

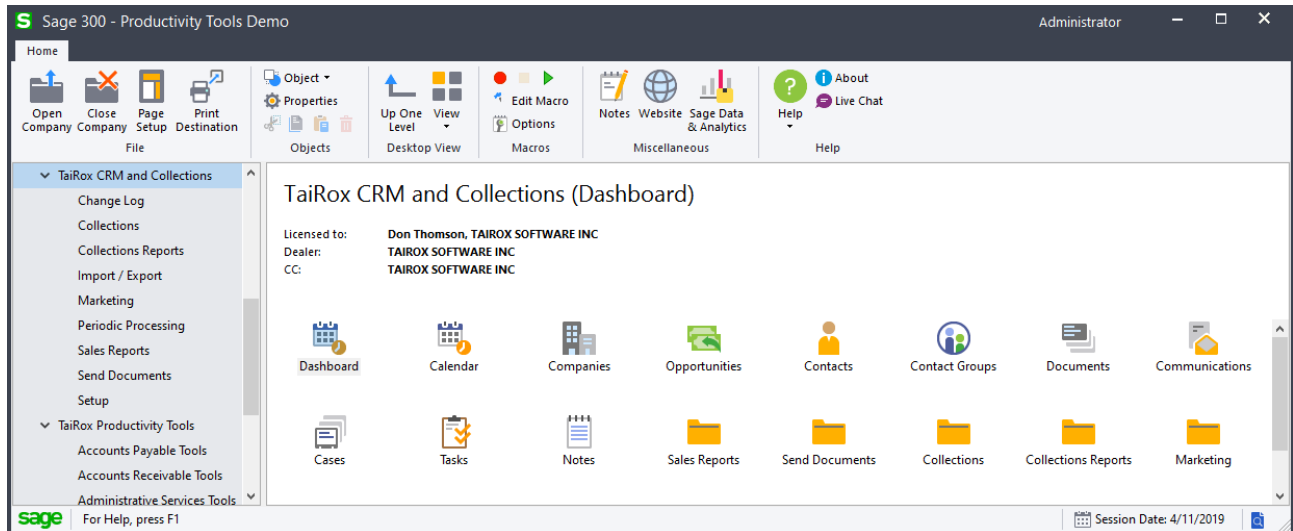
## TaiRox CRM and Collections for Sage 300

Available for \$2495 + \$625 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

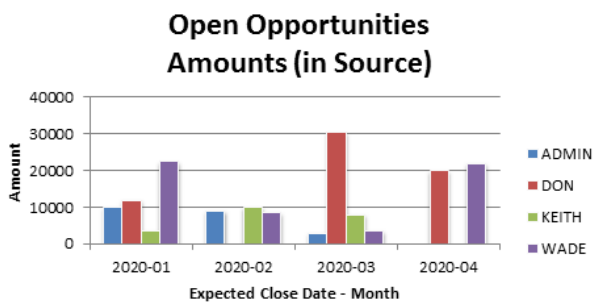
Manage opportunities for both customers and existing prospects. Integration with Sage 300 means prospects can easily be promoted to customers and opportunities can easily be turned into quotes or orders. Manage revisit dates for opportunities and support cases from a dashboard.

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 multiple 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

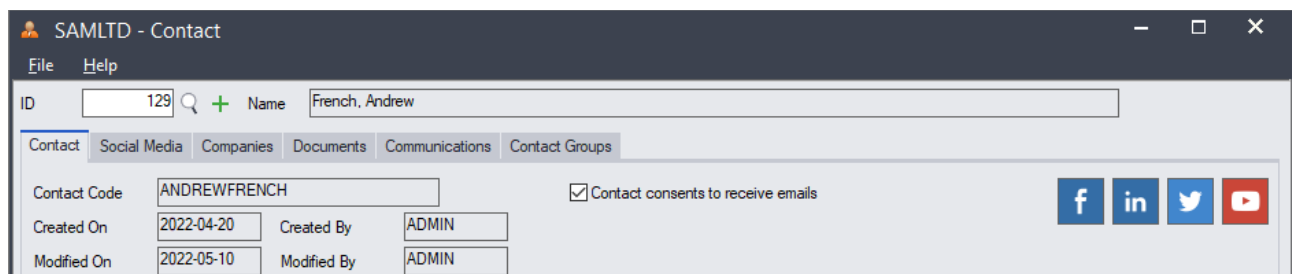
See every change to every field for every opportunity and case. Watch: <https://vimeo.com/604961050>

