Introducing TaiRox Products for Sage 300

Presented by: Don Thomson, TaiRox CEO



ACCPAC (Sage 300) Experience

TaiRox

- 1980s
  - Co-founded Basic Software Group, developer of ACCPAC DOS
  - Programmer, eventually supervised 35 development staff
- 1996 - 2001
  - Joined Computer Associates to fix early ACCPAC for Windows
  - As SVP R&D, managed over 300 development staff
- 2009-2025
  - Founded TaiRox Software to develop creative ACCPAC solutions
  - All TaiRox development staff worked for decades "inside Sage"

Sage 300 Company Sweet Spots

- Large Databases: 1Tb
- Large # of order lines: 100
- Lots of inventory items: 20,000
- Lots of one-off customers: 30,000 ship-tos
- Complex G/L accounts & consolidations
- Almost any company using O/E or P/O

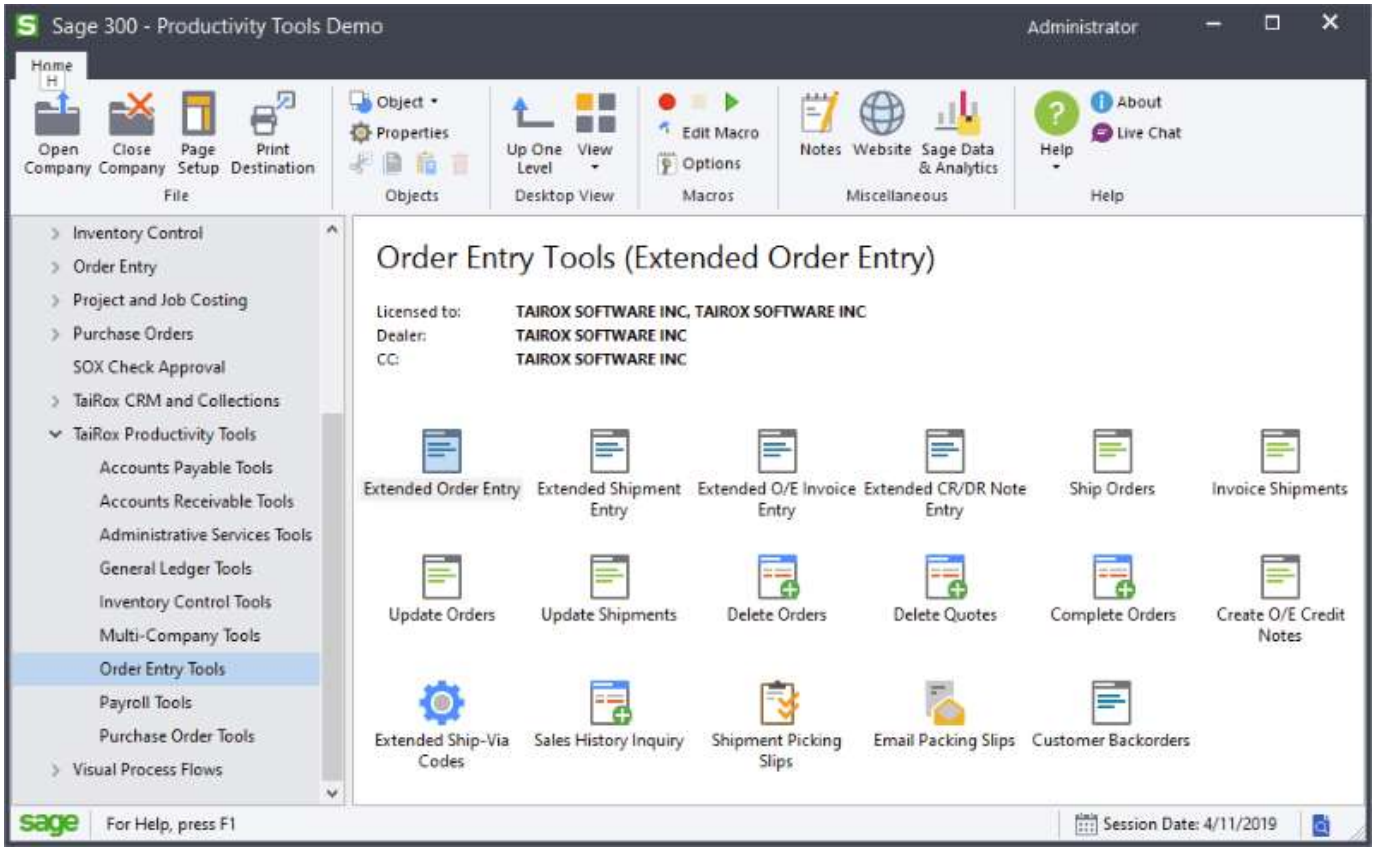
TaiRox Products for Sage 300

- Modules Run Inside the Sage 300 Desktop
  - Productivity Tools (prefix XL)
  - TaiRox Collections (prefix XQ)

- Programs Run Outside the Sage 300 Desktop
  - Automate G/L Consolidations
  - Copy Company
  - Download Rates
  - Fast Clear History
  - Fast Data Integrity
  - Fast Database Management – Fast DBTools

What is Productivity Tools?

