ERPAdvance Asia

FOR SAGE 300

TAIROX · APPLICATION SUITE

TaiRox CRM and Collections

Sales, support and collections inside Sage 300

TaiRox CRM and Collections adds sales pipelines, cases and collections to the Sage 300 desktop. Data is kept in your Sage 300 company database. It includes everything in TaiRox Collections, plus CRM tools for sales teams.

HOW IT WORKS

▸ Watch the demo

Add prospects
Companies and contacts

→

Track deals
Opportunities by stage

→

Quote or order
Create it in Sage 300 O/E

→

Collect
Reminders and follow-ups

KEY CAPABILITIES

Sales pipeline
Track opportunities through stages you set. Chart them by fiscal period, quarter or month.

Link to Sage 300 orders
Create a Sage 300 quote or order from an opportunity, or link existing quotes and orders.

Cases
Log collection, support, appointment and other cases, with tasks and revisit dates.

Prospect to customer
Promote a prospect to an A/R customer. Fields match, so nothing is lost.

Bulk email
Send campaigns via MailChimp or SendGrid, or your own mail server for existing customers.

Full collections
Overdue reminders, bulk invoices, better aging, promises, disputes and payment due alerts.

GOOD TO KNOW

Sage licensing
Users covered by your Sage 300 LanPaks.

Territories
Users see records for their own territories.

Change log
Keeps a log of field changes.

Optional fields
Add Sage 300 optional fields to CRM records.

Supports Sage 300 2018 to 2026 on SQL Server 2012 or later. Needs .NET Framework 4.7.2 or higher.

See how it fits your business

Contact your Sage 300 partner or ERPAdvance Asia for a demo.

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