

Reports use the standard Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.



### To print the Overdue Invoices report:

1. Select **TaiRox CRM and Collections > Collections Reports > Overdue Invoices**.
2. Specify the contents of the report using the options on the following screen, then click the Print button.

**Range Fields:** The program lets you select overdue invoices using a range of creation dates, invoice numbers, customer numbers, customer groups, and days overdue.

**Include:** Use the checkboxes to print open or closed records, to print notes that are attached to the Notes tab for overdue invoices, and to include overdue payment reminder emails or tasks.

**Select:** You can print a report that only shows invoices that are on hold or not on hold. The report flags all on hold invoices.

**Assigned To:** Select this checkbox and use the Finder to print all overdue invoices assigned to a single user. Leave the field blank to print all unassigned invoices.

**Sort By:** You can specify two levels of sorting using the invoice number, customer number, customer group, currency, assigned user, creation date, stage, days overdue, and revisit date. For example, you can group invoices by assigned to user, then list by currency within each group.

The program will print or display the overdue invoices report using the Sage 300 print destination that you selected.

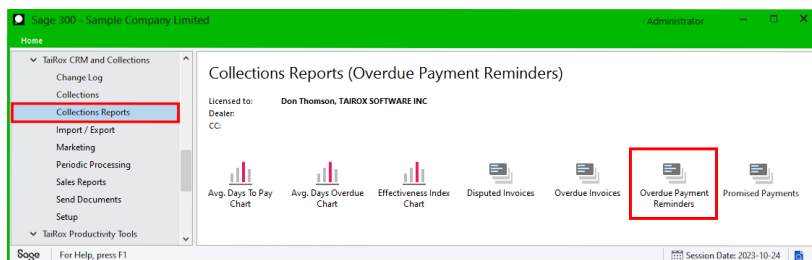
ID	Customer Number / Customer Name	Currency / Flags	Invoice Number	Inv. Date / Due Date	Inv. Amount / Days Balance Overdue	Assigned To / Revisit On	Status
61	1600 Dr. Dan Penn	CAD	IN000000000000024	2019-10-12 2019-10-25	252.72 37.76	77	Open
OPR ID: 20210929-122551-0003 Created On: 2019-10-29 Created By: ADMIN Create Task							
64	1600 Dr. Dan Penn	CAD	IN000000000000012	2019-08-10 2019-09-09	338.95 98.54	123 KEITH 2019-10-27	Open
NOTE ID: 3 Created On: 2019-10-06 Created By: ADMIN Name: Invoice item prices in dispute Customer claims a verbal agreement with sales for a 15% discount on items. Check with Bryan.							
<b>Summary</b>							
		Currency	Total				
		CAD	136.30				
<b>2 Overdue Invoices printed</b>							
Company Flags: *- Customer is on hold \$ - Company has unapplied credit ! - Company has open cases ? - Company has disputed invoices +- Company has promised payments Invoice Flags: #- Invoice has a payment schedule @ - Invoice is being disputed							

- Print selection criteria appear at the top of the report. This report lists invoices for customer 1600, one of which is assigned to Keith.
- Notes and overdue payment reminders (OPRs) are optionally printed for each invoice.
- Company flags show whether the customer is on hold or has unapplied credit, open cases, disputed invoices or promised payments. Invoice flags show whether the invoice has a payment schedule or is disputed.
- The program prints a summary of the total invoice amounts by source currency.

## Overdue Payment Reminders

This report that let you review the details and currency totals for all or a selection of your company's pending or processed (sent) payment reminders. You can print a summary or detail report, print the report for a range of customer groups, customer numbers and date processed, and sort the details using the selection criteria.

Reports use the standard Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.



**To print the Overdue Payment Reminders report:**

1. Select **TaiRox CRM and Collections > Collections Reports > Overdue Payment Reminders**.
2. Specify the contents of the report using the options on the following screen, then click the Print button.

**Report Type:** Choose “Pending” to list the payment reminders that will be sent if you process them now, or choose “Processed” to list payment reminders that have already been sent to customers.

If you select “Processed”, you can also choose the range of processing dates for the report.

**Report Format:** You can print a “Summary” report that lists each customer and amount overdue, or print a “Detail” report that lists each outstanding document for each customer.

**Range Fields:** The program lets you select overdue payment reminders using a range of customer groups, customer numbers, and date processed (if you are reporting processed reminders).

**Sort By:** You can specify three levels of sorting using the customer groups, customer numbers, and date processed. For example, you can group reminders by customer number, then by date processed for each customer.

The program will print or display the overdue payment reminders report using the Sage 300 print destination that you selected.

2023-06-06 9:48:02AM

Sample Company Limited

Page 1

Overdue Payment Reminders - Processed

Customer Group [1]To [ZZZZZZ]

Customer Number [1]To [ZZZZZZZZZZZZ]

Date Processed [2022-07-01]To [9999-08-01]

Report Format [Detail]

Sort By [Customer Number, Date Processed]

Customer Number	Customer Name	Date Processed	Days Over	Number	Amount Overdue	Currency	Action
1100	Bargain Mart - San Diego	2022-07-15	66	2	1,941.31	USD	Create Task
Document Number Doc. Date Doc. Amount Due Date Balance Days Overdue							
TR-INV-001		2022-05-01	1,397.20	2022-05-10	1,848.62	66	
TR-INV-011		2022-06-07	92.69	2022-06-07	92.69	38	
Customer Number	Customer Name	Date Processed	Days Over	Number	Amount Overdue	Currency	Action
1105	Bargain Mart - Oakland	2022-07-15	66	1	1,016.48	USD	Create Task
Document Number Doc. Date Doc. Amount Due Date Balance Days Overdue							
TR-INV-002		2022-01-01	1,126.51	2022-05-10	1,016.48	66	
Customer Number	Customer Name	Date Processed	Days Over	Number	Amount Overdue	Currency	Action
1200	Mr. Ronald Black	2022-07-15	61	2	106,232.26	USD	Create Task
Document Number Doc. Date Doc. Amount Due Date Balance Days Overdue							
TR-CRE-006		2022-06-02	264.61	2022-06-15	264.61	30	
TR-INV-003		2022-05-01	123,235.57	2022-05-15	105,967.65	61	

Summary

Currency	Total
USD	109,190.05

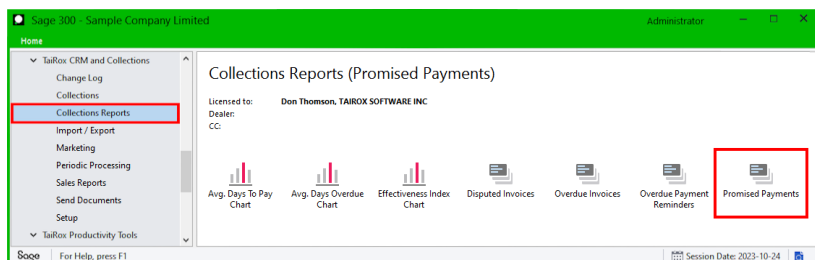
3 Overdue Payment Reminders

- Print selection criteria appear at the top of the report. This report lists payment reminders that were processed on July 15, 2022.
- Document details are optionally printed for each reminder.
- The program prints a summary of the outstanding amounts for reminders by source currency.

## Promised Payments

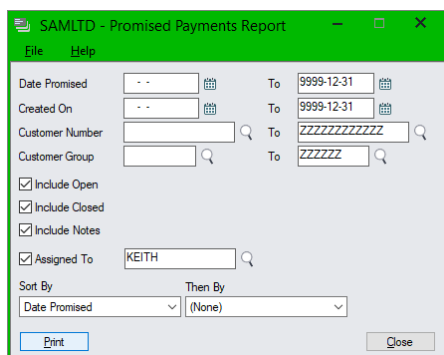
This report that let you review the current status, details, and currency totals for all or a selection of your company's promised payments. You can print the report for all assigned promised payments, for unassigned promises, or for promised payments assigned to a specific user.

Reports use the standard Crystal Reports engine for Sage 300, letting you print to standard Sage print destinations and export data to PDF, Word, or Excel spreadsheet formats.



### To print the Promised Payments report:

1. Select **TaiRoX CRM and Collections > Collections Reports > Promised Payments**.
2. Specify the contents of the report using the options on the following screen, then click the Print button.



**Range Fields:** The program lets you select promised payments using a range of dates promised, customer numbers, customer groups, and creation dates.

**Include Open/Closed/Notes:** Use the checkboxes to print open and/or closed records and to print all Notes that are attached to the Notes tab for promised payments.

The contents of the Notes field on the Promised Payments tab always appear on the report. (See example below.)

**Assigned To:** Select this checkbox and use the Finder to print all promised payments assigned to a single user. Leave the field blank to print all unassigned promised payments.

**Sort By:** You can choose two levels of sorting— by date promised, customer number, customer group, currency, assigned user, creation date, and revisit date. For example, you can group all promised payments by assigned to user, then list by currency within each group.

The program will print or display the promised payments report using the Sage 300 print destination that you selected.

6/3/2020 9:57:10AM Sample Company Limited Page 1

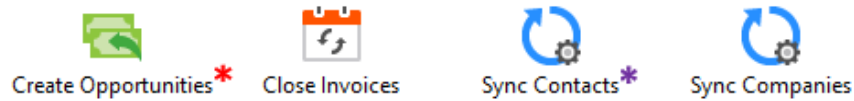
**Promised Payments**

**Date Promised** [ ] To [12/31/9999]  
**Created On** [ ] To [12/31/9999]  
**Customer Number** [ ] To [ZZZZZZZZZZZZ]  
**Customer Group** [ ] To [ZZZZZZ]  
**Include Open** [Yes]  
**Include Closed** [No]  
**Include Notes** [Yes]  
**Assigned To** [Anyone]  
**Sort By** [Date Promised]

ID	Customer No.	Customer Name	Date Promised	Amnt Promised	Amnt Paid	Curr.	Assigned To	Revisit On	Created On	Created By	Status						
2	1970	Mr. Ronald English	6/19/2020	13,000.00	0.00	USD	CARLA	6/25/2020	5/26/2020	ADMIN	Open						
Mr. English purchased goods on behalf of a client who subsequently changed their requirements. - Some items have now been exchanged and payment will be 15 days after final delivery. ID: 17 Created On: 6/1/2020 Created By: ADMIN Name: Kitting item changes for order #8987 #OFFICE SRL KIT - Kitting #1 replaced with Kitting #2 #OFFICEKIT - kit #1 - update following items D1-606/B - replace with D1-608/B D2-613/B - replace with D2-880/B																	
3	1500	Custom Comfort	7/13/2020	7,860.00	0.00	USD	KEITH	7/23/2020	5/26/2020	ADMIN	Open						
1	1580	Break-Away Designs	7/14/2020	500.00	0.00	USD	CARLA	6/19/2020	5/26/2020	ADMIN	Open						
4	1500	Custom Comfort	7/31/2020	12,870.00	6,000.00	USD	ADMIN	7/31/2020	5/26/2020	ADMIN	Open						
Outstanding amount to be paid in two installments - 1 - due June 30 - 6,000.00 USD - Paid - 2 - due July 31 - 6,870.00 USD																	
<b>Summary</b> <table border="1"> <thead> <tr> <th>Currency</th> <th>Total Promised</th> <th>Total Paid</th> </tr> </thead> <tbody> <tr> <td>USD</td> <td>34,220.00</td> <td>6,000.00</td> </tr> </tbody> </table>												Currency	Total Promised	Total Paid	USD	34,220.00	6,000.00
Currency	Total Promised	Total Paid															
USD	34,220.00	6,000.00															
4 Promised Payments printed																	

- This example includes a note added to the Note tab for the first promised payment (ID 2) for Mr. Ronald English.  
The other freeform text is from the Notes field on the Promised Payment tab.
- The program prints a summary of the total amount promised and total paid by source currency.

# Periodic Processing



- \* *Create Opportunities appears if you are using the CRM and Collections module (not the standalone Collections module)*
- \* *Sync Contacts appears only if you are using the Sage 300 M/T Contacts module*

The Periodic Processing folder includes tasks that are part of your regular procedures. Note that you can also automate several CRM and Collections tasks using the task Scheduler, in the Setup folder.

## Create Opportunities

The Create Opportunities program lets you:

- Specify the group of customers for which you want to create opportunities using fields from the A/R customer record and CRM optional fields. (For example, you can specify a range of A/R customer IDs and specify the account rep ID in an optional field.)  
You can cherry-pick from the resulting group to exclude individual companies.
- Specify the information that you want to appear for each opportunity – including opportunity optional fields.
- Generate the opportunities in one process.

***Create Opportunities will not appear on the Sage 300 Desktop if are using the Collections module without CRM.***

**Access:** Select **TaiRox CRM and Collections > Periodic Processing > Create Opportunities**.

**Notes:**

- The program creates opportunities for Companies that are also A/R Customers. It does not create opportunities for prospects.
- By default, the Company Range fields will display the last selection criteria used to create opportunities.

**Specify the group of companies for which you are creating opportunities**

You can specify ranges using A/R Customer fields for company selection – including the customer number, national account, group code, account set, terms, billing cycle, interest profile, payment code, tax group, currency code, customer price list, inventory location, ship-via code, and territory code. You can also use any of the optional fields that you use for companies in CRM and Collections.

Company Range

Select Companies By

From	To
Territory Code	CA
Sales Rep	KW
Rental Customer	Yes

(None)

Customer Number

National Account

Group Code

Account Set

Terms

Billing Cycle

Interest Profile

Payment Code

Tax Group

Currency Code

Customer Price List

Inventory Location

Ship Via Code

Account Class

Counter

Freight Method

Payment Method

Rental Customer

Load

Opportunity Details ...

Short Name

Street 1

Street 2

Street 3

Street 4

City

State/Prov

Country

For example, the above screen shows customer selection by the Territory field and by two company optional fields – Sales Rep and Rental Customer.

**Load the list of companies and choose which require opportunities:**

Opportunity Name

Order By

Include	ID	Name	Short Name	Street 1	Street 2	Street 3	Street 4	City	State/Prov.	Country
<input type="checkbox"/>	2	Bargain Mart - Oakland	BMT-OK	Bargain Mart Plaza	Corner 182nd and...			Anytown	CA	USA
<input type="checkbox"/>	1	Bargain Mart - San Diego	BMT-SD	Bargain Mart Plaza	Corner 182nd and...			Anytown	CA	USA
<input type="checkbox"/>	24	Bargain Mart Stores Inc.	BARMART	Bargain Mart Plaza	Corner 182nd and...			Anytown	CA	USA
<input type="checkbox"/>	10	Break-Away Designs	BREAK	743 Wark Street				Sacramento	CA	USA
<input type="checkbox"/>	15	Forester Building Supplies	FORES	#46 North Gate M...				San Franci...	CA	USA
<input type="checkbox"/>	12	J & Y Builders, Ltd	J & Y	333 Raleigh Way				Sacramento	CA	USA

- Click the Load button to display the list of companies that match the selection criteria.  
When the Load button is pressed, the program will display the companies in the range you specified.
  - You can adjust the company range, if necessary, then click the Load button again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the companies loaded in the grid.

Select All      Select None

- Click the Include column to “cherry-pick” companies:

Include	ID	Name	Short Name	Street 1	Street 2	Street 3	Street 4	City	State/Prov.	Count
<input checked="" type="checkbox"/>	2	Bargain Mart - Oakland	BMT-OK	Bargain Mart Plaza	Cornr 182nd and...			Anytown	CA	USA
<input checked="" type="checkbox"/>	1	Bargain Mart - San Diego	BMT-SD	Bargain Mart Plaza	Cornr 182nd and...			Anytown	CA	USA
<input checked="" type="checkbox"/>	24	Bargain Mart Stores Inc.	BARMART	Bargain Mart Plaza	Cornr 182nd and...			Anytown	CA	USA
<input checked="" type="checkbox"/>	10	Break-Away Designs	BREAK	743 Wark Street				Sacramento	CA	USA
<input checked="" type="checkbox"/>	15	Forester Building Supplies	FORES	#46 North Gate M...				San Franci...	CA	USA
<input checked="" type="checkbox"/>	12	OKA Outfitters Ltd.	OKA	633 Eglinton W...				Sacramento	CA	USA
<input checked="" type="checkbox"/>	1	Mc Ronald Black	BLA/C	2830 Wabash Bo				Los Angeles	CA	USA



### Click the Opportunity Details button to add the opportunity information:

The screenshot shows the 'Opportunity Details' dialog box. It has a 'Name' field, an 'Amount' field (set to 0.00 CAD), a 'Certainty' field (set to 50), and a 'Stage' field. A red arrow points to the 'Opportunity Details...' button in the top right corner of the main window.

- Click the Opportunity Details button to add opportunity details. The program will display the Opportunity screen, letting you fill in opportunity fields and optional fields for opportunities.
- Click the Close button on the Opportunity details form when you are finished. The Name of the opportunity will now appear in the Name field on the Create Opportunities screen.

The screenshot shows the 'Create Opportunities' screen. The 'Name' field is highlighted with a red box and contains the text 'Lease Discounts'. The 'Opportunity Details...' button is visible in the top right corner.

**Note:** You **MUST** complete the opportunity **Name and Stage fields**. All other information is optional. Note also that the program will not allow you to create duplicate opportunities – so you cannot create an opportunity for the same customer with the same name and creation date.

### Click the Process button to create the opportunities:

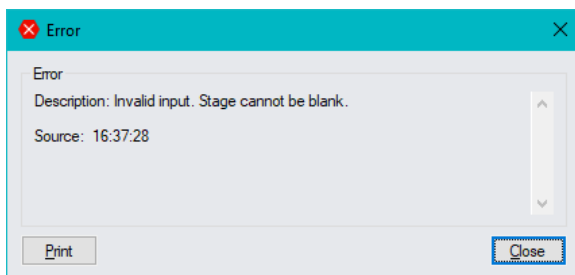
The screenshot shows the 'Create Opportunities' screen with a confirmation dialog box. A red arrow points to the 'Process' button at the bottom left. The dialog box asks: 'Are you sure you want to create Opportunities for Companies?' with 'Yes' and 'No' buttons.

- Click the Process button at the bottom of the screen to proceed.
- Click Yes to confirm that you want to create the opportunities.

The following message will appear if the opportunities were created successfully:

The screenshot shows a 'Message' dialog box. The message text is: 'Description: Create Opportunities complete. There were 3 Opportunities created.' The source is '16:34:34 -'. There are 'Print' and 'Close' buttons at the bottom.

If you did not specify a name or stage for the opportunities, you will see a message like this. Close the message and click the Opportunity Details button to add the opportunity name or stage.



**Click the Log button to confirm which opportunities were processed:**

```
=====
5/5/2020 11:37:12 AM Create Opportunities started.
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM Performed by user: ADMIN
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM Company Range
5/5/2020 11:37:12 AM      Customer Number From [] To [ZZZZZZZZZZ]
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM Opportunity
5/5/2020 11:37:12 AM      Name: Summer Furnishings Sale 2020
5/5/2020 11:37:12 AM      Amount: 1,000.000
5/5/2020 11:37:12 AM      Certainty: 50
5/5/2020 11:37:12 AM      Stage: QUALIFIED
5/5/2020 11:37:12 AM      Assigned To: ADMIN
5/5/2020 11:37:12 AM      Status: Open
5/5/2020 11:37:12 AM      Opened On: 5/5/2020
5/5/2020 11:37:12 AM      Expected Close: 8/15/2020
5/5/2020 11:37:12 AM      Revisit On: 6/1/2020
5/5/2020 11:37:12 AM      Revisit At: 12:00:00 AM
5/5/2020 11:37:12 AM      Notes: Sale dates -- July 15 to Aug 15
5/5/2020 11:37:12 AM      Comment: Printed brochure and email campaign to commence June 1.
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM Creating Opportunity for Customer BARMART...
5/5/2020 11:37:12 AM      Customer BARMART Opportunity ID 86 created.
5/5/2020 11:37:12 AM Creating Opportunity for Customer 1580...
5/5/2020 11:37:12 AM      Customer 1580 Opportunity ID 87 created.
5/5/2020 11:37:12 AM Creating Opportunity for Customer 7200...
5/5/2020 11:37:12 AM      Customer 7200 Opportunity ID 88 created.
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM 3 record(s) created.
5/5/2020 11:37:12 AM
5/5/2020 11:37:12 AM
=====
```

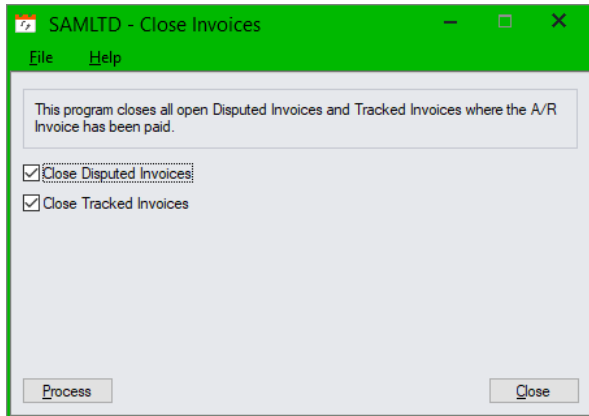
The Log lists:

- The user and the type of operation performed.
- The range of customers specified.
- The opportunity details.
- Each customer that was processed and whether the records were updated.

## Close Invoices

The Close Invoices program closes all open Disputed Invoices and Tracked Invoices when the A/R invoice has been paid, written off, or cleared from A/R (so it has a 0 balance).

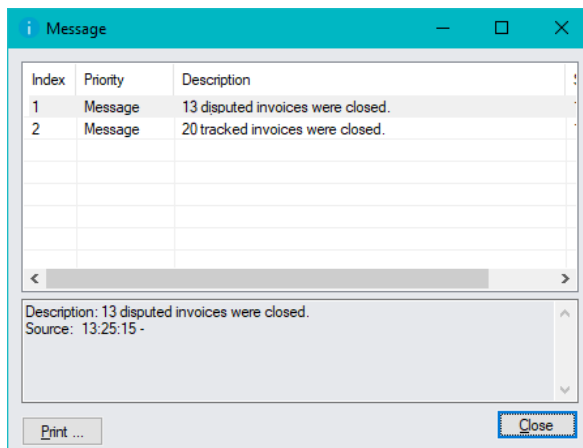
**Access:** Select **TaiRox CRM and Collections > Periodic Processing > Close Invoices**.



**To run the Close Invoices program:**

1. Select **TaiRox CRM and Collections > Periodic Processing > Close Invoices**.
2. Choose whether you want to close Disputed Invoices and Tracked Invoices.
3. Click the Process button.

The program will display a message showing the number of closed records.



## Sync TaiRox Contacts with M/T Contacts

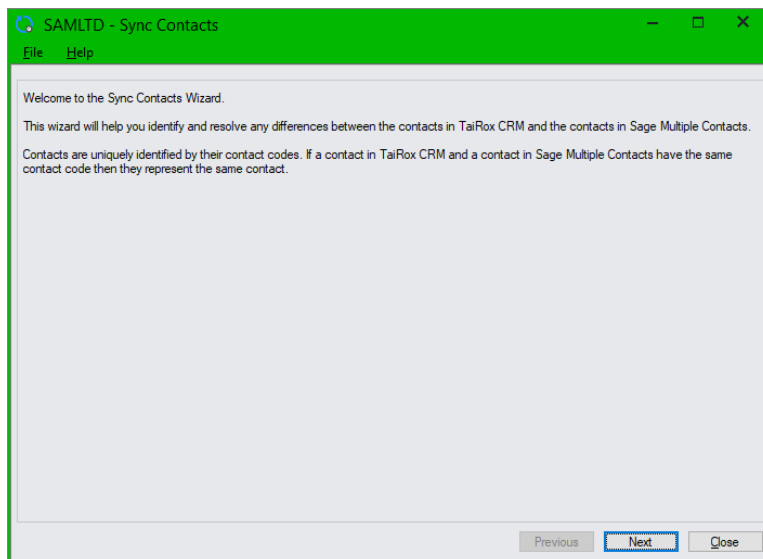
Sync Contacts is a program that quickly identifies contacts in TaiRox CRM and Collection that are missing from the Sage 300 M/T Contacts module and M/T Contacts that are missing from CRM.

Sync Contacts appears if you have Sage 300 version 2020.1 or higher installed and have activated the Sage 300 M/T Contacts module.

**Note on upgrading to Sage 300 2020.1 or higher:** If you are already running CRM and Collections and have just updated to a Sage 300 version with the M/T Contacts module (2020.1 or higher), perform the following steps to add your TaiRox contacts to the M/T Contacts module and to individual A/R customer records:

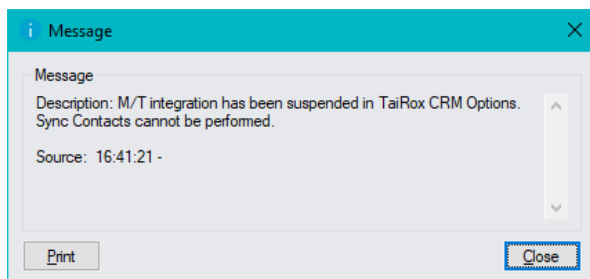
- Run Sync Contacts to add all TaiRox contacts to the Sage 300 M/T Contacts module.
- Run Sync Companies to add all contacts linked to TaiRox companies to their corresponding A/R Customer records.

**Access:** Select **TaiRox > CRM and Collections > Periodic Processing > Sync Contacts** to display the following screen.



**Note:** Make sure that “Suspend M/T Integration” is **NOT** selected in [Setup Options](#). The Sync Contacts program is **disabled** if you select the *Suspend M/T Integration* option.

The following message appears if you try to run Sync Contacts when M/T Integration has been disabled in CRM and Collections [Setup Options](#):

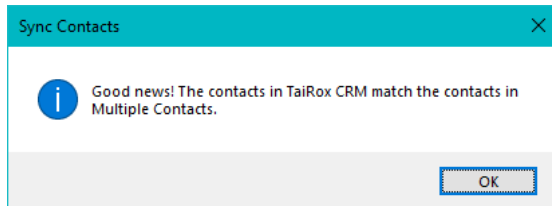


CRM and Collections automatically synchronizes TaiRox contacts data with M/T Contacts data unless you deliberately suspend M/T integration. See [Setup Options](#) for more information on M/T Contacts synchronization.

With integration on, if you add a contact in Sage M/T Contacts, the contact will be added to the contacts list in CRM and Collections. Similarly, if you delete a contact from CRM and Collections, the contact will also be deleted from the M/T Contacts module.

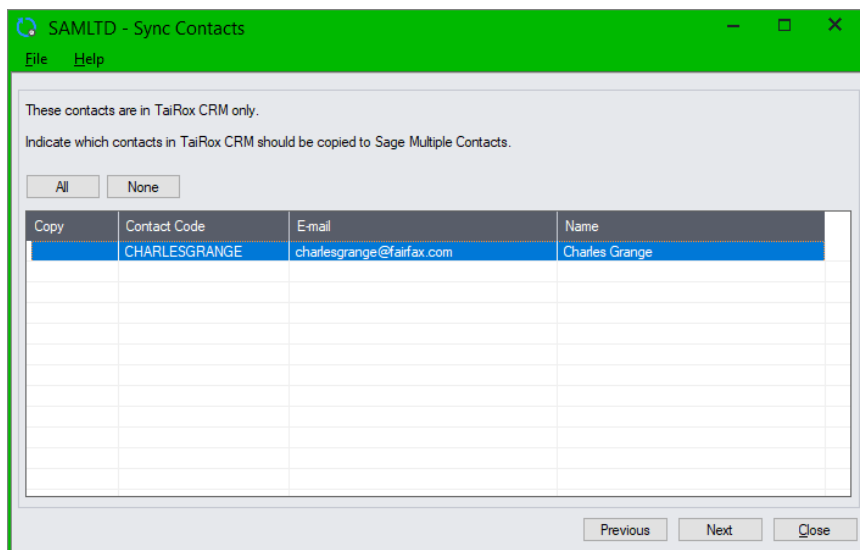
**Notes:**

- Click the Next button to check that contacts are synchronized. If contacts match, the following message appears:



## Screen #2 –contacts in TaiRox CRM and Collections only

If contacts appear in CRM and Collections that are NOT in the M/T Contacts module, the following screen appears.

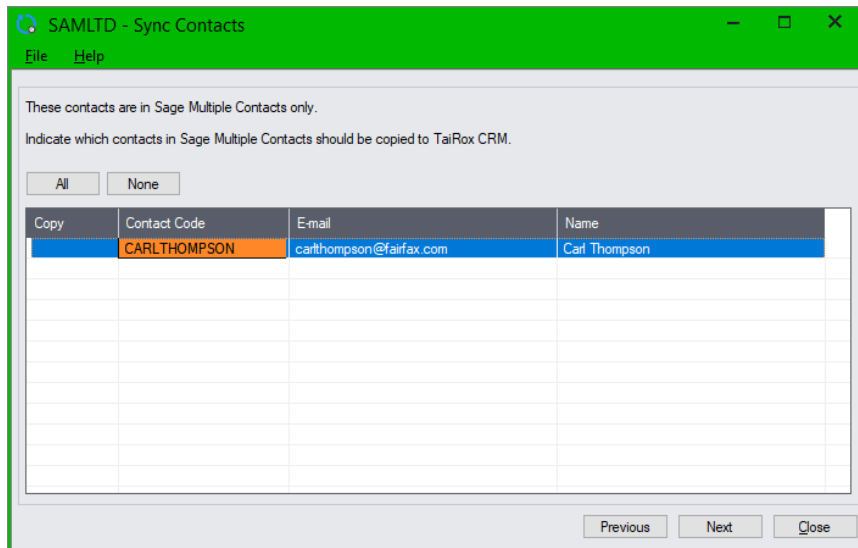


**To copy all TaiRox contacts to M/T Contacts:**

- Click the All button to select all contacts that are only in CRM and Collections.
- Double-click the Copy column for each entry to select or de-select individual contacts.
- Click the None button to de-select all contacts.
- Click the Next button when you have finished selecting contacts and move to the next Sync Contacts screen.

### Screen #3 – contacts in the Sage M/T Contacts module only

If contacts appear in the M/T Contacts module that are NOT in TaiRox CRM and Collections, the following screen appears.

