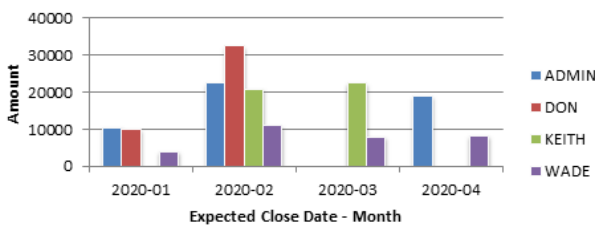
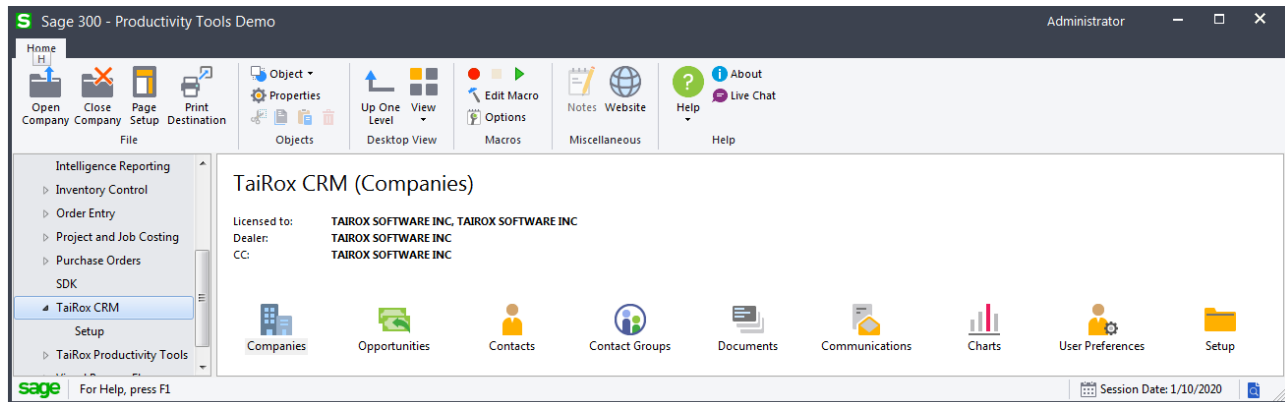


## TaiRox CRM for Sage 300

TaiRox CRM, available for \$990 per year, provides prospect & customer relationship 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.
- Attach network documents, internet documents and URLs to any entity. Launch with one click.
- See every change to every entity. Know who has made each change, and when.
- Deleted entities can be recovered from a recycle bin.

### Summary of Sage 300 Related Features:

- DBDump and DBLoad all data just like any other Sage 300 SDK module.
- Data is field-level compatible so prospects are promoted to customers without truncation.
- Optional Fields extend functionality like any other Sage 300 module.
- There is no complicated licensing scheme. Sage 300 LanPaks are all that's needed.
- Display the sales pipeline in functional currency using Sage 300 exchange rates.
- Quotes and orders created with Sage 300 Order Entry can be linked to an opportunity.
- Salespeople belong to multiple Sage 300 customer territories.
- Keys and mouse-clicks behave as any Sage 300 user would expect.

## TaiRox CRM for Sage 300

**CRM Companies** can be linked to Sage 300 customers or remain unlinked until promoted to a customer. All other CRM entities are directly or indirectly 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 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.

The screenshot shows the 'PTDEMO - Companies' application window. The 'Name' field is set to 'A-1 Yard Services' and the 'Customer Number' is 'APPLY-OI'. The 'Companies' tab is selected. A search bar is present with a 'Search' button and an 'Advanced...' link. The 'Order By' dropdown is set to 'Name'. The main table displays a list of companies with the following columns: ID, Name, Short Name, Street 1, Street 2, City, State/Prov., Country, Postal Code, Customer Number, and Phone Number. The table is sorted by Name, and the first row is highlighted. At the bottom, there are navigation controls including 'Page 1 of 2', 'Add...', 'Delete', 'Unlink', 'Change Log...', and 'Close' buttons.

