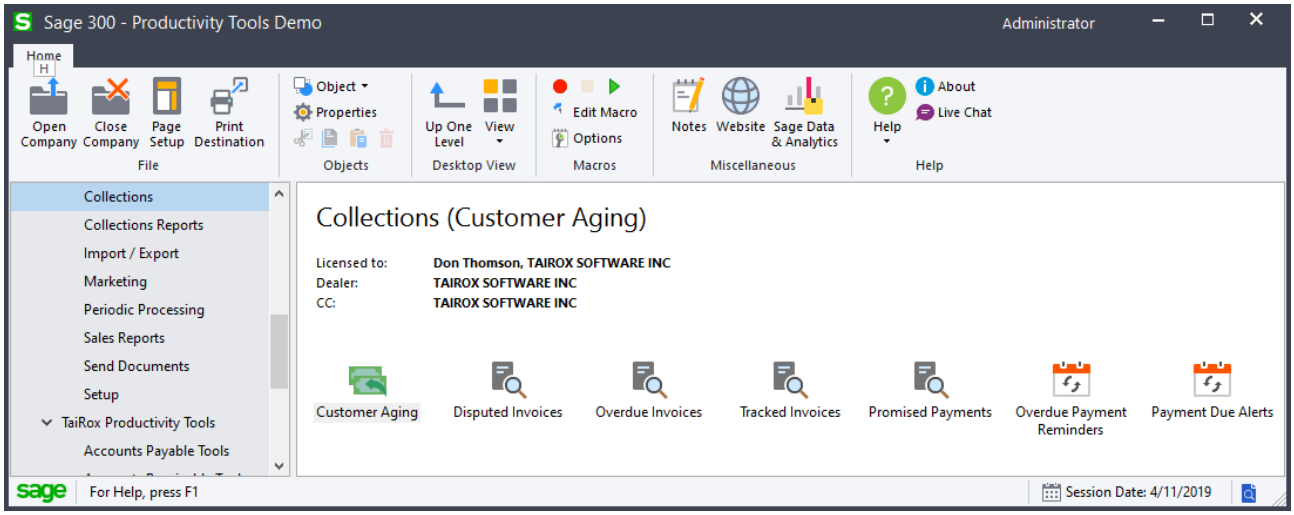
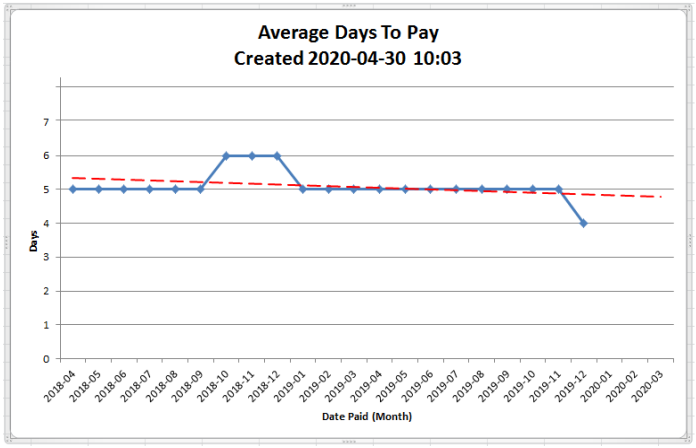
TaiRox Collections for Sage 300

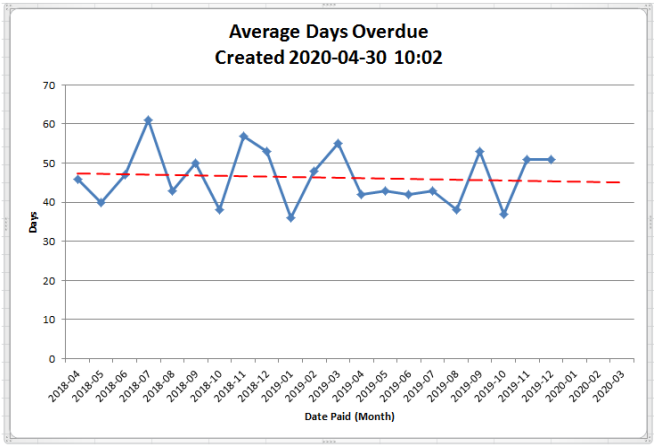
Available for $2195 + $550 per year, TaiRox Collections provides collections features, integrated into the Sage 300 desktop. Email invoices and payment reminders, keeping a record of what was sent. View all customer communications in one place. Manage phone tasks, disputed invoices and promised payments from a collections-focused dashboard. Watch an 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.