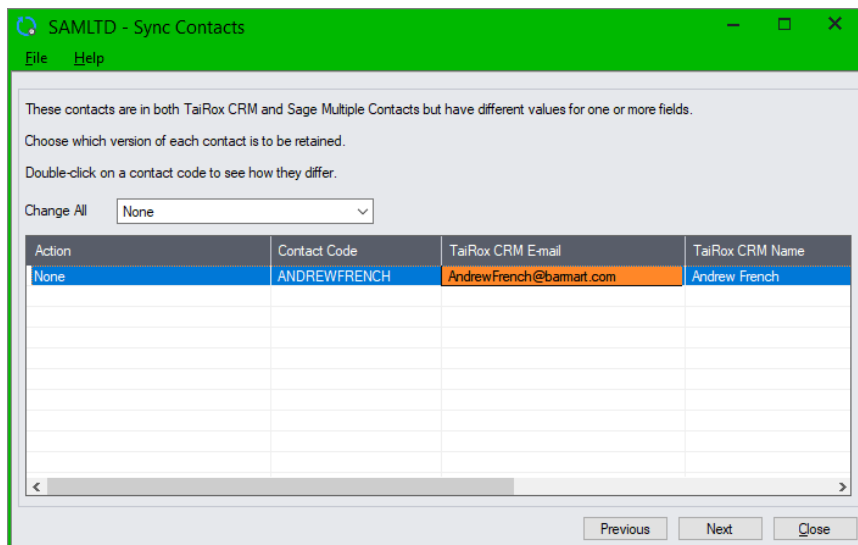


**To copy all M/T Contacts contacts to TaiRox CRM and Collections:**

- Click the All button to select all contacts that are only in the M/T Contacts module.
- Double-click the Copy column for each entry to select or de-select individual contacts.
- Click the None button to de-select all contacts.
- Click the Next button when you have finished selecting contacts and move to the next Sync Contacts screen.

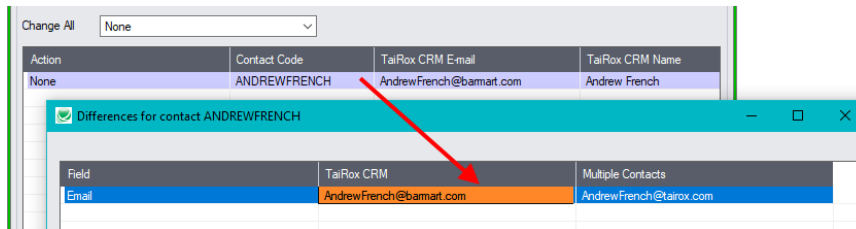
#### Screen #4 – contacts with different field values in TaiRox and Sage M/T Contacts

The following screen appears for contacts that appear in TaiRox CRM and Collections and in Sage's M/T Contacts module but have different field values in each program.

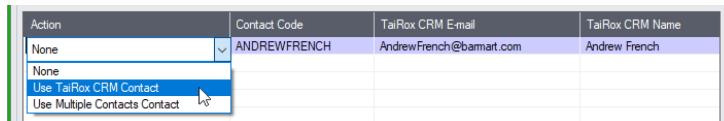


### To reconcile differences between TaiRox contacts and Sage M/T Contacts:

- Double-click individual lines in the grid to see the record differences between contacts in TaiRox CRM and Collections and contacts in Sage's M/T Contacts module.

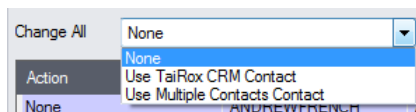


- Double-click the Action column, then choose from the dropdown to reconcile differences for one contact.



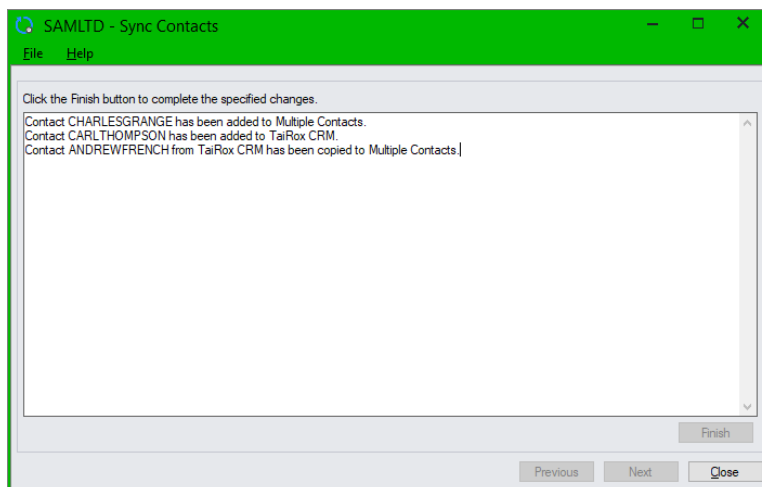
Choose None to leave the differences between records, or choose to use the TaiRox CRM data or the M/T Contacts data for the record.

- Use the Change All dropdown to select the same procedure for all contact differences in the list.  
Choose None to leave the differences between records, or choose to use the TaiRox CRM data or the M/T Contacts data for both records.



### Screen #5 – click the Finish button to make all selected changes

- On the final screen:
  - Click the Finish button to make all selected changes.
  - Click the Close button to exit without making any changes.
  - Click the Previous button to revisit prior screens to check your edits.
- All updates are listed on the screen as the program completes them:



## Sync TaiRox Companies with Sage 300 A/R Customers

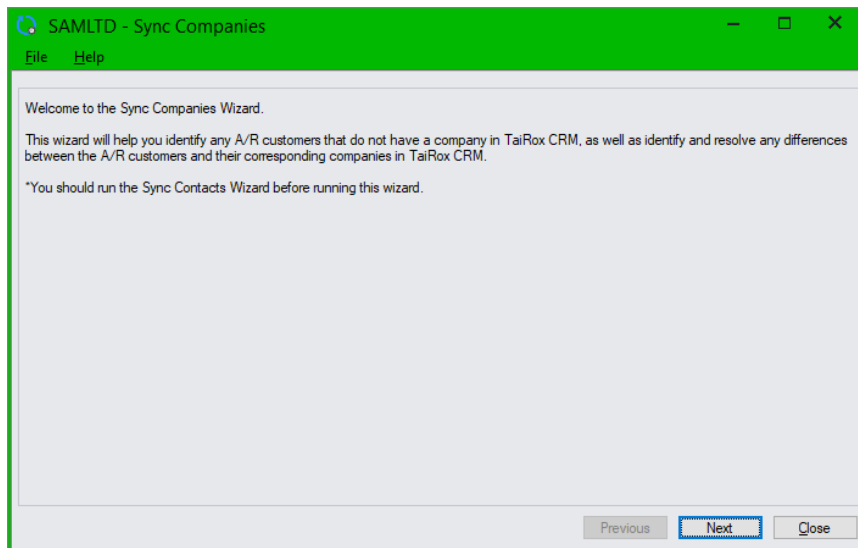
Sync Companies is a program that quickly identifies which TaiRox CRM and Collections companies have data that is inconsistent with the linked customer record in Accounts Receivable.

**If you use the Sage 300 M/T Contacts module**, Sync Companies will also compare the contacts added to TaiRox companies with the contacts added to A/R customers to see if they match.

**Note on upgrading to Sage M/T Contacts:** If you are already running TaiRox CRM and Collections and have just acquired the Sage Multiple Contacts module, perform the following steps to add your CRM contacts to the M/T Contacts module and to individual A/R customer records:

- Run Sync Contacts to add all TaiRox CRM and Collections contacts to the M/T Contacts module.
- Run Sync Companies to add all contacts linked to CRM companies to their corresponding A/R Customer records.

**Access:** Select **TaiRox > CRM and Collections > Periodic Processing > Sync Companies** to display the following screen.



If you do not use M/T Contacts, the final message “You should run the Sync Contacts Wizard ...” will not appear on the Sync Companies screen (shown above).

**Note:** Make sure that “Suspend A/R Integration” is **NOT** selected in [Setup Options](#). The Sync Companies program is **disabled** if you select the *Suspend A/R Integration* option.

The following message appears if you try to run Sync Companies when A/R Integration has been disabled in CRM and Collections [Setup Options](#):





CRM and Collections automatically synchronizes company data with A/R customer account information unless you deliberately suspend A/R integration. See [Options](#) for more information on A/R synchronization.

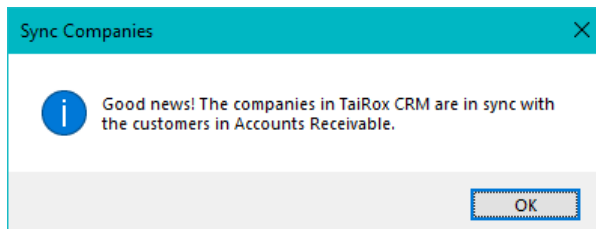
With integration on, if you add a customer in A/R, the customer will be added as a company in CRM and Collections. Similarly, if you delete a customer in A/R, the CRM and Collections company will be unlinked and flagged as deleted.

### Notes:

- **Regarding inactive customers:** Sync Companies only considers active customers when checking if a customer has a corresponding company in CRM and Collections.

If you need to add an inactive customer to CRM and Collections:

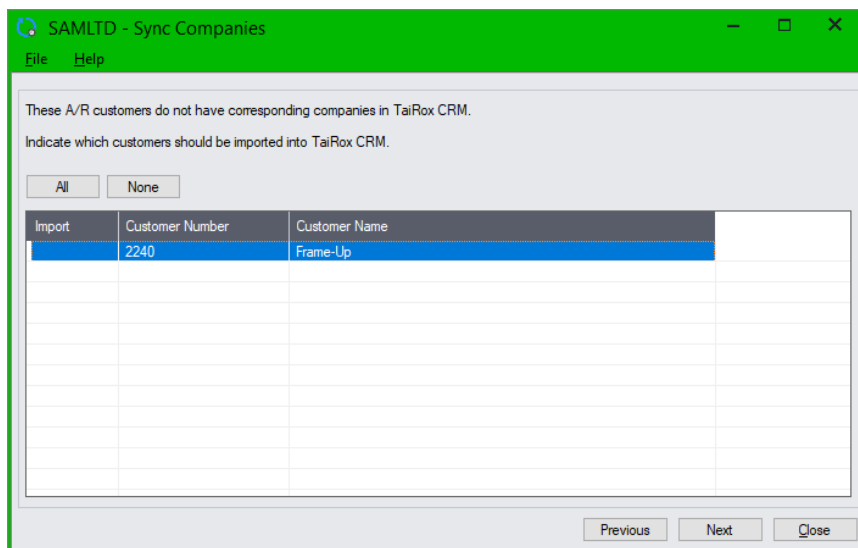
- Open the inactive customer in the A/R Customers program.
  - Make the inactive customer active, and save the change. The record will be automatically sync'd with the record with CRM and Collections.
  - Make the customer record inactive again, and save the change.
- If all company data matches with A/R customer data, the following message appears when you click the Next button to check that companies are synchronized.



- **If you do not use the M/T Contacts module – or if “M/T integration” is suspended in [Setup Options](#)**, the program will only compare companies to customers. **It will not compare contacts.**

## Screen #2 – A/R customers missing from TaiRox CRM and Collections

If Accounts Receivable customers are missing from TaiRox CRM and Collections, the following screen appears.

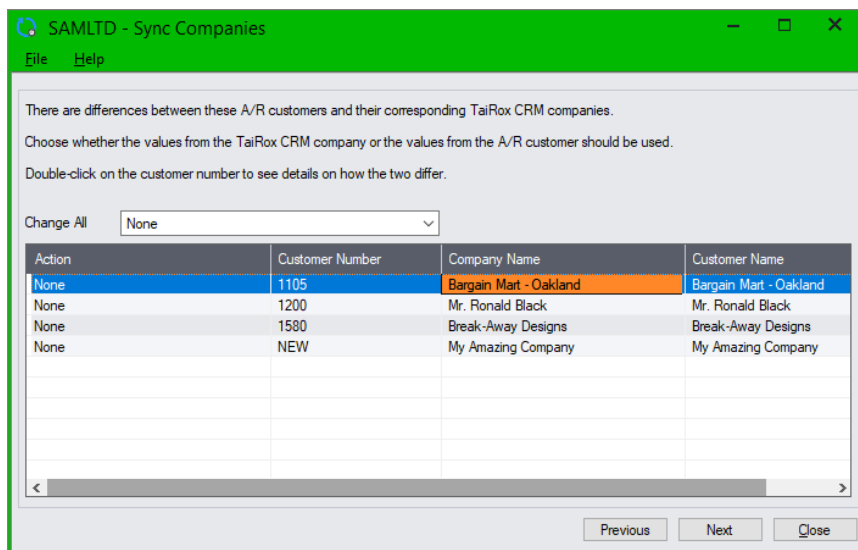


### To import missing A/R customers into CRM and Collections:

- Click the All button to select all customers that are only in Accounts Receivable and import them into CRM and Collections.
- Or double-click the Import column for each entry to select or de-select individual A/R customers.
- Click the None button to de-select all A/R customers.
- Click the Next button when you have finished selecting customers and move to the next Sync Companies screen.

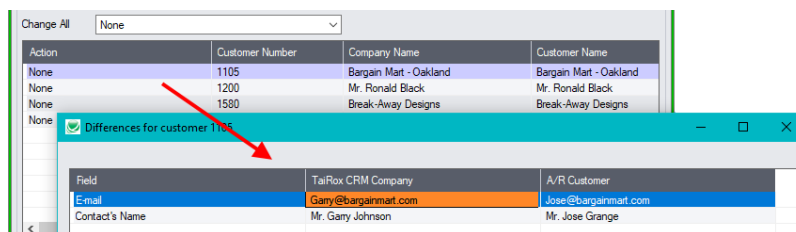
### Screen #3 – A/R customers with different field values than in TaiRox CRM and Collections

The following screen appears for A/R customers that appear in TaiRox CRM and Collections but have different field values in each program.



### To reconcile differences between A/R customers and TaiRox companies:

- Double-click individual lines in the grid to see the record differences between A/R customer records and companies in TaiRox CRM and Collections.



- Double-click the Action column, then choose from the dropdown to reconcile differences for one contact.



Choose None to leave the differences between records, or choose to use the TaiRox data or the A/R Customer data for both records.

- Use the Change All dropdown to select the same procedure for all companies and customers in the list.

Choose None to leave the differences between records, or choose to use the TaiRox CRM data or the A/R customer data for both records.

Change All	None		
Action	None	Company Name	Customer Name
	Use TaiRox CRM Company		
	Use A/R Customer		
None		Bargain Mart - Oakland	Bargain Mart - Oakland
None	1200	Mr. Ronald Black	Mr. Ronald Black

## Screen #4 – click the Finish button to make all selected changes

- On the final screen:
  - Click the Finish button to make all selected changes.
  - Click the Close button to exit without making any changes.
  - Click the Previous button to revisit prior screens to check your edits.
- All updates are listed on the screen as the program completes them:

SAMLTD - Sync Companies

File Help

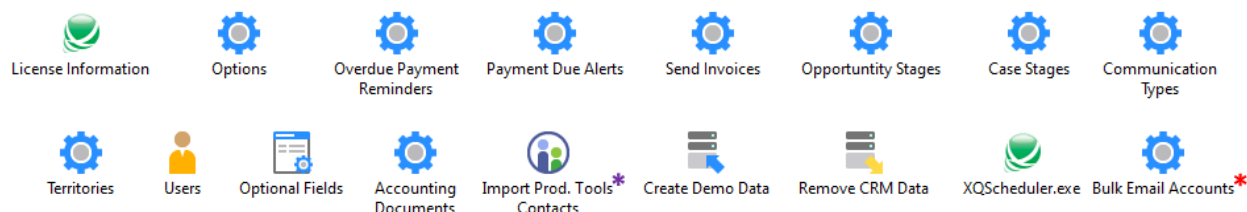
Click the Finish button to complete the specified changes.

A TaiRox CRM company has been created for customer 2240.  
 A/R Customer 1105 has been updated to match the TaiRox CRM company.  
 A/R Customer 1200 has been updated to match the TaiRox CRM company.  
 A/R Customer 1580 has been updated to match the TaiRox CRM company.  
 A/R Customer NEW has been updated to match the TaiRox CRM company.

Finish

Previous Next Close

# Setup and Maintenance Screens



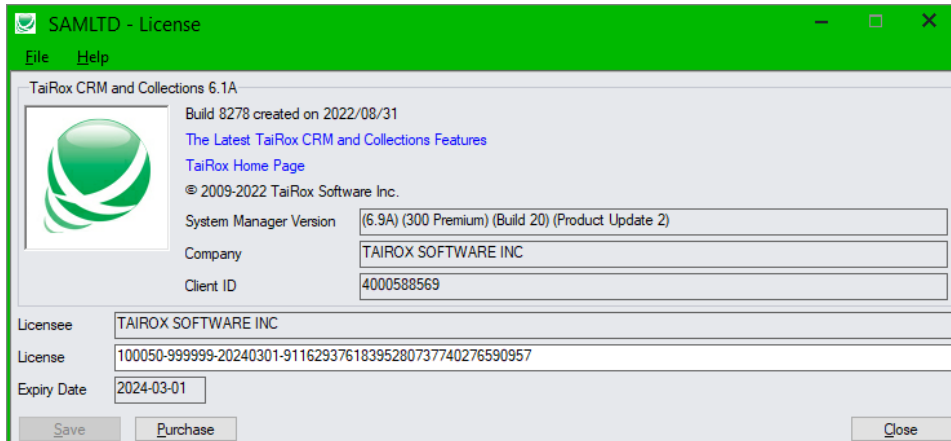
## Notes:

- Import Prod. Tools Contacts appears only if you use Productivity Tools and do **not** use the Sage 300 M/T Contacts module.
- XQScheduler.exe launches the CRM Job Scheduler for Overdue Payment Reminders and Payment Due alerts. You can also start it directly from the Windows File Manager.
- [Bulk Email Accounts](#) – in the Marketing folder – lets you enter setup information bulk email accounts. It does not appear if you are using the Collections module without CRM.

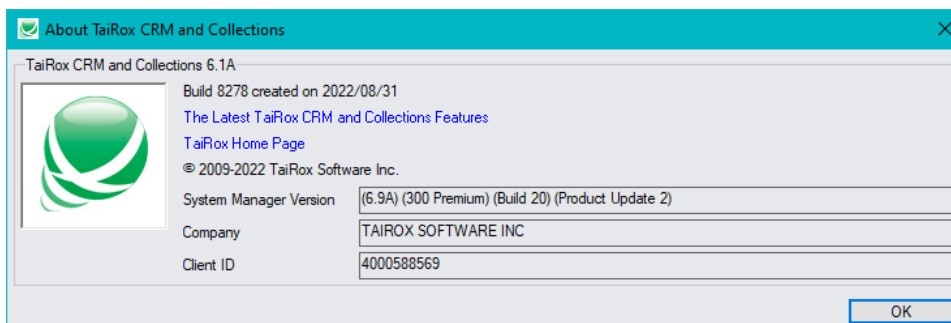
## License Information

The License Information icon lets you enter the CRM and Collections License code.

**Note:** The Client ID and Company information **must exactly match** that shown by the Sage 300 License Manager.



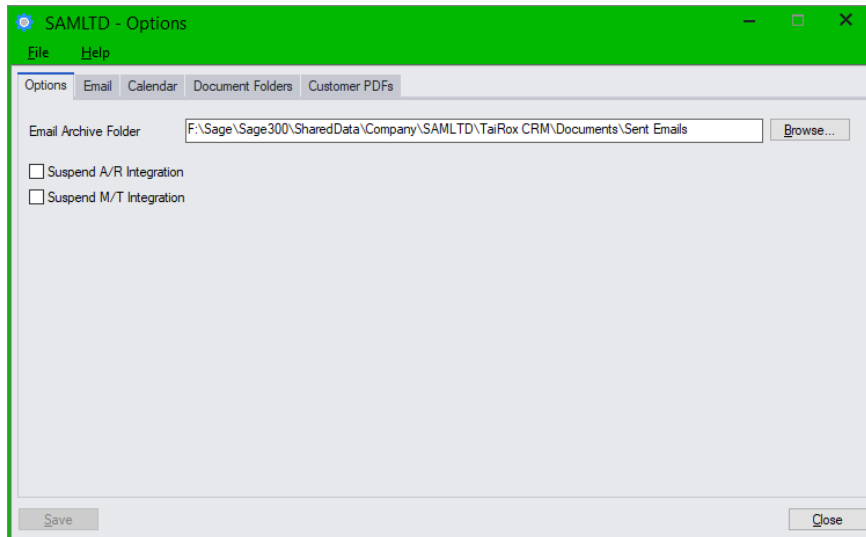
The Help About menu choice shows build information and links to the TaiRox web site.



## Options

Options include settings that apply to all CRM and Collections users. For information on changing settings in data entry grids, see [Appendix B: Using Data Entry Programs](#).

### Options Tab



**Email Archive Folder:** This is the default folder where emails created by Send Documents and Overdue Payment Reminders are stored as EML files. The files are referenced in CRM as Communications. (EML files store the complete email, including attachments.)

If you do not specify an archive folder, EML files will be stored in the Sage 300 Shared Data folder under COMPANY\<company ID>\TaiRox CRM\Documents. This setting lets you use a different location.

You can use UNC file paths to specify the archive folder (such as \\ComputerName\C\$\SentEmails).

**Suspend A/R Integration:** This checkbox lets you disable automatic updates between Accounts Receivable customer records and CRM company records.

**Note:** Sync Companies is disabled if you select the **Suspend A/R Integration** checkbox in Setup Options. Do not suspend A/R Integration while setting up CRM.

Leave this box unchecked to automatically synchronize customer and company records in Accounts Receivable and CRM.

**Suspend M/T Integration:** This checkbox appears *only if you are using the Sage Multiple Contacts module*. It lets you disable automatic updates between Sage 300 M/T Contacts records and the contacts listed in the CRM Contacts program.

**Note:** Sync Contacts is disabled if you select the **Suspend M/T Integration** checkbox in Setup Options. Do not suspend M/T Integration while setting up CRM.

In addition, Sync Companies will not compare contacts added to CRM and Collections Companies and A/R Customers if you suspend M/T Integration.

### More about CRM and Collections / Accounts Receivable Integration

CRM and Collections / Accounts Receivable integration synchronizes corresponding customer records.

If you change a field that is common to CRM companies and A/R customers (including optional fields and contacts), the linked customer record or company record will also be updated.

- If you insert a new company record in CRM and Collections (or A/R), the record will also be inserted in A/R (or CRM and Collections).
- If you add a contact to a company in CRM, the contact will be added to the A/R customer record.
- If you add a record with a new territory in A/R, the new territory will be added to CRM.
- If you delete a customer in A/R, the CRM company will be unlinked and marked as deleted.

## Email Tab

**Email Server Settings:** These settings are used by the following programs:

- Send Documents functionality in the Companies window to resend documents to customers.
- The Send Statements/Letters, Send A/R Invoices, Send O/E Invoices, and Send Invoices programs in the Send Documents folder.
- Send Bulk Email program unless you use a bulk email provider like MailChimp or SendGrid.
- By default for the [Overdue Payment Reminders](#) program, [Payment Due Alerts](#) program and [Send Invoices](#) program if you do not add settings with [Overdue Payment Reminders Setup](#), [Payment Due Alerts Setup](#), and [Send Invoices Setup](#).

[Send Bulk Email](#) lets you send batches of emails to contact groups, company contacts, or A/R customer contacts using the specified email server or using bulk email providers like MailChimp or SendGrid. This program is available only with [CRM](#) and Collections.

[Send Invoices](#) provides flexible customer selection criteria for emailing A/R and O/E Invoices to customers.

[Send Documents](#) lets you resend past customer documents to one or more customer contacts. See [Resend Individual Documents from the Companies window](#) for more information.

For more information on sending statements, letters, and invoices to customers, see [Send Statements, Letters, and Invoices to Multiple Recipients](#).

**Server Name:** Enter the name of the outgoing message server for CRM emails.

**Server Port:** Enter the SMTP port number.

**Use SSL:** Check this box to have the email communication SSL encrypted.

See the “Use SSL” note under “Send Test Email,” below.

**Username:** Enter the account user name for sending emails.

**Password:** Enter the password for the user account.

**From Email:** Provide the default From Email address that you want to use for emails created by CRM and Collections. (You can't always separate the From Email from the Username email.)

If this field is left blank, the default From Email address for CRM documents will be the user's email address in Sage 300.

**Note:** Depending on your SMTP server, this address may need to match the one you enter in the Username field – or it may not work unless you set up an email alias. Consult your SMTP server document for details about sending emails.

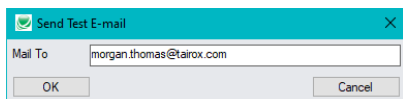
See the following sections for more information on overriding the From Email address for specific email programs:

- For A/R Statements and Letters and for A/R and O/E invoices use the [Accounting Documents Setup](#) program to override the default From Email.
- For Overdue Payment Reminders and Payment Due Alerts, use the [Overdue Payment Reminders Setup](#) program and [Payment Due Alerts Setup](#) program to override the default From Email.

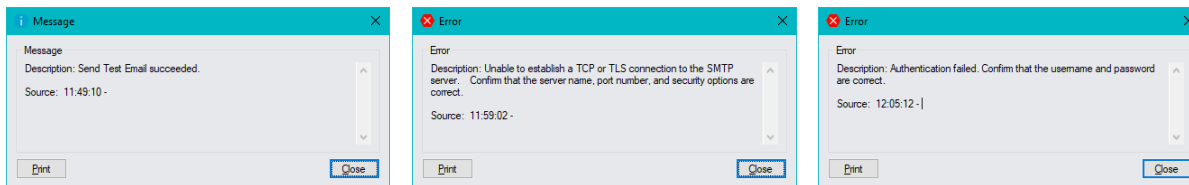
You can also override the default From Email address when you resend documents from the Company window by specifying a new address in the [Send Documents](#) window.

For more details on emailing documents, see [Step 13: Add settings for emailing overdue payment reminders, and payment due alerts to customers](#) and [Step 14: Add settings for emailing invoices, statements, letters to customers](#).

**Send Test Email:** Click this button to test email settings. The program will prompt you for an email address, and then send a test email.



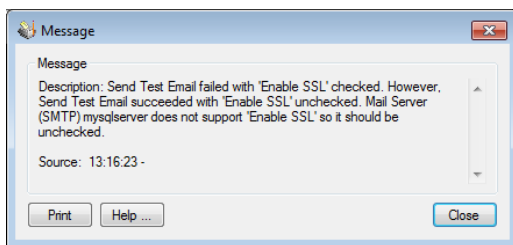
A number of different messages can appear depending on whether the test was successful. If the test fails, you should also check the log file – “C:\Users\<username>\AppData\Local\Temp\TaiRox CRM and Collections.log”.



Note that you can send test emails to multiple recipients by separating the email addresses with commas or semicolons.

***Note regarding “Use SSL” if unsupported by the SMTP server***

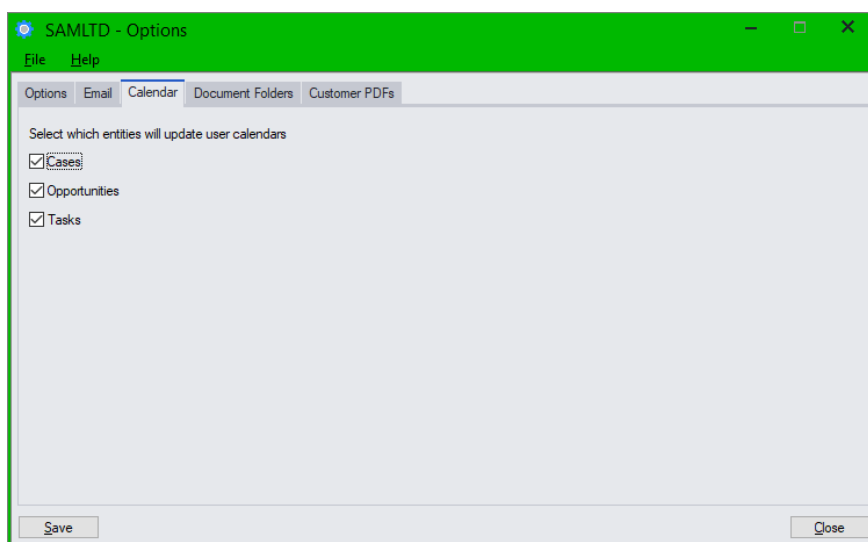
If you select the “Use SSL” checkbox, CRM will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. If the secure test fails, but the insecure test is successful, the program will display the following message.



If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The "Use SSL" checkbox has different meanings for different email sending mechanisms.)
- You should uncheck "Use SSL" to send emails without SSL protection.

## Calendar Tab



**Select which entities will updates user calendars:** Select the entities that you want to update users' calendars when you change revisit dates and user assignments. You can update users' calendars for changes to cases, opportunities, and tasks.

### Note:

- CRM and Collections does not send calendar files when tasks are generated by the Overdue Payment Reminders program. However, it will send calendar reminders when you change the revisit date or user for tasks generated by Overdue Payment Reminders.
- "Opportunities" will not appear if you are running the Collections module *without CRM*.

CRM and Collections generates .ics files when employees add or change revisit dates and user assignments for cases, opportunities, and tasks, and sends them to the "Email 1" address entered in Sage 300 for the assigned – and unassigned -- user.

**.ics files** (iCalendar files) are plain text files containing the details for a calendar event or a to-do item. Typically, they are sent as attachments to emails that you can save to a calendar, such as the calendar in Outlook or the Google calendar.

For more details on ics files and setting up users for receiving emails, see [Appendix E: Updating Calendars with .ics Event Files](#).

