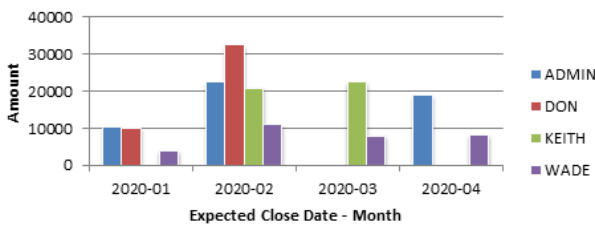
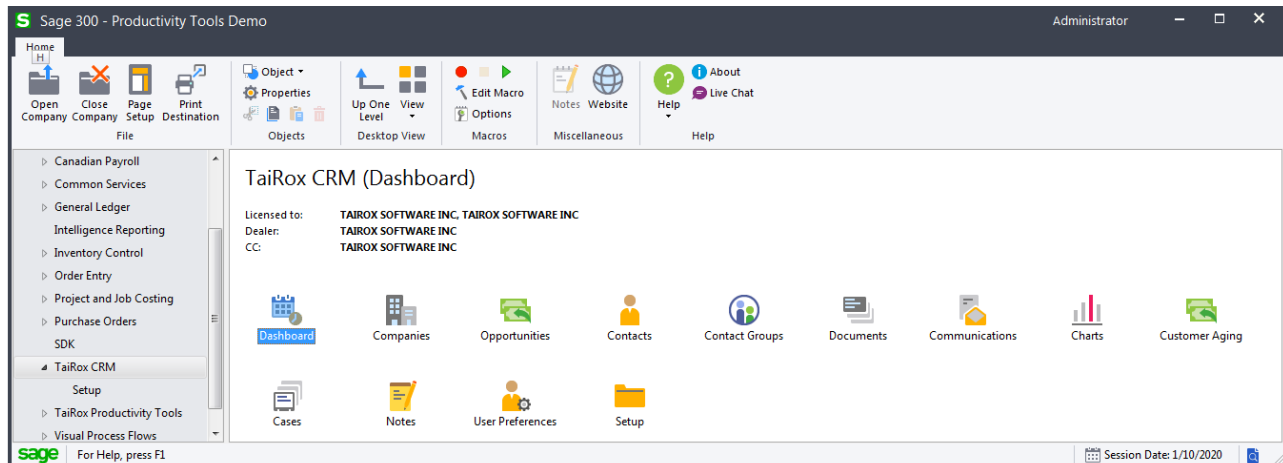


TaiRox CRM for Sage 300

TaiRox CRM, available for \$990 per year, provides customer relationship & collection management features integrated into the Sage 300 desktop and stored in a Sage 300 company database.



General Features:

- Track opportunities and create dozens of Excel charts to assess future sales and past performance.
- Track prospect companies and promote to Sage 300 A/R customers when sales close.
- Track contacts and link to their Facebook, LinkedIn, Twitter or other social media pages.
- Track communications with contacts. Group contacts. Send bulk email to MailChimp and Swiftpage.
- See every change to every entity. Know who has made each change, and when.
- A key design goal: The information you want to see is always one click away.
- Attach network documents, internet documents and URLs to any entity. Launch with one click.
- See lightning-fast customer aging on-screen, with both customer and document views.
- Create collection, support and other cases and manage by revisit date, priority and severity.
- View cases and opportunities on a date-centric dashboard, by day, week or month.
- Attach notes to cases, companies, contacts and opportunities.
- ***NEW*** Recreate and send invoices (etc.) to multiple contacts, keeping a perfect email record.

"The TaiRox team continues to knock it out of the park by developing great new products that enhance the performance and functionality of Sage 300. Our customers who have TaiRox products installed love them!" **Kelly Hummel, Net@Work.**

TaiRox CRM for Sage 300

Sage 300 Related Features:

- Data is field-level compatible so prospects are promoted to customers without truncation.
- Display the sales pipeline in functional currency using Sage 300 exchange rates.
- Display charts in fiscal periods or fiscal quarters as well as by week or month.
- Salespeople belong to multiple Sage 300 customer territories.
- Quotes and orders created with Sage 300 Order Entry can be linked to an opportunity.
- Launch the order entry window directly from CRM to create a new quote or order.
- Customer aging performs the same calculations as Sage 300 Accounts Receivable.
- Optional Fields extend functionality like any other Sage 300 module.
- DBDump and DBLoad all data just like any other Sage 300 SDK module.
- There is no complicated licensing scheme. Sage 300 LanPaks are all that's needed.
- Keys and mouse-clicks behave as any Sage 300 user would expect.

