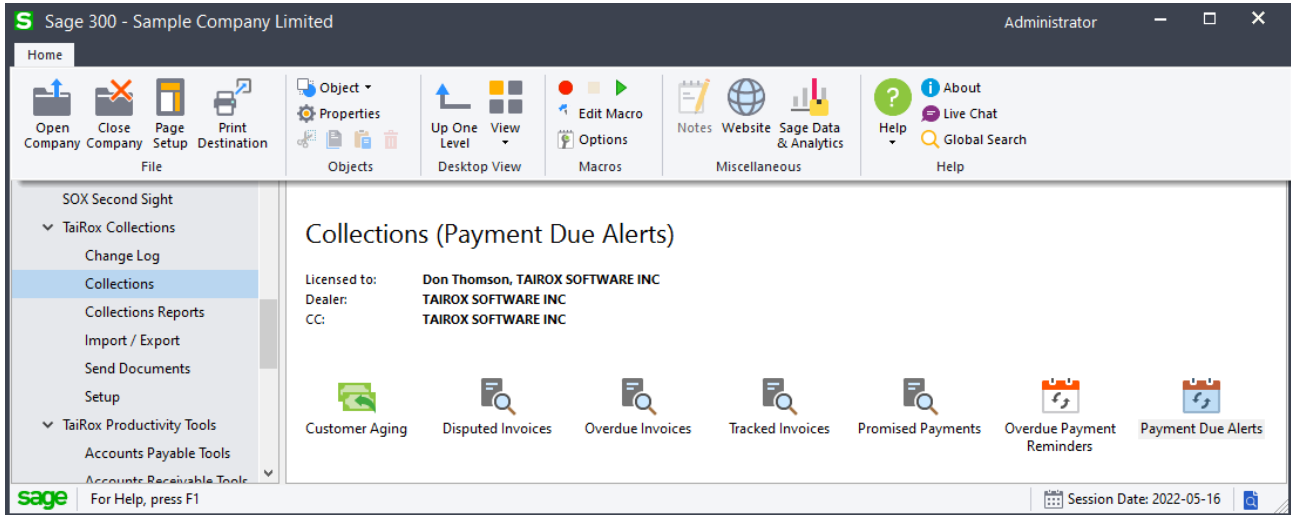


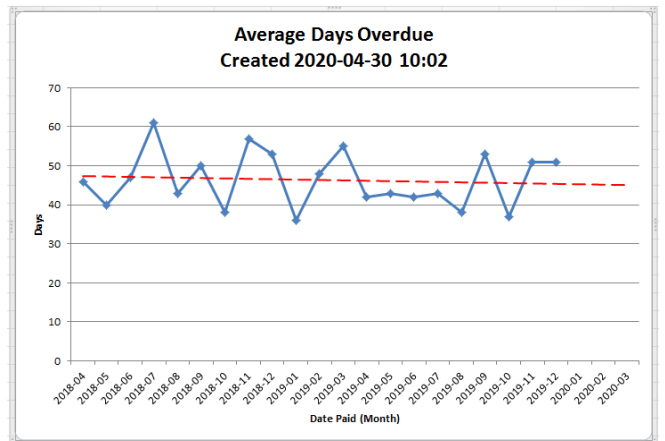
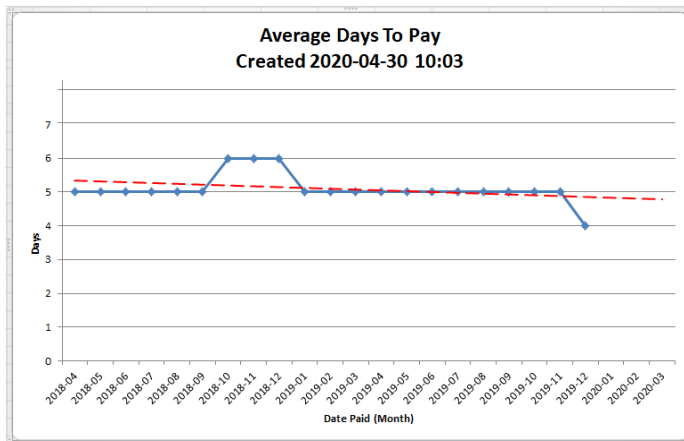
## TaiRox Collections for Sage 300

Available for \$1595 + \$400 per year, TaiRox Collections provides collections features, integrated into the Sage 300 desktop and stored in a Sage 300 company database. Manage overdue payment reminders, disputed invoices, promised payments, payment due alerts, cases, notes and communications from a collections-focused dashboard. Watch an overview: <https://vimeo.com/639657200>



### Assess collections performance

See trend lines in the Average Days to Pay and Average Days Overdue charts. Review details and totals in the Disputed Invoices and Promised Payments reports. Search using an internet-like search engine.