- Over 50 programs add hundreds of features to Sage 300

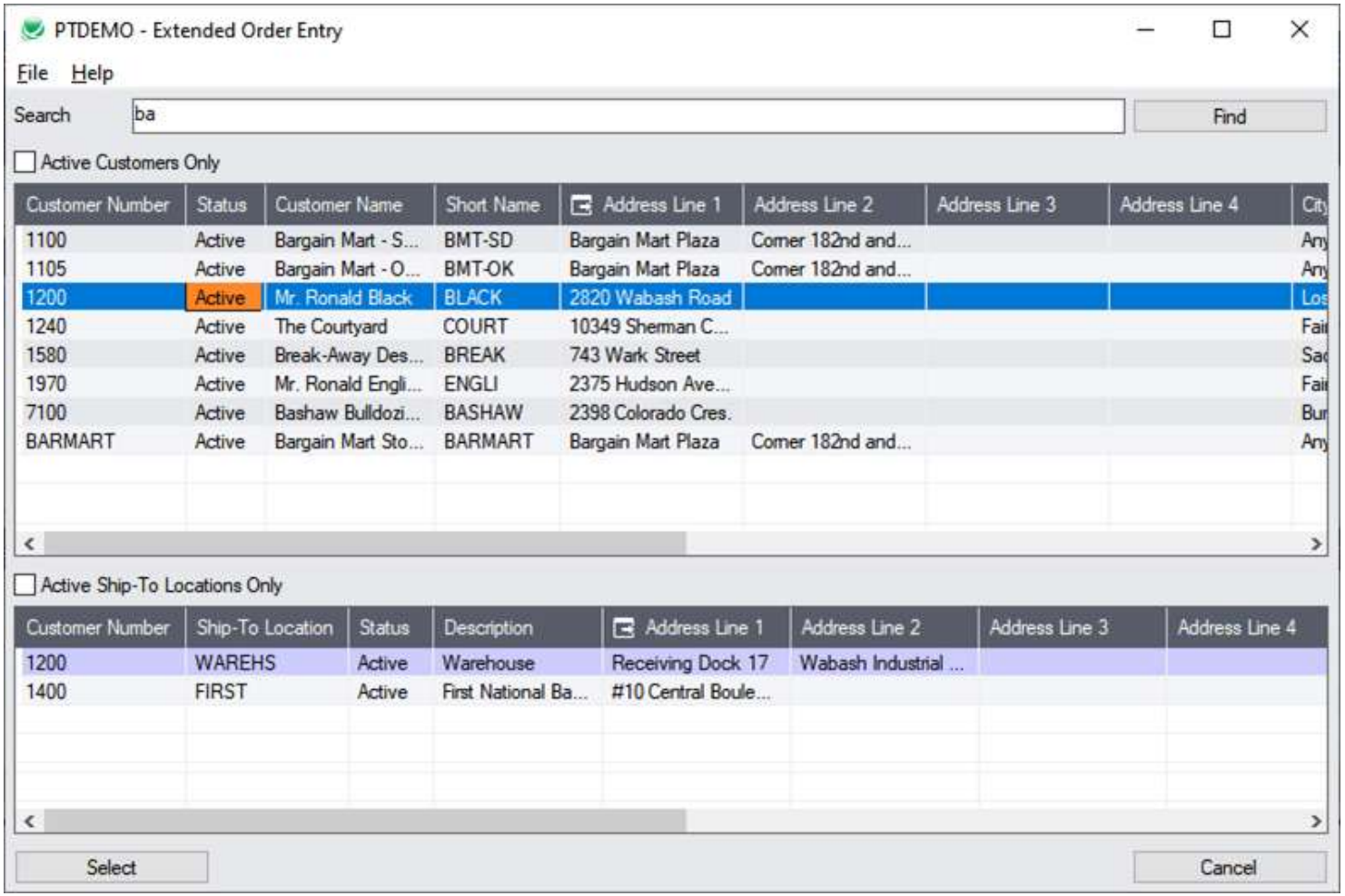


Productivity Tools – Names

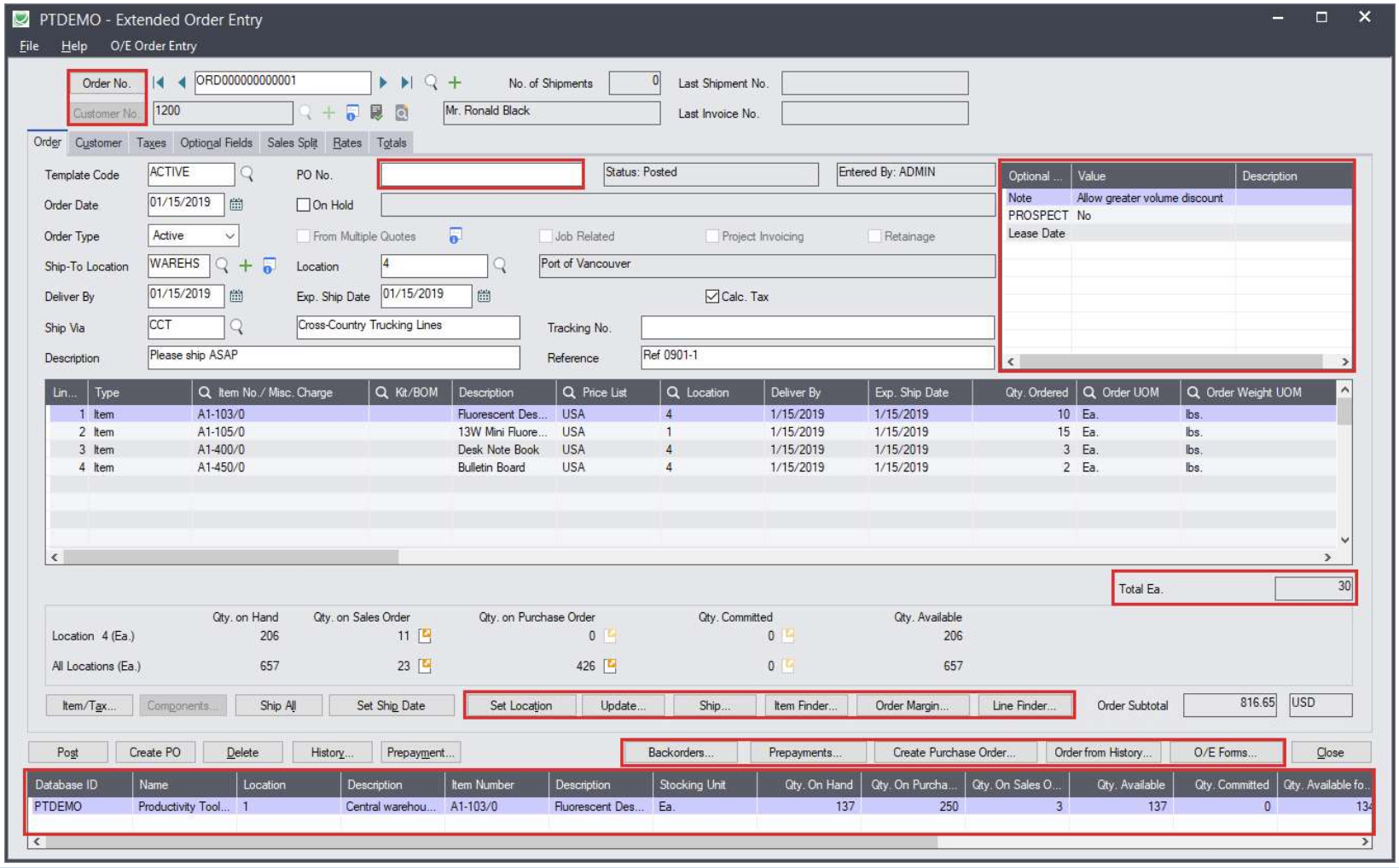
- **Extended**
  - Means the program "takes over" a Sage 300 UI, adding SmartFinders and many other features
  - Many programs copy setup information to multiple companies
- **Complete, Delete, Update, Ship, Invoice, Apply, etc.**
  - Means the program performs hundreds of operations
- **Inquiry, Status**
  - Means improved visibility into data