CRM Companies can be linked to Sage 300 customers or remain unlinked until promoted to a customer. Contacts, opportunities and cases are linked to a CRM company. Companies can be associated with a territory and CRM associates a Sage 300 user with one or more territories. These relationships control access to companies and associated entities.

The screenshot shows the 'PTDEMO - Contacts' application window. The 'Name' field is set to 'Anderson, Charles'. Below the search bar, there is a table of contacts. The table has columns for ID, Company Name, Last Name, First Name, Title, Position, Phone (Office), Phone (Mobile), and Phone (Other). The contacts are sorted by Last Name.

ID	Company Name	Last Name	First Name	Title	Position	Phone (Office)	Phone (Mobile)	Phone (Other)
53	Dr. Dan Penn	Anderson	Charles			(212) 555-1016	(212) 555-1005	(212) 555-1006
82	The House Doctors	Anderson	Frank		VP Sales	(305) 555-1017	(305) 555-1032	(305) 555-1095
111	The Paper Hangers	Anderson	Ronald			(212) 555-1080	(212) 555-1003	(212) 555-1031
24	The Courtyard	Anderson	Y	Mrs		(604) 555-1024	(604) 555-1055	(604) 555-1029
87	J & Y Builders Ltd.	Black	Beth		COO	(212) 555-1000	(212) 555-1032	(212) 555-1004
116	Business Works!	Black	Claire			(305) 555-1054	(305) 555-1081	(305) 555-1088
29	Custom Comfort	Black	Hoji	M		(403) 555-1088	(403) 555-1016	(403) 555-1095
58	J & Y Builders Ltd.	Black	William		Purchasing Director	(604) 555-1055	(604) 555-1059	(604) 555-1057
16	ACME Plumbing	Briar	Charles			(636) 555-1085	(636) 555-1048	(636) 555-1087
45	Astral Construction Co Ltd.	Briar	Frank		Salesperson	(250) 555-1061	(250) 555-1040	(250) 555-1022
103	Bashaw Bulldozing	Briar	Hoji			(416) 555-1002	(416) 555-1099	(416) 555-1018
74	Forester Building Supplies	Briar	Ronald			(866) 555-1094	(866) 555-1074	(866) 555-1093
132	Web customer sales	Briar	William	Ms	Director of Sales	(703) 555-1070	(703) 555-1094	(703) 555-1051
19	ACME Plumbing	Cavendish	Edward			(212) 555-1020	(212) 555-1017	(212) 555-1005
106	J & Y Builders Ltd.	Cavendish	George		COO	(415) 555-1096	(415) 555-1024	(415) 555-1043
48	Break-Away Designs	Cavendish	Joe	Ms		(305) 555-1034	(305) 555-1016	(305) 555-1068
77	Frame-Up	Cavendish	Wade		Purchasing Director	(212) 555-1053	(212) 555-1020	(212) 555-1018
135	Web customer sales	Cavendish	Y			(636) 555-1088	(636) 555-1087	(636) 555-1095
128	Bargain Mart Stores Inc.	English	Anne		CFO	(212) 555-1094	(212) 555-1085	(212) 555-1018
41	Astral Construction Co Ltd.	English	Jeff			(604) 555-1048	(604) 555-1089	(604) 555-1079

The Companies program displays company data with searching, sorting and paging abilities. All of the Sage A/R customer contact fields are maintained in CRM, with exactly the same length and format. This means there is no data loss when import, promote or synchronization operations are performed.

TaiRox CRM for Sage 300

Some Technical Details:

- Searching is done using TaiRox SmartFinder technology, "just like an internet search engine". Type in a word and all fields in all records are searched for a match. Too many matches? Enter a second word. What could be simpler?
- CRM maintains additional tracking fields as well as Sage 300 audit stamps. Modified By and Modified On fields are retained when dumping and loading databases. Created By and Created On fields are retained separately.
- Complete change logs are kept showing the user who made the change, the date and time of the change, and the before & after values of all changed fields.
- A single copy of a document can be linked to any number of entities of any type. Documents can be linked to network documents, internet documents such as PDF files or web pages.
- Click on a tab heading to provide quick access to entities related to the selected row.
- Drag fields to the desired location in the grid. Hide columns and restore defaults as usual.

