TaiRox Sage Tech Partner

TaiRox CRM and Collections for Sage 300

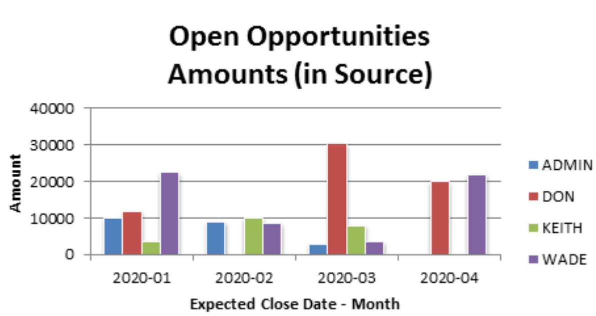
Available for $2395 + $600 per year, TaiRox CRM and Collections provides sales, marketing and collections features, integrated into the Sage 300 desktop and stored in a Sage 300 company database. There is no complicated licensing scheme. Sage 300 LanPaks are all that's needed.

Manage CRM Sales Pipelines and Support Cases from the Sage 300 Desktop

Manage opportunities for both customers and existing prospects. Integration with Sage 300 means prospects can easily be promoted to customers and opportunities can easily be turned into quotes or orders. Manage revisit dates for opportunities and support cases from a dashboard.
Watch an overview: https://vimeo.com/604286190

Assess sales performance

Display the sales pipeline in source currency or functional currency using Sage 300 exchange rates. Display charts in fiscal periods or fiscal quarters as well as by week or month. View a Sales Activity Report to see the opportunities, quotes, orders and communications that salespeople have entered in a user-supplied time period. Watch: https://vimeo.com/604958624



TaiRox CRM and Collections for Sage 300

Link opportunities to Sage 300 quotes and orders

Launch the Sage 300 order entry window directly from CRM to create a new quote or order from an opportunity. Link any number of existing Sage 300 quotes and orders to an opportunity.

View opportunities and support cases on a dashboard

The dashboard shows a concise list organized by revisit date. Assign salespeople to mutiple Sage 300 customer territories and the dashboard entries will be filtered by territory.
Watch: https://vimeo.com/604976266

Send Bulk Email to Prospects or Customers

Integrate with providers such as MailChimp and SendGrid to send broad marketing campaigns to prospects (requires a provider account). For customers with an existing business relationship, send newsletters and promotions quickly and simply using your own mail server.

Promote a prospect company to a customer without data Loss

All CRM company data is field-level identical to A/R customer data - that includes sortable, searchable optional fields that are displayed in company grids. Watch: https://vimeo.com/604960088

Searches like an internet search engine

The resulting data is one click away. Watch: https://vimeo.com/604959418

See an audit trail of changes

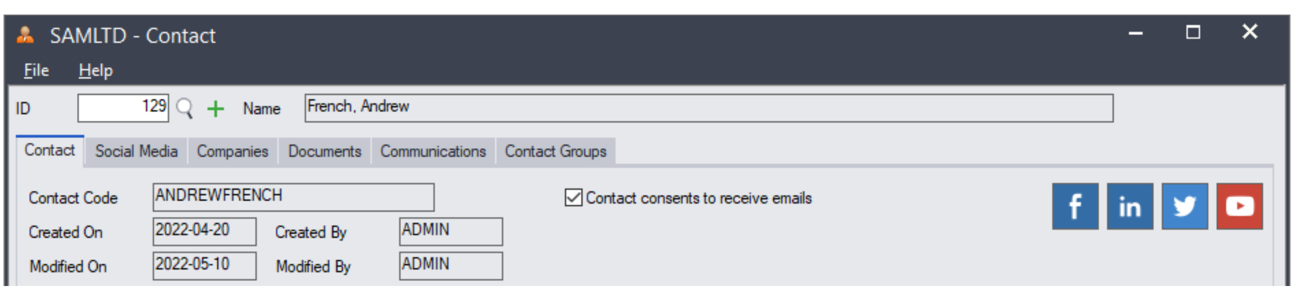
See every change to every field for every opportunitiy and case. Watch: https://vimeo.com/604961050

Handle special opportunities efficiently

Copy a recurring opportunity with a few mouse clicks. Create an opportunity for multiple customers in a single step.