Productivity Tools – SmartFinders

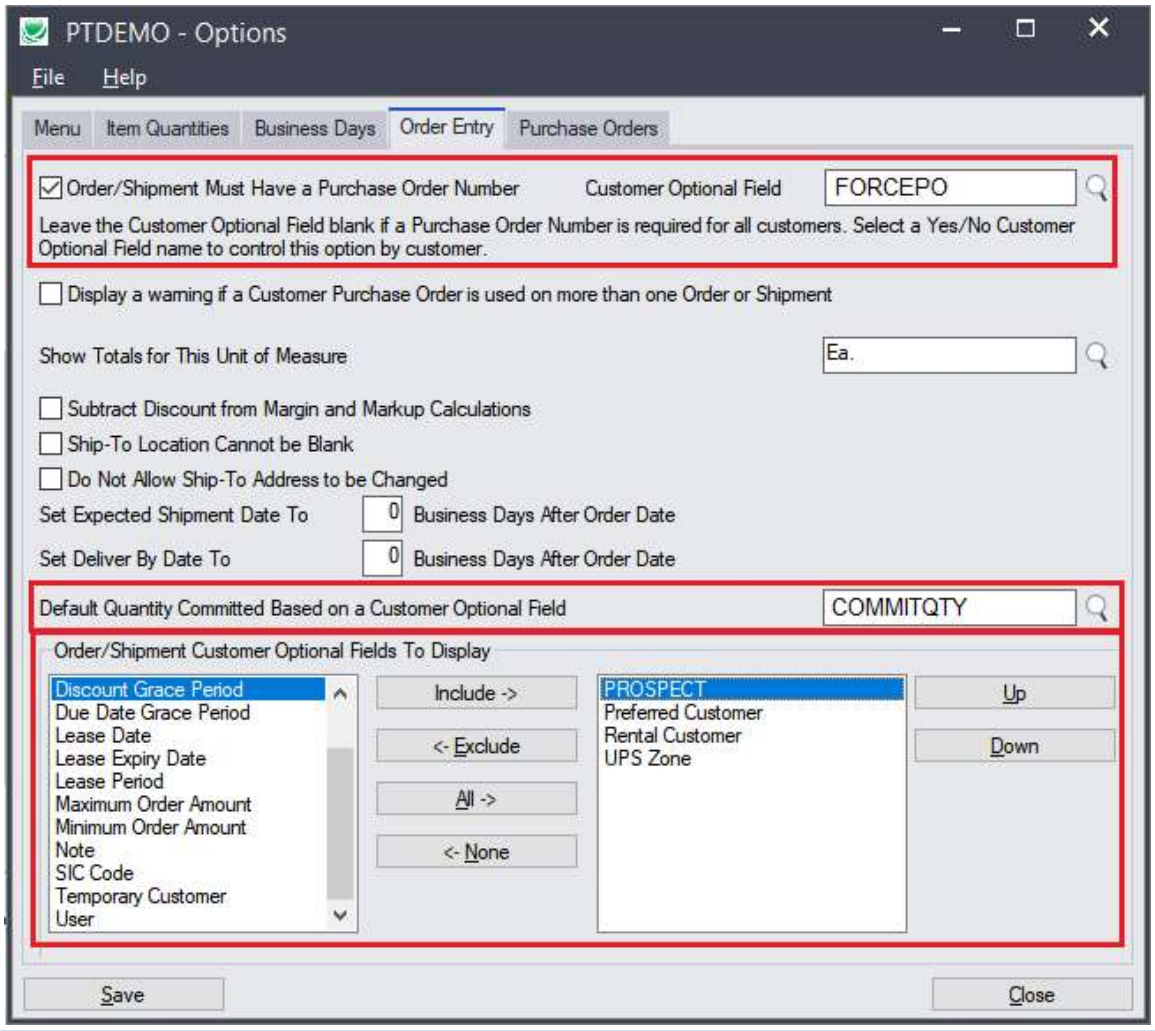
TaiRox



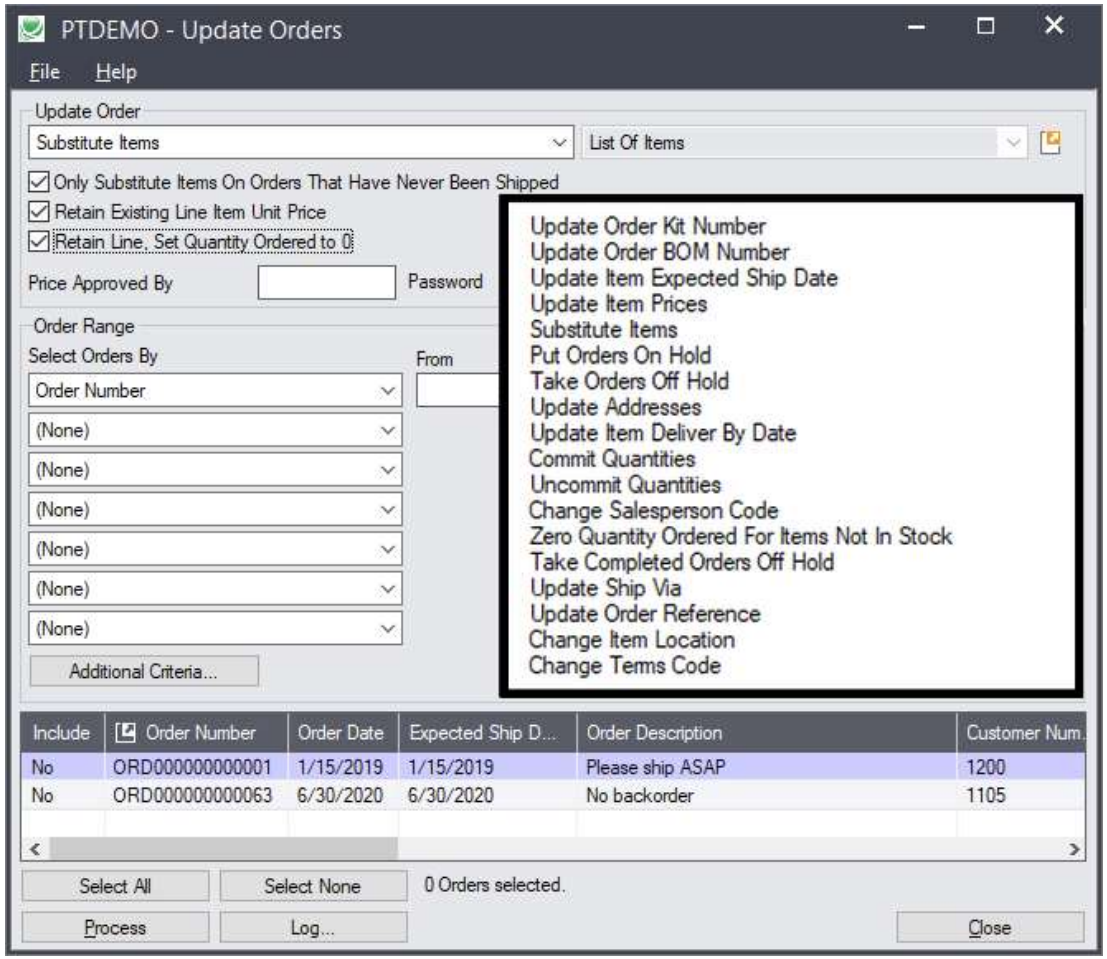
Productivity Tools – Extended Order Entry



