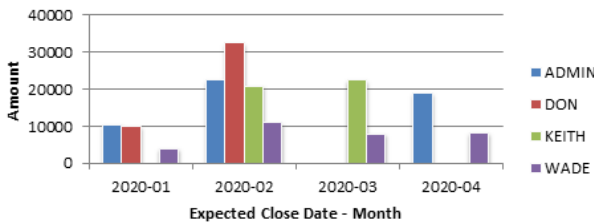
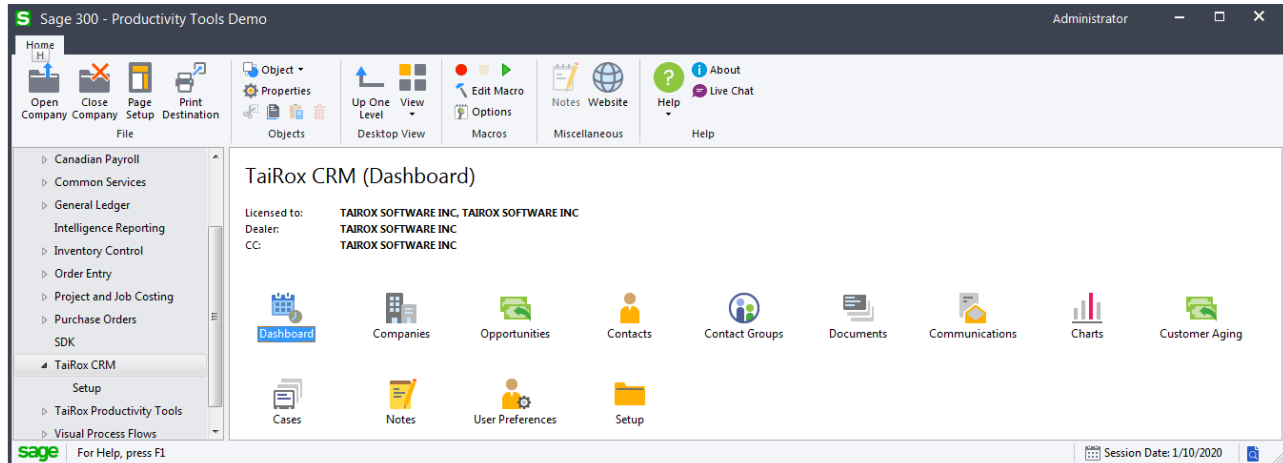


## TaiRox CRM for Sage 300

TaiRox CRM, available for \$990 per year, provides customer relationship & collection management features integrated into the Sage 300 desktop and stored in a Sage 300 company database.



### General Features:

- Track opportunities and create dozens of Excel charts to assess future sales and past performance.
- Track prospect companies and promote to Sage 300 A/R customers when sales close.
- Track contacts and link to their Facebook, LinkedIn, Twitter or other social media pages.
- Track communications with contacts. Group contacts. Send bulk email to MailChimp and Swiftpage.
- Attach network documents, internet documents and URLs to any entity. Launch with one click.
- See every change to every entity. Know who has made each change, and when.
- A key design goal: The information you want to see is always one click away.
- Deleted entities can be recovered from a recycle bin.
- **\*NEW\*** See lightning-fast customer aging on-screen, with both customer and document views.
- **\*NEW\*** Create collection, support and other cases and manage by revisit date, priority and severity.
- **\*NEW\*** View cases and opportunities on a date-centric dashboard, by day, week or month.
- **\*NEW\*** Attach notes to cases, companies, contacts and opportunities.