### 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

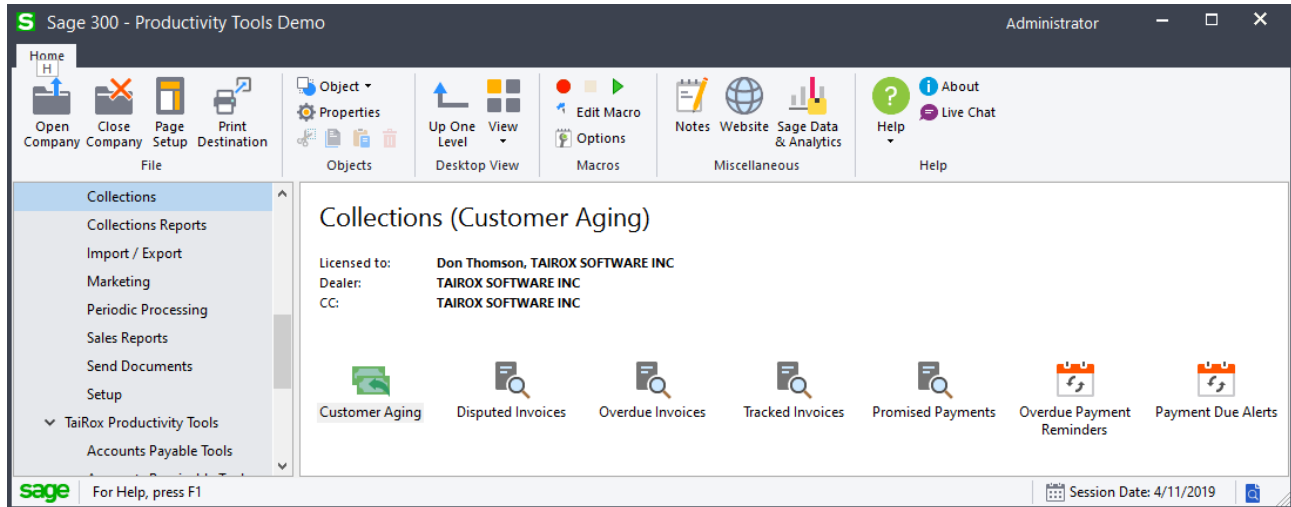
Store links to a contact's Facebook, LinkedIn, Twitter and other social media pages. See up-to-date data maintained by the contacts themselves.



