Compare TaiRox CRM and Sage CRM

TaiRox CRM and **Sage CRM** both track prospects and customers as companies. Both track contacts, opportunities, communications and documents related to those companies. Both will prepare email blasts for services like MailChimp. Both can restrict access by territories. Both update A/R customer data when company data is updated. Both link opportunities with quotes and orders.

Select TaiRox CRM when your smaller organization wants a simple-to-use, lightning-fast CRM application that lives within the Sage 300 desktop and is smoothly integrated with Sage 300.

Select Sage CRM when your larger organization wants a web-based solution that provides more structure (e.g. marketing campaign workflows) as well as a CRM customization platform.

Compare Tight Integration Advantages	TaiRox CRM	Sage CRM
Runs on the Same Hardware as Sage 300	☑	☒
Is A Sage 300 Desktop SDK Module	☑	☒
Provides DBDump and DBLoad Support	☑	☒
Supports Sage 300 Data Integrity Checks	☑	☒
Uses Sage 300 Lanpaks (Concurrent Users)	☑	☒
Supports Fiscal Period and Calendar Options[1]	☑	☒
Uses Current Sage 300 Exchange Rates[2]	☑	☒
Supports A Simple Upgrade Process[3]	☑	☒
100% Compatible Field Synchronization[4]	☑	☒
Drag & Resize Grid Columns, Restore Defaults	☑	☒
Sage 300 Compatible Keystrokes	☑	☒
Sage 300 Data is "One Click Away"[5]	☑	☒

[1] Opportunity charts can be by Fiscal Period or Quarter as well as Month and Calendar Quarter.
[2] TaiRox CRM uses Sage 300 objects to calculate exchange rates when valuing opportunities.
[3] TaiRox CRM updates: uninstall the old, install the new, activate data if required. Sage CRM updates are carefully planned events involving version and customization coordination.
[4] TaiRox CRM company fields are exactly the same size and format as A/R customer fields. Synching involves no data truncation or reformatting.
[5] TaiRox CRM launches core Sage 300 Customers, Customer Inquiry and Order Entry programs.

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TaiRox CRM's 21st Century Design	TaiRox CRM	Sage CRM
Tracks Every Change to Every Field, Forever[1]	☑	☒
Easily Recovers Deleted Entities	☑	?
Creates Native Excel Opportunity Charts[2]	☑	?
Displays Common Social Media Icons	☑	?
Searches like an Internet Search Engine[3]	☑	☒
Safely Customizes without Programming[4]	☑	☒
Provides Support-Free Outlook Integration[5]	☑	☒

[1] TaiRox CRM maintains a complete change log showing the user who made the change, the date and time of the change, and the before and after values of all fields.

[2] TaiRox CRM opportunity charts are Excel spreadsheets with no external links and no external database connections. No Excel add-ins are required.

[3] Enter a word into a search field and see all entities that contain that word in any relevant field. Narrow the search by enterring a second word. Both products provide field-specific searching.

[4] TaiRox CRM uses Sage 300 optional fields. Opportunity stages and communication types are user-defined. Adding new fields, stages or types in will not break TaiRox CRM. VBA is a less safe programming option.

[5] TaiRox CRM launches Outlook, defaulting the sending email address.

Sage CRM is Comprehensive & Web Based	TaiRox CRM	Sage CRM
Deep Outlook Integration[1]	☒	☑
Provides Meta-Data Customizations[2]	☒	☑
Customizes using .NET Framework[3]	☒	☑
Customizes using JavaScript[3]	☒	☑
Provides Marketing Campaign Workflows	☒	☑
Tracks Support Issues (Cases)	☒	☑
Provides a Mobile CRM Interface	☒	☑
Provides a Dashboard Interface	☒	☑

[1] Sage CRM will natively send emails and will file emails & tasks in Outlook. Budget for ongoing IT support.

[2] Sage CRM supports meta-data customization that can include JavaScript programming and SQL Server views. Changes to one meta-data element must be coordinated with changes to other elements.

[3] A native web-based programming method. Client-side and server-side techniques can be used.