"The TaiRox team continues to knock it out of the park by developing great new products that enhance the performance and functionality of Sage 300. Our customers who have TaiRox products installed love them!" **Kelly Hummel, Net@Work.**

## TaiRox CRM for Sage 300

### Sage 300 Related Features:

- Data is field-level compatible so prospects are promoted to customers without truncation.
- Display the sales pipeline in functional currency using Sage 300 exchange rates.
- Display charts in fiscal periods or fiscal quarters as well as by week or month.
- Salespeople belong to multiple Sage 300 customer territories.
- Quotes and orders created with Sage 300 Order Entry can be linked to an opportunity.
- Launch the order entry window directly from CRM to create a new quote or order.
- Customer aging performs the same calculations as Sage 300 Accounts Receivable.
- Optional Fields extend functionality like any other Sage 300 module.
- DBDump and DBLoad all data just like any other Sage 300 SDK module.
- There is no complicated licensing scheme. Sage 300 LanPaks are all that's needed.
- Keys and mouse-clicks behave as any Sage 300 user would expect.

**CRM Companies** can be linked to Sage 300 customers or remain unlinked until promoted to a customer. Contacts, opportunities and cases are linked to a CRM company. Companies can be associated with a territory and CRM associates a Sage 300 user with one or more territories. These relationships control access to companies and associated entities.

The screenshot shows a software window titled "PTDEMO - Contacts". It features a search bar at the top with the text "Anderson, Charles" and a dropdown menu for "Order By" set to "Last Name". Below the search bar is a table of contacts. The table has columns for ID, Company Name, Last Name, First Name, Title, Position, Phone (Office), Phone (Mobile), and Phone (Other). The table contains 20 rows of contact data. At the bottom of the window, there are navigation controls including "Page 1 of 7", "Add...", "Delete", "Add To Group...", "Add To New Group...", and "Change Log...".

ID	Company Name	Last Name	First Name	Title	Position	Phone (Office)	Phone (Mobile)	Phone (Other)
53	Dr. Dan Penn	Anderson	Charles			(212) 555-1016	(212) 555-1005	(212) 555-1006
82	The House Doctors	Anderson	Frank		VP Sales	(305) 555-1017	(305) 555-1032	(305) 555-1095
111	The Paper Hangers	Anderson	Ronald			(212) 555-1080	(212) 555-1003	(212) 555-1031
24	The Courtyard	Anderson	Y	Mrs		(604) 555-1024	(604) 555-1055	(604) 555-1029
87	J & Y Builders Ltd.	Black	Beth		COO	(212) 555-1000	(212) 555-1032	(212) 555-1004
116	Business Works!	Black	Claire			(305) 555-1054	(305) 555-1081	(305) 555-1088
29	Custom Comfort	Black	Hoji	M		(403) 555-1088	(403) 555-1016	(403) 555-1095
58	J & Y Builders Ltd.	Black	William		Purchasing Director	(604) 555-1055	(604) 555-1059	(604) 555-1057
16	ACME Plumbing	Briar	Charles			(636) 555-1085	(636) 555-1048	(636) 555-1087
45	Astral Construction Co Ltd.	Briar	Frank		Salesperson	(250) 555-1061	(250) 555-1040	(250) 555-1022
103	Bashaw Bulldozing	Briar	Hoji			(416) 555-1002	(416) 555-1099	(416) 555-1018
74	Forester Building Supplies	Briar	Ronald			(866) 555-1094	(866) 555-1074	(866) 555-1093
132	Web customer sales	Briar	William	Ms	Director of Sales	(703) 555-1070	(703) 555-1094	(703) 555-1051
19	ACME Plumbing	Cavendish	Edward			(212) 555-1020	(212) 555-1017	(212) 555-1005
106	J & Y Builders Ltd.	Cavendish	George		COO	(415) 555-1096	(415) 555-1024	(415) 555-1043
48	Break-Away Designs	Cavendish	Joe	Ms		(305) 555-1034	(305) 555-1016	(305) 555-1068
77	Frame-Up	Cavendish	Wade		Purchasing Director	(212) 555-1053	(212) 555-1020	(212) 555-1018
135	Web customer sales	Cavendish	Y			(636) 555-1088	(636) 555-1087	(636) 555-1095
128	Bargain Mart Stores Inc.	English	Anne		CFO	(212) 555-1094	(212) 555-1085	(212) 555-1018
41	Astral Construction Co Ltd.	English	Jeff			(604) 555-1048	(604) 555-1089	(604) 555-1079

The Companies program displays company data with searching, sorting and paging abilities. All of the Sage A/R customer contact fields are maintained in CRM, with exactly the same length and format. This means there is no data loss when import, promote or synchronization operations are performed.