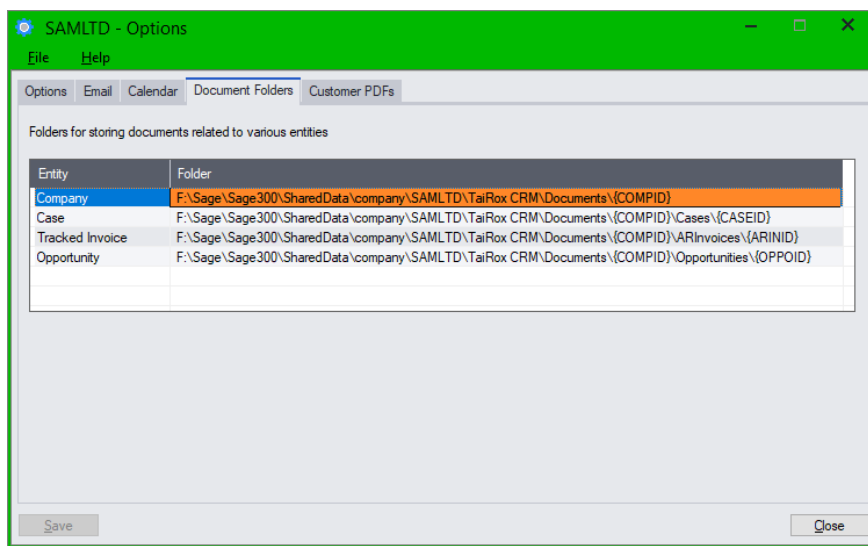


To set up TaiRox CRM and Sage 300 to send calendar event files you must also:

- Add “Email 1” email addresses for all users in **Sage 300 > Administrative Services > Users**.  
*TaiRox CRM and Collections sends calendar events to the Email 1 email address.*
- Add the settings for your email server on the Email tab in **CRM and Collections > Setup > Options**.

Use the Send Test Email button to test the email server settings.

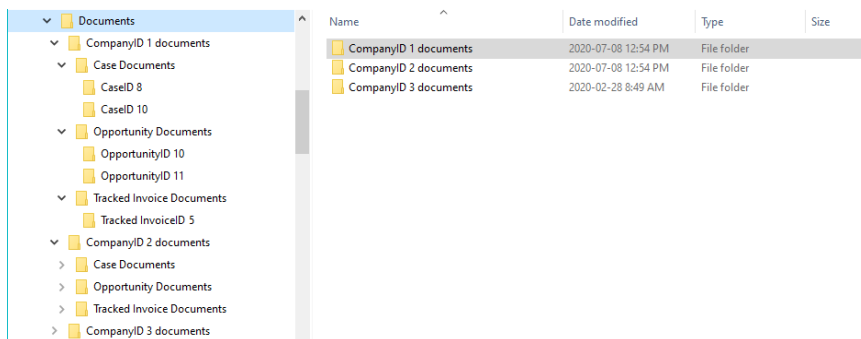
## Document Folders Tab



The Document Folders tab lets you organize sales and accounting documents according to your company's unique needs – and in any location accessible from the CRM and Collections server.

**Note:** The Opportunity entry will not appear if you installed the Collections module without CRM.

The default settings shown above store all CRM and Collections documents, for each company, under the Sage 300 “*SharedData\Company\<companyID>\TaiRoxCRM\Documents*” folder – as shown below:



In this example, company documents are stored in the *Documents\CompanyID* folder, and documents for Cases, Tracked Invoices, and Opportunities are stored below that in the *Cases*, *ARInvoices*, and *Opportunities* subfolders.

Alternatively, you can store case, tracked invoice, and opportunity documents separately from all other documents, as in the following example:

Entity	Folder
Company	C:\Sage300SharedData\company\SAMLTD\TaiRox CRM\Documents\{COMPID}
Case	C:\Sage300SharedData\company\SAMLTD\TaiRox CRM\Cases\{COMPID}\{CASEID}
Tracked Invoice	C:\Sage300SharedData\company\SAMLTD\TaiRox CRM\ARInvoices\{COMPID}\{ARINID}
Opportunity	C:\Sage300SharedData\company\SAMLTD\TaiRox CRM\Opportunities\{COMPID}\{OPPOID}

If you use drag and drop to attach documents companies, cases, opportunities and invoices, they are automatically copied to folders that you specify here.

**Note:** Tracked Invoice documents include all documents attached to invoices using the Tracked Invoices, Overdue Invoices, and Disputed Invoices program.

In this example, all cases are stored in one folder, all tracked invoices are stored in another folder, and all opportunities are stored in a third folder, with subfolders for companies and folders below that for individual opportunities and cases.

Folder Name	Creation Date/Time	File Type
Case Documents	2020-02-28 9:00 AM	F
CompanyID 1 documents	2020-02-28 8:47 AM	F
CompanyID 2 documents	2020-02-28 8:48 AM	F
CompanyID 3 documents	2020-02-28 8:49 AM	F
Opportunity Documents	2020-02-28 9:01 AM	F

If you want, you can have the root opportunity and case folders anywhere on the network, so, for example, cases could be located on an Accounting server, and opportunities on a Sales server.

The document folder paths include the following variables for specifying folders with names for the Company ID, Case ID, Tracked Invoice ID, and Opportunity ID.

Vaible name	Variable	Example – specification in Options and actual generated path
<b>Company ID</b>	{COMPID}	\\TaiRox CRM\Documents\{COMPID} \\TaiRox CRM\Documents\COMP00003
<b>Case ID</b>	{CASEID}	\\TaiRox CRM\Documents\{COMPID}\Cases\{CASEID} \\TaiRox CRM\Documents\COMP00003\Cases\CASE00009
<b>Tracked Invoice ID</b>	{ARINID}	\\TaiRox CRM\Documents\{COMPID}\TrackedInvoices\{ARINID} \\TaiRox CRM\Documents\COMP00003\TrackedInvoices\ARIN00015
<b>Opportunity ID</b>	{OPPOID}	\\TaiRox CRM\Documents\{COMPID}\Opportunities\{OPPOID} \\TaiRox CRM\Documents\COMP00003\Opportunities\OPPO00082

**Note:** You can use the company ID variable for company document paths, case documents paths, tracked invoice document paths, and opportunity document paths.

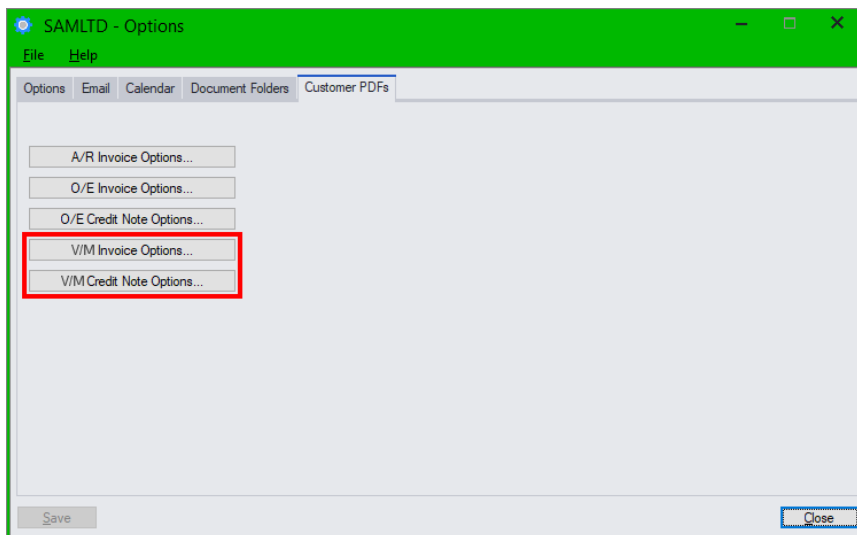
However, you cannot use the company ID variable for contact document paths or communication document paths because contacts do not have to belong to a company, and communications can belong to contacts, companies, opportunities, or cases.

## Customer PDFs Tab

Click the A/R and O/E Invoice and Credit Note Options buttons to choose the report and report options to use for generating A/R and O/E invoices and credit/debit notes attached to emails sent by the Overdue Payment Reminders program, Payment Due Alerts program, and Send Invoices program.

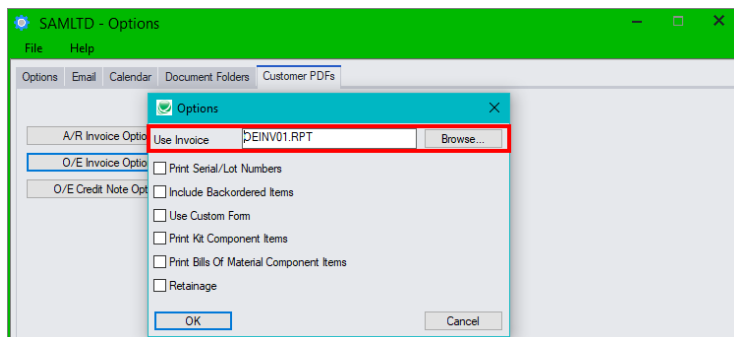
- The A/R Invoice Options apply also to A/R Credit and Debit notes.
- The “V/M” invoice and credit note buttons appear if you use Technisoft's Service Manager application for Sage 300.

**Note:** The reports and options specified here are shared by the Overdue Payment Reminders program, Payment Due Alerts program, and the Send Invoices program, so the invoices generated by all three programs will match.



**Also note:**

- The Crystal Report form used for A/R and O/E invoices and CR/DR notes is set on this tab.  
By default, the program will browse to the AR\ENG or OE\ENG folder to let you choose the report for invoices.
- **Do not specify a path when you choose an invoice print form** in CRM Options.



If you are running a multi-lingual Sage 300 system, the Overdue Payment Reminders program, Payment Due Alerts program, and Send Invoices program will use the preferred customer language from the appropriate language folders. (This will not work if you include a path to a specific folder.)

## Overdue Payment Reminders Setup

These settings are used by the [Overdue Payment Reminders program](#) (in the Collections folder) to send overdue payment reminder emails to customers with overdue invoices or create phone call tasks to followup on overdue accounts.

To send overdue payment reminder emails you must also [specify email addresses for overdue payment reminders](#) on the Contacts tab for each company record.

**Note:** CRM uses the “Preferred Language” setting in the Company window to send overdue payment reminder emails and invoices to customers in English, French, or Spanish. See [Appendix C](#) for details.

### Settings Tab

#### Overdue Payment Reminder Stages

**Days Overdue:** The default settings are standard aging buckets, but you can change the date ranges. CRM uses these aging buckets to assign overdue invoices to invoice stages when you click the Update button on the Overdue Payment Reminders form or Overdue Invoices form. See [Overdue Payment Reminders](#) for information on using the Overdue Payment Reminders program.

**Label:** You can change the labels used to describe each overdue invoice stage. Labels appear on the Overdue Payment Reminders form.

**Color:** Double-click the Color square to change the color used for each overdue stage on the Overdue Payment Reminders form.

**Action:** The program supports two actions:

- **Send Email** – to send payment reminders using the selected email template to company contacts when the company's oldest invoice reaches this overdue stage.
- **Create Task** – to create a collections task for calling up a customer when the company's oldest invoice reaches this overdue stage.

The Overdue Payment Reminders program performs the action specified for the *oldest* overdue invoice.

**Email Template:** Choose the default email message that you want to send to customers for each overdue invoice stage. You can edit the default template files or add your own.

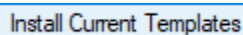
Note also that the “Format” setting on this tab determines whether only overdue documents, or all unpaid documents, are included in the table on overdue payment reminder emails.

You can override the default email message templates specified here when you process overdue payment reminders.

Note the following points regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
\\<Sage300>\XQ61A\Templates\Overdue Payment Reminders
- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory  
C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders
- The Setup program looks in the company directory for Overdue Payment Reminder templates:  
C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders

You can get the most recent templates installed by program updates by clicking the “Install Current Templates” button. It will copy new templates from \\XQ61A\Templates\Overdue Payment Reminders to the company folder.

A rectangular button with a blue border and the text "Install Current Templates" in blue.

**Note that the program will copy over the previous templates of the same name. You should rename templates that you are using to ensure they aren't replaced.**

See [Appendix C: Editing Payment Due and Overdue Payment Reminders](#) for information on editing reminder email templates and using templates that match the target company's preferred language.

Note that the Overdue Payment Reminders program uses the email template for the oldest invoice that's overdue when it sends out overdue invoice payment reminders. So if you have an email that's over 90 days overdue, the program will send the email for the oldest overdue email stage (unless you change the default aging periods).

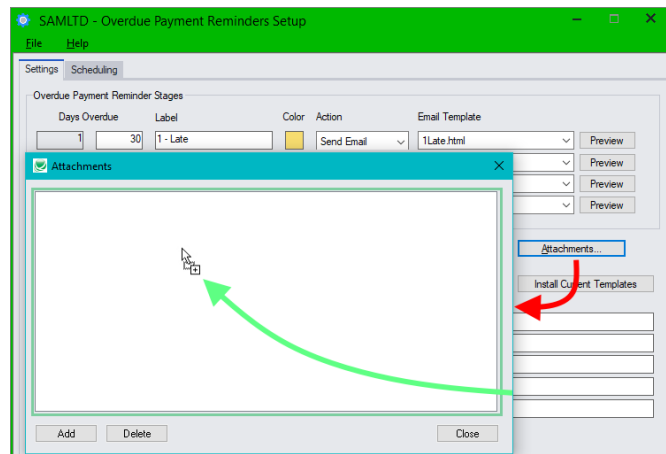
The Template dropdown is greyed out if the action is Create Task.

**Preview:** Click the Preview button to view the body of the selected payment reminder email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.

**Attachments:** Click the Attachments button to add additional attachments to all of the overdue payment reminder emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.



**Minimum days overdue before creating an Overdue Payment Reminder:** Specify the **default** minimum number of days that an invoice must be overdue before marking it as an overdue invoice and creating a reminder email or phone call task.

You can change this setting for individual companies in the Company window. (For example, you may have customers whose payment is always late or that may have different payment terms.)

**Minimum number of days between Overdue Payment Reminders:** If you do not specify a minimum (e.g. 10 days), the program will let you create a new reminder each time you run Update and process payment reminders. This can result in customers getting reminders on two consecutive days, if you send out reminders daily, unless you specify a minimum number of days between reminders.

**Format:** Select Overdue Invoices to only list overdue invoices, debit notes, and interest charges on overdue payment reminders, or select Account Summary to list all unpaid documents and unapplied credits. Use the Preview button to see the difference between Overdue Invoices and Account Summary formats.

**Email Subject:** Specify the subject line that you want to appear on all overdue payment reminder emails.

**From Email:** Specify the "From Email" address that you want to appear on overdue payment reminders.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your overdue payment reminder emails.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

**Create a Communication When You Send an Email:** Select the "Create a Communication" checkbox to create a communication when overdue payment reminders are emailed to customers.

**Note:** This checkbox creates a communication for each email recipient. See [Selecting Recipients for Emailed Invoices, Statements, Letters, Payment Reminders and Payment Due Alerts](#).

**Email Archive Folder:** Specify a different archive folder for overdue payment reminders. If you do not specify a folder, CRM will use the folder specified on the first tab in the [Options](#) form.

*If you do not specify a folder in the Options form, CRM will store EML files in the Sage 300 Shared Data folder under COMPANY\Company ID\TaiRox CRM\Documents. (EML files include the email message and all attachments.)*

**Organize Documents:** This dropdown lets you save archived overdue payment reminder emails in subfolders of the Email Archive Folder you specified above, organized by Year (*ArchiveFolder\YYYY*), Year and Month (*ArchiveFolder\YYYYMM*) or Year, Month, and Day (*ArchiveFolder\YYYYMMDD*).

### Notes On using Overdue Payment Reminders

- **You can turn off overdue payment reminders on the Company screen for each customer.** See the [Company window](#) to change reminder settings for individual customers.
- **You specify the company contacts that receive emails on the Contacts tab on the company screen.**
- **For each company**, you can set the minimum days that a payment must be overdue before sending an overdue payment reminder, and you can set the minimum number of days between overdue payment reminders and payment due alerts.
- You can attach copies of overdue invoices to the emailed payment reminders.
- You can change the email template specified here when you process reminder emails. See [Overdue Payment Reminders](#).
- Send emails that match each company's preferred language. See [Sending Emails and Invoices Using the "Preferred Language" Company Setting](#).

### Scheduling Tab

The Scheduling tab provides the email and task assignment options that will be in effect when running Overdue Payment Reminders as a background Windows scheduled task. (These options also appear in a popup window when you click the "Create Overdue Payment Reminders" button when generating payment reminders interactively from the Collections folder.) See the CRM and Collections Scheduler User Guide for information on setting up Windows scheduled tasks.

The substitution variables let you provide user information for emails when the program is run as a task.

SAMLTD - Overdue Payment Reminders Setup

File Help

Settings Scheduling

Send Email

☒ Attach copies of the invoices

Substitution Variables

Variable Name	Value
\$USER_NAME	admin
\$USER_PHONE	7788812019
\$USER_EMAIL1	
\$USER_EMAIL2	

Create Task

Assign To

Revisit On  days after creation

Generate overdue payment reminders, but do not send emails or create tasks for customers with

☒ Unapplied Credit

☒ Disputed Invoices

☒ Promised Payments

**Send Email settings:** Apply to any selected customers that have a Send Email action.

- Select "Attach Copies of the Invoices" to include PDF copies of overdue invoices with emails.
- Use the Variables values to provide the name, email address, and phone number that you want to appear in emails when the program is launched from a scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

**Create Task settings:** These settings apply to any selected customers that have a Create Task action.

- You can specify a user name in the Task options to assign tasks for this set of companies to a single user.
- Specify the number of days following run time that the call task should appear on the assigned user's dashboard.
- The “V/M” invoice and credit note buttons appear if you use Technisoft's Service Manager application for Sage 300.

**Exclude Customer settings:** Choose which customers to exclude from emails or tasks.

## Editing Overdue Payment Reminder Templates

See [Appendix C: Editing Payment Due and Overdue Payment Reminders](#) for more information on editing email templates.

Note that each recipient receives only one email per mailout. For example, the following HTML overdue payment reminder email – 4Delinquent.html – might be sent to customers whose oldest invoice payment is over 90 days overdue.

Dear Dr. Penn,

One or more of your invoices is seriously overdue.

Because we have been unable to work out payment with you, I regret to inform you that if we do not hear from you in 5 days we will report this issue to the credit bureau and turn your account over to a collection agency who will contact you in regard to payment.

The details of all overdue invoices are as follows:

Invoice	Date	Amount	Due	Balance	Days Overdue
IN00000000000039	05-Apr-20	1112.43	15-Apr-20	283.18	138
IN00000000000052	31-May-20	138.35	05-Jun-20	138.35	87

Sincerely,  
Administrator

Overdue Payment Reminder templates are ANSI text or HTML files that provide the contents of the reminder emails. Make sure that you use a plain text editor – like Notepad – to edit email templates.

Template files must be saved in ANSI text format – not in a Unicode variant. You can check the format by opening the file in Notepad and clicking File > Save As. The Encoding appears at the bottom of the form.

The Overdue Payment Reminders Setup program looks for email template files in the following location:

<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Overdue Payment Reminders

See [Sending Emails and Invoices Using the “Preferred Language” Company Setting](#) for more information on template folders.



## Payment Due Alerts Setup

Payment due alerts are email reminders sent to customers *before* a payment is due to remind them and encourage prompt payment. Overdue payments are not included in payment due alerts; they are handled by the overdue payment reminders program.

Before you can send payment due alerts, you must also [specify email addresses for overdue payment reminders](#) on the Contacts tab for each company record.

**Note:** CRM uses the “Preferred Language” setting in the Company window to send overdue payment reminder emails and invoices to customers in English, French, or Spanish. See [Appendix C](#) for details.

### Settings Tab

**Number of days before due date to send a Payment Due Alert:** Specify the number of days before payments are due to send reminders. This number applies to the invoice that is closest to being due.

**Minimum number of days between Payment Due Alerts:** If you do not specify a minimum (e.g. 10 days), the program will let you create a new alert each time you run Update and process payment due alerts. This can result in spamming customers.

The Minimum number of days between Payment Due Alerts ***must be less*** than the Minimum number of days before the due date to send Payment Due Alerts. This ensures that an alert will be sent for each invoice before it becomes due.

This means that if you run Payment Due Alerts daily, an alert will go out for each invoice with the number of days specified before the due date.

**Email Template:** Choose the default email message that you want to send to customers to remind them of invoice payments. You can edit the default template files or add your own – and you can override the default email message templates when you process payment due alerts.

Note the following points regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
\<Sage300>\XQ61A\Templates\Payment Due Alerts

- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory

C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Templates\Payment Due Alerts

- The Payment Due Alerts Setup program looks in the company directory for Payment Due Alerts templates. Template files must be stored in the following folder to be selected by the program.

C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Payment Due Alerts

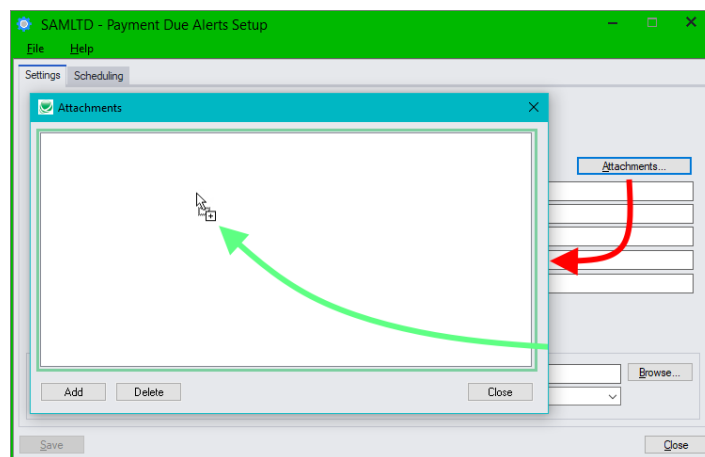
You can get the most recent templates installed by program updates by copying the new templates from \XQ61A\Templates\Payment Due Alerts to the company folder. Make sure that your current templates have a different name from the templates installed by CRM and Collections.

**Preview:** Click the Preview button to view the body of the selected payment due alert email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.

**Attachments:** Click the Attachments button to add additional attachments to all of the payment due alerts emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.



**Email Subject:** Specify the subject line that you want to appear on all payment due alert emails.

**From Email:** Specify the “From Email” address that you want to appear on payment due alerts.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your payment due alert emails.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

### Notes On using Payment Due Alerts

- The program includes invoices on payment due alerts that are within the number of days before the due date that is set in Payment Due Alerts Setup.
- Invoices will appear on only one payment due alert.** After that, the program ignores them.
- Invoices that are past the due date will not appear on a Payment Due Alert.

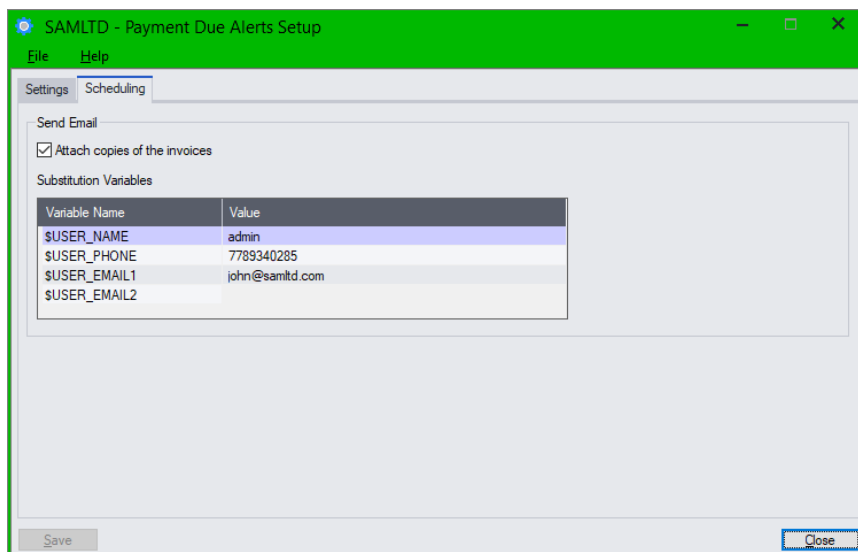
- If you do not send payment due alerts frequently, some invoices could be skipped.
- **You can turn off alert emails on the Company screen for each customer.** See the [Company window](#) to change settings for individual customers.
- **You specify the company contacts that receive emails on the Contacts tab on the company screen.**
- **For each company**, you can set the minimum number of days between payment due alerts.
- You can attach copies of due invoices to the payment due reminder emails.
- You can change the email template specified when you process reminder emails. See [Payment Due Alerts](#).
- You can send emails that match each company's preferred language. See [Sending Emails and Invoices Using the "Preferred Language" Company Setting](#).

## Scheduling Tab

The Scheduling tab provides the email options that will be in effect when running Payment Due Alerts as a scheduled background task.

See the CRM and Collections Scheduler User Guide for information on setting up Windows scheduled tasks for sending Payment Due Alerts.

The substitution variables let you provide user information for email variables when the program is run as a scheduled task.



### Send Email settings

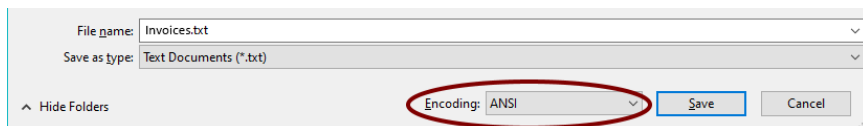
- Select "Attach Copies of the Invoices" to include PDF copies of invoices with emails.
- Use the Variables values to provide the name, email address, and phone number that you want to appear in emails when the program is launched from a scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

## Editing Payment Due Alert Templates

See [Appendix C: Editing Payment Due and Overdue Payment Reminders](#) for more information on editing email templates. Note that each recipient receives only one email per mailout.

Payment Due Alert templates are ANSI text or HTML files that provide the contents of the reminder emails. Make sure that you use a plain text editor – like NotePad – to edit email templates.

Template files must be saved in ANSI text format – not in a Unicode variant. You can check the format by opening the file in Notepad and clicking File > Save As. The Encoding appears at the bottom of the form.



The Payment Due Alerts Setup program looks for email template files in the following location:

<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Payment Due Alerts

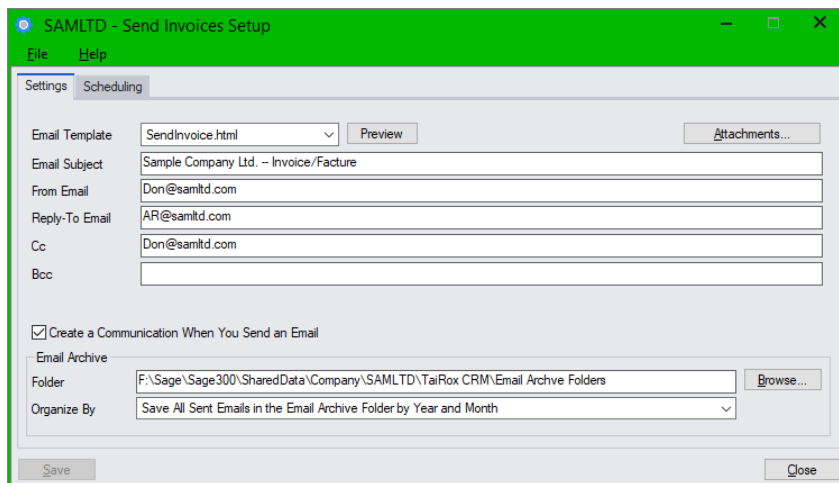
See [Sending Emails and Invoices Using the “Preferred Language” Company Setting](#) for more information on template folders.

## Send Invoices Setup

The Send Invoices program sends posted invoices to all recipients. You specify the company contacts that receive invoices on the Contacts tab on the company screen.

**Note:** If you select A/R Invoices or O/E invoices for a company contact, the program will send that recipient A/R Invoices, O/E Invoices, and O/E CR/DR notes – as well as documents created by Technisoft's Service Manager for Sage 300 (if you have it), and any A/R summary invoices created by other third-party programs for Sage 300.

Before you can send invoices to recipients, you must also [select email addresses for invoices](#) on the Contacts tab for each company record.



**Note:** CRM uses the “Preferred Language” setting in the Company window to send emails and invoices to customers in English, French, or Spanish with the Send Invoices program. See [Appendix C](#) for details.

### Settings Tab

**Email Template:** Choose the default email message that you want to send to customers with invoices. You can edit the default template files or add your own – and you can choose a different email message template when you run the Send Invoices program.

Note the following points regarding template locations:

- During installation, the program copies the email templates to the following program directory:  
`<Sage300>\XQ61A\Templates\Send Invoices`
- When you first activate CRM and Collections for a new company, the program copies the email templates to the following company directory  
`C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Templates\Send Invoices`
- The Send Invoices Setup program looks in the company directory for Send Invoices templates. Template files must be stored in the following folder to be selected by the program.  
`C:\Sage300SharedData\Company\<companyID>\TaiRox CRM\Templates\Send Invoices`

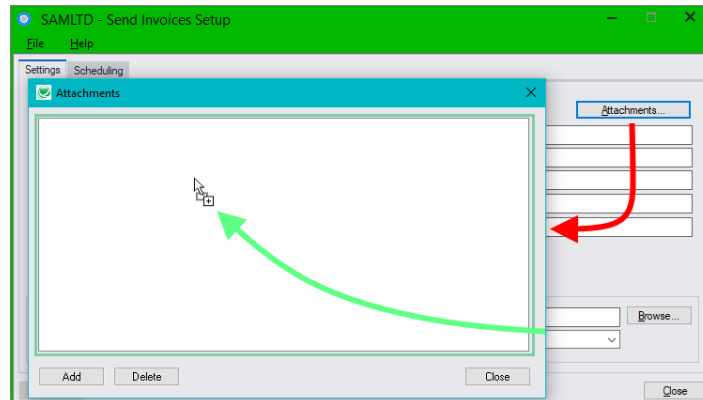
**Preview:** Click the Preview button to view the body of the selected Send Invoices email template.

**Note:** The Preview button will use the default program for the file type that's set up in Windows File Explorer. For example, the default program may be your internet browser.

You can get the most recent templates installed by program updates by copying the new templates from \\XQ61A\\Templates\\Send Invoices to the company folder. Make sure that your current templates have a different name from the templates installed by CRM and Collections.