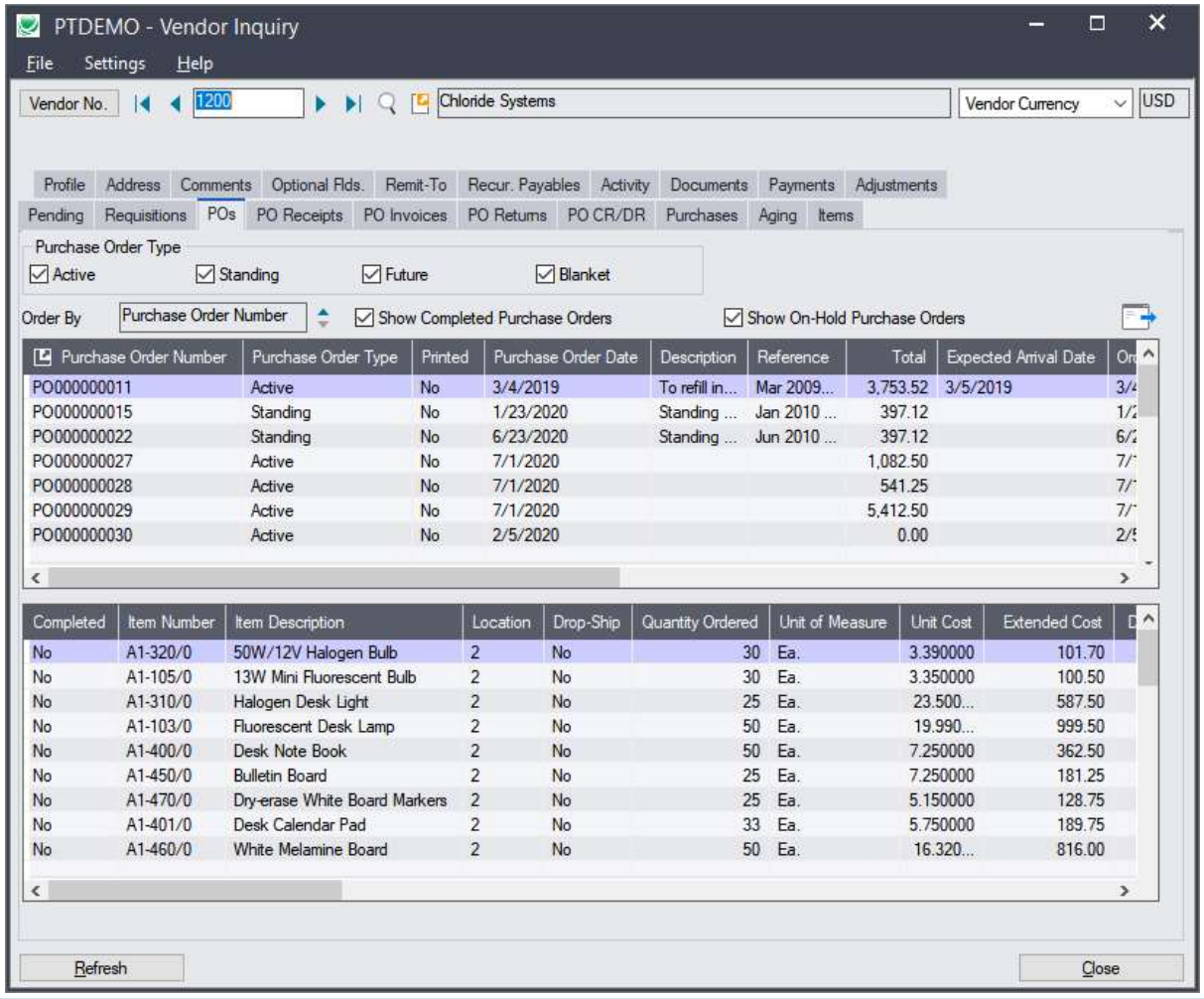
Productivity Tools – Order Entry Options



