



A Collections Module for Sage 300

TaiRox CRM Collections: TaiRox CRM provides collections features integrated into the Sage 300 desktop and stored in a Sage 300 company database. Identify and manage overdue payments quickly. Track disputed invoices. Manage customer interactions from a dashboard.

ID	Status	On Hold	Flags	Customer...	Company Name	Invoice Number	Days Overdue	Stage	Invoice Date	Due Date	Invoice Amount	Balance	Currency	Des
1	Pending	No	!	1100	Bargain Mart - San Diego	IN0000000000005	212	4 - Delinquent	5/13/2019	6/12/2019	974.09	283.18	USD	Ship
2	Pending	No	!	1100	Bargain Mart - San Diego	IN0000000000010	123	4 - Delinquent	8/10/2019	9/9/2019	974.09	283.18	USD	Ship
3	Pending	No	!	1100	Bargain Mart - San Diego	IN0000000000021	60	2 - Past Due	10/12/2019	11/11/2019	329.90	95.87	USD	Cust
4	Pending	No	!	1100	Bargain Mart - San Diego	IN0000000000027	10	1 - Late	12/1/2019	12/31/2019	974.09	283.18	USD	Over
5	Pending	No	!	1100	Bargain Mart - San Diego	TR-INV-001	365	4 - Delinquent	1/1/2019	1/10/2019	1,397.20	1,848.62	USD	Inv
6	Pending	No	!	1100	Bargain Mart - San Diego	TR-INV-011	337	4 - Delinquent	2/7/2019	2/7/2019	92.69	92.69	USD	Inter
7	Pending	No	!	1105	Bargain Mart - Oakland	IN0000000000003	217	4 - Delinquent	5/8/2019	6/7/2019	687.82	188.79	USD	Cust
8	Pending	No	!	1105	Bargain Mart - Oakland	IN0000000000008	126	4 - Delinquent	8/7/2019	9/6/2019	687.82	188.79	USD	Ship
9	Pending	No	!	1105	Bargain Mart - Oakland	IN0000000000025	10	1 - Late	12/1/2019	12/31/2019	687.82	687.82	USD	Ship
10	Pending	No	!	1105	Bargain Mart - Oakland	TR-INV-002	365	4 - Delinquent	1/1/2019	1/10/2019	1,126.51	1,016.48	USD	Inv
11	Pending	No	!	1105	Bargain Mart - Oakland	TR-INV-002	285	4 - Delinquent	3/1/2019	3/31/2019	14,645.68	15,106.13	USD	Inv
12	Pending	No	!	1200	Mr. Ronald Black	TR-CRE-006	329	4 - Delinquent	2/2/2019	2/15/2019	264.61	264.61	USD	Cred
13	Pending	No	!	1200	Mr. Ronald Black	TR-INV-003	360	4 - Delinquent	1/1/2019	1/15/2019	123,235.57	105,967.65	USD	Inv
14	Pending	No	!	1210	ACME Plumbing	IN0000000000014	117	4 - Delinquent	9/4/2019	9/15/2019	1,046.96	56.63	USD	Ship
15	Pending	No	!	1210	ACME Plumbing	IN0000000000015	117	4 - Delinquent	9/4/2019	9/15/2019	631.80	94.39	USD	Ship
16	Pending	No	!	1210	ACME Plumbing	IN0000000000016	117	4 - Delinquent	9/4/2019	9/15/2019	1,657.47	283.18	USD	Cust
17	Pending	No	!	1240	The Courtyard	IN0000000000006	212	4 - Delinquent	5/13/2019	6/12/2019	338.53	94.39	USD	Over
18	Pending	No	!	1240	The Courtyard	IN0000000000011	123	4 - Delinquent	8/10/2019	9/9/2019	338.53	94.39	USD	Over
19	Pending	No	!	1240	The Courtyard	TR-INV-004.1	330	4 - Delinquent	2/2/2019	2/14/2019	5,419.59	4,648.44	USD	Inv
20	Pending	No	!	1400	Coastal Electric Company	IN0000000000007	212	4 - Delinquent	5/13/2019	6/12/2019	338.95	98.54	CAD	Back

Manage Overdue Invoices to Improve Cash Flow. Create overdue invoice records with customer-specific overdue thresholds. Update overdue records daily. Email stage-specific payment reminders when overdue invoices move to the next stage.

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.