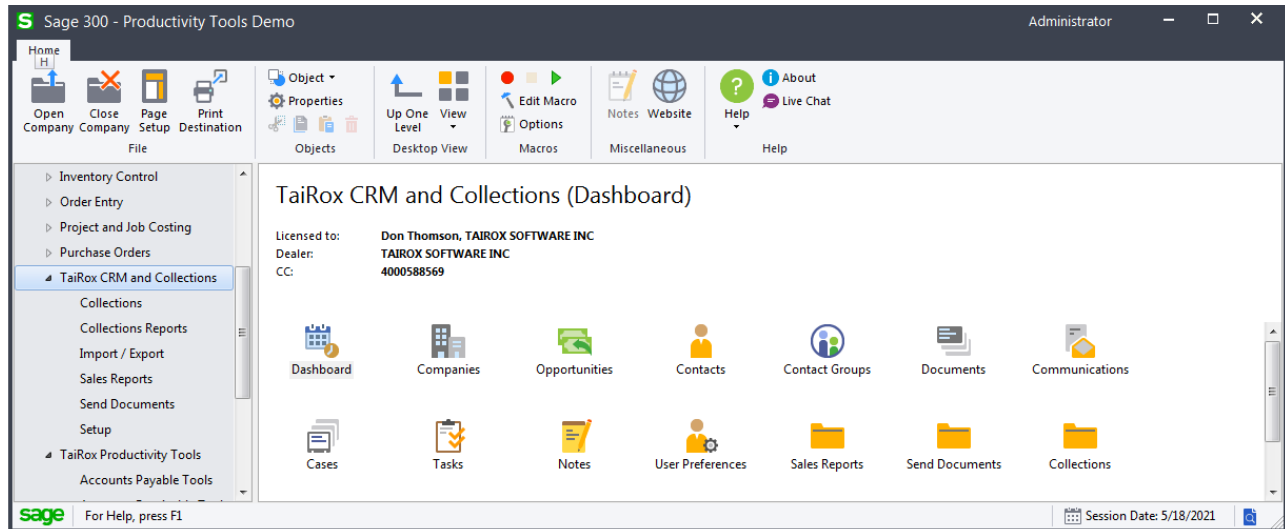


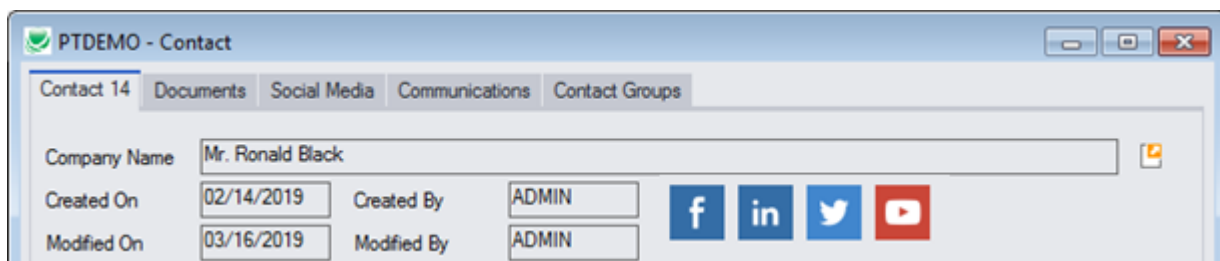
## TaiRox CRM and Collections for Sage 300

Available for **\$1795 + \$450 per year**, TaiRox CRM and Collections provides collections and sales features integrated into the Sage 300 desktop and stored in a Sage 300 company database. Identify and manage overdue payments quickly. Turn prospects and opportunities into customers, quotes and orders. Manage customer interactions from a dashboard. Watch an overview: <https://vimeo.com/604286190>



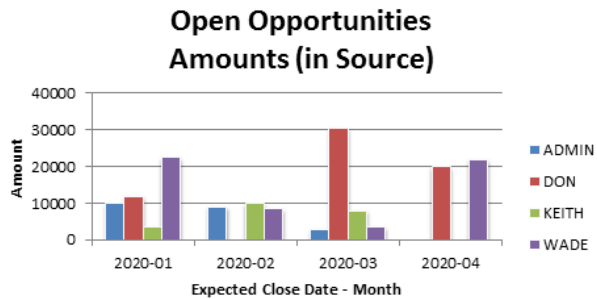
### Find it Fast:

- Searches like an internet search engine using optimized database queries. Everything you want to see is one click away. Watch: <https://vimeo.com/604959418>
- Optional fields are searchable, sortable and display in grids.
- Watch: <https://vimeo.com/604960088>
- Every change to every field for every entity is kept forever (until purged). Watch: <https://vimeo.com/604961050>
- CRM is fully integrated with the Sage 300 desktop. Watch: <https://vimeo.com/604962293>
- Contacts are fully integrated with Sage 300 multiple contacts.
- Contacts are directly linked to social media platforms for up-to-date data.