CRM Contacts belong to a single company.

The screenshot shows a web-based contact form titled "PTDEMO - Contact". The form is divided into several sections. At the top, there are tabs for "Contact 12", "Documents", "Social Media", "Communications", and "Contact Groups". The main form area contains the following fields and controls:

- Company Name:** A text input field containing "Mr. Ronald Black".
- Created On:** A date input field containing "02/09/2019".
- Created By:** A text input field containing "ADMIN".
- Modified On:** A date input field containing "02/09/2019".
- Modified By:** A text input field containing "ADMIN".
- Inactive:** A checkbox labeled "Inactive" which is currently unchecked.
- Last Name:** A text input field containing "English" with a green plus sign to its right.
- First Name:** A text input field containing "Jo".
- Title:** An empty text input field.
- Position:** An empty text input field.
- Phone (Office):** A text input field containing "(403) 555-1070".
- Phone (Mobile):** A text input field containing "(403) 555-1065".
- Phone (Other):** A text input field containing "(403) 555-1018".
- E-mail:** A text input field containing "Jo.English@tairox.com" with a small envelope icon to its right.
- Subscribed:** A checked checkbox labeled "Subscribed".
- Notes:** A large, empty text area for notes.
- Change Log:** A small button labeled "Change Log..." located at the bottom right of the notes area.

At the bottom of the form, there are two buttons: "Save" on the left and "Close" on the right. To the right of the form, there are two social media icons: LinkedIn and YouTube.

Quick access is provided to documents, communications and social media links related to a contact.

Want to see a picture of the contact? Click on their Facebook or LinkedIn icon.

A contact can belong to any number of groups.

Filtered contacts can be exported to MailChimp and Swiftpage formats for email campaign processing.

TaiRox CRM for Sage 300

CRM Opportunities belong to a single company.

Any number of Sage 300 orders, quotes and documents can be linked to an opportunity.

Dozens of sales management charts are created from opportunities. Charts are stored as editable Excel spreadsheets.

The stages of an opportunity are user defined.

PTDEMO - Opportunity

Opportunity 8 | Orders | Documents | Notes

Company Name: Mr. Ronald Black

Created On: 02/09/2019 | Created By: ADMIN

Modified On: 02/09/2019 | Modified By: ADMIN

Name: Spring Sale

Amount: 10,000.00 USD

Certainty: 35

Stage: MEETING | Meeting

Assigned To: ADMIN

Status: Lost

Opened On: 02/09/2019 | Expected Close: 08/04/2019

Revisit On: / / | Closed On: 08/04/2019

Notes: Grade C

Buttons: Save, Close, Change Log...

CRM Cases belong to a single company.

Any number of documents and notes can be linked to a case.

Cases are categorized as Collection, Support and Other.

NEW Cases now include user defined stages.

A case's priority can be low, normal or high. A case's severity can be low, normal or high.

PTDEMO - Case

Case 3 | Documents | Notes

Company Name: Mr. Ronald Black

Created On: 11/06/2019 | Created By: ADMIN

Modified On: 11/06/2019 | Modified By: ADMIN

Name: 106,232.26 USD Overdue

Type: Collection

Severity: Normal

Priority: Normal

Assigned To: KEITH

Status: Open

Opened On: 01/10/2020

Revisit On: 01/12/2020

Notes:

Buttons: Save, Close, Change Log...

TaiRox CRM for Sage 300

Customer Aging provides a lightning-fast way to spot customers whose payment obligations suggest that a collections case should be opened. Customers with unapplied credits and open collections cases are flagged - with a customer-centric view of all cases one click away. There are Customer and Document display options. Aging options are provided consistent with Sage 300 methods.