## TaiRox CRM and Collections for Sage 300

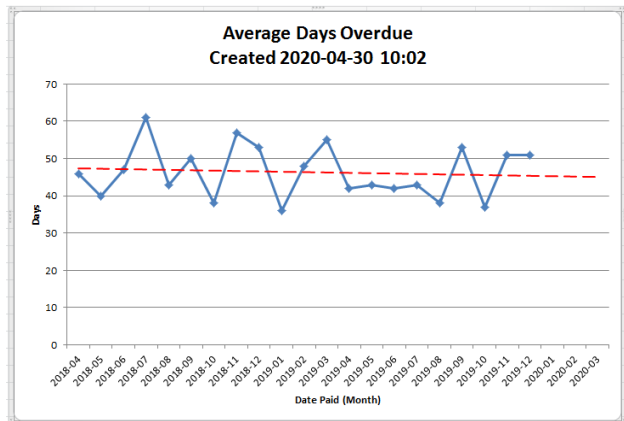
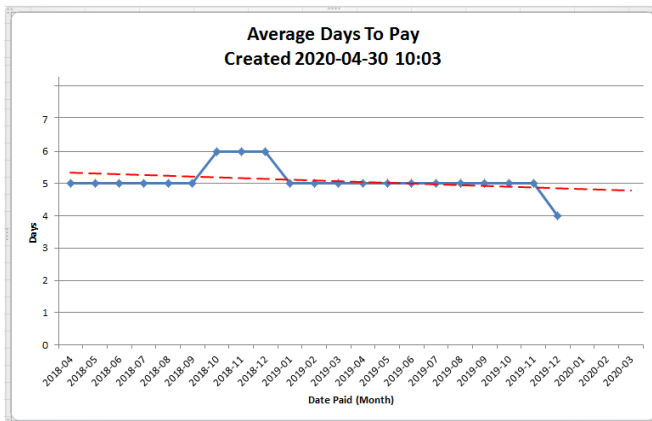
### Manage Collections from the Sage 300 Desktop

Collections features are integrated into the Sage 300 desktop. Email invoices and payment reminders, keeping a record of what was sent. View all customer communications in one place. Manage phone tasks, disputed invoices and promised payments 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.



## TaiRox CRM and Collections for Sage 300

### Overdue Payment Reminders

Email stage-specific reminders or generate phone call tasks for customers with overdue accounts. Opt-out customers or add customer-specific grace periods. Nicely formatted HTML emails are sent to multiple customer contacts, and include a current account summary. Phone call tasks are included on users' dashboards. Watch: <https://vimeo.com/604986255>

#### 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
<b>Total:</b>				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

## TaiRox CRM and Collections for Sage 300

### Customer Aging

See an aged trial balance on screen, with more information, in less than a second. A flags column marks customers with unapplied cash, disputed invoices and promised payments. Use enhanced filtering and sorting options. Flip from a customer-centric view to a document-centric view with one click.

Watch: <https://vimeo.com/605003090>

### Send Invoices

Bulk send A/R Invoices, O/E Invoices, and CR/DR Notes. Store a record of sent emails as a communication. Send Invoices will run interactively or can be driven by the Scheduler program (included with Collections). Watch: <https://vimeo.com/675594034>

### Resend (Ad-Hoc) Documents

When a customer is stalling payment by asking for more details, select any collections related accounting documents from one screen: A/R Invoices, A/R Receipts, A/R Statements, O/E Orders, O/E Invoices, and O/E Credit/Debit Notes. Drag and drop additional files into the communication tab and send the email to multiple contacts. Watch: <https://vimeo.com/605016839>

### Dashboard

The date-oriented dashboard shows phone call tasks, promised payments, disputed invoices and tracked invoices. A revisit date ensures that items will appear on a user's dashboard until closed. See daily, weekly, monthly or yearly views. See assigned-to-you or assigned-to-your-team items.

Watch: <https://vimeo.com/604976266>

### Promised Payments

Record the date promised, amount promised, and amount paid. A revisit date is required. Link one or more invoices related to the promise. Watch: <https://vimeo.com/605008276>

### Disputed Invoices

Record the amount in dispute. A revisit date is required. Link any number of files or notes to the dispute. Watch: <https://vimeo.com/605006489>

### Tracked Invoices

Track important invoices as soon as they are created (before they are overdue or disputed). Link any number of files or notes to the invoice. Watch: <https://vimeo.com/605818798>

### Payment Due Alerts

Nicely formatted HTML emails are sent to multiple customer contacts before their invoices are due. The alerts list all unpaid - but not overdue - customer invoices. Watch: <https://vimeo.com/604999626>

### Scheduler

Scale up! Send hundreds of invoices, overdue payment reminders and payment due alerts overnight by scheduling a Windows Task. Watch: <https://vimeo.com/951193307>