**Attachments:** Click the Attachments button to add additional attachments to all of the invoice emails – such as your policy on overdue accounts.

You can use “drag and drop” to add attachments, or click the Add button on the Attachments screen to search for attachments using Windows File Explorer.



**Email Subject:** Specify the subject line that you want to appear on all invoice emails.

**From Email:** Specify the “From Email” address that you want to appear on invoice emails.

**Reply-To Email:** You can also specify a different email address that will be used when recipients reply to your emails.

**Cc / Bcc:** Add email addresses in the Cc and Bcc fields to send copies (or blind copies) to other recipients in your company. To Cc or Bcc multiple recipients, separate the email addresses with commas or semicolons.

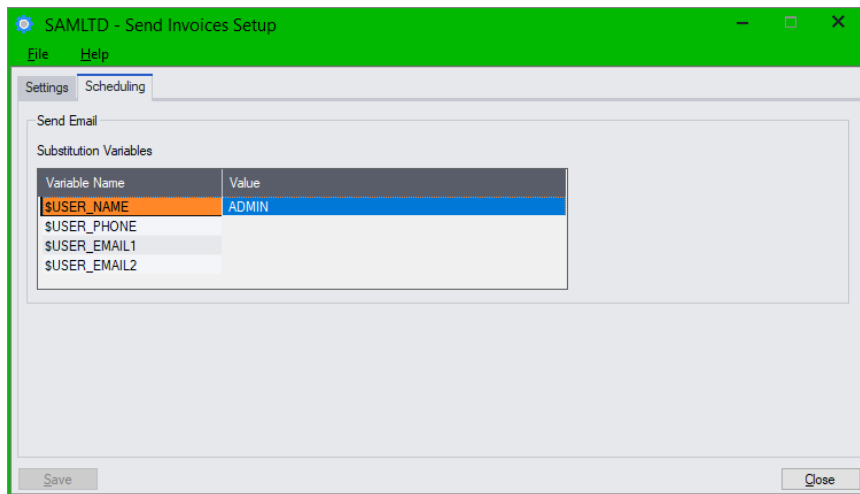
### Notes On using Send Invoices

- ***Invoices must be posted and unprinted to appear in an email run.***
- ***You can turn off invoices on the Company screen for each customer.*** See the [Company window](#) to change settings for individual customers.
- ***You specify the company contacts that receive emails on the Contacts tab on the company screen.***
- You can change the email template specified when you process emails. See [Send Invoices](#).
- You can send emails that match each company’s preferred language. See [Sending Emails and Invoices Using the “Preferred Language” Company Setting](#).

### Scheduling Tab

The Scheduling tab provides user settings that will be in effect when running Send Invoices as a scheduled background task.

See the CRM and Collections [Scheduler User Guide](#) for information on setting up Windows scheduled tasks for sending invoices.



### Send Email Substitution Variables

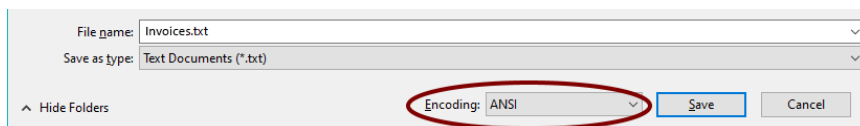
- Use the Variables values to provide the name, email address, and phone number that you want to appear in emails when the program is launched from a scheduled task. (Note that the actual task user may be the Sage 300 Admin user, but you may want emails to be from the Accounts Receivable manager.)

### Editing Send Invoices Templates

See [Appendix C: Editing Payment Due and Overdue Payment Reminders](#) for more information on editing email templates. Note that each recipient receives only one email per mailout.

Send Invoice templates are ANSI text or HTML files that provide the contents of the reminder emails. Make sure that you use a plain text editor – like Notepad – to edit email templates.

Template files must be saved in ANSI text format – not in a Unicode variant. You can check the format by opening the file in Notepad and clicking File > Save As. The Encoding appears at the bottom of the form.



The Send Invoices Setup program looks for email template files in the following location:

<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Send Invoices

See [Sending Emails and Invoices Using the “Preferred Language” Company Setting](#) for more information.

## Opportunity Stages

Opportunity Stages is a maintenance program that lets administrators specify the stages of an opportunity. See [Opportunities](#) for information on using opportunities.

***Opportunity Stages will not appear if you are using the Collections module without CRM.***

CRM creates a default set of stages when you create the CRM database, but you can change the stages to suit your company. The opportunity stages should match the steps in your sales process.

The screenshot shows the 'SAMLTD - Opportunity Stages' application window. It features a green header with 'File' and 'Help' menus. The main content area includes a 'Code' field with 'MEETING', a 'Description' field with 'Meeting', and a grid for metadata: 'Created On' (2022-05-10), 'Created By' (ADMIN), 'Modified On' (2022-05-10), and 'Modified By' (ADMIN). Below this is an 'Inactive' checkbox, a 'Sort Order' field with the value '3', and a 'Notes' text area. At the bottom, there are 'Save', 'Delete', and 'Close' buttons.

### Notes:

- The Sort Order determines the order for listing the opportunity stages in drop-down lists and charts.
- When your CRM data is first activated, the following stages are created. You can add more stages, and change the order.
  - UNQUAL (sort order 1)
  - QUALIFIED (sort order 2)
  - MEETING (sort order 3)
  - PROPOSAL (sort order 4)

For example, you might add “NEGOTIATION” to the default set.

- When an opportunity stage is marked Inactive, it will no longer be presented as an option when adding new opportunities. An inactive stage will continue to be displayed in grids and charts if present in the selected data.
- The Notes field can be up to 250 characters long.



## Case Stages

Case Stages is a maintenance program that lets administrators specify the stages of collection, support, appointment, or other processes. See [Cases](#) for more information.

Cases include a “Type” field, which can be Collections, Support, Appointment, or Other, and you can set the sort order for case stages to separate the stages by case type.

For example, if you have collection cases only, your codes might look like this: “REMINDER”, “DEFAULTNOTE”, “DEMAND”, and “LEGAL”.

However, if you have different types of cases, you might have codes like C1, C2, C3, and S1, S2, S3 – with appropriate descriptions for collection and support cases, and use the sort order to list collection case stages first in the Finder.

All stages are user-defined. You do not have to use them.

### Notes:

- The Sort Order is a number used for presenting data in the Finder and in drop-down lists and charts.

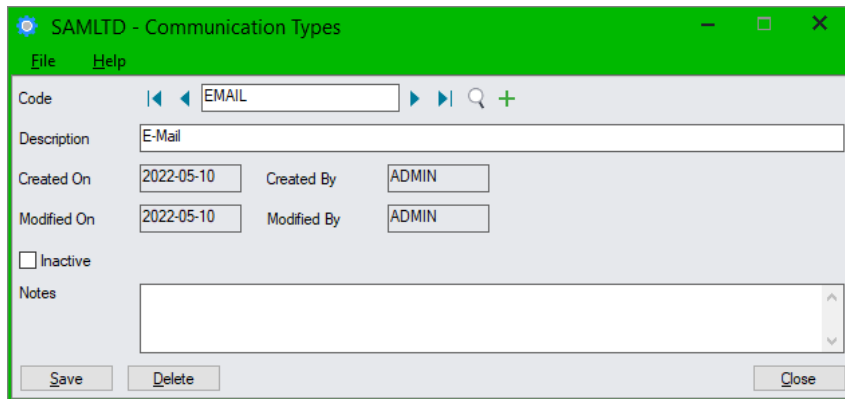
In this example, the Finder on the Cases screen shows stages with sort order 1-9. The first stage listed is for an appointment, the next group shows collection stages, and the last group is for support issues.

Code	Description	Created By	Modified On	Modified By	Inactive
A1	Appointment	ADMIN	2021-03-02	ADMIN	No
C1	Opening collection case with ...	ADMIN	2021-03-02	ADMIN	No
C2	Case still open	ADMIN	2021-03-02	ADMIN	No
C3	Case resolved	ADMIN	2021-03-02	ADMIN	No
S1	S1 - Issue logged with support	ADMIN	2021-03-02	ADMIN	No
S2	S2 - Issue escalated to level 2	ADMIN	2021-03-02	ADMIN	No
S3	S3 - Level 2 contact made	ADMIN	2021-03-02	ADMIN	No
S4	S4 - Customer appointment	ADMIN	2021-03-02	ADMIN	No
S5	S5 - Support issue resolved	ADMIN	2021-03-02	ADMIN	No

- When a case stage is marked Inactive, it will no longer be presented as an option when adding or updating cases. An inactive stage will continue to be displayed in grids and charts if present in the selected data.
- You can use the notes to describe what action should be taken at each stage, who should be informed, etc.
- The Notes field can be up to 250 characters long. Use it to describe what steps should be performed at each stage.

## Communication Types

Communication Types is a maintenance program that enables administrators to identify the different types of communications.



SAMLTD - Communication Types

File Help

Code: EMAIL

Description: E-Mail

Created On: 2022-05-10 Created By: ADMIN

Modified On: 2022-05-10 Modified By: ADMIN

☐ Inactive

Notes:

Save Delete Close

### Notes:

- When data is activated, the following types are created:
  - EMAIL
  - FAX
  - MAIL
  - PHONE
  - TEXT
- When a communication is marked Inactive, it will no longer be presented as an option when adding new communications. An inactive type will continue to be displayed in grids if present in the selected data.
- The Notes field can be up to 250 characters long.

## Territories

Territories is a maintenance program that enables administrators to add the territories to which companies belong, and to specify which users have access to each territory.

All new customer companies must be assigned to a territory when they are set up. The territory can be any that you imported from Sage 300 or added in CRM and Collections – or can be the default (blank) Territory.

**Note:** *CRM and Collections restricts what a Sage 300 User can see based on the territories to which they belong.*

ID	Code	Name	Notes	Created On	Created By
1		Default Territory		2019-12-09	ADMIN
2	AK	Alaska		2019-12-09	ADMIN
3	CA	California		2019-12-09	ADMIN
4	IA	IA		2019-12-09	ADMIN
5	MO	MO		2019-12-09	ADMIN
6	NJ	NJ		2019-12-09	ADMIN
7	ON	ON		2019-12-09	ADMIN
8	PA	PA		2019-12-09	ADMIN
9	TX	TX		2019-12-09	ADMIN
10	VA	VA		2019-12-09	ADMIN

### Options when using Territories:

- CRM and Collections users can be granted a right to see company data for **all** territories. This is a switch in the User record that effectively turns off all restrictions based on territory for that user.
- CRM and Collections users can be granted a right to see companies in any number of specific territories. There is no hierarchy of territories – this provides maximum flexibility.

### To assign a user to a territory

- Add the user to Sage 300.
- Add the user to CRM and Collections with the Users Setup program.
  - Select All Territories for the user *in the Users Setup program*, or add a list of Territories.

#### OR

- Select a territory *in the Territories Setup program*, and add users to the User tab. You can select All Territories for users that you add to User tab to grant them access to all territories.

## Users

The Users program presents a search field so you can immediately find users if you have more than one page. Double-click a row to open the user record.

User must be added to CRM and Collections and assigned to territories – or all territories – before they can enter or view any company data.

**Note:** *TaiRox CRM restricts what a Sage 300 User can see based on the territories to which they belong.*

The screenshot shows the 'SAMLTD - Users' window. At the top, there are fields for 'User ID' (ADMIN) and 'User Name' (Administrator). Below these are tabs for 'Users' and 'Territories'. A search bar and a 'Search' button are present. The 'Order By' dropdown is set to 'User ID'. A table lists four users:

ID	User ID	User Name	All Territories	Notes	Created On	Created By	Modifi
1	ADMIN	Administrator	Yes	Administrator	2021-05-10	ADMIN	2021-4
4	DON	Don Fenske	Yes	Non Admin	2021-05-10	ADMIN	2021-4
3	KEITH	keith Rider	Yes	Non Admin	2021-05-10	ADMIN	2021-4
2	WADE	Wade Woodsman	Yes	Non Admin	2021-05-10	ADMIN	2021-4

At the bottom, there are navigation controls including 'Page 1 of 1', 'Add...', 'Delete', 'Change Log...', and 'Close' buttons.

### To add a user to CRM and Collections

- Click the Add button.
- Click the Finder button on the User screen that appears. (see screen below)
- Select the Sage 300 User from the Finder.
- Click the Add button, then Close the User window.
- Double-click the All Territories column to provide access to All Territories, or go to the Territories tab and click the Link button to add a list of territories to which the user has access.

### Notes:

- **A CRM and Collections user must first be added to Sage 300 as a user.**
- Users can be assigned to a list of territories, or they can be assigned to all territories.
- The CRM and Collections user “ADMIN” is created when CRM and Collections data is activated. All other CRM and Collections users must be added with the Users program.
- The Territories tab has a Link button for granting selected user access to one or more territories. The Unlink button removes that access.

## User popup window for adding new users and viewing existing ones

The User popup window lets you add Sage 300 users to CRM and Collections and edit existing users.

The left screenshot shows the 'SAMLTD - User' window with the 'Optional Fields' tab selected. It includes fields for 'Created On', 'Modified On', 'Created By', 'Modified By', 'User ID', 'All Territories', and 'Notes'. The 'Add' button is at the bottom left, and the 'Cancel' button is at the bottom right.

The right screenshot shows the same window with data entered: 'Created On' is 2021-05-10, 'Modified On' is 2023-05-30, 'Created By' is ADMIN, 'Modified By' is ADMIN, 'User ID' is KEITH, and 'Notes' is Non Admin. The 'Save' button is at the bottom left, and the 'Close' button is at the bottom right.

### Notes:

- All CRM users must first be added in Sage 300 as Sage 300 users.
- Individual Sage 300 users must then be added as CRM users before they can use CRM.
- The Notes field can be up to 250 characters long.
- The Optional Fields tab appears if you use the Optional Fields module and assigned optional fields to users.

## To Delete a User from CRM and Collections

- Select the user in the grid on the Users tab.
- Click the Delete button or press the Delete key.
- You can view deleted users by right-clicking the Title bar on the grid and choosing Show Deleted.

The screenshot shows the 'SAMLTD - Users' window with the 'Users' tab selected. A grid of users is displayed. A context menu is open over the grid, showing options like 'Hide User ID', 'Restore Defaults', and 'Show Deleted'.

ID	Deleted	User ID	All Territories	Notes	Created On	Created By
1		ADMIN	Yes	Administrator	2021-05-10	ADMIN
5		CARLA	Yes		2022-11-22	ADMIN
4		DON	Yes	Non Admin	2021-05-10	ADMIN
3	Deleted	KEITH	Yes	Non Admin	2021-05-10	ADMIN
6		MORGAN	Yes		2023-04-19	ADMIN
2		WADE	Yes	Non Admin	2021-05-10	ADMIN

## To Undelete a User from CRM and Collections

- Use "Show Deleted" to see the deleted user.
- Double-click the Deleted column for the user you want to undelete.

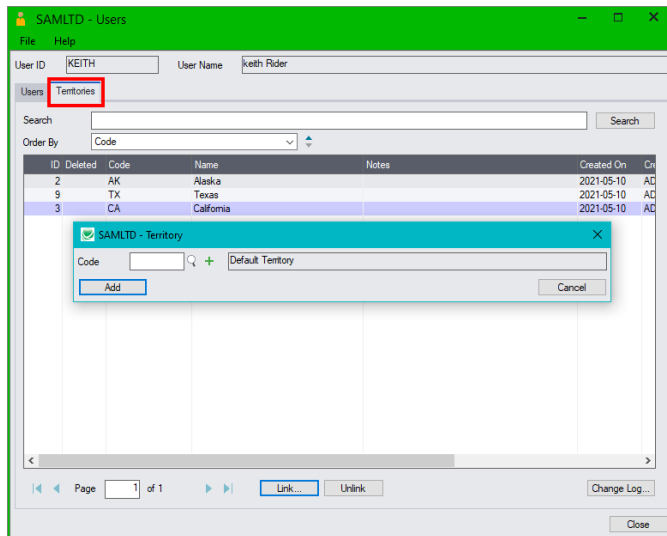
The screenshot shows the 'SAMLTD - Users' window with the 'Users' tab selected. A confirmation dialog box is open, asking 'Are you sure you want to undelete User 'KEITH'?'. The 'Yes' button is highlighted.

ID	Deleted	User ID	All Territories	Notes	Created On	Created By
1		ADMIN	Yes	Administrator	2021-05-10	ADMIN
5		CARLA	Yes		2022-11-22	ADMIN
4		DON	Yes	Non Admin	2021-05-10	ADMIN
3	Deleted	KEITH	Yes	Non Admin	2021-05-10	ADMIN
6		MORGAN	Yes		2023-04-19	ADMIN
2		WADE	Yes	Non Admin	2021-05-10	ADMIN

- Confirm that you want to undelete the user.

## To Link a User to a Territory

- Select the user from the grid on the Users tab, then select the Territories tab.



- Click the Link button (or press the Insert key in the grid).
- Enter the code for the territory, or use the Finder to select it.

## To Unlink a User from a Territory

- Select the user from the grid on the Users tab, and click the Unlink button (or press the Delete key).
- Users will no longer appear in the grid for this territory.

### See Also:

[Appendix A - Common Screen Operations](#) for searching, sorting, tabs and common button explanations.

[Appendix B – Using Data Entry Programs](#) for tabs and common button explanations.

## Optional Fields

Optional Fields is a maintenance program that lets administrators specify the optional fields that will appear on the Company, Contact, Opportunity, Case, User, Document and Communication screens.

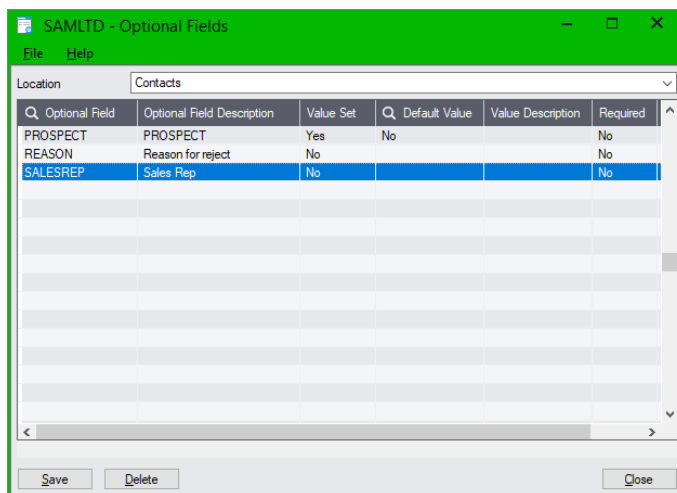
TaiRox optional fields are searchable, sortable and displayed in grids. For example, if you add a “sales rep” optional field to company records, you will see the “sales rep” field in the Companies window grid, and you can list companies in “sales rep” order or select all companies for a particular sales rep.

You can also specify company optional fields to search for disputed invoices, overdue invoices, tracked invoices, and promised payments, allowing you to find items by “sales rep” (using our previous example).

In addition, CRM and Collections synchronizes optional field values if optional fields for a company are the same as the optional fields for an A/R Customer.

To use optional fields in CRM and Collections:

- First, add optional fields to Sage 300 using **Common Services > Optional Fields**. You can also add values for a Finder list when you add the fields.
- Second, add the Sage 300 optional fields to CRM and Collections using **TaiRox CRM and Collections > Setup > Optional Fields**.

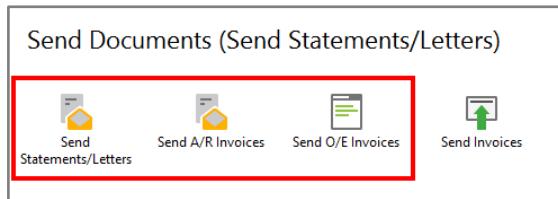


### Notes:

- *If the list is empty*, just click the Finder in the first column heading to select the new optional field from the list that appears.  
*If the list already contains optional fields*, click the Insert key, and then click the Finder to select the new optional field from the list.
- Double-click the Value Set field to set a default value for the field.
- Use the Finder in the Default Value field to select from values or enter a default value if no list of values exists.
- When an optional field for a company is the same as an optional field for an A/R Customer, the Promote function (Promoting a Company to an A/R Customer) will copy this field to the A/R Customer's optional fields.
- If you add an optional field to CRM and Collections that is already used for A/R customers, the program will display a message stating that the optional fields match. You can click the Yes button to set the values for the new field to the values in A/R records.

## Accounting Documents

Accounting Documents is a maintenance program that lets administrators specify Email messages and various email options for Send Statement/Letters, Send A/R Invoices, and Send O/E Invoices.



*The Accounting Documents program lets you specify email messages for three programs in the Send Documents folder – Send Statements/Letters, Send A/R Invoices, and Send O/E Invoices.*

**Access:** Open **Setup > Accounting Documents**.

**Name (of accounting document):** Select the document type from the “Name” dropdown for which you want to set up message and server settings – i.e. A/R Statement, A/R Letter, A/R Invoice, or O/E Invoice.

Once you choose the document type, you can specify the properties and email message for this document type, as well as where to store copies of all sent emails.

Note that this form does not apply to Overdue Payment Reminders, Payment Due Alerts or the Send Invoices program.

**Inactive Checkbox:** Select this checkbox if you do not want to email this document type.

The “Inactive” checkbox lets you set up email settings and contact email addresses before activating the Send Documents feature.

**Specify the Email message settings for the currently selected accounting document:**

Note that the accounting documents on this form use the email server settings in [CRM Options](#). This screen lets you change some of the information on the emails sent to customers.

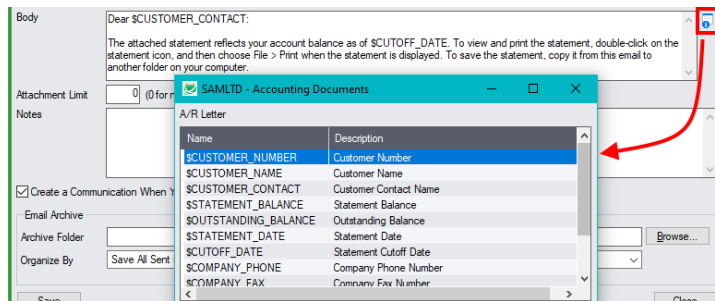
**Reply To Email:** CRM lets you use a different Reply To address for each form. This allows customers to reply to different email addresses for statements, letters and invoices. The Reply To address overrides the “From Email” address specified on the [Options](#) form.

**Cc and Bcc:** Each form can also have different email addresses Cc'd or Bcc'd. To Cc or Bcc multiple recipients, separate the recipient email addresses with commas or semicolons.



**Subject and Body:** Enter the subject and the content of your email. CRM adds information to the email from the customer record.

- Click the Zoom button by the Subject and Body fields to insert customer-specific data, or press F9 in the subject or body field. (F9 may not work in some versions of Windows or if using a VM.)



**Note:** You can copy the default email messages from Sage 300 A/R Statements/Letters/Labels, A/R Invoices, and O/E Invoices screens to CRM's Accounting Documents screen.

For example:

1. Select email recipients on the Contacts tab for each company (on the Company screen in CRM).
2. Open A/R Statements/Letters/Labels and select "Statement" or "Letter" as the document type.
3. Select "Customer" as the Delivery Method.
4. Click the Zoom button (🔍) to the right of the Email Message field.
5. Highlight the body of the email, and press Ctrl-C to copy or right-click and choose Copy.
6. Select A/R Customer Statement at the top of the Accounting Documents form and paste the text into the email body (Ctrl-V or right-click and select Paste).

**Attachment Limit:** This setting controls the maximum number of attachments that can be included with an email. CRM will create additional emails if the maximum number of attachments is exceeded.

When sending invoices, CRM sends a single email to each company contact with all invoices that meet the selection criteria attached. In some circumstances (if this number is too large) emails may be rejected because there are too many attachments. Senders have no way of knowing if an email is rejected for this reason.

**Notes:** Add any notes you like – such as when or why you last updated the email, why the accounting form is currently "Inactive," etc. The field is up to 250 characters long.

**Create a Communication When You Send an Email:** Select the "Create a Communication" checkbox to create a communication when documents are emailed to customers.

**Note:** This checkbox creates a communication for each contact that receives an email. See the next section for [Selecting Recipients for Emailed Invoices, Statements, Letters, Payment Reminders and Payment Due Alerts](#).

**Email Archive Folder:** Specify a different archive folder for each document type. If you do not specify a folder, CRM will use the folder specified on the first tab in the [Options](#) form.

*If you do not specify a folder in the Options form, CRM will store EML files in the Sage 300 Shared Data folder under COMPANY\Company ID\TaiRox CRM\Documents. (EML files include the email message and all attachments.)*

**Organize Documents:** This dropdown lets you save archived emails in subfolders of the Email Archive Folder you specified above, organized by Year (*ArchiveFolder\YYYY*), Year and Month (*ArchiveFolder\YYYYMM*) or Year, Month, and Day (*ArchiveFolder\YYYYMMDD*).

## Select Recipients for Emailed Invoices, Statements, Letters, Payment Reminders, and Payment Due Alerts

You use the Contacts tab in the Company window to select the company contacts that are emailed invoices, statements, letters, overdue payment reminders, and payment due alerts.

### ***To email statements, letters, and invoices to customers, you must:***

1. Specify the “Customer” Delivery Method when you print Statements, Letters, or Invoices from CRM and Collections.

If the Print function’s Delivery Method is set to “Print Destination”, CRM will NOT send emails.

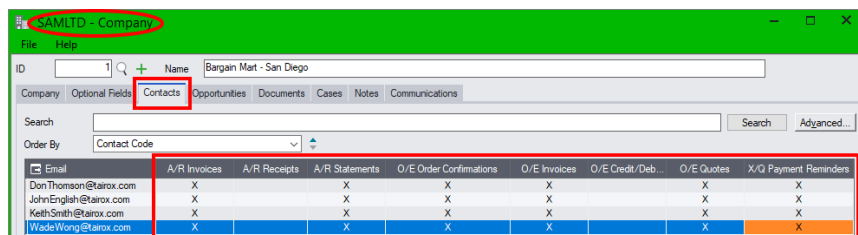
### **AND select the contacts that will receive the emails**

2. **Provide an email address for each company or principle company contact** on the A/R Customer Address tab and choose Email (customer) or Email (contact) as the Delivery Method in the A/R Customer record (on the Processing tab).

CRM will use the email templates set up in the Accounting Documents Setup function.

### **AND/OR**

Select the contacts for each company on the Contacts tab on the CRM Company screen.



### ***Using Email or Contact’s Email addresses after you set up accounting documents:***

If the Delivery Method set on the A/R Customer Record Processing tab is Email (customer) or Email (contact), CRM will send to that email address IN ADDITION TO all contacts selected for the document type on the Contacts tab in the Company window.

- CRM will not create a communication if the Delivery Method for the A/R customer is “Mail” and accounting documents are not set up (in Setup > Accounting Documents).
- If you do not want to send to the Customer Email or Contact Email addresses specified in the A/R Customer Record, specify “Mail” as the Delivery Method in A/R customer records.
- If you select Email (multiple contacts), you must also select the accounting documents for each contact on the Contacts tab.

## How to Select Email Recipients on the Contacts tab for Each Company

For each company, you must select the email recipients for each document on the Contacts tab in the Company (or Companies) window. You can specify any number of recipients for each document from the list of CRM and Collections contacts for the company.

**Send Statements, Letters, and Invoices:** TaiRox’s Send Documents features will email statements, letters and invoices to customers if their Delivery Method in the A/R customer record is set to Email (customer), Email (contact) or Email (multiple contacts). It will also create a communication for statements, letters and invoices and attach it to the company.

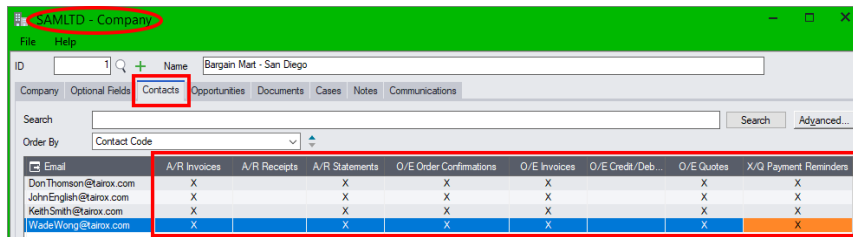
If you select Email (multiple contacts), you must also select the accounting documents that each contact receives on the Contacts tab in the Company window for each CRM and Collections company.

**XQ Payment Reminders:** You must select XQ Payment Reminders on the Contacts tab in the Company window for each Overdue Payment Reminders and Payment Due Alerts email recipient.

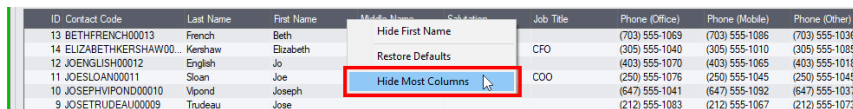
**Send A/R Invoices and O/E Invoices.** CRM and Collections' Send Invoices program sends A/R and O/E invoices and CR/DR notes to all contacts if you select A/R Invoices and/or O/E Invoices in the Contacts grid. Essentially, if any of these flags is set, the program will send all receivables type documents.

### To Select Email Recipients for each company and document type

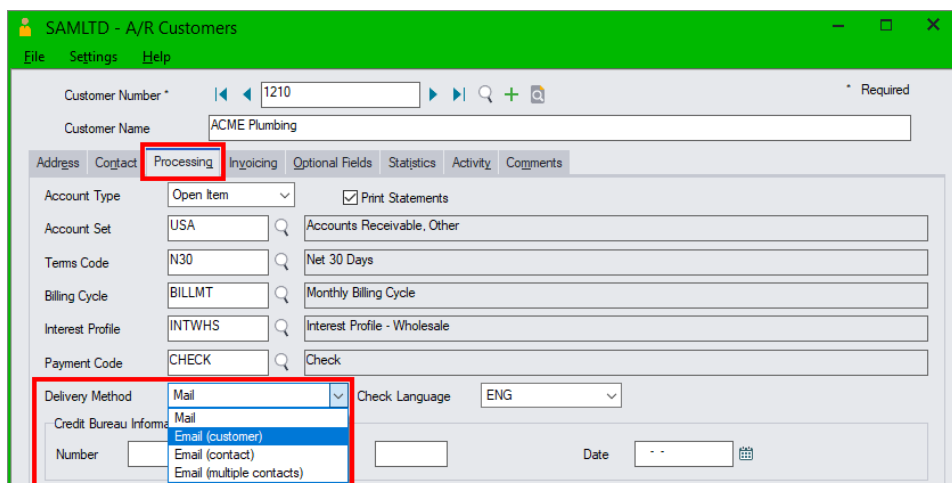
- Select the company in the CRM and Collections Companies window.
- Choose the Contacts tab for the company.
- For each contact row, double-click the column for the document that you want to email.