PTDEMO - Customer Aging

File Help

Current: -3,265,010

Age Unapplied Credit Notes and Debit Notes: As Current

Age Receipts, Unapplied Cash and Unapplied Prepayments: As Current

Display: Customers

Only Show Customers Overdue by 1 or More Days

Customer Number	Company Name	Flags	Currency	Days Overdue	Current	1 - 30	31 - 60	61 - 90	Over 90
1100	Bargain Mart - San Diego	!\$	USD	365	2,291.13	283.18	95.87	0.00	2,507.67
1105	Bargain Mart - Oakland	!\$	USD	365	2,273.11	687.82	0.00	0.00	16,500.19
1200	Mr. Ronald Black	!\$	USD	360	3,898.97	0.00	0.00	0.00	106,232.26
1210	ACME Plumbing	!	USD	117	2,233.80	0.00	0.00	0.00	434.20
1240	The Courtyard	!\$	USD	330	993.03	0.00	0.00	0.00	4,837.22
1400	Coastal Electric Company	!\$	CAD	300	-22,005.98	98.54	0.00	0.00	1,677.66
1500	Custom Comfort	!	USD	307	2,023.77	0.00	0.00	0.00	67,569.58
1520	Mr. Stephen Kershaw	!	USD	117	660.76	0.00	0.00	0.00	528.60
1580	Break-Away Designs	!\$	USD	342	4,727.72	0.00	0.00	0.00	178,552.39
1600	Dr. Dan Penn	!\$	USD	329	320.11	0.00	0.00	37.76	10,090.12
7100	Bashaw Bulldozing	!\$	CAD	308	265.42	0.00	0.00	0.00	350.57
7300	The Royal Cavendish Co.	!\$	GBP	332	479.16	0.00	0.00	0.00	36,910.76
7400	The Yoshida Gardens	!\$	JPN	338	17,140	0	0	0	74

Page 1 of 1

Customer Information related to collection cases provides a way to see all cases and documents for that customer together with data related to collections.

PTDEMO - Customer Information

Customer Number: 1200 | Mr. Ronald Black

Credit Limit: 20,000.00 USD

Balance: 110,131.23 USD

Terms: DUETBL | Average Days to Pay: 75.5 | Number of Paid Invoices: 19

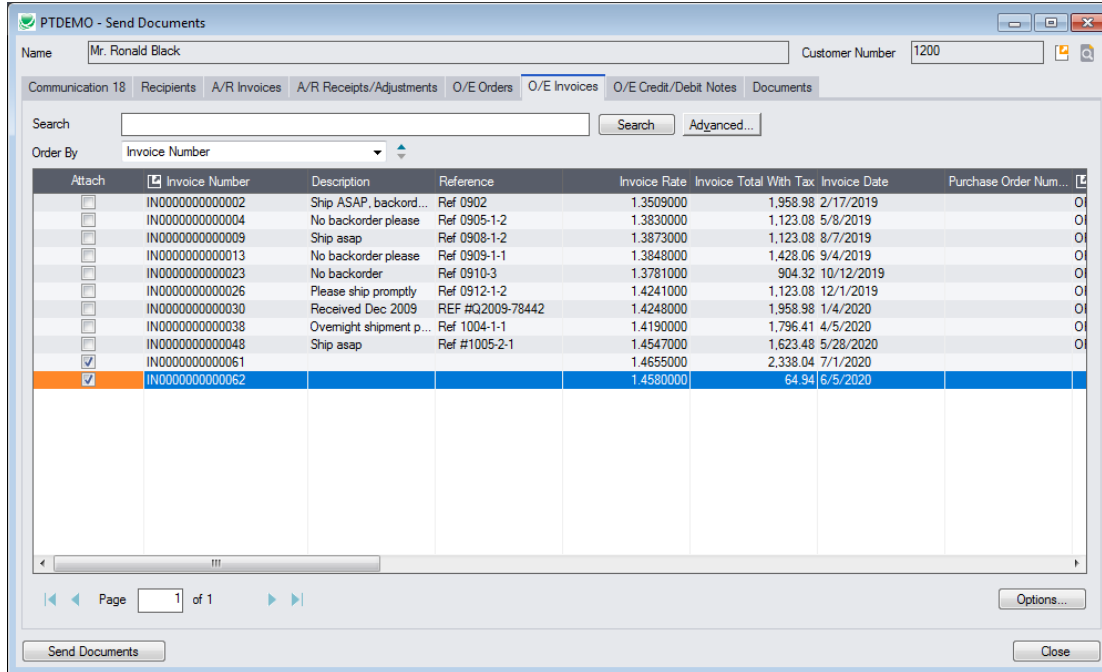
Current	1 - 30	31 - 60	61 - 90	Over 90
3,898.97	0.00	0.00	0.00	106,232.26