## TaiRox CRM for Sage 300

### Some Technical Details:

- Searching is done using TaiRox SmartFinder technology, "just like an internet search engine". Type in a word and all fields in all records are searched for a match. Too many matches? Enter a second word. What could be simpler?
- CRM maintains additional tracking fields as well as Sage 300 audit stamps. Modified By and Modified On fields are retained when dumping and loading databases. Created By and Created On fields are retained separately.
- Complete change logs are kept showing the user who made the change, the date and time of the change, and the before & after values of all changed fields.
- A single copy of a document can be linked to any number of entities of any type. Documents can be linked to network documents, internet documents such as PDF files or web pages.
- Click on a tab heading to provide quick access to entities related to the selected row.
- Drag fields to the desired location in the grid. Hide columns and restore defaults as usual.

CRM Contacts belong to a single company.

The screenshot shows a web-based contact form titled "PTDEMO - Contact". The form has several tabs: "Contact 12", "Documents", "Social Media", "Communications", and "Contact Groups". The "Contact 12" tab is active. The form fields are as follows:

- Company Name: Mr. Ronald Black
- Created On: 02/09/2019
- Created By: ADMIN
- Modified On: 02/09/2019
- Modified By: ADMIN
- Inactive:  / /
- Last Name: English +
- First Name: Jo
- Title:
- Position:
- Phone (Office): (403) 555-1070
- Phone (Mobile): (403) 555-1065
- Phone (Other): (403) 555-1018
- E-mail: Jo.English@tairox.com
- Subscribed:
- Notes:

There are social media icons for LinkedIn and YouTube. At the bottom of the form, there are "Save" and "Close" buttons, and a "Change Log..." link.

Quick access is provided to documents, communications and social media links related to a contact.

Want to see a picture of the contact? Click on their Facebook or LinkedIn icon.

A contact can belong to any number of groups.

Filtered contacts can be exported to MailChimp and Swiftpage formats for email campaign processing.

## TaiRox CRM for Sage 300

CRM Opportunities belong to a single company.

Any number of Sage 300 orders, quotes and documents can be linked to an opportunity.

Dozens of sales management charts are created from opportunities. Charts are stored as editable Excel spreadsheets.

The stages of an opportunity are user defined.

The screenshot shows the 'PTDEMO - Opportunity' window. It contains the following fields and values:

- Company Name: Mr. Ronald Black
- Created On: 02/09/2019, Created By: ADMIN
- Modified On: 02/09/2019, Modified By: ADMIN
- Name: Spring Sale
- Amount: 10,000.00 USD
- Certainty: 35
- Stage: MEETING (Meeting)
- Assigned To: ADMIN
- Status: Lost
- Opened On: 02/09/2019, Expected Close: 08/04/2019
- Revisit On: / /, Closed On: 08/04/2019
- Notes: Grade C

**\*NEW\*** CRM Cases belong to a single company.

Any number of documents and notes can be linked to a case.

Cases are categorized as Collection, Support and Other.

A case's priority can be low, normal or high. A case's severity can be low, normal or high.

The screenshot shows the 'PTDEMO - Case' window. It contains the following fields and values:

- Company Name: Mr. Ronald Black
- Created On: 11/06/2019, Created By: ADMIN
- Modified On: 11/06/2019, Modified By: ADMIN
- Name: 106,232.26 USD Overdue
- Type: Collection
- Severity: Normal
- Priority: Normal
- Assigned To: KEITH
- Status: Open
- Opened On: 01/10/2020
- Revisit On: 01/12/2020
- Notes: (Empty)

## TaiRox CRM for Sage 300

**\*NEW\* Customer Aging** provides a lightning-fast way to spot customers whose payment obligations suggest that a collections case should be opened. Customers with open collections cases are flagged - with a customer centric view of all cases one click away. There are Customer and Document display options. Aging options are provided consistent with Sage 300 methods.