**Hint:** Right-click the column headings in the grid and choose “Hide Most Columns” to easily view the contact names and the email forms (as shown above). You can reset the columns after selecting email recipients.



**If you do not add contacts for each company,** the Send Documents programs will use the Delivery Method defined for the company on the Processing tab of the A/R Customer record. See below.



- Note that the Send Documents programs will honor the Delivery Method setting if Accounting Documents are not set up for the company.

This means that the program will also print statements, letters and invoices if the delivery method is “Mail.”

- If a company no longer wants to receive emails, uncheck the recipients on the Contacts tab, as well as set the delivery method to “Mail” on the A/R Customer account Processing tab.

## Set Up Bulk Email Accounts

The Bulk Email Accounts program stores email account information for sending bulk emails to customers. You must get an email account with a supported provider and enter the account information here before you can use the Send Bulk Email program in the Send Documents folder.

**Note:**

- ***Bulk Email Accounts will not appear on the Sage 300 Desktop*** if you are using the Collections module without CRM.
- ***Bulk Email Accounts appears in the Marketing folder – not in Setup.***

TaiRox CRM also lets you send bulk emails using the SMTP email server specified in CRM > Setup > Options if you do not subscribe to a bulk email service.

### **General steps for setting up bulk emailing with a bulk emailing service:**

1. Subscribe to MailChimp or SendGrid services (or other services supported by CRM and Collections) – or use the SMTP server specified in Setup > Options.
2. Add bulk email service account information to CRM using the Bulk Email Accounts setup program in the Marketing folder. (This program is not in the CRM Setup folder.)
3. Create contact groups in CRM for sending bulk emails. You can also choose email recipients by selecting ranges of CRM companies or ranges of A/R customer accounts.
4. Log in to your bulk email service to:
  - Create email templates for bulk emails.
  - Create unsubscribe groups for each kind of emails that you send.
  - Associate your sending domain with the bulk email provider (if feature is available).
 etc.

Subscriber features are dependent on the email service provider.

5. Send test emails to a limited group of recipients.

For more information on setting up email templates for bulk emails, see [Appendix D: Sending Bulk Emails and Using Bulk Email Templates](#).

**Access:** Select **TaiRox CRM and Collections > Marketing > Bulk Email Accounts**.

The screenshot shows a software window titled "SAMLTD - Bulk Email Accounts". It has a menu bar with "File" and "Help". Below the menu is a toolbar with navigation icons. The main area contains a form for configuring a bulk email account. The "Account" field is set to "SENDGRID". The "Description" is "SendGrid bulk mailing account". The "Created On" and "Modified On" dates are both "2023-07-17", and the "Created By" and "Modified By" are both "ADMIN". There is an "Inactive" checkbox which is unchecked. The "Provider" is set to "SendGrid" in a dropdown menu, with a "Send Test Email" button next to it. The "API Key" field contains a long alphanumeric string. The "API Uri" is "https://api.sendgrid.com/v3". The "Notes" field contains the text "Account for sending bulk emails to customers". At the bottom of the window are "Save", "Delete", and "Close" buttons.

***To add account details for a bulk email account:***

- First, subscribe to an emailing service such as MailChimp and SendGrid and follow their instructions for getting a suitable API key for CRM program access.  
See [Using CRM's Send Bulk Emails Program](#), in Appendix D, for details.
- Choose your subscription provider from the Provider dropdown list. CRM and Collections currently supports bulk emailing through MailChimp and SendGrid. More providers will be added in future.
- Enter the API key supplied by your email provider. (You may have to generate it while logged in to the email provider's website.)

The Send Bulk Email program uses the API key to log in to the bulk email provider's website when you perform a bulk email run.

If you are creating the key, you must give it sufficient permissions to perform a bulk email run. For example, if you use SendGrid, the API key should have "Full Access", which allows CRM to access GET, PATCH, PUT, DELETE, and POST endpoints within the selected permission.

- You can enter any notes with the account record.

For information on setting up email templates for bulk emails, see [Appendix D: Sending Bulk Emails and Using Bulk Email Templates](#).

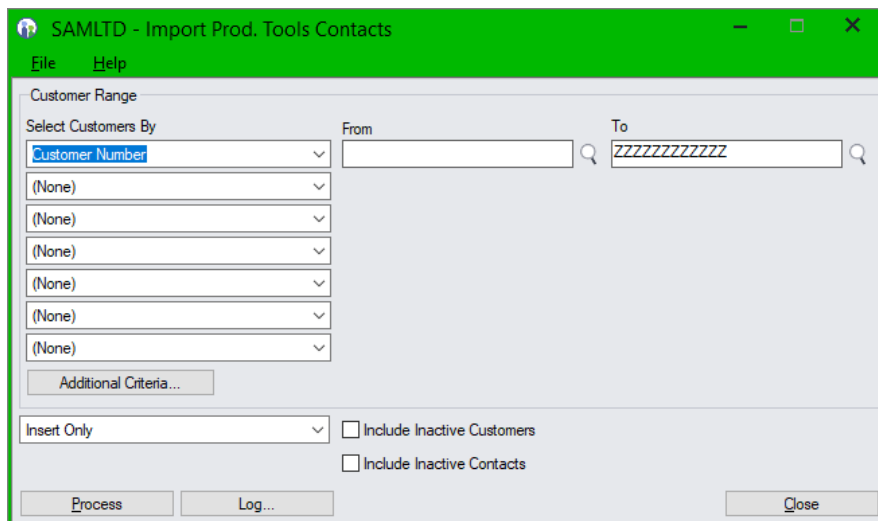
## Import Productivity Tools Contacts from TaiRox Productivity Tools

If you use TaiRox Productivity Tools and you have set up contacts in the TaiRox Extended Customers program, you can import your A/R contacts into CRM and Collections. Productivity Tools lets you add multiple contacts to Sage 300 A/R customers.

The Import Prod. Tools Contacts program does not import contact information from Accounts Receivable customer records.

**Note:** *This program will not appear in the CRM and Collections Setup Folder if you activated the Sage 300 Multiple Contacts module.*

See [Appendix F: Exporting and Importing Companies, Contacts and Notes](#) for information on importing contacts from other contact management programs.

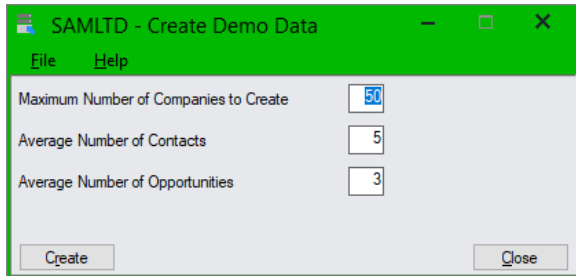


### Notes:

- Use “Import Prod. Tools Contacts” to import contacts from TaiRox Extended Customers when initially setting up the CRM data – using the Insert Only operation. You can also filter contacts belonging to specific customers if you want.
- Operations include Insert Only, Update Only, and Insert and Update.
- An option is provided for including inactive contacts or contacts for inactive customers.
- Optional fields are not imported using this program.

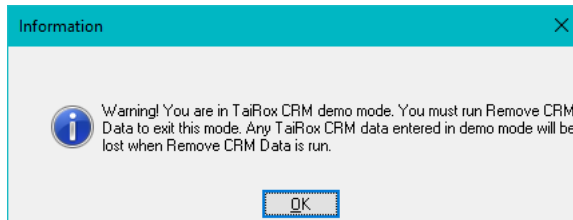
## Create Demo Data

Create Demo Data quickly creates demonstration data from Sage 300 sample data or from a copy of a production database. The data is created relative to the Sage 300 session date.



### Important Notes:

- Create Demo Data can only be run on databases with empty CRM and Collections tables.
- Create Demo Data marks the database as “Demo”. In that state a warning message appears whenever the Sage 300 desktop is opened.



- You can run Remove CRM Data on a database marked as Demo. Remove CRM Data will delete all CRM and Collections tables and deactivate the application, removing CRM and Collections entries from common services.

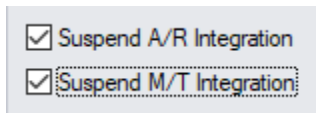
### Notes:

- A key reason to create demonstration data is so that sales pipeline charts generated from opportunities will look meaningful.
- A pseudorandom number generator (aka a deterministic random bit generator) is used to vary the data in a consistent way. This means companies will have no contacts, one contact or several contacts. The same holds true for other entity relationships. Dates will also be varied.
- All demonstration data is created relative to the session date. Some data (e.g. created-on and modified-on dates) will be set to a value earlier than the session date ("the past").
- Opportunity stages and communication types are varied as might be expected in a typical pipeline.
- Opportunities have special dates (expected-closed, revisit-on) that would normally be set to a value later than the session date ("the future"), unless the opportunity stage has been won or lost; in which case, these dates and the closed-on date will be in the past.
- Contact names are created with various first and last name combinations so that searching will find more than one name in a search (e.g. same first name) and yet the first and last names will be different.
- Optional fields are not created using this program.

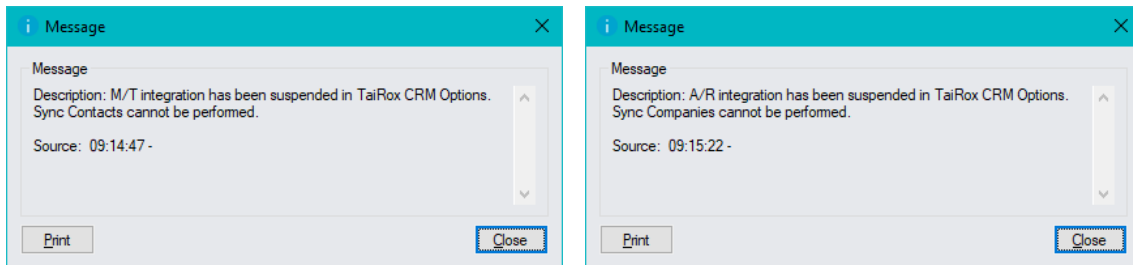


***A/R and M/T Integration are suspended in CRM Demo Data:***

Note that A/R and M/T Integration are suspended when you create CRM Demo Data. If you look in [Setup Options](#), you will see that both “suspend integration” options are checked, as below.



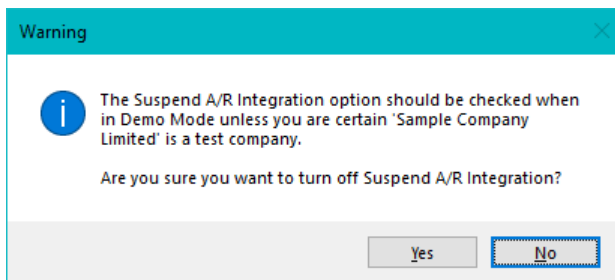
If you select Sync Contacts or Sync Companies, then following messages will appear.

***Note that A/R and M/T Integration are suspended for your protection!***

Integration is suspended to ensure that CRM does NOT update the Sage 300 Multiple Contacts and Accounts Receivable data.

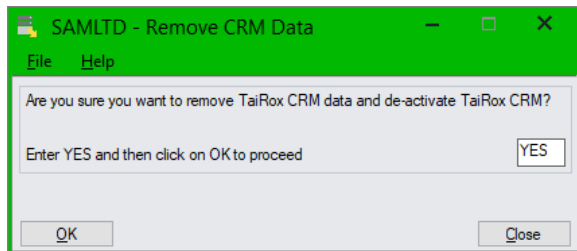
If you created Demo Data with SAMLTD or SAMINC – or with a copy of your company database and want to see the results of A/R and M/T Integration, you can turn on integration in [Setup Options](#).

If you uncheck the “Suspend xx Integration” checkboxes, the program will display a message like this:



## Remove Demo Data

Remove CRM Data quickly deletes all CRM and Collections tables and deactivates the application, removing CRM and Collections entries from Common Services.



You must type YES – all uppercase – to enable the OK button.

### ***Important Notes:***

- Create Demo Data marks the database as "Demo". A warning message will appear whenever you open a Sage 300 demo database, stating that you are in Demo mode.
- Remove CRM Data is the only way to exit Demo mode for that database.

## XQScheduler

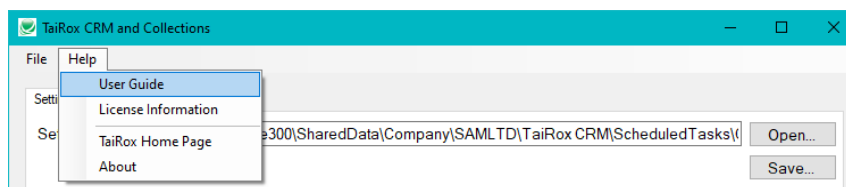
The CRM and Collections Scheduler lets you create Windows scheduled tasks to automatically send Overdue Payment Reminders, Payment Due Alerts, and Send Invoices to customers. It also lets you update overdue payments in the Overdue Payments program grid. See the [Scheduler User Guide](#).

CRM provides two ways to send overdue payment reminders, payment due alerts and invoices to clients:

- **Interactively** – using the Overdue Payment Reminders, Payment Due Alerts, and Send Invoices programs to select recipients and choose runtime options.
- **In the background using a Windows Scheduled Task** – using the runtime settings on the Scheduling tabs for the Overdue Payment Reminders Setup program, Payment Due Alerts Setup program, and Send Invoices Setup program.

**See the Scheduler User Guide for instructions on creating Windows Scheduled Tasks.**

- Start the Scheduler and select User Guide from the Help menu to see the User Guide.



**General steps for creating Windows Scheduled Tasks for overdue payment reminders and payment due alerts:**

- Enter default program settings using the Overdue Payment Reminders Setup, Payment Due Alerts Setup, and Send Invoices Setup programs.  
**The Settings tabs** for the setup programs include default settings for using the programs interactively or when launched by Windows scheduled tasks.  
**The Scheduling tabs** provide the email and task assignment options that are in effect when running the programs as scheduled tasks. Most of these options appear in a popup window when you run the programs interactively from the Collections folder.
- Run the CRM and Collections' Scheduler program and enter Sage 300 login settings and email notification information.
- Save the XML parameter file for running Overdue Payment Reminders, Payment Due Alerts, and Send Invoices to the Shared Data Folder for your company.
- Use the Create Scheduled Task button on the CRM and Collections Scheduler's Settings tab to create a basic scheduled task.
- Use the Start Task Scheduler button to open the Windows Task Scheduler and change security options to run the task whether the user is logged on or not.
- Set the task to run with the highest privileges.

The CRM and Collections Scheduler program creates a basic Windows scheduled task that points to the current XML path and name.

Make sure that the Windows task points to the correct XML file. This is the most common error made by Sage 300 consultants not familiar with the Task Scheduler.

Also, the task created by the CRM and Collections Scheduler will not run on a regular basis until you edit the task and provide Windows login credentials.

# Appendix A: Common Screen Operations

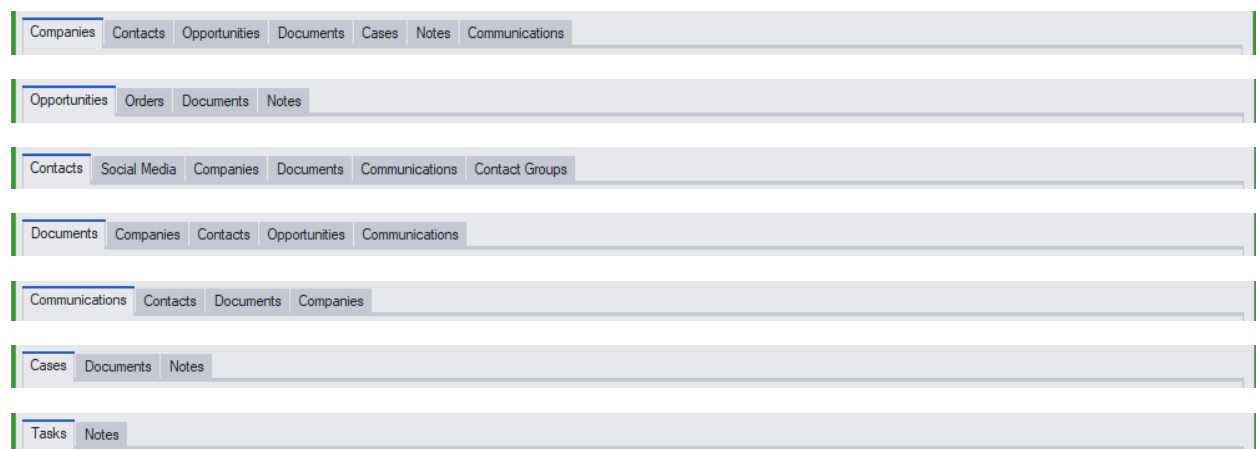
## Using Tabs, Search, Advanced Search, and Sorting

### ***Tabs display more information for the item selected in the first tab:***

When a row in the main display grid on the first tab is selected, clicking on another tab shows all of the entities that are linked to the selected entity. New entities can be added from those additional tabs.

Contacts and documents can be linked to any entity (a many-to-many relationship).

For example, select a company on the Companies tab, and then view all contacts, opportunities, etc. for the selected company on the other tabs.



### **Search:**

Searching works "like an internet search engine".

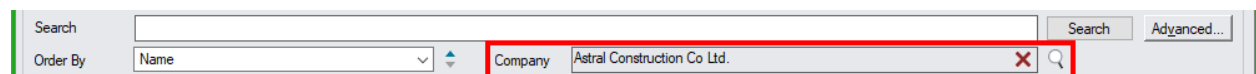
- Enter a single word (or part of a word) and press Enter or click the Search button to display all entities with that word in any text field.
- Enter a second word to refine the search. The second word can also be in any text field – such as "black" and "los" for Ronald Black in Los Angeles.



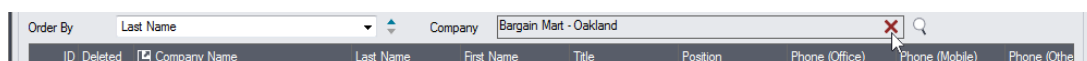
- Click the red X at the end of the Search field to remove search terms.

### **Company search filter:**

On many screens you can filter your search with the Company field.



- Click the Company Finder (shown above) and select the company you want.  
You can use the top Search field on the form to refine your search after selecting the company.
- Click the red X in the Company field to remove the company filter.



**Advanced:**

To search by a specific value or range of values (e.g. a date range), use the Advanced Search capabilities.

For some records – such as Opportunities – Advanced Search also lets you select subsets of these values, such as the opportunity status.

**Sorting:**

Each display grid for entities has an appropriate drop-down that lets you select the sort order.

Hovering above the icon to the right of the drop-down will show "Ascending" or "Descending", the current order. Clicking on this icon will reverse the sort order.

**Navigation:**

Navigate through multi-page lists using the navigation icons, or enter the page number and tab out of the field.

Drag the bottom of the window to enlarge it and increase the number of items displayed in the grid. The program will return you to the first page of items when you change the grid size.

## Using Common Buttons on CRM and Collections Forms

**Add**

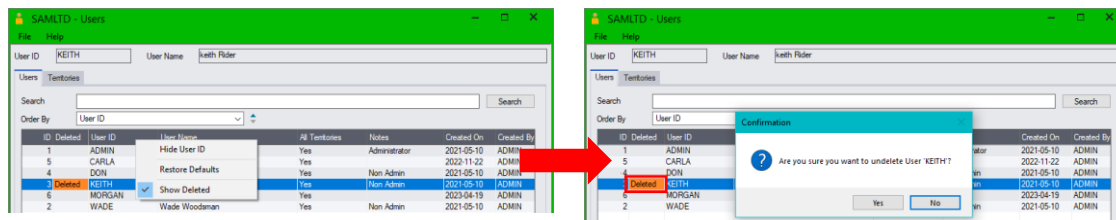
Adds a new entity. You can also use the Insert key while in the grid. Or, on some forms, use the **+** button.

**Delete**

Deletes the currently selected entity (after confirmation). You can also delete entries by pressing the Delete key while in the grid.

### ***You can recover deleted entities.***

Double-click the title bar on the grid, and select "Show Deleted" from the dropdown menu to display deleted entities, then double-click the deleted entity to restore it.



### ***Link / Unlink / Promote***

Are used when two types of entities can be linked together. Promote is a special case of Link that connects a CRM Company to an A/R Customer.

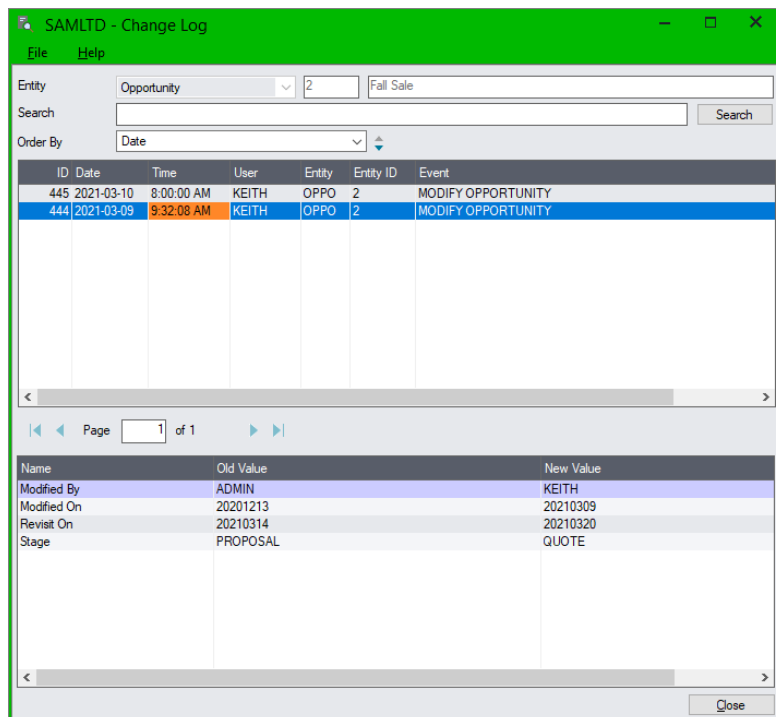
**Unlink** removes the link by deleting a row in the link table.

"Show Deleted" will not show a deleted link, but the link can easily be re-added.

### ***Change Log***

Every change to every field in every key entity is logged. When viewing a change log, select a row in the top grid to display all changes in the bottom grid.

In this example, the Opportunity Stage and Revisit Date have been changed by user KEITH, and the program has also updated the Modified By and Modified On values.



You can double-click a row in the bottom grid to open a window for side-by-side comparisons. This is particularly useful for comparing Notes.

# Appendix B: Using Data Entry Programs

CRM and Collections data entry programs let you enter and edit data using familiar Sage 300 controls. All CRM records – such as companies, contacts, opportunities – include an ID that's displayed beside the main entity name. The ID is a unique number, internally generated by CRM and Collections.

Data for each record appears on tabs, similar to Sage 300 entry screens. For example, the Company maintenance program has tabs for the Optional Fields, Contacts, Opportunities, Documents, Cases, Notes, and Communications that are linked to the company.

SAMLTD - Company

File Help

ID: [ ] Name: Bargain Mart - San Diego

Company Optional Fields Contacts Opportunities Documents Cases Notes Communications

Created On: 2019-12-09 Created By: ADMIN

Modified On: 2021-03-03 Modified By: ADMIN

Customer Number: 1100

Currency: USD

☐ Inactive

Short Name: BMT-SD

Territory: CA California

Phone Number: (408) 451-8981

1 Case(s) Collections...

1 Disputed Invoice(s)

1 Overdue Invoice(s)

Promised Payment(s)

Click the Contacts tab to see the linked contacts for the company. If you have a large number of contacts attached to a single company, use the Search function to narrow down the contact list – as below.

SAMLTD - Company

File Help

ID: [ ] Name: Bargain Mart - San Diego

Company Optional Fields Contacts Opportunities Documents Cases Notes Communications

Search: cla

Order By: Contact Code

ID	Contact Code	Last Name	First Name	Middle Name	Salutation	Job Title	Phone (Office)	Phone (Mobile)	Phone (Other)
5	CLAIREWHITE00005	White	Claire				(905) 555-1042	(905) 555-1092	(905) 555-1046

There are many ways to drill down to data from different locations.

## Add, Delete, Link, Unlink and Change Log Buttons

Some or all of the following buttons will appear on each tab of a maintenance program.

Page 1 of 1

Add... Delete Link... Unlink

Change Log...

Close

**Add:** Lets you add new entries by popping up an entry form.

**Delete:** Deletes entries. Note that deleted entries are retained in the database and can be viewed by right-clicking the title bar on the grid and choosing "Show Deleted".

ID	Deleted	User ID	User Name	All Territories	Notes	Created On	Created By
1		ADMIN	Hide User ID	Yes	Administrator	2021-05-10	ADMIN
5		CARLA	Restore Defaults	Yes		2022-11-22	ADMIN
4		DON		Yes	Non Admin	2021-05-10	ADMIN
3	Deleted	KEITH	Show Deleted	Yes	Non Admin	2021-05-10	ADMIN
6		MORGAN		Yes		2023-04-19	ADMIN
2		WADE	Wade Woodsman	Yes	Non Admin	2021-05-10	ADMIN

***Link:*** The same document can be linked to multiple entities of any type. Clicking Link adds a link to an existing document. It does not create a new document.

***Unlink:*** A link to a document can be removed. This removes the link by deleting a row in the link table.

*"Show Deleted" will not show a deleted link (the link can be easily re-added).*

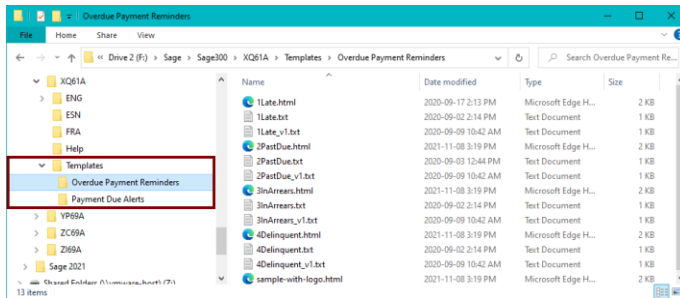


# Appendix C: Editing Email Templates for Payment Due Alerts, Overdue Payment Reminders, and Send Invoices

## Template Locations on Sage 300 Servers

The CRM and Collections installation program installs eight email templates for the Overdue Payment Reminders program and two templates each for the Payment Due Alerts program and Send Invoices program in the Templates subfolder for the CRM and Collections application:

\<Sage300>\XQ61A\Templates\Overdue Payment Reminders  
 \<Sage300>\XQ61A\Templates\Payment Due Alerts  
 \<Sage300>\XQ61A\Templates\Send Invoices



When you activate CRM and Collections for a new company, activation also copies the email templates to the following company-specific folders – so they are available to the Overdue Payment Reminders Setup, Payment Due Alerts Setup and Send Invoices Setup programs.

C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders  
 C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Payment Due Alerts  
 C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Send Invoices

- Email templates must be in the correct company folders to be selected by the Overdue Payment Reminders, Payment Due Alerts Setup and Send Invoices Setup programs.
- You can also add French and Spanish versions of email templates in language-specific subfolders, such as the following:

C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Send Invoices\FRA

Templates in language subfolders are used according to the “Preferred Language” setting for companies. See [Sending Emails and Invoices Using the “Preferred Language” Company Setting](#) in this appendix for details.

**If you are updating CRM and Collections**, you can copy any new templates for Overdue Payment Reminders and Payment Due Alerts from the program folders to the \Company\<companyID>\TaiRox CRM\Templates\ folders.

Include tairox-logo.png when you copy new sample emails to your sample data and company folders. New email templates include an embedded logo – see [Adding a Logo](#) for more information.

For Overdue Payment Reminders, you can click the “Install Current Templates” button on the Overdue Payment Reminders Setup screen to copy new templates from \XQ61A\Templates\Overdue Payment Reminders to the company folder.

Install Current Templates

Note that the program will copy over the previous templates of the same name. You should rename templates that you are using to ensure they aren't replaced.

The email templates provide the body text for emails. The subject, email sender, Cc and Bcc addresses come from the Overdue Payment Reminders Setup program, Payment Due Alerts Setup program and Send Invoices Setup program.

The sample email templates include one HTML email and one text-only email template for each of the four aging stages used by the Overdue Payment Reminders program and one HTML email and one text-only email template for the Payment Due Alerts program and Send Invoices program.

By default, programs use HTML versions of the default templates. You can change the selection using [Overdue Payment Reminders Setup](#), [Payment Due Alerts Setup](#), and [Send Invoices Setup](#).

The following screen shows the email header fields on the [Overdue Payment Reminders Setup](#) screen for Overdue Payment Reminders.

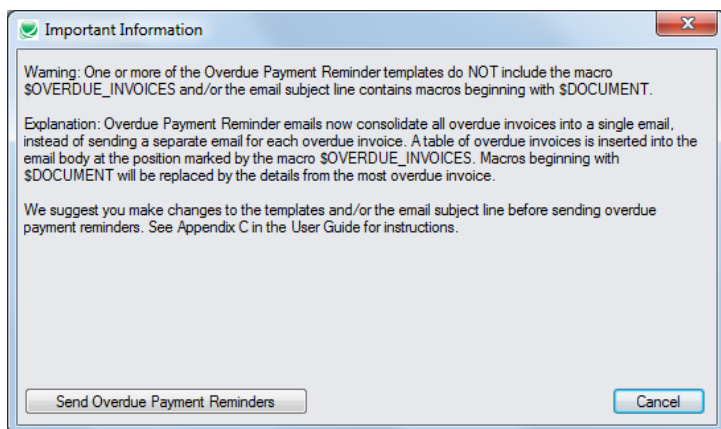
The screenshot shows a form titled 'Overdue Invoices' with the following fields:

Format	Overdue Invoices
Email Subject	Sample Company Limited - Payment Overdue
From Email	AR@samitd.com
Reply-To Email	AR@samitd.com
Cc	
Bcc	Don@samitd.com

## Important Information Message if Templates Have Significantly Changed

*The message may be different in later versions of CRM and Collections.*

For example, as of September 2020, this message appears when you click the Process Overdue Payment Reminders button if any payment reminder templates – or if the email subject line – included a \$DOCUMENT macro.