Link contacts to their social media accounts

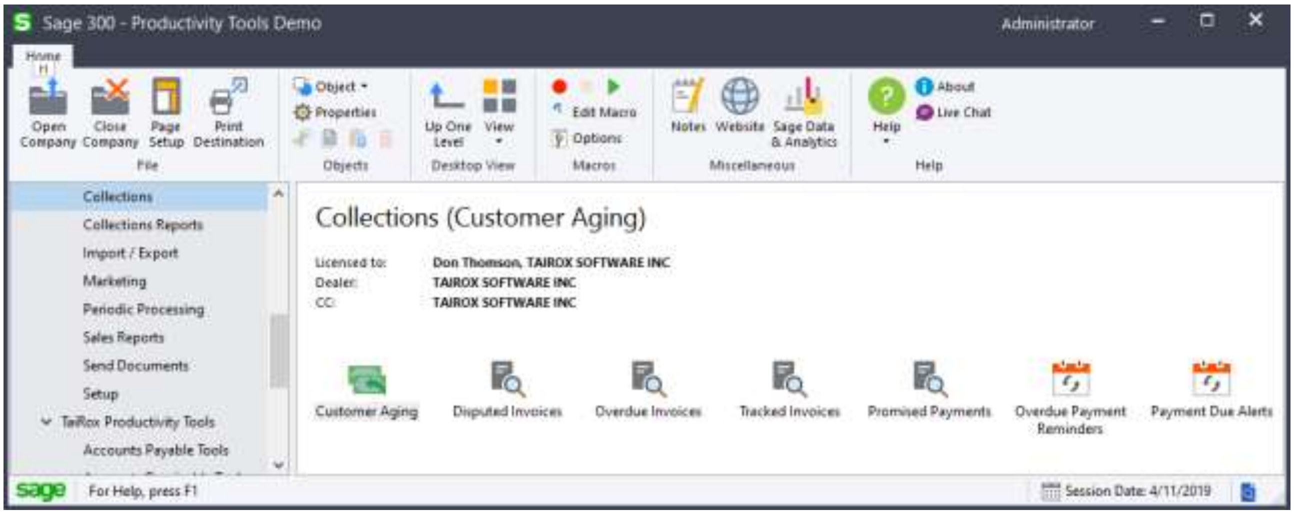
Store links to a contact's Facebook, LinkedIn, Twitter and other social media pages. See up-to-date data maintained by the contacts themselves.



TaiRox CRM and Collections for Sage 300

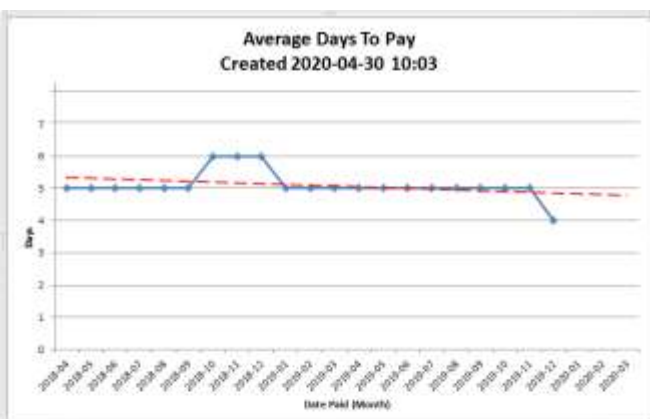
Manage Collections from the Sage 300 Desktop

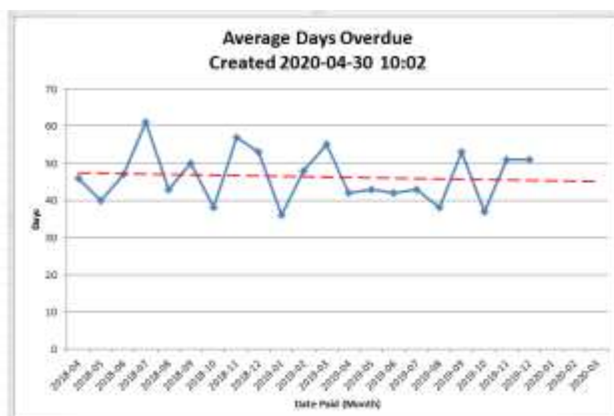
Manage overdue payment reminders, disputed invoices, promised payments, payment due alerts, cases, notes and communications from a collections-focused dashboard.
Watch a collections overview: https://vimeo.com/639657200



Assess collections performance

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





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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

New: A Scheduler program automates the emailing of reminders and alerts.

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
Total:				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

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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