PTDEMO - Customer Aging

File Help

Current: 15,301,000  
 1: 1,069,540  
 30: 95,870  
 31: 37,760  
 60: 426,265,220  
 61: 90  
 90: 90  
 Over: 90

As-Of Date: 01/10/2020  
 Currency: Source

Age Unapplied Credit Notes and Debit Notes: As Current  
 Age Receipts, Unapplied Cash and Unapplied Prepayments: As Current  
 Display: Customers  
 Include Customers that are Current

Go

Customer Number	Company Name	Currency	Current	1 - 30	31 - 60	61 - 90	Over 90
1100	Bargain Mart - San Diego	USD	2,291.13	283.18	95.87	0.00	2,507.67
1105	Bargain Mart - Oakland	USD	2,273.11	687.82	0.00	0.00	16,500.19
1200	Mr. Ronald Black	USD	3,898.97	0.00	0.00	0.00	106,232.26
1210	ACME Plumbing	USD	2,233.80	0.00	0.00	0.00	434.20
1240	The Courtyard	USD	993.03	0.00	0.00	0.00	4,837.22
1400	Coastal Electric Company	CAD	-22,005.98	98.54	0.00	0.00	1,677.66
1500	Custom Comfort	USD	2,023.77	0.00	0.00	0.00	67,569.58
1520	Mr. Stephen Kershaw	USD	660.76	0.00	0.00	0.00	528.60
1580	Break-Away Designs	USD	4,727.72	0.00	0.00	0.00	178,552.39
1600	Dr. Dan Penn	USD	320.11	0.00	0.00	37.76	10,090.12
7100	Bashaw Bulldozing	CAD	265.42	0.00	0.00	0.00	350.57
7300	The Royal Cavendish Co.	GBP	479.16	0.00	0.00	0.00	36,910.76
7400	The Yoshida Gardens	JPN	17,140	0	0	0	74

Page 1 of 1

Close

**Customer Information** related to collection cases provides a way to see all cases and documents for that customer together with data related to collections.

PTDEMO - Customer Information

Customer Number: 1200 | Mr. Ronald Black

Credit Limit: 20,000.00 USD

Balance: 110,131.23 USD | Average Days to Pay: 75.5

Current: 3,898.97 | 1 - 30: 0.00 | 31 - 60: 0.00 | 61 - 90: 0.00 | Over 90: 106,232.26 USD

Cases Documents

ID	Name	Type	Priority	Severity	Assigned To	Status	Revisit On
3	106,232.26 USD Overdue	Collection	Normal	Normal	KEITH	Open	1/12/2020


## TaiRox CRM for Sage 300

TaiRox CRM moves towards the modern world while maintaining Sage 300 look-and-feel. Relative to early Sage 300 release dates, today's world has changed. Disk space and memory is inexpensive. Databases, CPUs and networks are fast. Computers are connected to the internet.

### TaiRox CRM Modernization

**Fast!:** SQL Server queries search, sort & page

**SmartFinders:** search like an internet search engine

**Paging:** 

**Optional Fields:** shown in grids, sortable, searchable

**Google Maps:** one click shows you company's location

**Social Media:** one click opens Skype, etc.

Last Name    
First Name

**Email Launcher:** one click opens Outlook

**Change Logs:** see who made changes, when

Field	Old Value	New Value
Amount	10000.000	12000.000
Certainty	50	75

#### More About Modernization:

- Fast! Sage 300 supports a single database engine, SQL Server and CRM takes full advantage. Sorting and searching is done using SQL queries.
- Sage 300 uses optional fields as a customization mechanism. We've gone a step further by adding searching and sorting support. See the optional fields in our grid without requiring additional pop-ups forms.
- Today's salespeople don't use Rolodex cards. They look up information maintained by a contact on the contact's social media site. CRM stores any number of social media links per contact.
- Disk space is cheap and databases are fast. CRM tracks every change to every field for every major entity. There is no question about who changed what, and when.

"Finally! A CRM solution for Sage 300 without technical integration issues ... and with all the basic CRM needs covered." **Nancy Lavery, Robert Lavery & Associates.**