ID	Name	Short Name	Street 1	Street 2	City	State/Prov.	Country	Postal Code	Customer Number	Phone Number
25	A-1 Yard Services	A1YARD	PO Box 1123		Toronto	Ontario	Canada	L7Y 3Z1	APPLY-OI	
4	ACME Plumbing	ACME	927 Warehouse ...		Kansas City	MO	Canada	59782-1775	1210	(816) 555-3341
9	Astral Construction Co Ltd.	ASTRA	418 Canal Drive		Austin	TX	USA	78767-6112	1550	(512) 555-9192
2	Bargain Mart - Oakland	BMT-OK	Bargain Mart Plaza	Corner 182nd and...	Anytown	CA	USA	45112	1105	(408) 451-8981
1	Bargain Mart - San Diego	BMT-SD	Bargain Mart Plaza	Corner 182nd and...	Anytown	CA	USA	45112	1100	(408) 451-8981
26	Bargain Mart Stores Inc.	BARMART	Bargain Mart Plaza	Corner 182nd and...	Anytown	CA	USA	45112	BARMART	(408) 555-MART
18	Bashaw Bulldozing	BASHAW	2398 Colorado Cr...		Burlingame	Ontario	Canada	L7L 2Y9	7100	(905) 555-1212
10	Break-Away Designs	BREAK	743 Wark Street		Sacramento	CA	USA	93721	1580	(916) 555-1422
24	Business Works!	BUSWRKS	PO Box 3399		Toronto	Ontario	Canada	L7Y 3Z1	APPLY-BF	
19	CanAm Industries	CANAM	1898 King George...		Toronto	Ontario	Canada	L7Y 3Z1	7200	(416) 555-8752
23	Cash Transactions	CASH							9999	
6	Coastal Electric Company	COAST	586 Tanner Road		Toronto	Ontario	Canada	67182-1087	1400	(416) 555-4799
7	Custom Comfort	CUSTO	3741 Main Street		Richmond	VA	USA	23519	1500	(804) 555-7272
11	Dr. Dan Penn	PENN	1876 Jackson Str...		Des Moines	IA	USA	72784	1600	(515) 555-4728
15	Forester Building Supplies	FORES	#46 North Gate M...		San Franci...	CA	USA	98132	2235	(415) 555-9830

### Key Features for Companies, Contacts, Opportunities, Communications, Documents and Groups:

- 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.
- Drag fields to the desired location in the grid. Hide columns and restore defaults as usual.
- A complete change log is kept showing the user who made the change, the date and time of the change, and the before and after values of all changes.
- 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.

## TaiRox CRM for Sage 300

CRM Contacts & Opportunities are integrated into the Sage 300 desktop and stored in a Sage 300 company database.

The screenshot shows the 'PTDEMO - Contacts' window. It features a sidebar with tabs for 'Contact', 'Documents', 'Social Media', 'Communications', and 'Contact Groups'. The main area contains a form for contact details. The 'Company Name' is 'Mr. Ronald Black'. 'Created On' and 'Modified On' are both '01/31/2019', with 'Created By' and 'Modified By' set to 'ADMIN'. There are social media icons for Facebook, Twitter, and YouTube. The 'Last Name' is 'Trudeau', 'First Name' is 'Jose', and 'Email' is 'Jose.Trudeau@tairox.com'. There are also fields for 'Phone (Office)', 'Phone (Mobile)', and 'Phone (Other)'. A 'Save' button is at the bottom left, and a 'Close' button is at the bottom right.

CRM Contacts belong to a single company.

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.

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.

The screenshot shows the 'PTDEMO - Opportunities' window. It features a sidebar with tabs for 'Opportunity', 'Orders', and 'Documents'. The main area contains a form for opportunity details. The 'Company Name' is 'Mr. Ronald Black'. 'Created On' is '02/01/2019' and 'Modified On' is '02/16/2019', both by 'ADMIN'. The 'Name' is 'Fall Sale'. The 'Amount' is '8,500.00' in 'USD' with a 'Certainty' of '10'. The 'Stage' is 'PROPOSAL'. It is 'Assigned To' 'KEITH' and has a 'Status' of 'Lost'. 'Opened On' is '02/01/2019', 'Expected Close' is '06/01/2019', 'Revisit On' is '04/08/2019', and 'Closed On' is '06/01/2019'. The 'Notes' field contains 'Grade C'. A 'Save' button is at the bottom left, and a 'Close' button is at the bottom right.


## 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 of the basic CRM needs covered" **Nancy Lavery, Robert Lavery & Associates.**