## TaiRox CRM and Collections for Sage 300

### Manage Sales From the Sage 300 Desktop



- **Produce dozens of Excel charts to assess future sales and past 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. Watch: <https://vimeo.com/604958624>
- **Track prospect companies** with their contacts and opportunities. Stores links to a contact's Facebook, LinkedIn, Twitter and other social media pages. Assign salespeople to multiple Sage 300 customer territories.
- **The 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>
- **Promote prospect companies** to Sage 300 A/R customers when sales close with no data loss or truncation. All CRM company data is field-level identical to A/R customer data.
- **Link quotes and orders** created with Sage 300 Order Entry to opportunities. Launch the order entry window directly from CRM to create a new quote or order.
- **Create drag-and-drop folders** for companies, opportunities and cases. Files dragged to these entities will be maintained in the folders.
- **Copy a recurring opportunity** with a few mouse clicks. Create an opportunity for multiple customers in a single step.
- **View a Sales Activity Report** to see the opportunities, quotes, orders and communications that salespeople have entered in a user-supplied time period.
- **Integrate with your calendar** by turning on the option to send a calendar attachment by email to the Sage 300 user whenever an opportunity, case or task changes. Watch: <https://vimeo.com/604980928>

# TaiRox CRM and Collections for Sage 300

## Manage Collections Faster with More Information At Hand

Manage overdue invoices, disputed invoices, promised payments, payment due alerts, cases, notes and communications from a collections-focused dashboard.

Watch a Collections overview: <https://vimeo.com/604286190>

ID	Status	On Hold	Flags	Customer...	Company Name	Invoice Number	Days Overdue	Stage	Invoice Date	Due Date	Invoice Amount	Balance	Currency	Re
7	Pending	No	!	1500	Custom Comfort	TR-INV-004.2	442	1 - Late	2/2/2019	3/9/2019	68,006.48	67,456.45	USD	
12	Pending	No	!\$	7300	The Royal Cavendish Co.	TR-INV-010.4	443	1 - Late	2/6/2019	3/8/2019	7,194.80	4,414.49	GBP	
10	Pending	No	!\$	7100	Bashaw Bulldozing	TR-INV-005.2	443	1 - Late	2/6/2019	3/8/2019	28,442.32	350.57	CAD	
9	Pending	No	!\$	1600	Dr. Dan Penn	TR-INV-010.1	464	2 - Past Due	2/3/2019	2/15/2019	15,198.30	10,090.12	USD	
4	Pending	No	!\$	1200	Mr. Ronald Black	TR-CRE-006	464	2 - Past Due	2/2/2019	2/15/2019	264.61	264.61	USD	
6	Pending	No	!\$	1240	The Courtyard	TR-INV-004.1	465	2 - Past Due	2/2/2019	2/14/2019	5,419.59	4,648.44	USD	
11	Pending	No	!\$	7300	The Royal Cavendish Co.	TR-INV-005.3	467	2 - Past Due	2/9/2019	2/12/2019	19,058.97	17,804.09	GBP	
2	Pending	No	!\$	1100	Bargain Mart - San Diego	TR-INV-011	472	2 - Past Due	2/7/2019	2/7/2019	92.69	92.69	USD	
13	Pending	No	!\$	7400	The Yoshida Gardens	TR-INV-010.2	473	2 - Past Due	2/4/2019	2/6/2019	812	74	JPN	
8	Pending	No	!\$	1580	Break-Away Designs	TR-INV-005.1	477	2 - Past Due	1/30/2019	2/2/2019	178,007.33	178,552.39	USD	
5	Pending	No	!\$	1200	Mr. Ronald Black	TR-INV-003	495	2 - Past Due	1/1/2019	1/15/2019	123,235.57	105,967.65	USD	
3	Pending	No	!\$	1105	Bargain Mart - Oakland	TR-INV-002	500	2 - Past Due	1/1/2019	1/10/2019	1,126.51	1,016.48	USD	
1	Pending	No	!\$	1100	Bargain Mart - San Diego	TR-INV-001	500	2 - Past Due	1/1/2019	1/10/2019	1,397.20	1,848.62	USD	

- **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. Scheduled collections phone call tasks appear on users' dashboards. Watch: <https://vimeo.com/604986255>
- **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>

## TaiRox CRM and Collections for Sage 300

- **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.
- **Resend A/R and O/E documents to customers in 30 seconds.** Stop searching through email or network folders. Find the company using internet search capabilities. Click on Send Documents and the invoice is recreated as a PDF file and emailed to multiple contacts at the company. Drag and drop files to the communication. 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.** Enhance core functionality by sending to multiple contacts per customer. Email records retain the body and all attachments in a single EML file that can be opened with one click and resent with another click. Watch: <https://vimeo.com/605018210>
- **Integrate with your calendar** by turning 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>