Productivity Tools – Update Orders

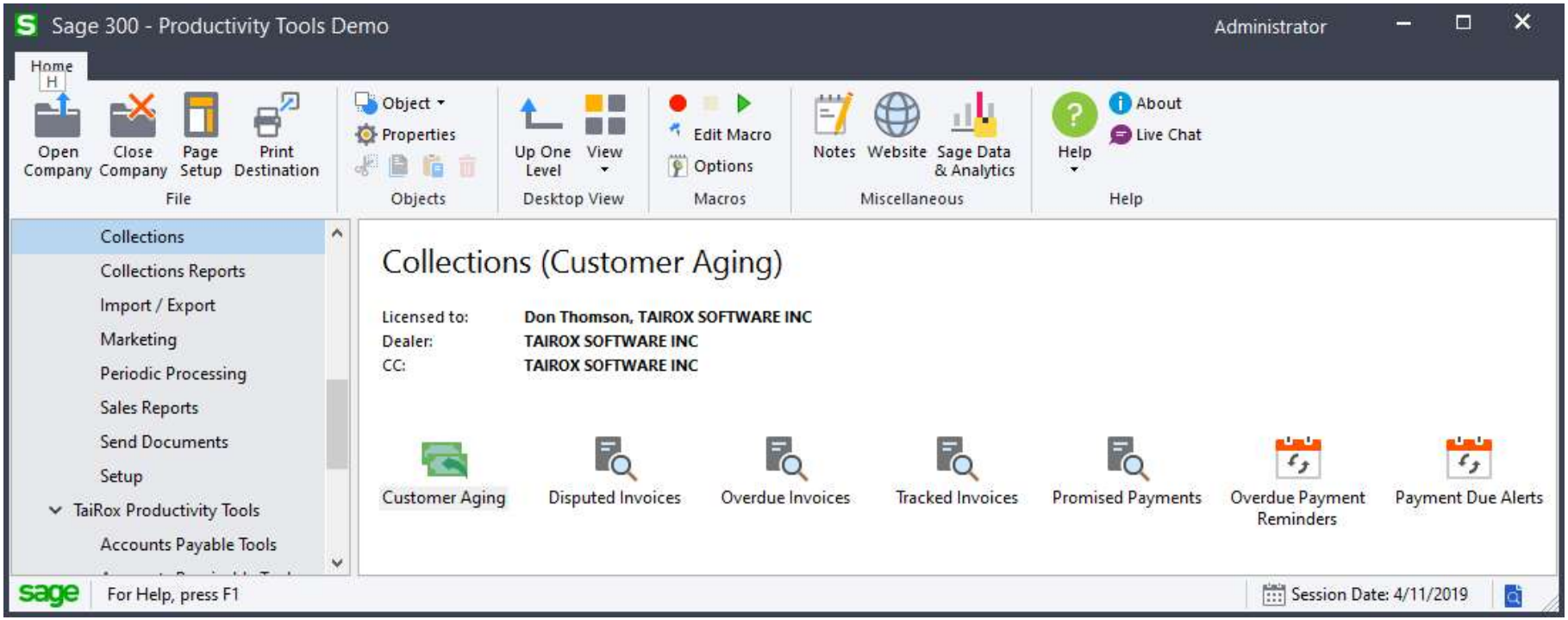


Productivity Tools – Vendor Inquiry



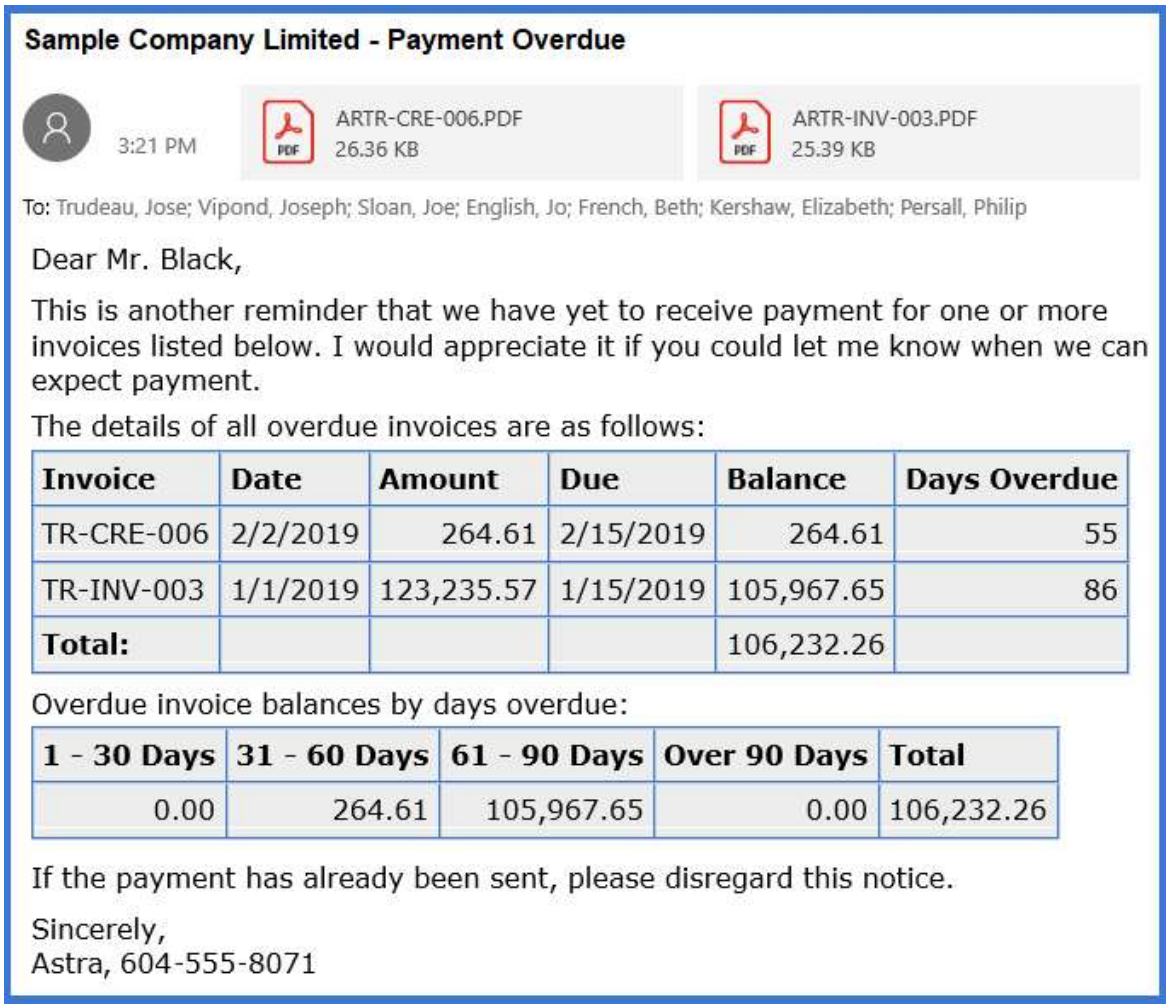
TaiRox Collections

- Not Merely Integrated: Embedded!
  - Sage 300 Look-and-Feel, Multi-Currency, Multiple Contacts, Multi-Language
  - DBDump, DBLoad, Integrity Check, Number Changer, Clear History



TaiRox Collections

- Overdue Payment Reminders
- Payment Due Alerts
- Invoices



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:

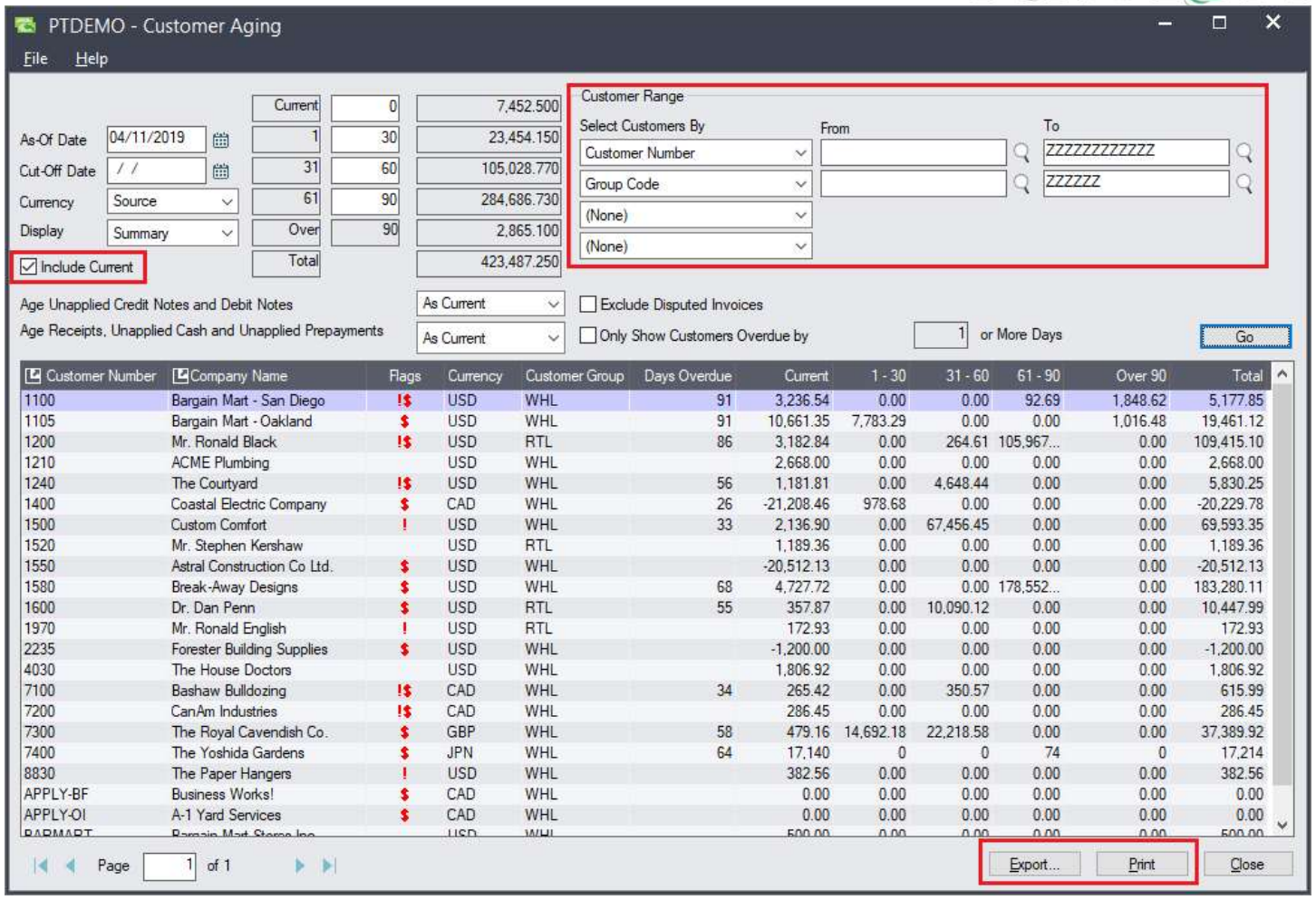
1 - 30 Days	31 - 60 Days	61 - 90 Days	Over 90 Days	Total
0.00	264.61	105,967.65	0.00	106,232.26

If the payment has already been sent, please disregard this notice.