In June 2023, we dropped the deprecated macros starting with \$DOCUMENT\_. They can no longer be used with payment due alerts or with overdue payment reminders.

In September 2020, we added the \$OVERDUE\_INVOICES macro to insert a table with all overdue invoices into payment reminder emails. See the list of macro variables later in this appendix.

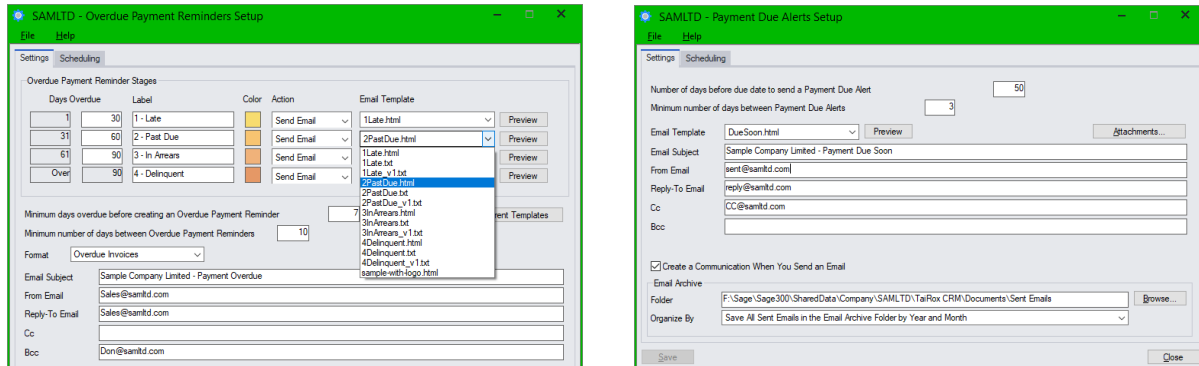
To cancel the mailout and update your email templates, click the cancel button.

**Note:** The email subject, from email address, reply-to email, Cc and Bcc fields are set in the [Overdue Payment Reminders Setup](#), [Payment Due Alerts Setup](#) and [Send Invoices Setup](#) programs.

## HTML and Text-Only Email Templates

CRM and Collections provides one HTML email and one text-only email template *for each* of the four aging stages used by the Overdue Payment Reminders program, and provides one HTML email and one text-only email template for the Payment Due Alerts program and for the Send Invoices program.

You select the default email templates that you want to use in the [Overdue Payment Reminders Setup](#) and [Payment Due Alerts Setup](#), and [Send Invoices Setup](#) programs. You can override the default templates at runtime.

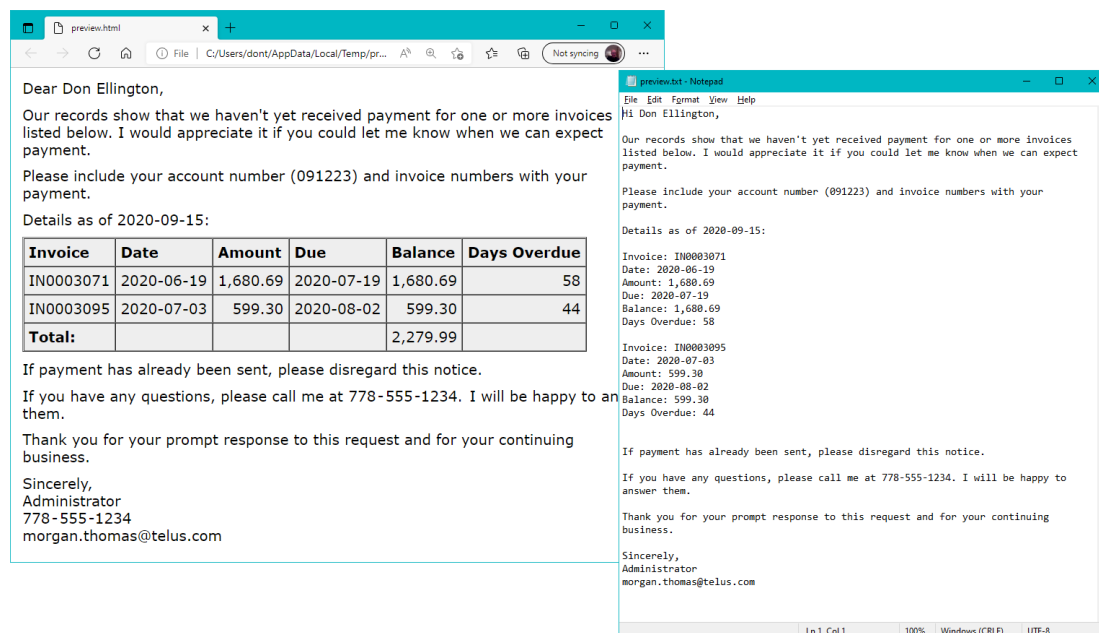


- Email templates must have an “html” or a “txt” extension and must be in the following directories in order to be selected.

C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders  
 C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Payment Due Alerts  
 C:\<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Send Invoices

- Click the Preview button to see how the email will appear to recipients.

The following example illustrates the main difference between the HTML and text-only email templates – where the HTML template displays overdue invoices in a formatted table, the text-only template lists the invoice details vertically.



**Note:** The Preview button will open the email template using the default program for the file type that's set up in the Windows File Explorer.

## Editing Email Templates

Email templates for payment due alerts, overdue invoice reminders and the Send Invoices program are ANSI text or HTML files that provide the body of the emails. Use a plain text editor – like NotePad – to edit the text and HTML email templates. Do not use an editor that might change the file format and insert hidden formatting.

Note that reminder emails for payment due alerts list ALL due invoices and emails for overdue payment reminders list ALL overdue invoices for each company (unless the invoices are on hold) – so each recipient receives only one email per mailout.

Templates for payment due alerts and overdue invoice reminders can also include macros that lists all pending or overdue invoices and invoice amounts for the company:

- **\$INVOICES** lists all not-yet-due invoices on payment due alerts emails.
- **\$OVERDUE\_INVOICES** lists all overdue documents – or all unpaid documents -- on overdue payment reminder emails, depending on whether you choose the Overdue Invoices format or the Account Summary format from the Format dropdown on the Overdue Payment Reminders Setup screen.
- **\$AGING\_TABLE** displays overdue amounts for the standard aging periods – 30, 60, 90, and over 90 days – and current amounts if you choose the Account Summary format for documents.

The Overdue Payment Reminders program uses the email template for the oldest overdue invoice – unless the aging period is set to generate phone call tasks instead of send email reminders.

For example, the following HTML overdue payment reminder email – 4Delinquent.html – might be sent to customers whose *oldest* invoice payment is over 90 days overdue.

Note that this example lists overdue invoices only. You can change the Format setting in the Overdue Payment Reminders Setup screen to display all unpaid documents instead. See [Overdue Payment Reminder Setup](#).

The screenshot shows a web browser window displaying an overdue invoice and a code editor window showing the HTML code for the invoice. Red arrows indicate the mapping between the HTML code and the rendered content.

**HTML Code (Right Window):**

```

20 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="
21 <tr>
22 <td>Dear $CUSTOMER_CONTACT,</td>
23 </tr>
24 <tr>
25 <td>One or more of your invoices is seriously overdue.</td>
26 </tr>
27 <tr>
28 <td>Because we have been unable to work out payment with you, I regret
to inform you that if we do not hear from you in 5 days, we will report
this issue to the credit bureau and turn your account over to a
collection agency who will contact you in regard to payment.</td>
29 </tr>
30 <tr>
31 <td>The details of all overdue invoices are as follows:</td>
32 </tr>
33 </table>
34 <p></p>
35 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="
36 <tr>
37 <td><OVERDUE_INVOICES
38 </td></tr>
39 </table>
40 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="
41 <tr>
42 <td><Overdue invoice balances by days overdue:</td>
43 </tr>
44 </table>
45 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="
46 <tr>
47 <td><$AGING_TABLE></td>
48 </tr>
49 </table>
50 <table class="PanelA" border="0" cellpadding="5" cellspacing="0">
51 <tr>
52 <td>
53 <table class="PanelA" cellpadding="0" cellspacing="0">
54 <tr><td>Sincerely,</td></tr>
55 <tr><td>$USER_NAME</td></tr>

```

**Rendered Content (Left Window):**

Dear Don Ellington,

One or more of your invoices is seriously overdue.

Because we have been unable to work out payment with you, I regret to inform you that if we do not hear from you in 5 days, we will report this issue to the credit bureau and turn your account over to a collection agency who will contact you in regard to payment.

The details of all overdue invoices are as follows:

Invoice	Date	Amount	Due	Balance	Days Overdue
IN0003071	6/19/2020	1,680.69	7/19/2020	1,680.69	98
IN0003095	7/3/2020	599.30	8/2/2020	599.30	84
<b>Total:</b>				2,279.99	

Overdue invoice balances by days overdue:

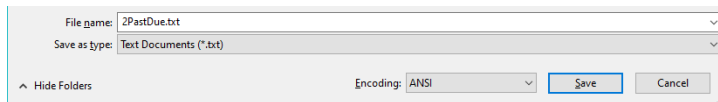
1 - 30 Days	31 - 60 Days	61 - 90 Days	Over 90 Days	Total
0.00	0.00	599.30	1,680.69	2,279.99

Sincerely,  
Administrator

- The image on the left shows what you see when you click the Preview button.
- The image on the right shows the email in a text editor – in this case, NotePad++.
- The \$CUSTOMER\_CONTACT macro displays the contact name in the email.

- **\$OVERDUE\_INVOICES** generates the first table shown above, with invoice information for all overdue invoices that are not on hold – or for all outstanding documents (depending on the Format setting on the Overdue Payment Reminder Setup screen).
- **\$AGING\_TABLE** generates the second table, showing overdue or outstanding amounts by aging period.
- **\$INVOICES** is used for payment due alerts to list all due invoices instead of overdue ones.
- The **\$USER** macro inserts information for the user generating the emails.

Template files must be saved in ANSI text format – not in a Unicode variant. You can check the format by opening the file in Notepad and clicking File > Save As. The Encoding appears at the bottom of the form.



The CRM and Collections Setup programs look for email template files in the following locations. You must put all templates that you want to use in these locations, and then select them using the Setup programs.

```
<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Overdue Payment Reminders
<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Payment Due Alerts
<SharedData>\COMPANY\<OrgID>\TaiRox CRM\Templates\Send Invoices
```

## Macro Variables in Email Templates

You can use the following variables in email templates. Note that templates for the Send Invoices program can include the Customer Information and User information but not Document Information. You can also include most variables (except ones that generate a table) in the email subject.

Customer Information (from Sage A/R – not CRM)	Document Information	User (Sage user account information)
\$COMPANY_PHONE \$COMPANY_FAX \$COMPANY_CONTACT \$COMPANY_NAME  \$CUSTOMER_NUMBER \$CUSTOMER_NAME \$CUSTOMER_CONTACT \$CUSTOMER_BALANCE	<b>For Payment Due Alerts</b> \$INVOICES – for payment due alerts. Lists <b><i>all not-yet-due invoices</i></b> for the company: <ul style="list-style-type: none"> <li>– Document number</li> <li>– Document date</li> <li>– Document amount</li> <li>– Due date</li> <li>– Balance</li> </ul> <b>For Overdue Payment Reminders</b> \$OVERDUE_INVOICES – for overdue payment reminders. Lists <b><i>all overdue invoices or all unpaid invoices</i></b> for the company (depending on the format): <ul style="list-style-type: none"> <li>– Document number</li> <li>– Document date</li> <li>– Document amount</li> <li>– Due date</li> <li>– Balance</li> <li>– Days overdue</li> </ul> \$AGING_TABLE – amount for each aging period defined in CRM Options (including "Current" if using the Account Summary format) \$OVERDUE_AMOUNT – total balance of overdue amounts in table \$OVERDUE_DAYS – most overdue inv. \$AS_OF_DATE – system date when the overdue payment data was updated \$FORMAT – displays "Account Summary" or "Overdue Invoices" depending on the options setting for reminders	\$USER_NAME \$USER_PHONE \$USER_EMAIL1 \$USER_EMAIL2 <ul style="list-style-type: none"> <li>– Inserts the user information for the user account generating the overdue payment reminders.</li> </ul> <b>Current Date</b> \$TODAY

The sample email shown previously:

- Includes the Contact name in the greeting. Emails can be sent to multiple contacts at each company.
- Includes \$OVERDUE\_INVOICES. This macro expands to include all overdue invoices – or all unpaid documents – listing the invoice #, date, amount, due date, current balance outstanding, and days overdue.

Example of a table if you choose Overdue Invoices as the Format in Overdue Payment Reminders Setup.

Invoice	Date	Amount	Due	Balance	Days Overdue
IN0003071	2020-06-19	1,680.69	2020-07-19	1,680.69	58
IN0003095	2020-07-03	599.30	2020-08-02	599.30	44
<b>Total:</b>				2,279.99	

- On Hold invoices will not appear in the list of overdue invoices.

Example of table if you choose Account Summary as the Format in Overdue Payment Reminders Setup.

Invoice	Date	Amount	Due	Balance	Days Overdue
IN0003071	2020-06-19	1,680.69	2020-07-19	1,680.69	58
IN0003095	2020-07-03	599.30	2020-08-02	599.30	44
IN0004014	2020-09-03	324.79	2020-10-02	324.79	
<b>Total:</b>				2,604.78	

The \$INVOICES macro for payment due alerts is similar, but does not have a “Days Overdue” column.

- \$AGING\_TABLE generates the second table, showing overdue amounts by aging period. A “Current” period will appear if you choose the Account Summary format in Overdue Payment Reminders Setup.
- The signature line of the letter shown above includes the \$USER\_NAME only, because the other \$USER information is missing from the user record.

Note that the user information is for the logged-in Sage 300 user that is running the Overdue Payment Reminders program. You may want to substitute a single company representative, email address, and phone number for these macro variables.

- *Note that \$DOCUMENT variables are no longer valid.* Previously, these variables listed the details of the OLDEST overdue invoice. They can no longer be used with payment due alerts or with overdue payment reminders.

## Embedded CSS and Table Formatting in HTML Email Templates

The header information in the sample email templates sets the font style, font size, and grey background for the overdue invoices table. Do not edit this section unless you are very familiar with HTML.



The body of the email is set up as a series of tables, with each paragraph in a table cell. Do not change the email structure unless you are familiar with HTML. We suggest that you just edit the text in each cell.

You can preview your email templates using a browser, then by using the Preview button in the Overdue Payment Reminders Setup, Payment Due Alerts Setup, and Send Invoices Setup programs after you copy the edited file back to the correct SharedData folder and select it in the Setup program.

```

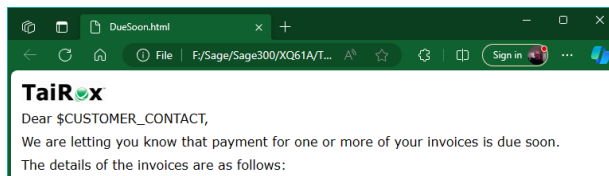
17 </style>
18 </body>
19
20 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="0">
21 <tr>
22 <td>Dear $CUSTOMER_CONTACT,</td>
23 </tr>
24 <tr>
25 <td>One or more of your invoices is seriously overdue.</td>
26 </tr>
27 <tr>
28 <td>Because we have been unable to work out payment with you, I regret to inform you that if we do
not hear from you in 5 days, we will report this issue to the credit bureau and turn your account
over to a collection agency who will contact you in regard to payment.</td>
29 </tr>
30 <tr>
31 <td>The details of all overdue invoices are as follows:</td>
32 </tr>
33 </table>
34 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="0">
35 <tr>
36 <td>$OVERDUE_INVOICES</td>
37 </tr>
38 </table>
39 <table class="PanelA" border="0" cellpadding="5" cellspacing="0">
40 <tr>
41 <td>
42 <table cellpadding="0" cellspacing="0">
43 <tr><td>Sincerely,</td></tr>
44 <tr><td>$USER_NAME</td></tr>
45 <tr><td>$USER_PHONE</td></tr>
46 <tr><td>$USER_EMAIL</td></tr>
47 </table>
48 </td>
49 </tr>
50 </table>
51 </body>
52 </html>

```

## Adding a Logo

The sample email templates installed by CRM and Collections include an embedded logo to illustrate how you can add your own logo to Overdue Payment Reminders, Payment Due Alerts, and Invoice emails.

Here is an email template loaded in a browser, showing the company logo at the top:



And here is the HTML segment for the embedded logo:

```

10 .PanelB {
11 font-family: Verdana, Arial, Helvetica, sans-serif;
12 font-size: 16px;
13 color: #000000;
14 background-color: #ffffff;
15 }
16 ---
17 </style>
18 </body>
19
20 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="0">
21 <tr>
22 <td></td>
23 </tr>
24 </table>
25 <table class="PanelA" width="700" border="0" cellpadding="5" cellspacing="0">
26 <tr>
27 <td>Dear $CUSTOMER_CONTACT,</td>
28 </tr>
29 <tr>
30 <td>We are letting you know that payment for one or more of your invoices is due soon.</td>

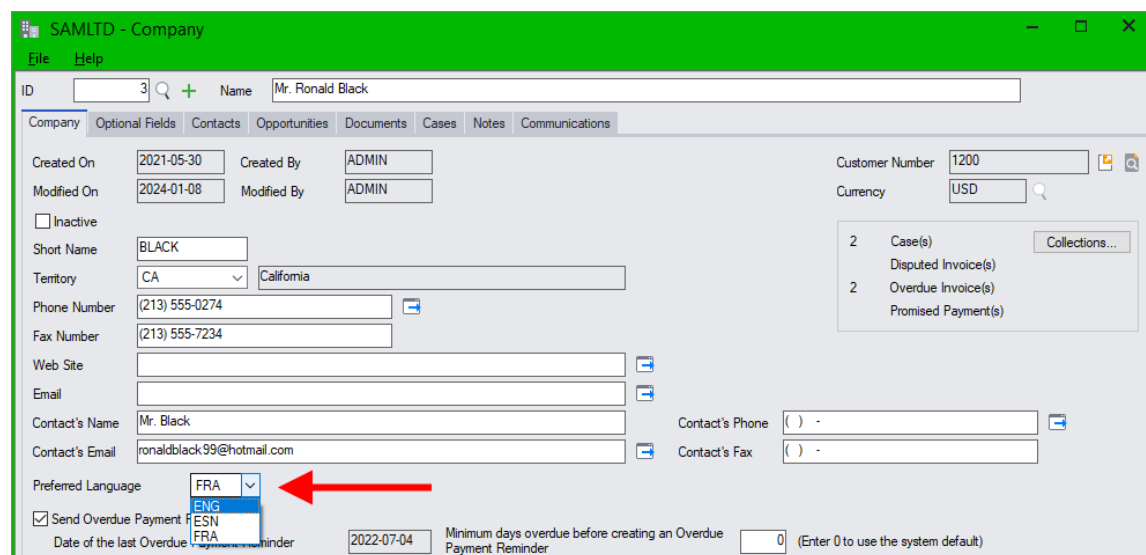
```

**Note:**

- The image is embedded in a table at the top of the email.
- The image files must be located in the same folder as the template.
- Don't use any special characters in the filenames.
- You can enclose the filename in quotes or apostrophes in the html template.

## Sending Emails and Invoices Using the “Preferred Language” Company Setting

TaiRox Collections provides multi-language support for sending emails from the Overdue Payment Reminders, Payment Due Alerts, and Send Invoices programs.

The screenshot shows the 'SAMLTD - Company' window. The 'Company' tab is active. The 'Preferred Language' dropdown menu is open, showing options: FRA, ENG, and ESN. A red arrow points to the 'ENG' option. Other fields visible include ID (3), Name (Mr. Ronald Black), Created On (2021-05-30), Modified On (2024-01-08), Customer Number (1200), Currency (USD), Short Name (BLACK), Territory (CA), Phone Number ((213) 555-0274), Fax Number ((213) 555-7234), Web Site, Email, Contact's Name (Mr. Black), Contact's Email (ronaldblack99@hotmail.com), Contact's Phone, Contact's Fax, Date of last Overdue Payment Reminder (2022-07-04), and Minimum days overdue before creating an Overdue Payment Reminder (0).

You select a company's preferred language on the Company screen, along with other options for sending overdue payment reminders, payment due alerts, and invoices.

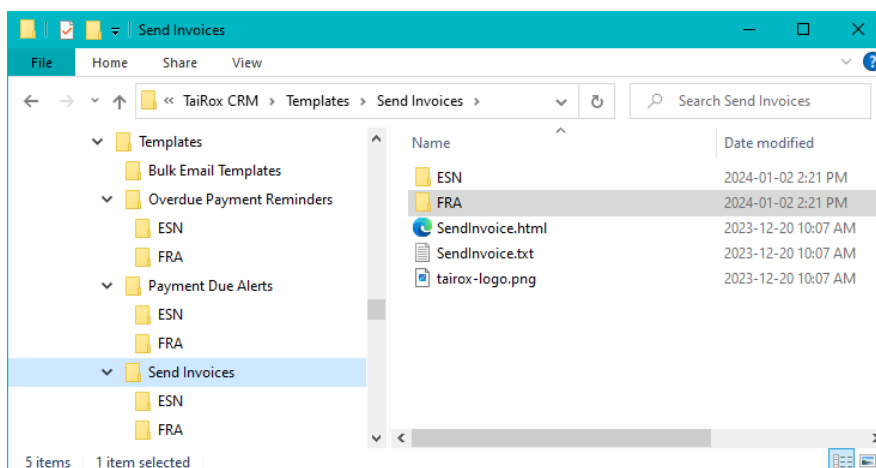
TaiRox CRM and Collections provides support for English, French, and Spanish language preferences. The program will send emails in the selected language, and will also provide translated versions of attached invoices.

**Here are the steps for sending French or Spanish emails with translated invoice attachments:**

- Install the Sage 300 language files for French and/or Spanish to send emails and invoices in the target languages.
- Select the Preferred Language for all customers that should receive French or Spanish emails.
- Add the English versions of your email templates to the default templates folders for overdue payment reminders, payment due alerts, and invoices.
- Create FRA and ESN subfolders for the translated versions of your email templates.
- Add the French and Spanish versions of your email templates to the default templates folders for overdue payment reminders, payment due alerts, and invoices.
  - The translated templates must have the same names as the English versions in the root folders.
  - You must include any image files for the emails in the language subfolders.

The following screen shows the root template directory for the Send Invoices program, with html and text versions of the template, along with a picture file for the logo that appears in the email.





The screen also includes two subfolders for Spanish and French versions of the email templates.

**Note the following points:**

- When you select a template using Setup program for Overdue Payment Reminders, Payment Due Alerts or Send Invoices, the program looks for html or txt files in the root folder for Overdue Payment Reminders, Payment Due Alerts, or Send Invoices root folder. For example:

\\Sage300\\SharedData\\Company\\<ORGID>\\TaiRox CRM\\Templates\\Send Invoices

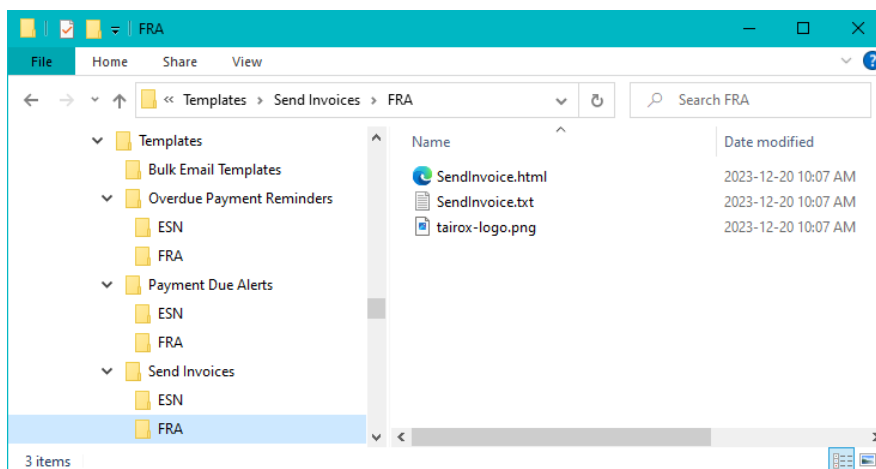
The dropdown that you use to select a template file will not display template files that are in the language subfolders.

- When you run the Send Invoices program (for example), the program will check the preferred language code for each customer, look for the appropriate language subfolder, and, if it exists, look for a template that matches the selected email template name.

If the template does not exist in the language subfolder, the program will use the English template file in the “...\\Templates\\Send Invoices” root folder.

In other words, you must create the language-specific versions of your template using the same template names and copy them to the appropriate language subfolder where the program can find them.

The contexts of the language subfolder will look like this – with similarly-named html, txt and image files:



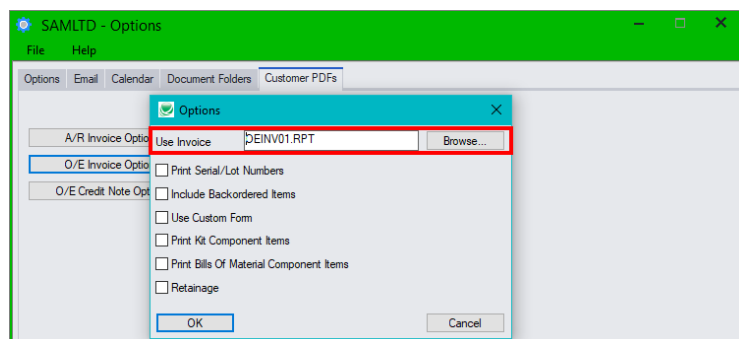
In this case, the French-language version has all the same files as the default English folder – including the logo file.

### Also Note:

- The subject line for the email comes from the setup programs for Overdue Payment Reminders, Payment Due Alerts, and Send Invoices. It does not get translated.
- The Crystal Report form used for A/R and O/E invoices and CR/DR notes is set on the [Customer PDFs tab in CRM Options](#).

By default, the program will browse to the AR\ENG or OE\ENG folder to let you choose the report for invoices. When you run the program, it will select the preferred customer language from the language folders.

- **Do not specify a path when you choose an invoice print form** in CRM Options.



- Column titles in tables will be translated to French and Spanish – the two other languages supported by CRM and Collections.
- If you are inserting an image in your email – such as the logo – it must be copied to the language folder with the email template.

## Previewing Translated Email Templates

The Preview buttons for Overdue Invoice Reminders, Payment Due Alerts, and Send Invoices work as follows:

- **If the template preview is for a specific customer** – such as when you select a customer in the Overdue Payment Reminders or Payment Due Alerts grid and click the Template column heading – the program will display the email for the customer’s preferred language (if the email template exists).

Number	Company Name	Flags	Days Over...	Stage	Invoices Overdue	Amount Overdue	Currency	Action	Template
	Custom Comfort	!	8	1 - Late	1	67,456.45	USD	Send Email	1Late.html
	Dr. Dan Penn	\$	30	1 - Late	1	10,090.12	USD	Send Email	1Late.html
	The Courtyard	\$	31	2 - Past Due	1	4,648.44	USD	Send Email	2PastDue.html
	Break-Away Designs	\$	43	2 - Past Due	1	178,552.39	USD	Send Email	2PastDue.html
	The Royal Cavendish Co.	\$	33	2 - Past Due	2	22,218.58	GBP	Send Email	2PastDue.html
	The Yoshida Gardens	\$	39	2 - Past Due	1	74	JPN	Send Email	2PastDue.html

- **If the template preview is *not* for a specific customer** – such as when you click the Preview button on the Send Invoices screen or on the setup screens for Overdue Payment Reminders, Payment Due Alerts, and Send Invoices – **the program will display the email template that matches the Sage 300 user’s language setting.**

So, if you are running Sage 300 in French, the program will preview the French email template.

# Appendix D: Sending Bulk Emails and Using Bulk Email Templates

TaiRox CRM and Collections provides several ways to send mass email messages to contacts using mass emailing programs such as MailChimp, SendGrid, or Swiftpage.

- **Upload a contact list to your bulk mail account and use it to send out emails.**
  - Export a selection or group of contacts – or all contacts belonging to a communication.
  - Upload the contact file to MailChimp, SendGrid, or Swiftpage websites.
  - Send emails to all contacts on the uploaded list.

The contact must have an email address, first and last name, must consent to receiving emails (set on the Contact screen), and not be inactive or belong to an inactive or deleted company.

- **Use CRM's Send Bulk Email program to send personalized emails to selected contact groups, CRM companies' contacts, or A/R customers' contacts.**

*Using a bulk email provider to send emails:*

- Create email templates and unsubscribe groups using the facilities on your bulk email provider's website.
- Run the Send Bulk Email program to send out bulk emails from your provider, using the program to select the email template, unsubscribe list, and set of email recipients.

*Sending bulk emails directly from CRM:*

- Optionally create email templates for use with the Send Bulk Email program – such as company information letters or newsletters.
- Run the Send Bulk Email program to send bulk emails from CRM using an email template stored on your server or directly adding the email text and specifying the email recipients.

The Send Bulk Email option is available with CRM and Collections. It is not included in the stand-alone Collections module from TaiRox Software.

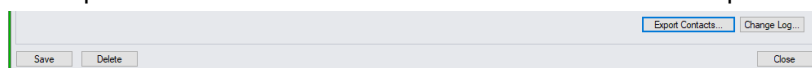
This appendix describes the process for sending emails using both methods.