## TaiRox Collections for Sage 300

### Manage overdue payment reminders to improve cash flow

Email stage-specific overdue payment reminders and generate phone call tasks for customers with overdue accounts. The program skips on-hold invoices, lets you include invoices as attachments, sends emails to multiple company contacts, and lets you opt out customers or add customer-specific grace periods. Email bodies include either an Overdue Invoices or an Account Summary table. Scheduled collections phone call tasks appear on users' dashboards. Watch: <https://vimeo.com/604986255>

#### Sample Company Limited - Payment Overdue



3:21 PM



ARTR-CRE-006.PDF  
26.36 KB



ARTR-INV-003.PDF  
25.39 KB

To: Trudeau, Jose; Vipond, Joseph; Sloan, Joe; English, Jo; French, Beth; Kershaw, Elizabeth; Persall, Philip

Dear Mr. Black,

This is another reminder that we have yet to receive payment for one or more invoices listed below. I would appreciate it if you could let me know when we can expect payment.

The details of all overdue invoices are as follows:

Invoice	Date	Amount	Due	Balance	Days Overdue
TR-CRE-006	2/2/2019	264.61	2/15/2019	264.61	55
TR-INV-003	1/1/2019	123,235.57	1/15/2019	105,967.65	86
<b>Total:</b>				106,232.26	

Overdue invoice balances by days overdue:

1 - 30 Days	31 - 60 Days	61 - 90 Days	Over 90 Days	Total
0.00	264.61	105,967.65	0.00	106,232.26

If the payment has already been sent, please disregard this notice.

Sincerely,  
Astra, 604-555-8071

## TaiRox Collections for Sage 300

### **Speed collections with payment due alerts**

Send 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. The program lets you attach due invoices as PDF files, and sends emails to multiple company contacts. CRM uses the same contact list for each company for payment due alerts and for overdue payment reminders.

Watch: <https://vimeo.com/604999626>

### **See an enhanced, lightning-fast aged trial balance**

See an ATB that flags unapplied cash, disputed invoices and collections cases. Filter by customer groups and disputed invoice amounts. Create a collections case on the spot or drill down to an existing case. Flip from a customer-centric view to a document-centric view with one click. Don't wait for a printing process when you can see the same information on screen in less than a second.

Watch: <https://vimeo.com/605003090>

### **Record and manage disputed invoices**

Create and maintain a record of which invoices are in dispute. Include a revisit date so that the disputed invoice will appear on users' dashboards. Optionally assign to a specific person.

Watch: <https://vimeo.com/605006489>

### **Track promised payments**

Record date promised, amount promised and amount paid. Include a revisit date so that the promised payments will appear on users' dashboards. Watch: <https://vimeo.com/605008276>

### **Resend A/R and O/E documents to customers in 30 seconds**

Stop searching through email folders. Find the company using internet-like search capabilities. Click on Click on Send Documents to resend invoices to customers as PDF attachments. Drag and drop additional files into the communication and send the email to multiple contacts.

Watch: <https://vimeo.com/605016839>

### **View collections cases in a dashboard**

The CRM dashboard shows a concise list of cases to be revisited by date. Change the display to daily, weekly or monthly with one click. Flip between cases assigned to you and to your team with one click.

Watch: <https://vimeo.com/604976266>

### **Bulk send invoices, statements and letters**

Store a record of sent emails as a communication. Find and view the emails quickly using internet searching capabilities. Watch: <https://vimeo.com/605018210>. A new send invoices program emails A/R Invoices, O/E Invoices, and CR/DR Notes in one operation with flexible selection criteria. Watch:

<https://vimeo.com/675594034>

### **Integrate with your calendar**

Turn on the option to send a calendar attachment by email to the Sage 300 user whenever a case or task changes. Watch: <https://vimeo.com/604980928>