Sincerely,
Astra, 604-555-8071

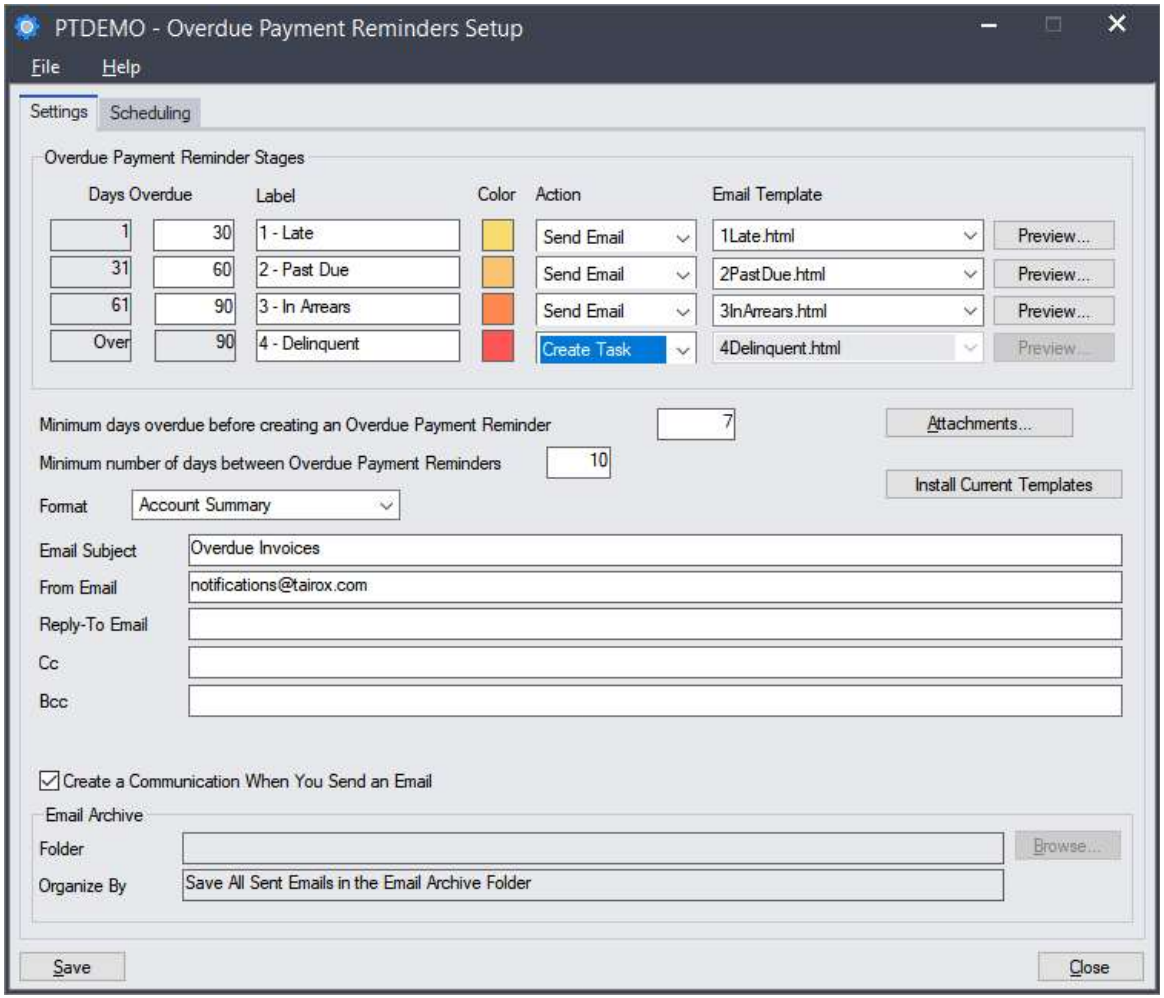
TaiRox Collections

- Aged Trial Balance
  - Fast
  - Enhanced Display
  - Filtering Options
  - Export to Excel
  - Print ATB



TaiRox Collections – Overdue Reminder Options

- Multiple Overdue Buckets
- Email Dunning Templates
- Grace Periods
- Invoice or Account Summary



Automate G/L Consolidations

TaiRox