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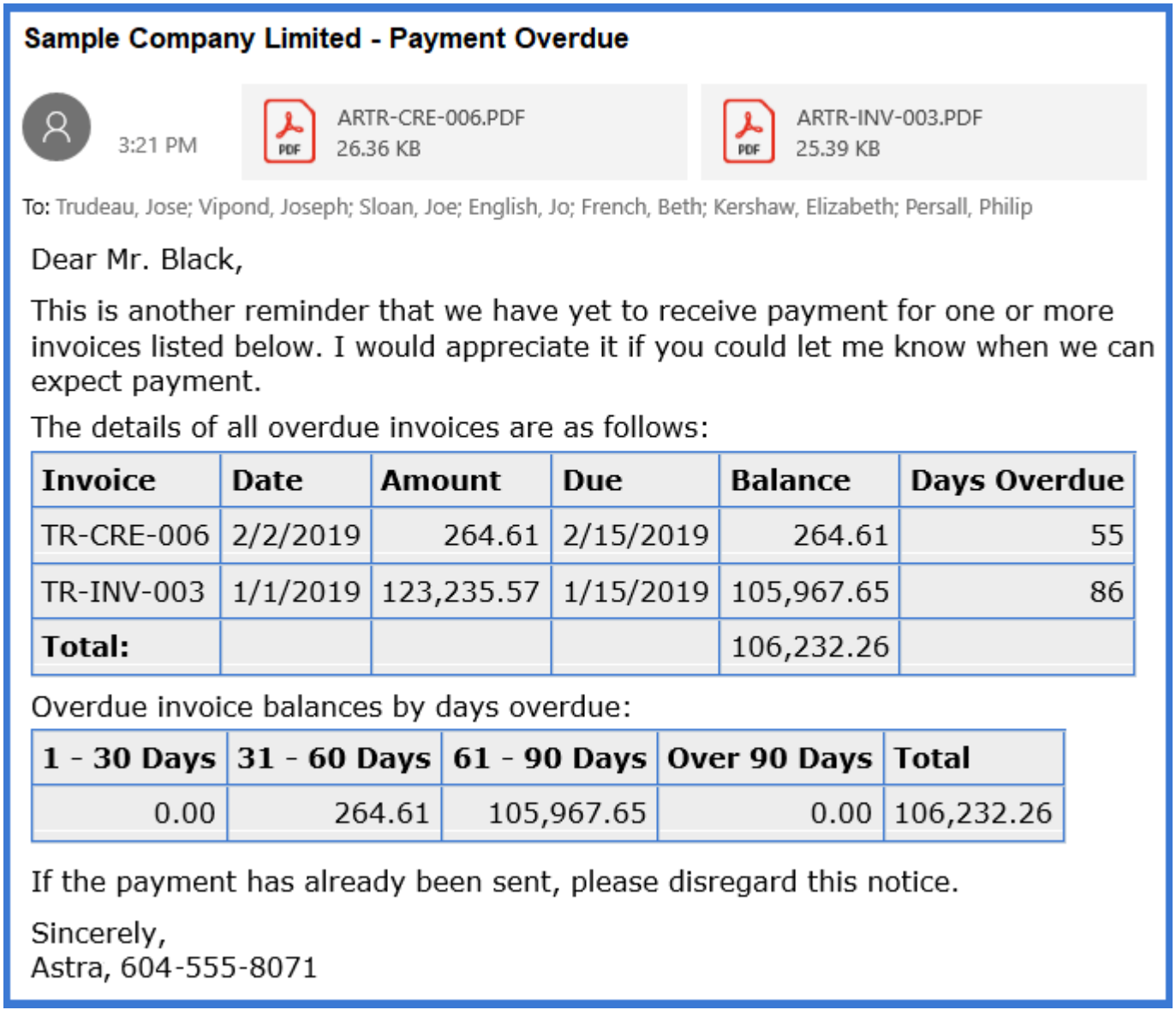
Overdue Payment Reminders

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
Total:				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

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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