

This guide demonstrates CRM's ability to email A/R Invoices to multiple contacts per company.

**Note:** CRM will not send any emails from Demo Data. This means that you can demo CRM's Send Documents functions without having access to an email server.

Follow the instructions in this guide to see emails in Outlook as if they were sent. CRM will display a message when you use email functions stating that TaiRox CRM is in demo mode, and that emails will be generated but not sent to recipients.

## Send A/R Invoices to Multiple Contacts

**Step 1: Refresh your sample data from SAMLTD or SAMINC**

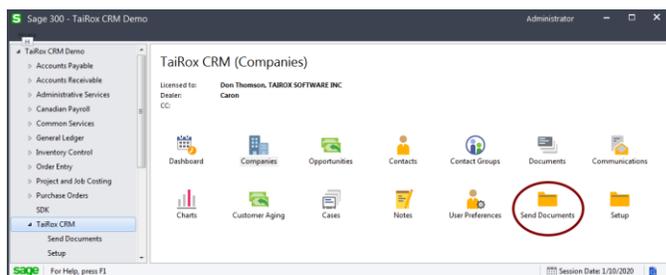
**Step 2: Activate TaiRox CRM using Sage's Data Activation program in Administrative Services**

**Step 3: Run TaiRox CRM's Create Demo Data program (in the Setup folder)**

Demo data takes only a few moments to be created, and it is cleanly removed from the Sage database with the Remove Demo Data function. See the CRM User Guide for details.

**Step 4: Set the Sage 300 Print Destination to Preview**

**Step 5: Open the TaiRox CRM Send Documents folder on the Sage desktop**



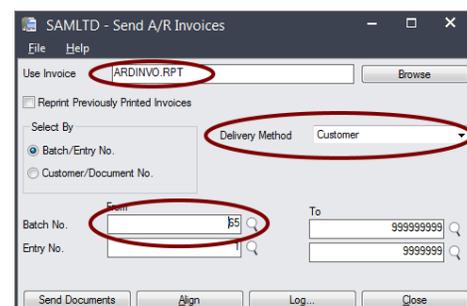
**Step 6: Open the Send A/R Invoices window**

CRM provides enhanced versions of Send Statements/Letters, Send A/R Invoices, and Send O/E Invoices.



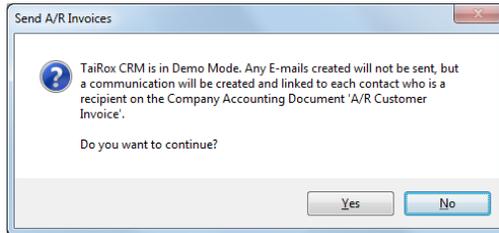
**Step 7: Select the Invoice report, Delivery Method, and Batch Number**

- Choose a standard Sage 300 A/R invoice form.
- Select "Customer" as the Delivery Method. If you select "Print Destination", invoices will not be emailed.
- Choose a batch number. We suggest you choose the most recent (last batch).



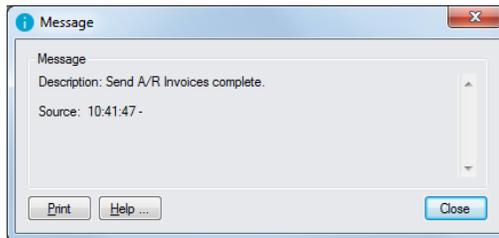
**Step 8: Click the Send Documents button**

- CRM will display the following message stating that emails will not be sent in CRM Demo Mode.



- **Click Yes to continue.**

Once all emails have been created, the following message will appear.



- **Click the Close button to continue.**

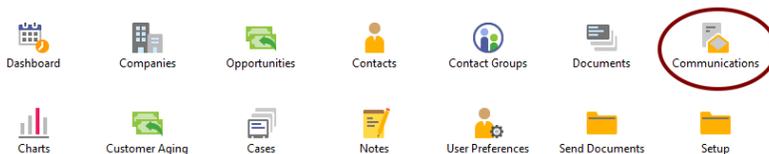
**Important note:** After processing emails, CRM will print invoices to the current Sage Print Destination for any customers that don't have email contacts set up, and have "Mail" selected as the Delivery Method in A/R.

**Step 9: Click the Log button to check who received invoices**

- The Log File for A/R Invoices lists the customers that were invoiced and the email recipients for each customer.
- Note the recipients – we're going to look at one of the emails in the next step.

**Step 10: Open the "Communication" program to lookup an emailed invoice**

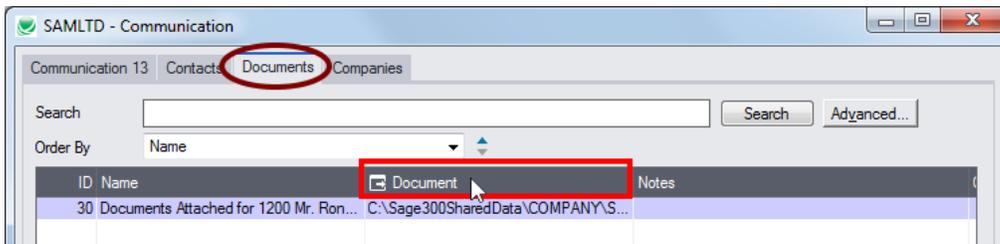
- Double-click the Communications icon on the Sage 300 desktop.

**Step 11: Select the last/most recent Communication to look up an emailed invoice**

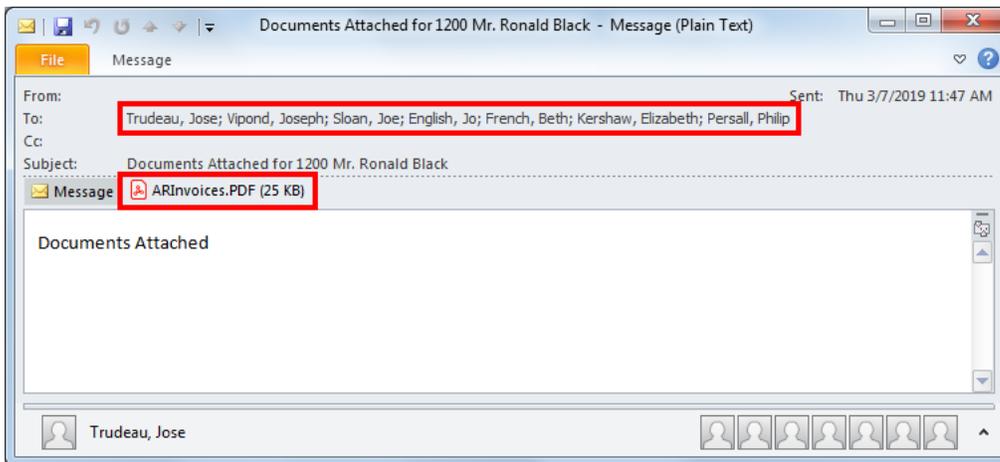
- Double-click the Communications icon on the Sage 300 desktop.
- Double-click the last communication in the list "Documents Attached for 1200 Mr. Ronald Black." (All other communications in the Demo Data are for newsletters.)

**Step 12: Open the document (email) linked to the communication**

- Click the Documents tab to display the email document for this communication.



- Click the “Document” column heading to display the email.  
In this example, CRM launches Outlook to display the email.  
If there is more than one document listed in the grid, highlight the one you want, and then click the Document column heading.



- Note that the email has been sent to several company contacts.
- Double-click the attachment to see the invoice in PDF format.  
This invoice is that same as if it was printed by Sage 300 and Crystal.