## Exporting Contacts and Uploading a Contact List

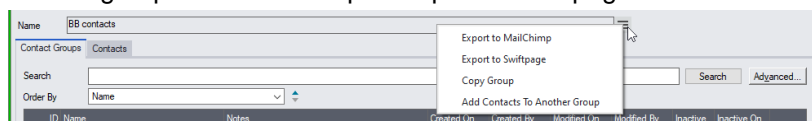
In order to export and upload contacts to a bulk email provider, each contact must have an email address, a first and last name, must consent to receiving emails (this is a checkbox on the Contact screen), and not be inactive or belong to an inactive or deleted company.

You can export a list of contacts using any of the following methods:

- Export **all filtered contacts from the Contacts program** using the **File > Export** function.
- Export **all contacts belonging to a Contact Group** from the Contact Groups program by clicking the Export Contacts button at the bottom of the Contact Group record...



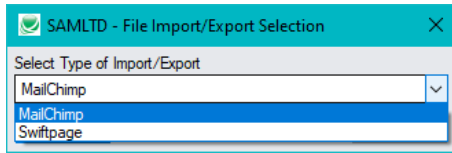
...or by clicking the Actions button (≡) at the top of the screen beside the Name field and choosing Export to MailChimp or Export to Swiftpage.



- Export **all contacts belonging to a Communication** from the Communications program by clicking the Export Contacts button.

## Choose MailChimp or Swiftpage

The Export function lists two email options – MailChimp and Swiftpage.



**The MailChimp format** includes just 3 fields: Email Address, First Name and Last Name. This format can also be imported into Swiftpage or other services.

**The Swiftpage format** includes many other fields that could be used for more complex communications. These fields will need to be remapped when importing into Swiftpage. The Swiftpage remapping input will look something like this:

### Import List

Your data fields must be mapped to List Manager fields.

Field Map:

Save Map as:

Original Column Name	Swiftpage E-marketing Contact List Column
Email Address	Email Address
First Name	First Name
Last Name	Last Name
Phone Office	Custom 1
Phone Mobile	Custom 2
Phone Other	Custom 3
Address 1	Address 1
Address 2	Address 2
Address 3	Address 3
Address 4	Custom 4
City	City
State	State
Country	Country
ZIP Code	ZIP Code
Web Site	Web Site

## Using CRM's Send Bulk Email Program

The Send Bulk Email program lets you send emails using a bulk email provider or using the email server specified in CRM Options.

You can also use templates from your email provider's site, or add the email subject and body on-the-fly.

### To Set Up Bulk Emailing with a bulk email provider:

1. Subscribe to MailChimp or SendGrid services (or other services supported by CRM and Collections). You can also set up and use the email server that is specified in CRM Options.
2. Add bulk email service account information to CRM using the Bulk Email Accounts setup program in the Marketing folder. (The Marketing folder does not appear in TaiRox Collections.)

3. Create contact groups in CRM for sending bulk emails. You can also choose email recipients by selecting ranges of CRM companies or ranges of A/R customer accounts.
4. Log in to your bulk email service to:
  - Create email templates for bulk emails.
  - Create unsubscribe groups for each kind of email that you send.
  - Associate your sending domain with the bulk email provider (if feature is available).
  - Create customer surveys.

Features are dependent on the email service provider.

5. Send test emails to a limited group of recipients.

## Using the Email Server Specified in CRM Options

This is an ideal option if you do not have a bulk email provider or if you are sending an email to just a few recipients.

### To send the email, you just:

- Select the "Email Server set up in Options)".
- Enter a "From" email address and name.
- Select recipients by choosing the contact group, contacts for a range of companies, or contacts for a range of A/R customers.
- Enter the subject and body of an email directly on the Send Bulk Email screen, or choose an email template stored on the Sage 300 server.

See [Editing Payment Due and Overdue Reminder Templates](#) for general information on editing email templates. Note that substitution variables are not supported in bulk email templates.

- Select attachments for the email and optional fields for the communication it creates.
- Click the Send button to send.

Send Bulk Email is ideal for sending out a new price list to contacts or letting customers know that their sales rep has changed.

## Using a Bulk Email Provider

The Send Bulk Email program lets you send emails through a bulk email provider using templates and unsubscribe lists from the email provider's site.

### To send the email:

- Select the "Bulk Email Provider".
- Select the email template stored on the bulk email provider's site.
- Select the unsubscribe list that matches the email you are sending.
- Enter a "From" email address and name.
- Select recipients by choosing the contact group, contacts for a range of companies, or contacts for a range of A/R customers.
- If you are not using a template, enter the subject and body of an email directly on the Send Bulk Email screen.
- Select attachments for the email and optional fields for the communication it creates.
- Click the Send button to send.

## Using your Provider's Bulk Email Templates and Unsubscribe Lists

Send Bulk Email lets you select a bulk email template and an unsubscribe group set up on your provider's website. Using multiple templates and unsubscribe lists, you can:

- Send on-brand HTML newsletters viewable through a browser and employ a newsletter unsubscribe list so users can stop receiving newsletters.
- Send business announcements with a business announcements unsubscribe list – to announce address changes, salesperson changes, etc.
- Send promotional emails using a PROMOTIONS unsubscribe list.
- Send informational emails, attach price lists, and use a different unsubscribe list.
- Take advantage of other provider features, such as surveys or landing pages.

# Appendix E: Updating Calendars with .ics Event Files

CRM and Collections generates .ics files when employees add or change revisit dates and user assignments for cases, opportunities, and tasks, and sends them to the “Email 1” address entered in Sage 300 for the newly assigned and newly unassigned users.

**.ics files** (iCalendar files) are plain text files containing the details for a calendar event or a to-do item. Typically, they are sent as attachments to emails that you can save to a calendar, such as the calendar in Outlook or the Google calendar.

**Note:** CRM and Collections does not send calendar files when tasks are generated by the Overdue Payment Reminders program. However, it will send calendar reminders when you change the revisit date or user for tasks generated by overdue payment reminders.

## Setting Up TaiRox CRM and Sage 300 to Email Calendar Events

Setting up TaiRox CRM and Sage 300 to send calendar event files involves the following steps:

- Add “Email 1” email addresses for all users in **Sage 300 > Administrative Services > Users**.

The screenshot shows the 'SAMLTD - Users' window. The 'User ID' is 'GERRY'. The 'User Name' is 'Gerry Freyer'. The 'Account Type' is 'User'. The 'Language' is 'English'. The 'Authentication Method' is 'Sage 300'. The 'Job Role' is 'Accounting Manager/Controller'. The 'Email 1' field is highlighted with a red box and contains the address 'gerry.freyer@universal.com'. The 'Email 2' field is empty. The 'Microsoft Office 365 Integration' section is also visible.

**TaiRox CRM and Collections sends calendar events to the Email 1 email address.**

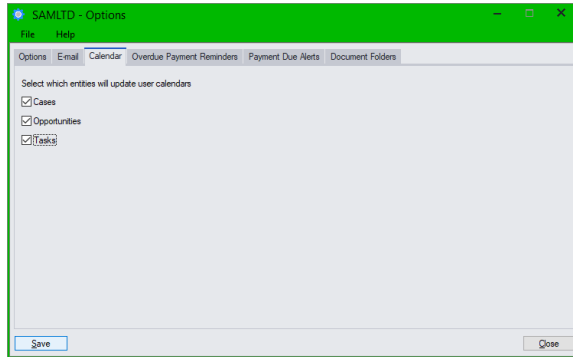
- Add the settings for your email server in **CRM and Collections > Settings > Options**.

The screenshot shows the 'SAMLTD - Options' window. The 'Email Server Settings' section is active. The 'Server Name' is 'smtp.youmailserver.com'. The 'Server Port' is '587'. The 'Use SSL' checkbox is checked. The 'Username' is 'useraccount@youmailserver.com'. The 'Password' is masked with asterisks. The 'From Email' is 'accounts@youmailserver.com'. There is a 'Send Test Email' button and a 'Save' button at the bottom.

Use the Send Test Email button to test the email server settings.

- Select the entities that you want to update calendars. The program lets you send calendar events whenever the revisit date and user assignment changes for cases, opportunities, and tasks.

Note that “Opportunities” will not appear if you are running the Collections module *without* CRM.



## How Calendar Events Update Your Calendar

Calendar events are generated and emailed to assigned users:

- When you manually create a new case, opportunity, or task with an assigned user and revisit date. The revisit date is the date for the calendar event.
- When the revisit date and/or user assignment changes for cases, opportunities, and tasks.

The program sends a calendar event to the assigned user—and to the previous owner if the ownership changes – when you save the case, opportunity, or task.

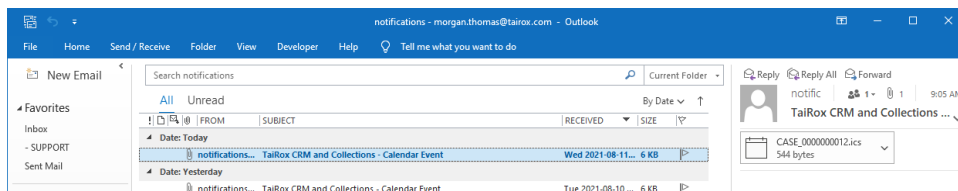
## Examples of Calendar Events

Calendar events are sent as email attachments and are handled differently by different email clients.

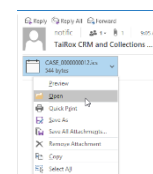
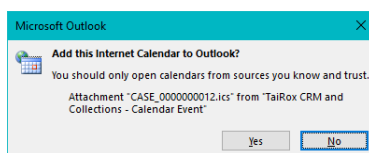
### Outlook email client

The following screens show a typical sequence for adding the emailed calendar event for a case to your calendar.

- Email arrives in email client – such as Outlook:



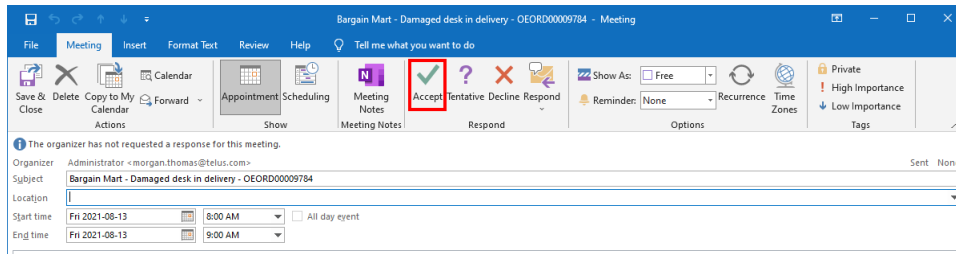
- Double-click on the calendar event attachment, or right-click the attachment and choose the “Open” command.
- **If Outlook is set as the default program for “.ics” files**, the program prompts you to add the calendar event to Outlook.



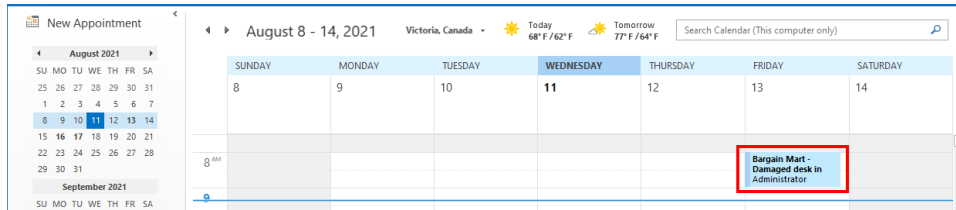
If this message does not appear, you can change Windows Settings to add Outlook as the default program. See below, [To change the default app...](#)



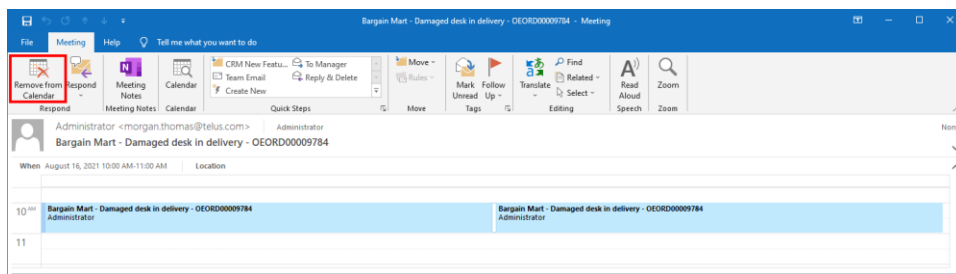
- To **Add this Internet Calendar to Outlook**, click the Yes button in the above dialog box to open the event, and then click the Accept button to add the calendar event.



The new calendar event will now appear in the Outlook calendar.

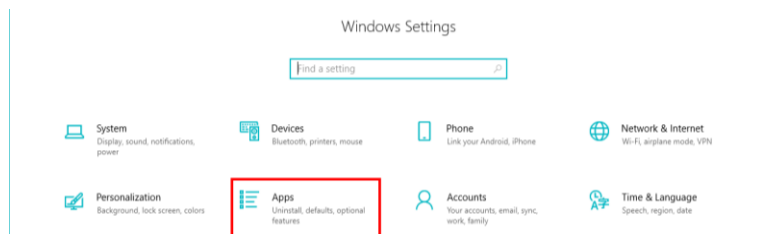


- If a case is reassigned to another user, you might see a calendar event like this appear, allowing you to delete a previously scheduled event from your calendar.

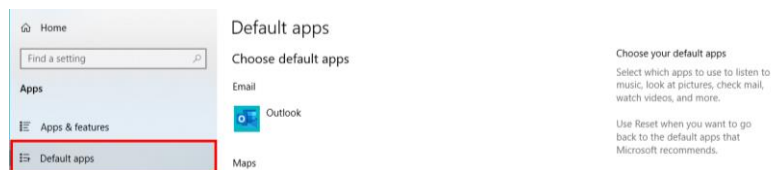


To change the default app to Outlook:

- Choose Settings > Apps.

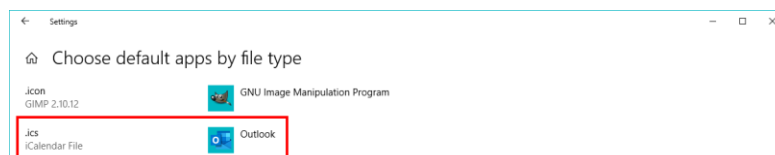


- Choose Default Apps.



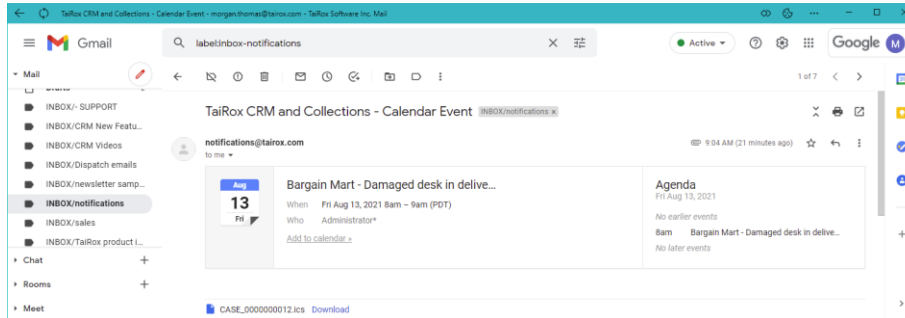
Scroll down and choose

- Scroll down to ".ics", and select Outlook if it's not already selected.

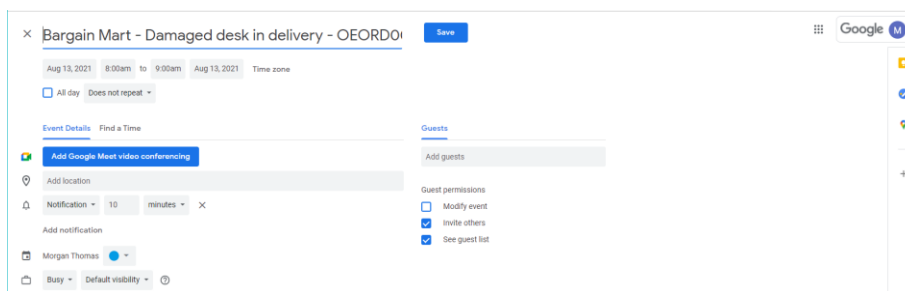


## Gmail email client

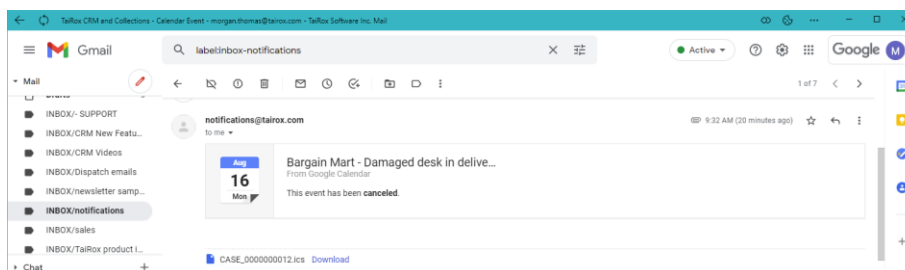
The following screen shows the same new calendar event in Gmail.



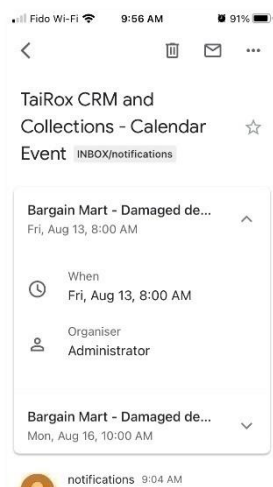
- Click the Add to Calendar link to add the event to the Google Calendar, where you can edit the entry before saving.



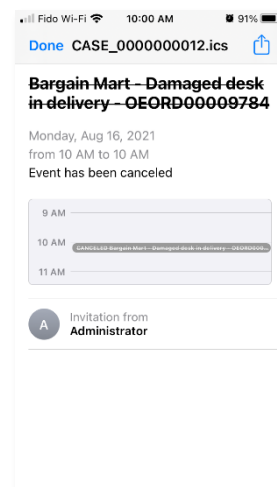
The next screen shows a calendar event being cancelled in Gmail.



*If viewing the Gmail message on your phone, the screen may look like this:*



*Email message for new calendar event*



*Opened Email attachment for cancelled calendar event*

## Examples of Calendar Event Files

CRM creates two main types of calendar event files for each entity that generates .ics files:

- METHOD = PUBLISH – used to create or update an event in a user's calendar when the case, opportunity or task is first reassigned to a user or is updated with a new revisit/meeting date.
- METHOD = CANCEL – used to delete an event in a user's calendar when the case, opportunity or task has been reassigned to a different user.

For example, here is a sequence of calendar events sent to a single user regarding a revisit date / meeting date for a case.

**Note:**

- The UID identifies the case.
- The sequence number shows the order of events.
- The title of the case is "Bargain Mart - Damaged desk in delivery - OEORD00009784".
- The administrator is the user who updated the file each time – set as event organizer.
- The event was cancelled when the assigned user was changed from Morgan to Carla.
- File dates are in UTC, not local time.

Calendar file adds an event on August 13 for Morgan	Date and Time changed to Monday at 10:00 am	Calendar event cancelled (reassigned to Carla)
<pre> BEGIN:VCALENDAR VERSION:2.0 PRODID:-//TaiRox Software Inc.//TaiRox CRM and Collections//EN METHOD:PUBLISH BEGIN:VEVENT ORGANIZER;CN=Administrator: MAILTO:mthomas@telus.com UID:CASE_0000000012 SEQUENCE:0 SUMMARY:Bargain Mart - Damaged desk in delivery - OEORD00009784 DTSTART:20210813T080000 DTSTAMP:20210811T160450Z CREATED:20210811T160450Z TRANSP:TRANSPARENT PRIORITY:5 CLASS:PUBLIC END:VEVENT END:VCALENDAR </pre>	<pre> BEGIN:VCALENDAR VERSION:2.0 PRODID:-//TaiRox Software Inc.//TaiRox CRM and Collections//EN METHOD:PUBLISH BEGIN:VEVENT ORGANIZER;CN=Administrator: MAILTO:mthomas@telus.com UID:CASE_0000000012 SEQUENCE:1 SUMMARY:Bargain Mart - Damaged desk in delivery - OEORD00009784 DTSTART:20210816T100000 DTSTAMP:20210811T163143Z CREATED:20210811T163143Z TRANSP:TRANSPARENT PRIORITY:5 CLASS:PUBLIC END:VEVENT END:VCALENDAR </pre>	<pre> BEGIN:VCALENDAR VERSION:2.0 PRODID:-//TaiRox Software Inc.//TaiRox CRM and Collections//EN METHOD:CANCEL BEGIN:VEVENT ORGANIZER;CN=Administrator: MAILTO:mthomas@telus.com UID:CASE_0000000012 SEQUENCE:2 STATUS:CANCELLED SUMMARY:Bargain Mart - Damaged desk in delivery - OEORD00009784 DTSTART:20210816T100000 DTSTAMP:20210811T163236Z CREATED:20210811T163236Z TRANSP:TRANSPARENT PRIORITY:5 CLASS:PUBLIC END:VEVENT END:VCALENDAR </pre>

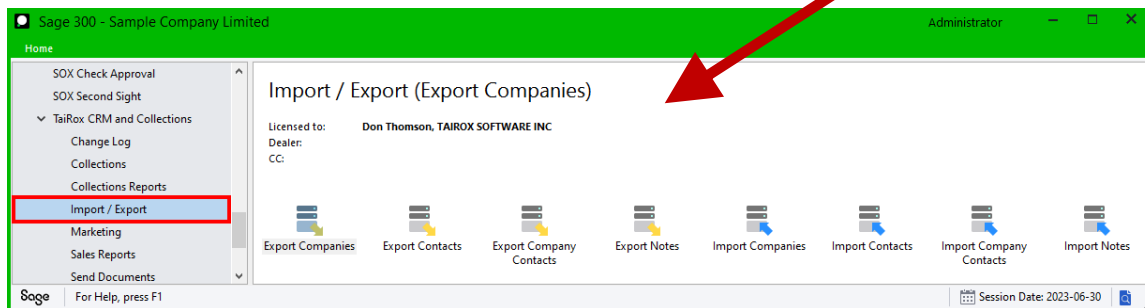
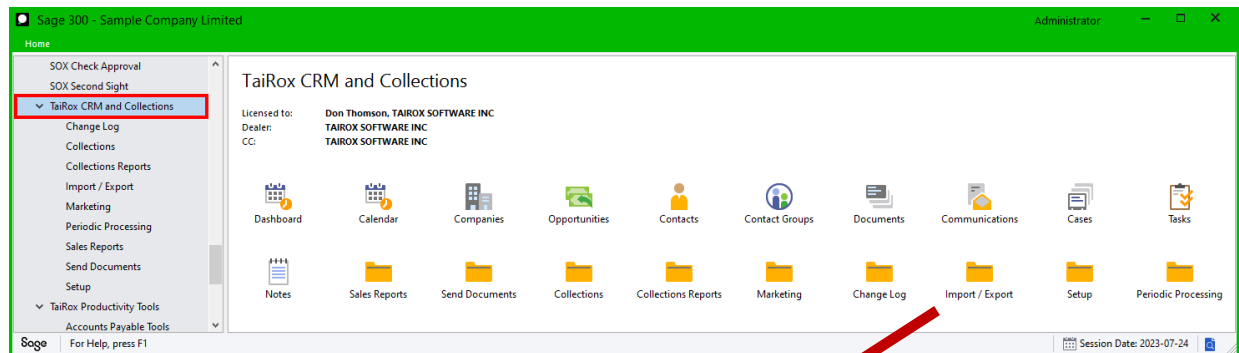
# Appendix F: Exporting and Importing Companies, Contacts, and Notes

CRM and Collection's programs for exporting and importing companies, contacts, and notes provide a flexible way to import company, contact and note data from non-Sage 300 databases and to create new CRM systems from existing ones. Import and export files are in Excel (xlsx) format.

Export and Import programs provide full support for optional fields, letting you export and import a file with a single line per company that includes optional fields.

**Note:** Import Companies does not automatically update A/R Customer records.

Run Sync Companies from the CRM and Collections Periodic Processing menu after importing records if you updated companies that are linked to A/R customers.



## Full Import / Export Support

The Export and Import programs for companies, contacts, company contacts, and notes let you:

- Import company, contact, company contact, and note information into CRM and Collections.
  - **Import Companies** imports from a file with a single line per company, allowing you to import companies from non-Sage programs. It also allows you to import a file that you previously exported from CRM and edited.
  - **Import Contacts** imports from a file of contact information with a single line per contact. It allows you to import contacts from non-Sage programs.
  - **Import Company Contacts** imports records that link contacts to CRM companies and specify which accounting forms (statements, invoices, and overdue payment reminders) should be emailed to the contact for the company.

**Note:** You must add or import companies and contacts before you can add or import the company contacts records.

- **Import Notes** imports notes for companies, cases, opportunities, and tracked invoices from Excel files with a single line per note.
- Export company, contact, company contact, and note information to a single record per line **that includes optional fields (where appropriate)**.
  - **Export Companies** creates a file with a single line per company for use with other programs, or to edit in a spreadsheet and then reimport the data.
  - **Export Contacts** creates a file of contact information with a single line per contact for use with other programs, or to edit in a spreadsheet and then reimport the data.

Note that the standard Sage 300 Export choice on the Companies File menu exports optional fields to a separate tab of a workbook. TaiRox Export functions include the optional fields as additional columns in the company and contact records.

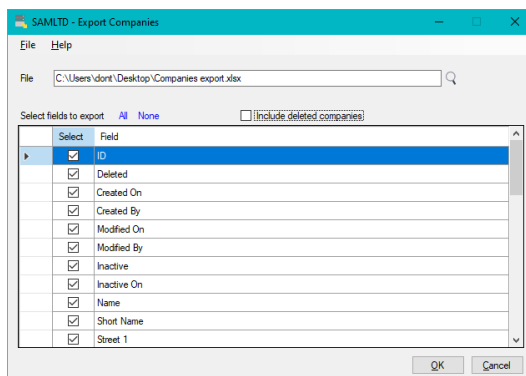
- **Export Company Contacts** exports the companies that contact is linked to, along with the accounting forms (statements, invoices, and overdue payment reminders) that each contact is emailed.
- **Export Notes** creates a file with a single line per note for use with other programs, or to edit in a spreadsheet and then reimport the data.
- Easily import additional company and contact fields that are in source programs but not in CRM.

Just add optional fields to CRM that match the additional source program's data fields, extract records from the source program into a spreadsheet, and then import all the data directly into CRM by mapping the additional source fields to CRM's optional fields.

TaiRox import programs also let you add new records to CRM and/or update existing records, allowing bulk record updates such as the addition of a new optional field.

## Exporting Company, Contact, Company Contact, or Notes Records

- Select the Export program from the Import / Export folder.



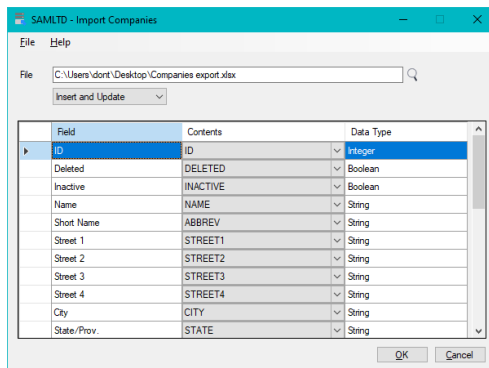
- Use the Finder to specify the destination file name and file location.
- For notes, choose whether to export notes for companies, cases, opportunities, or tracked invoices.
- For companies, choose whether to export deleted companies.
- Select which fields you want to export to the spreadsheet.

- Click the OK button. Optional field columns appear at the end of each company and contact spreadsheet line (if you use optional fields).

## Importing Company Records

- Select the Import Companies program from the Import / Export folder.
- Use the Finder to specify the source file name and file location. (If the name is already in the field, press Tab or Enter to load the import spreadsheet and display the spreadsheet columns.)

Note that the program reads the 1st row from the 1st visible worksheet to validate the import file and display the import fields.



- Choose Insert, Update, or Insert and Update, depending on the import process.
- If necessary, match the columns in the spreadsheet to the fields in the Company records.

Field	Contents	Data Type
ID	ID	Integer
Deleted	<Default Value>	Boolean
Inactive	<Default Value>	Boolean
Name	NAME	String
Short Name	ABBREV	String
Street 1	NAME	String
Street 2	STREET1	String
Street 3	STREET2	String
Street 4	STREET3	String
City	STREET4	String
State/Prov.	CITY	String
	STATE	String
	COUNTRY	String
	POSTALCODE	String

In the above example, the Deleted and Inactive fields are not in the spreadsheet, and the program provides a "default value" for these fields.

The spreadsheet has a column called ABBREV, which is being matched to the Short Name field in CRM.

- Match the optional fields to the import fields at the bottom of the list.
- Click the OK button to proceed.

### Notes – Import Companies

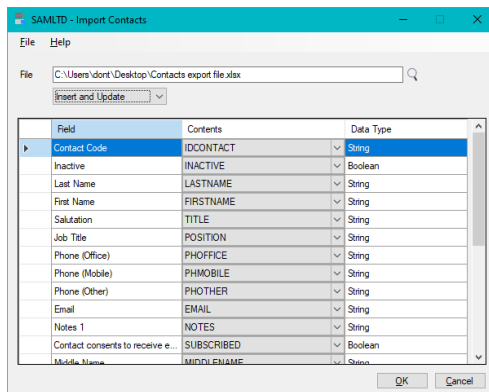
- The ID number is a required field.** Import will not proceed if you set ID to <Default Value>.
- Leave the ID number blank for new company records;** provide the ID number for updated records. The ID is used to match the updated record to the existing record.
- Currency code is a required field** – but you can set it to the <Default Value>.
- Records with an invalid Territory code will be skipped** – but you can set it to the <Default Value> (which will appear in the Company record as the Default Territory).
- Run Sync Companies after importing company records** that are linked to A/R customer records.