Documents | Cases

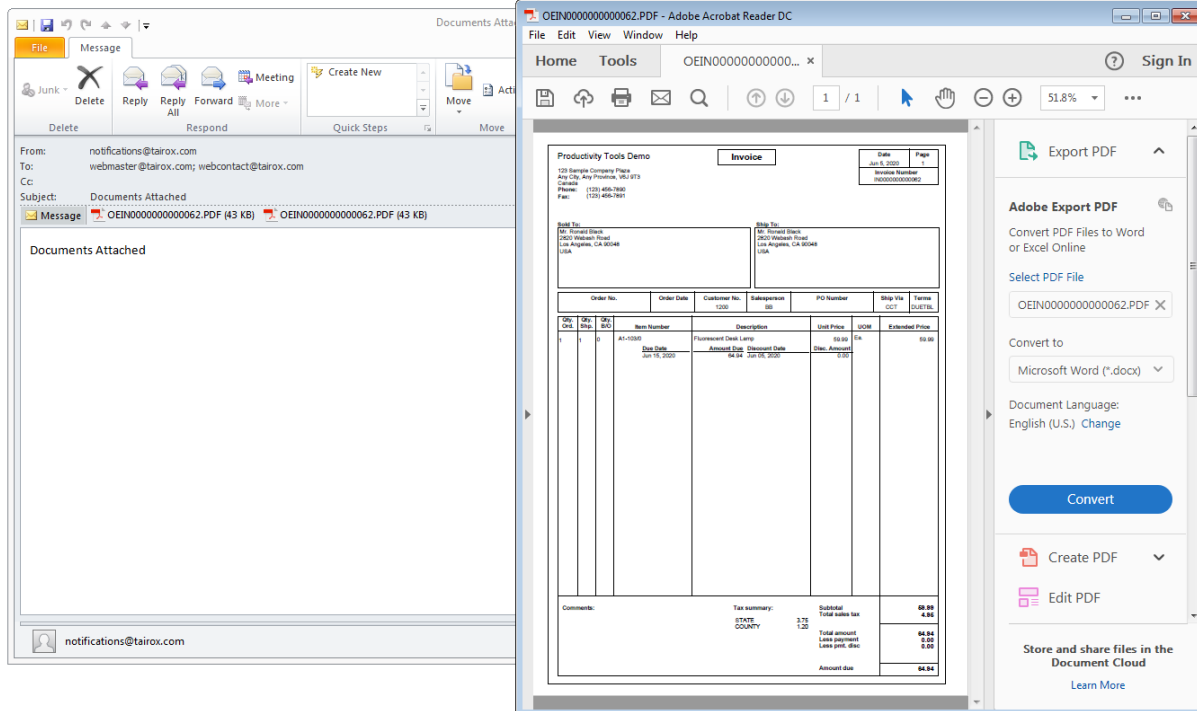
ID	Name	Type	Priority	Severity	Assigned To	Status	Stage
3	106,232.26 USD Overdue	Collection	Normal	Normal	KEITH	Open	

TaiRox CRM for Sage 300

NEW Send Documents regenerates and sends invoices (etc.) quickly.



A complete record of the email with attachments is kept as a CRM document attached to the company.




TaiRox CRM for Sage 300

TaiRox CRM moves towards the modern world while maintaining Sage 300 look-and-feel. Relative to early Sage 300 release dates, today's world has changed. Disk space and memory is inexpensive. Databases, CPUs and networks are fast. Computers are connected to the internet.

TaiRox CRM Modernization

Fast!: SQL Server queries search, sort & page


SmartFinders: search like an internet search engine

Paging: 

Optional Fields: shown in grids, sortable, searchable

Google Maps: one click shows you company's location

Social Media: one click opens Skype, etc.

Last Name: 
First Name:

Email Launcher: one click opens Outlook

Change Logs: see who made changes, when

Field	Old Value	New Value
Amount	10000.000	12000.000
Certainty	50	75

More About Modernization:

- Fast! Sage 300 supports a single database engine, SQL Server, and CRM takes full advantage. Sorting and searching is done using SQL queries.
- Sage 300 uses optional fields as a customization mechanism. We've gone a step further by adding searching and sorting support. See the optional fields in our grid without requiring additional pop-ups forms.
- Today's salespeople don't use Rolodex cards. They look up information maintained by a contact on the contact's social media site. CRM stores any number of social media links per contact.
- Disk space is cheap and databases are fast. CRM tracks every change to every field for every major entity. There is no question about who changed what, and when.

"Finally! A CRM solution for Sage 300 without technical integration issues ... and with all the basic CRM needs covered." **Nancy Lavery, Robert Lavery & Associates.**