- When updating a company:
  - If you specify <Default Value>, or if the cell is empty, import will keep the current field value.
 Optional fields are handled as follows:
  - If you specify <Default Value> for the optional field, import will leave the existing value “as is”.
  - If you specify a column, import behaves as follows:
    - If the optional field already exists then it is either updated with the imported value [if there is a value] or deleted if the imported value is null.
    - If the optional field does not exist and a value was specified then the optional field is inserted.
- When inserting a new company:
  - If you specify <Default Value>, the program will enter the default value if one exists.
 Optional fields are handled as follows:
  - If you specify <Default Value> for the optional field, it will be inserted if its auto insert property is Yes in optional fields setup.
  - If you specify a column, the optional field will be inserted if the column contains a value.

## Importing Contact Records

- Select the Import Contacts program from the Import / Export folder.
- Use the Finder to specify the source file name and file location. (If the name is already in the field, press Tab or Enter to load the import spreadsheet and display the spreadsheet columns.)

Note that the program reads the 1st row from the 1st visible worksheet to validate the import file and display the import fields.

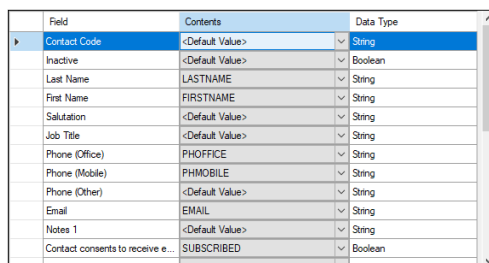


- Choose Insert, Update, or Insert and Update, depending on the import process.

### **Note that Contacts are independent of companies.**

You associate contacts with companies using the Company Contacts import file – or add them to companies on the Contacts tab for each company record (or on the Companies tab for each contact record).

- If necessary, match other columns in the spreadsheet to the fields in the Company records.



In the above example, the Deleted and Inactive fields are not in the spreadsheet, and the program provides a “default value for these fields.

- You can match contact optional fields at the bottom of the list to the import fields.
- Click the OK button to proceed.

## Notes – Import Contacts

- **The Contact Code is a required field.** Import will not proceed if you set the Contact Code to <Default Value>.

The Contact Code is also used to match the record updates to the existing records.

- Same Contact Code – it’s an update.
- New Contact Code – it’s an insert.
- The “Contact consents to receive emails” field is used for mass emails. It filters out contacts who don’t want emails when you export to MailChimp or Swiftpage.
- When updating a contact:
  - If you specify <Default Value>, or if the cell is empty, import will keep the current field value.

Optional fields are handled as follows:

- If you specify <Default Value> for the optional field, import will leave the existing value “as is”.
- If you specify a column, import behaves as follows:
  - If the optional field already exists then it is either updated with the imported value [if there is a value] or deleted if the imported value is null.
  - If the optional field does not exist and a value was specified, then the optional field is inserted.
- When inserting a new contact:
  - If you specify <Default Value>, the program will enter the default value if one exists.

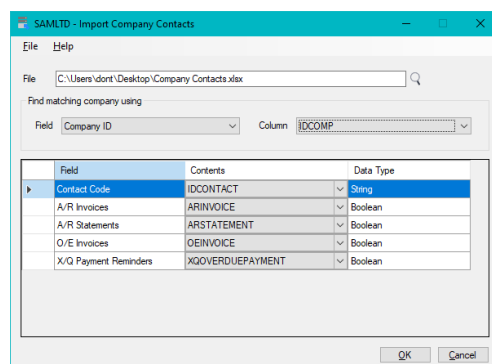
Optional fields are handled as follows:

- If you specify <Default Value> for the optional field, it will be inserted if its auto insert property is Yes in optional fields setup.
- If you specify a column, the optional field will be inserted if the column contains a value.

## Importing Company Contacts Records

- Select the Import Company Contacts program from the Import / Export folder.
- Use the Finder to specify the source file name and file location. (If the name is already in the field, press Tab or Enter to load the import spreadsheet and display the spreadsheet columns.)

Note that the program reads the 1st row from the 1st visible worksheet to validate the import file and display the import fields.





- Choose the fields for matching contacts to the correct companies in CRM.

**Note:** The Company Contacts file links contacts to companies and lets you specify the accounting documents that each contact is sent. You must add company records and contacts to CRM **before** importing the Company Contacts file.

You can identify the company that contacts belong to by:

- The Company ID field – the unique number that CRM assigns to each company in CRM.
- The Company Name field in the CRM company record.
- Matching an optional field that has been added to the company to a field in the import file.

Choose the field in the customer record for identifying the customer record from the left dropdown, and the column that matches it in the import spreadsheet.

In this case, we are matching the Company Name in CRM to a “NAMECOMP” column in the import file.

- If necessary, match other columns in the spreadsheet to the fields in the Company records.

Field	Contents	Data Type
Contact Code	IDCONTACT	String
A/R Statements	ARSTATEMENT	Boolean
A/R Letters	ARLETTER	Boolean
A/R Invoices	ARINVOICE	Boolean
O/E Invoices	OEINVOICE	Boolean
X/Q Overdue Payment Remin...	XQOVERDUEPAYMENT	Boolean

- Click the OK button to proceed.

## Importing Notes Records

- Select the Import Notes program from the Import / Export folder.
- Use the Finder to specify the source file name and file location. (If the name is already in the field, press Tab or Enter to load the import spreadsheet and display the spreadsheet columns.)

Note that the program reads the 1st row from the 1st visible worksheet to validate the import file and display the import fields.

- Choose the type of notes that you are importing – Companies, Cases, Opportunities, or Tracked Invoices.
- Choose Insert, Update, or Insert and Update, depending on the import process.

- Choose the fields for matching notes to the correct companies, cases, opportunities, or tracked invoices in CRM.

You can identify the company/case/opportunity/tracked invoice that notes belong to by:

- The Company ID/Case ID/Opportunity/Tracked Invoice ID field – the unique number that CRM assigns to each record in CRM.

OR

- If you are importing notes for companies, the Company Name field in the CRM company record.
- If you are importing notes for tracked invoices, the Document Number.

- Match other columns in the spreadsheet to the fields in the CRM records.

Note that you **MUST** choose the matching spreadsheet field for each record field – as in the following example.

Field	Contents	Data Type
Note ID	IDNOTE	Integer
Note Name	NAMENOTE	String
Note	TEXT	String

- Click the OK button to proceed.

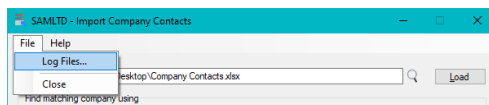
## Notes – Import Notes

- When inserting a new note:
  - The note IDs in the Excel file must be 0. CRM will assign IDs to all new notes.
- When updating an existing note:
  - The note ID in the spreadsheet file must match the ID of the note you are updating/replacing.

## View Import Log File

The import programs generate a log file that lists any issues from the import procedure.

- Choose File > Log Files... to display the file.



- The log shows the number of records added, updated, or skipped, as well as any import errors.

```
=====
Import Companies    2019-10-21 17:07:49

Performed by user: ADMIN
File: C:\Users\user\Documents\Import test.xlsx
Operation: Insert and Update

Row 3
Invalid input. Territory OR does not exist.
Row 4
Invalid input. Currency cannot be blank.

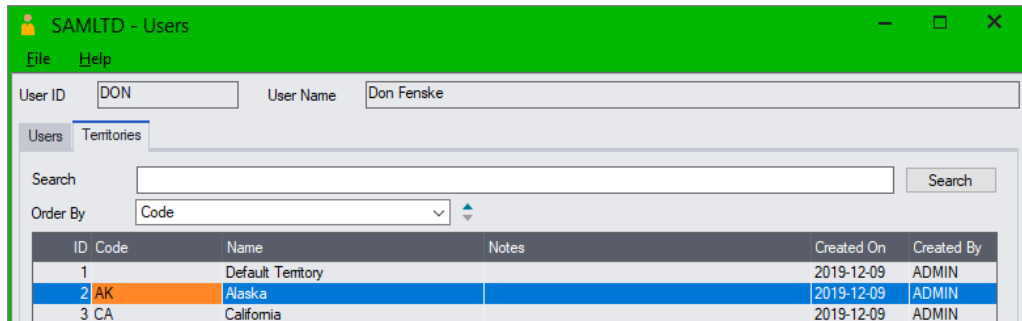
3 record(s) were read from the file.

0 records added.
0 records updated.
1 records skipped.
2 records not processed due to error(s).
```

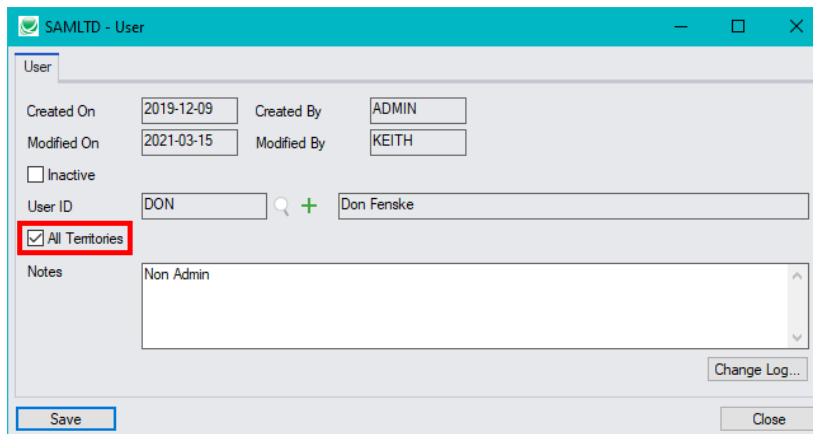
# Appendix G: CRM and Collections Security

CRM and Collections provides two layers of security on user access to customer account data: access by territory and access by security authorization.

- **Access by territory** – users see companies, opportunities, cases, and tasks based on the territories to which they belong. Tasks that are not associated with a company are not filtered by territory.
  - Users can be granted rights to see any number of specific territories. There is no hierarchy of territories.



- Users can be granted the right to see all territories. CRM and Collections includes a switch that effectively turns off all **territory** restrictions for a user.



- **Access by security authorization** – CRM and Collections provides a full set of security authorizations to control access to CRM settings, user maintenance, customer data, collections data, etc.
  - Setup Maintenance
  - Setup Inquiry
  - Import Processing
  - Export Processing
  - User Maintenance
  - Company Maintenance
  - Company Inquiry
  - Promote/Unlink Companies
  - Opportunity Maintenance
  - Opportunity Inquiry
  - Contact Maintenance
  - Contact Inquiry
  - Document Maintenance
  - Document Inquiry
  - Communication Maintenance
  - Communication Inquiry
  - Note Maintenance
  - Note Inquiry
  - Collections
  - Case Maintenance
  - Case Inquiry
  - Send Documents
  - Accounting Doc Maintenance
  - Accounting Doc Inquiry
- Disputed invoices, promised payments, and tracked invoices (collections related entities) appear **only if the user has been granted "Collections" security access.**

- Collections type cases also appear only if the user has been granted “Collections” security access.
- Users must have been granted Opportunity Inquiry (or Opportunity Maintenance) security access in order to see opportunities.
- Users must have been granted Case Inquiry (or Case Maintenance) in order to see cases.
- Security groups and user authorizations are all defined through Administrative Services – just like core Sage 300 modules.

# Frequently Asked Questions (FAQ)

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Read the user guide for TaiRox CRM and Collections in addition to reviewing this FAQ. The CRM and Collections user guide provides specific guidelines for setting up TaiRox as well as general information and notes on all CRM and Collections features.

## Resources Available to Answer Sage 300 Questions?

In many cases, issues with CRM and Collections are actually Sage 300 issues – such as database connectivity issues or issues where Sage 300 cannot create a control, and many of these issues have been encountered by other Sage 300 users.

### **Q: Where can you get fast answers to Sage 300 issues?**

*A: Google the error message and check the results.*

Sage 300 error messages are often self-explanatory or can be Googled for an explanation. These messages may indicate fairly simple issues that users can resolve, or environmental issues that consultants can resolve.

In many cases, you may find your answer on an existing Sage 300 support forum, posted by partners who have already encountered your issues.

For example:

<https://support.na.sage.com/selfservice/>  
[www.pluscommunity.com/ubbthreads/](http://www.pluscommunity.com/ubbthreads/)  
[https://www.sagecity.com/support\\_communities/sage300\\_erp](https://www.sagecity.com/support_communities/sage300_erp)  
<https://www.acutedata.com/sage-300-kb/>

## CRM and Collections Installation and Upgrade Issues

### **Q: Where can I get CRM and Collections release notes, and what will they tell me?**

*A: Click the [Release Notes](#) link in the upper left-hand corner of the TaiRox CRM and Collections product page on the TaiRox web site.*

*Among other things, the Release Notes will tell you about recent fixes and provide program compatibility information. For example:*

Build 2023-10-04

- Support added for Sage 300 2024.
- Contract Groups have enhanced management of copy and merge operations.

Build 2023-07-31

- Marketing menu added with Bulk Mail setup and send functions, enhanced Contact Group functions.

Send emails to multiple users through local mail server, MailChimp and SendGrid.

**Q: How do you install TaiRox CRM and Collections?**

*A: TaiRox CRM and Collections has a standard Windows installation file that follows standard removal protocols.*

As of September 2022, the installation file – Setup-2018-202n.msi – works with Sage 300 2018 to the current version.

**Important:**

- Sage 300 must already be installed on the machine before you install TaiRox CRM.
- Activate Sage's M/T Contacts module if available in your version of Sage 300. CRM contacts are totally compatible with Sage's Multiple Contacts module.
- When upgrading, uninstall the previously installed version of TaiRox CRM using the Windows Control Panel/Windows Settings before installing the new version.

**Q: What is the upgrade procedure for TaiRox CRM and Collections?**

*A: When upgrading, uninstall the previously installed version of TaiRox CRM using the Windows Control Panel/Windows Settings before installing the new version.*

**Q: How do I synchronize TaiRox CRM contacts with Sage 300 after activating the Sage 300 M/T Contacts module?**

*A: Sage's M/T Contacts module was added in versions of Sage 2020 Product Upgrade 1.*

**To use Sage contacts:**

- You must first install a version of Sage 2020 PU1 or higher that has the Multiple Contacts module.
- Upgrade TaiRox CRM to the most recent version.

**Step 1:** *Activate Sage 300 Multiple Contacts using the Data Activation program in Administrative Services. (And activate the most recent version of CRM, if necessary.)*

**Step 2:** *Run Sync Contacts in the TaiRox CRM Periodic Processing folder on the Sage 300 Desktop. Sync Contacts will add all CRM contacts to the Sage 300 M/C Contacts module.*

**Step 3:** *Run Sync Companies in the TaiRox CRM Periodic Processing folder on the Sage 300 Desktop. Sync Companies will update Sage A/R customer records with the contacts maintained for CRM Companies.*

After completing these steps, A/R customer contacts will match the contacts in CRM, and updates to contacts in either CRM or A/R will be reflected in both systems.

**Q: I have issues running Sage 300 and CRM after completing a Sage 300 upgrade. What can I do? And how can I diagnose installation issues?**

*A: Always upgrade all of your TaiRox products to the most recent versions when you upgrade Sage 300 products.*

The latest version of a TaiRox product replaces all previous versions of that product. CRM and Collections supports all versions of Sage 300 from 2018 through to the current version. In other words, the TaiRox CRM installation program is **not** Sage 300 version specific. If you upgrade Sage 300, make sure that you also upgrade TaiRox CRM and Collections.

A: *Run TaiRox Install Check (available here on the TaiRox website -- <http://tairox.com/install-check-for-sage-300-erp-accpac.html>)*

Install Check checks the environment on a computer running Sage 300. If the environment is not correct, some or all functions in Sage 300 and third-party applications may not operate correctly.

Install Check leaves no footprint – it does not install, does not change the Windows registry, and does not require a license.

Install collects basic environmental information and checks that certain Sage 300 related operations can be performed. The download is a zipped-up EXE file. Run the EXE, click the Installation Check & System Information buttons, copy the results to the clipboard, save in a Word document and analyze: paying particular attention to any red message.

If you are running a TaiRox program that provides a log file that shows a problem, review the log file as well.

If you can re-create a problem in a known environment (all O/S, Sage 300 and third-party software freshly installed in a recorded order), we can check what might be happening in a matching environment using our developer tools.

Note that SDK applications publish a list of files that are part of their application. Install Check checks this list against files that are actually installed. This helps diagnose situations, for example, when an anti-virus program has incorrectly quarantined a legitimate file.

## **Q: Why did the Sage Desktop stop working?**

We just upgraded a client to a new version of Sage 300. All workstations except one are working fine. One workstation gets a “DESKTOP has stopped working” message when the user attempts to log on to their live company database; however, it works fine when they log in to SAMINC or SAMSYS.

A: *This error is usually indicative of a Product Update mismatch.*

For example -- We had this error when setting up a test environment. The live data was from Sage 300 2018 PU6 and we restored it into the test environment where the application files were Sage 300 2018 Rev 0. The error went away when we installed PU6 in the test environment.

## **Q: Where can I find TaiRox CRM log files?**

A: *CRM creates logs when it runs processes for Emailing Statements, Letters and Invoices to customers, and it creates change logs whenever you change a company, contact, contact group, opportunity, case, document, communication, note, disputed invoice, promised payment, task, tracked invoice, territory, or user.*

To see a log file for Send Statements / Letters, Send A/R Invoices and Send O/E Invoices, open the program and click the Log button.

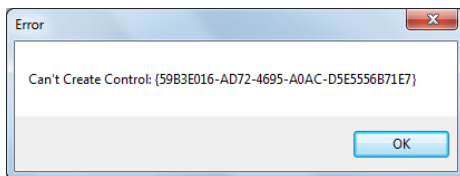
To view change logs, open the maintenance program and click the Change Log button, or open the Change Log folder and choose the Change Log icon to view change logs, or use the Change Log Report to print change reports.

**Q: How can I deactivate a product that is installed with Sage 300?**

*A: Fast DBTools has a deactivation function that correctly deactivates products by deleting all tables with the prefix and the rows in Common Services tables that refer to the prefix. For example, CRM uses data prefix "XQ".*

**Q: Why does message "Can't Create Control" appear when running a TaiRox CRM or Sage 300 program? (The problem is only occurring for a specific user.)**

A user gets the following message when opening a CRM program or drilling down to Sage 300 from CRM.



Other users logging in from the same workstation have no problems – for example as either ADMIN or with their own ID.

This user was previously able to run this program successfully, but had an issue and hasn't been able to use the program since.

*A: There are many possible reasons for this message to appear. For example, some Sage 300 containers have had issues.*

First thing to try: Restore Defaults on the Sage screen where there were issues and on the TaiRox Extended version of the screen.

- Right-click the icon on the Sage desktop, and choose Restore Defaults from the pop-up menu.

*A: You should also check that all Sage 300 and TaiRox CRM updates and have been installed.*

*A: Another possibility – if using a remote desktop to run Sage 300, check if the program's screen size is too large relative to the display resolution of your remote desktop window when you get the Can't Create Control error.*

- If you log onto the server (via remote desktop) and change the resolution does the problem go away?

The problem can arise when one user runs the program successfully and resizes the form – which then causes problems when another user runs the program as a published application.



*A: Google the error message for more troubleshooting leads, and look at the forums listed at the top of this FAQ.*

**Q: I get this error when trying to “Send Test Email” from Setup > Options in Tairox Collections. What is the problem?**



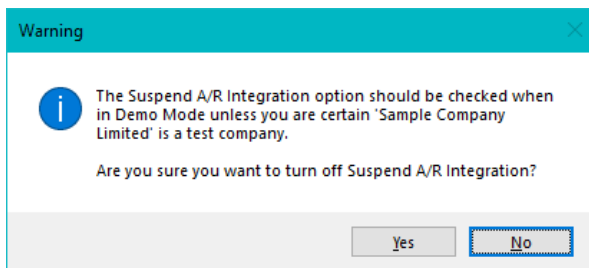
*A: This problem usually arises when you are running on a workstation, and did not run Workstation Setup after installing CRM and Collections. As a result, the Chilkat dll that was installed in the Sage 300 runtime folder has not been registered for this workstation.*

*You can fix the problem by running Sage's RegAcc.exe program on the workstation to register the dlls/ocxs that were installed with TaiRox CRM and Collections. (You can find RegAcc in the runtime folder.)*

## A/R and M/T Integration with Demo Data

**Q: Why did I get an error message when I unchecked “Suspend A/R and M/T Integration in CRM and Collections Options?”**

I unchecked the A/R and / or the M/T Integration checkboxes in [Setup Options](#) and got the following message:



*A: A/R and M/T Integration are suspended for your protection to ensure that CRM does NOT update the Sage 300 Multiple Contacts and Accounts Receivable data.*

If you created Demo Data with SAMLTD or SAMINC – or with a copy of your company database and want to see the results of A/R and M/T Integration – you can turn on integration in [Setup Options](#).

***Do not turn integration on if you are working with a production database!***

## User Management

### Q: Why can't I add a new user to CRM and Collections?

A: You must first add the user to Sage 300, and then use TaiRox CRM > Setup > Users to add the user to CRM.

- First, add users to Sage 300 using **Administrative Services > Users**.
- Second, add users to TaiRox CRM using **TaiRox CRM > Setup > Users**.

## Using SmartFinder Search

### Q: Why don't I have any search results?

A: Check the spelling for the terms you entered. If you are unsure of spelling, shorten the search string to characters that you are sure of.

## Using Contacts

### Q: How do you delete a customer contact from a CRM company? Does it delete the contact from Sage 300?

To delete a contact from a CRM company record, go to the Contacts tab, highlight the contact record in the grid, and use the Delete key (or the Unlink button).

- This will remove the contact from the company record, and, if you are using the M/T Contacts module, it will also remove it from the A/R customer record unless you suspend A/R integration (in [Setup Options](#)).

Similarly, if you remove a contact from the A/R customer record, it will also be removed from the CRM company record unless you suspend A/R integration.

- The contact will still remain in the CRM Contacts list and in the M/T Contacts module.
- If you delete a contact from the Sage M/T Contacts module, it will also be removed from the CRM Contacts program unless you suspend M/T integration.

#### **Notes concerning M/T Contacts in Sage 300 A/R and A/P:**

- If you delete the contacts from A/P or A/R, the contacts will be removed only from the vendor or customer record. The contact record will still exist in the list maintained by Sage's M/T Contacts module.
- To delete the contact from Sage 300, use the M/T Contacts module in Common Services. Note, however, that in the Sage 2020 versions of A/P and A/R, the code for the contact will still appear on the vendor or customer contact tabs until you delete it.

## Emailing Company Contacts

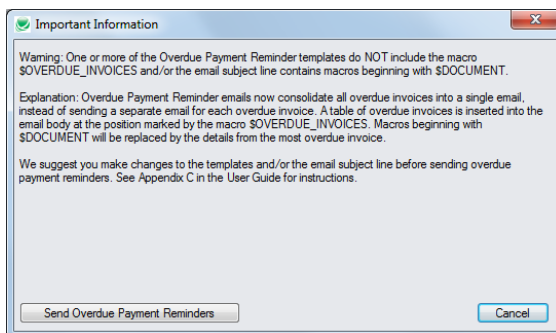
### Q: Can I send emails to CRM contacts directly from CRM?

A: Yes. The *Send Documents* button on the *Companies* screen lets you create an email for the currently selected company, add attachments, and select company contacts. The sent emails are added as communications for each contact.

See [Sending Miscellaneous Emails and Email Attachments to Contacts](#) for details.

## Emailing Statements, Invoices, Payment Alerts, and Reminders

### Q: I see the following “Important Information” message when I try to send overdue payment reminders. What’s wrong?



A: This message (or one like it) tells you that Email templates have changed due to a program update, and that you should update your old email templates.

The message was added in 2020 to warn you that templates – or the email subject line – included a `$DOCUMENT` macro. The message may be different in later versions of the program.

Some changes over the past few years are as follows:

In June 2023, we dropped the deprecated macros starting with `$DOCUMENT_`. They can no longer be used with payment due alerts or with overdue payment reminders.

In September 2020, we added the `$OVERDUE_INVOICES` macro to insert a table with all overdue invoices into payment reminder emails. We also changed all macros starting with `$DOCUMENT` to refer to the oldest outstanding invoice.

If you want to continue and send the Payment Reminder – for example, if you are demonstrating the feature or if you want to separately include information about the oldest invoice – click the *Process Overdue Payment Reminders* button to continue.

To cancel the mailout and update your templates, click the *Cancel* button.

The Email Subject, From Email, Reply-To Email, Cc and Bcc fields for A/R Statements/Letters and A/R and O/E Invoices are set in the **Setup** > [Accounting Documents](#) program.

Those fields for Overdue Payment Reminders and Payment Due Alerts are specified with the [Overdue Payment Reminders Setup](#) and [Payment Due Alerts Setup](#) programs.

**Q: My invoices are not being sent properly via email. In some cases, an email is actually sent, but the log notes a failure and the program does not create an EML file or a communication. This is a sporadic issue. What's wrong?**

I ran Send O/E Invoices, but the EML file was not created in the CRM directory, and the program did not create a communication, even though an email was sent. However, for no apparent reason, the program worked properly when I tried it later. This happens sporadically.

*A: Check the log file for a timeout after the program starts to send an email. It may be that your email server is not sending a response back in the first 30 seconds, which is the default email timeout for CRM and Collections. Your mail server may be busier at some times and not so busy at others – when you do not experience the issue.*

If your email server is timing out, you have several options:

- Check the server to see why it takes over 30 seconds to respond. IT staff may be able to upgrade the server or set up a relay email server.
- Increase the ReadTimeout value in the XQ.INI file in recent versions of CRM and Collections (in the Sage300\XQ61A subfolder). This setting was added in July, 2022.

The downside of this approach is that our program may appear to be “hung” as it waits for a longer time to get a response from the mail server.

The setting is initially commented out (the line starts with “;”) and default to 30 seconds.

```
[SendDocuments]
SendEmails=True
;ReadTimeout is in seconds. The default value is 30.
;ReadTimeout=300
```

Un-comment the line and specify a larger value than 30.

**Q: I have the wrong “From Email” address in my emailed documents. Where does this address come from?**

*A: The default “From Email” address comes from the Email tab in the Setup > [Options](#) program. If this field is blank, the default address will be the Email 1 address from the Sage 300 user's account.*

You can override the default email address in Options for the following emailed documents using the [Accounting Documents](#) Setup program:

- A/R statements and letters
- A/R and O/E invoices

And you can override the default email for Overdue Payment Reminders and Payment Due Alerts with the [Overdue Payment Reminders Setup](#) and [Payment Due Alerts Setup](#) programs.

If you do not specify a From Email address in Accounting Documents, the above programs will use the setting in Options.

You can also override the default From Email address when you resend documents from the Company window by specifying a new address in the [Send Documents](#) window.

**Q: The emails for Overdue Payment Reminders, Payment Due Alerts, and/or Send Invoices are not using the customer's preferred language. What's wrong?**

A: See [Sending Emails and Invoices Using the "Preferred Language" Company Setting](#) for details on sending emails in the customer's language.

**Here are the steps for sending French or Spanish emails:**

- Install the Sage 300 language files for French and/or Spanish to send emails and invoices in the target languages.
- Select the Preferred Language in the Company window for all customers that should receive French or Spanish emails.
- Create FRA and ESN subfolders for the translated versions of your email templates.

For example:

```
<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Overdue Payment Reminders\FRA
<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Payment Due Alerts\FRA
<Sage300SharedData>\Company\<companyID>\TaiRox CRM\Templates\Send Invoices\FRA
```

- Add the French and Spanish versions of your email templates to the default templates folders for overdue payment reminders, payment due alerts, or invoices.
  - The translated templates must have the same name as the English versions in the root folders.
  - You must include any image files for the emails in the language subfolders.

## Synchronizing Contacts and Companies

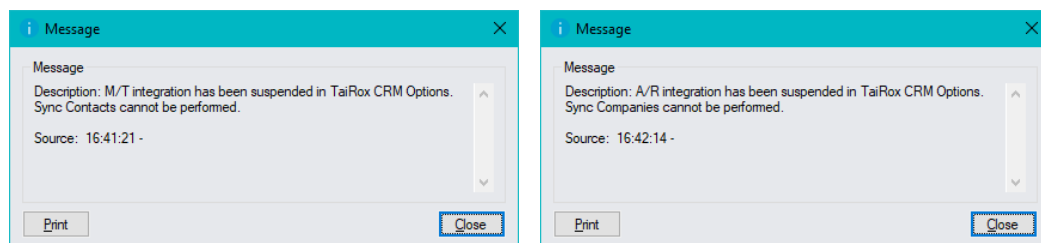
**Q: Why doesn't Sync Companies add CRM companies to A/R?**

A: *Sync Companies synchronizes companies that were not synchronized by CRM's normal A/R Integration – and A/R integration does not automatically add new companies to A/R.*

Usually, you will add prospective customers to CRM, and then promote them to Accounts Receivable when they become customers. See [Promoting Prospects to Customers in Accounts Receivable](#).

Sync Companies is mainly used when you first set up CRM and want to add all customer records to CRM as companies, and when circumstances have caused the two databases to go out of sync (such as suspending A/R Integration on the [Setup Options](#) form).

**Q: Why does a message appear when I choose Sync Contacts / Sync Companies?**



A: *Sync Contacts and Sync Companies are disabled if you suspend integration with the Sage M/T contacts module and with A/R. To enable the programs, you must uncheck "Suspend M/T Integration" and "Suspend A/R Integration" on the first tab of the [Setup Options](#) screen.*

## Using Sage Number Changers

**Q: I've been using the Sage Number Changers and don't think that all records were updated in CRM. Does CRM or CRM and Collections work with Sage 300 number changers**

*CRM or CRM and Collections does handle Sage 300 number changers – but ONLY for changing one number to another. It does not combine two numbers into one.*

You should also:

- Make sure that you are using the most recent version of CRM or CRM and Collections with Sage 300 to ensure that your version of CRM matches the version of Sage 300.
- Update generated data after using the number changers – for example, update Customer Aging, Overdue Invoices, Payment Due Alerts, and Send Invoices.

Note also that CRM database tables do not include vendors, I/C items or G/L Accounts, so those Number Changers do not apply.