Consolidation Company Settings

Consolidated Company Information

Company Name	TaiRox Application Tools Demo	Test Sign-on
Company ID	SAMLTD	
User	ADMIN	
Password	*****	
Transaction Date	2022-05-11	☐ Default Fiscal Year-Period from Consolidated Company
Fiscal Year	2022 Period 5	
Currency Rate Date	2022-05-11	

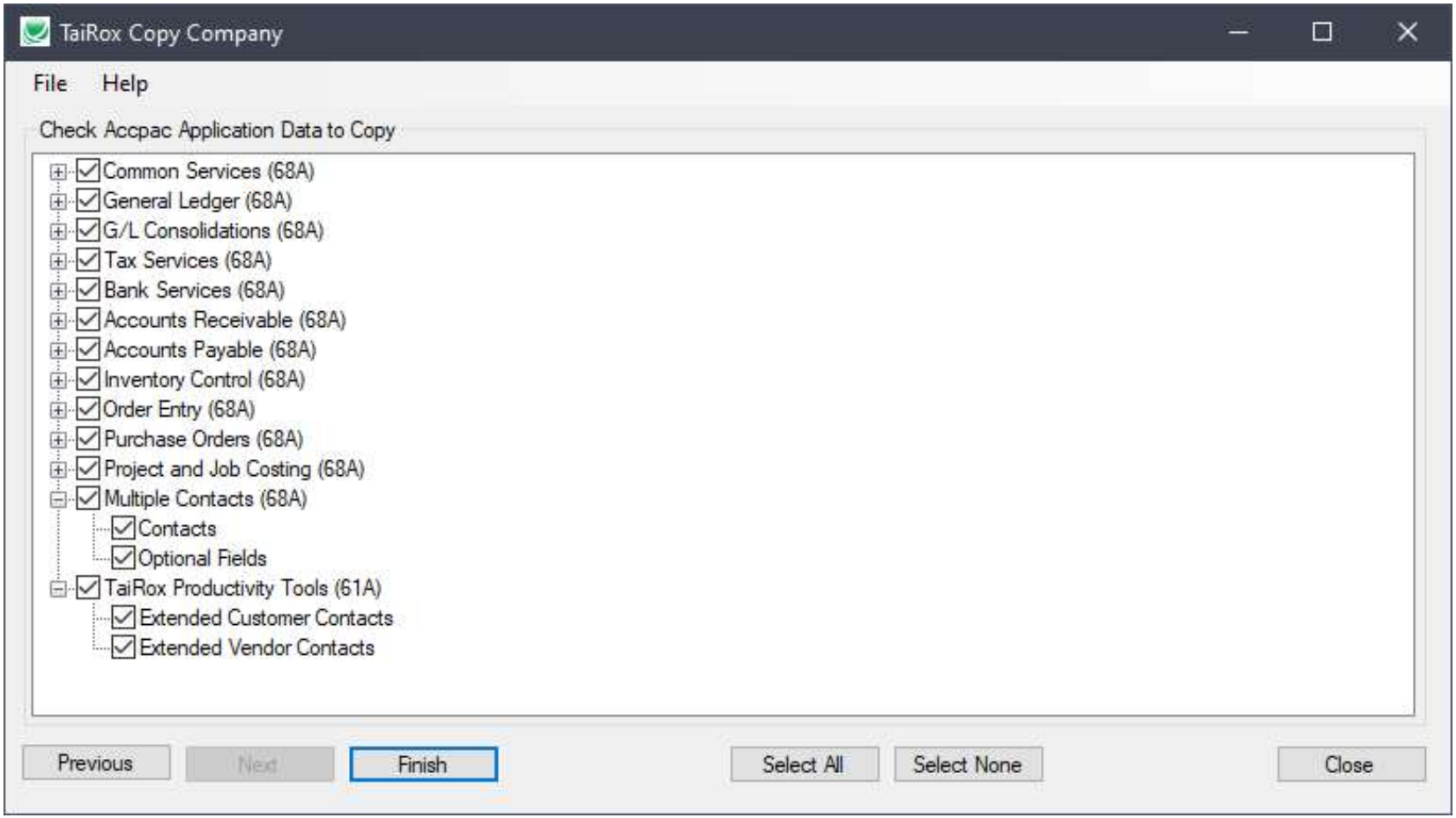
☐ Post G/L Batches

Source Company Settings

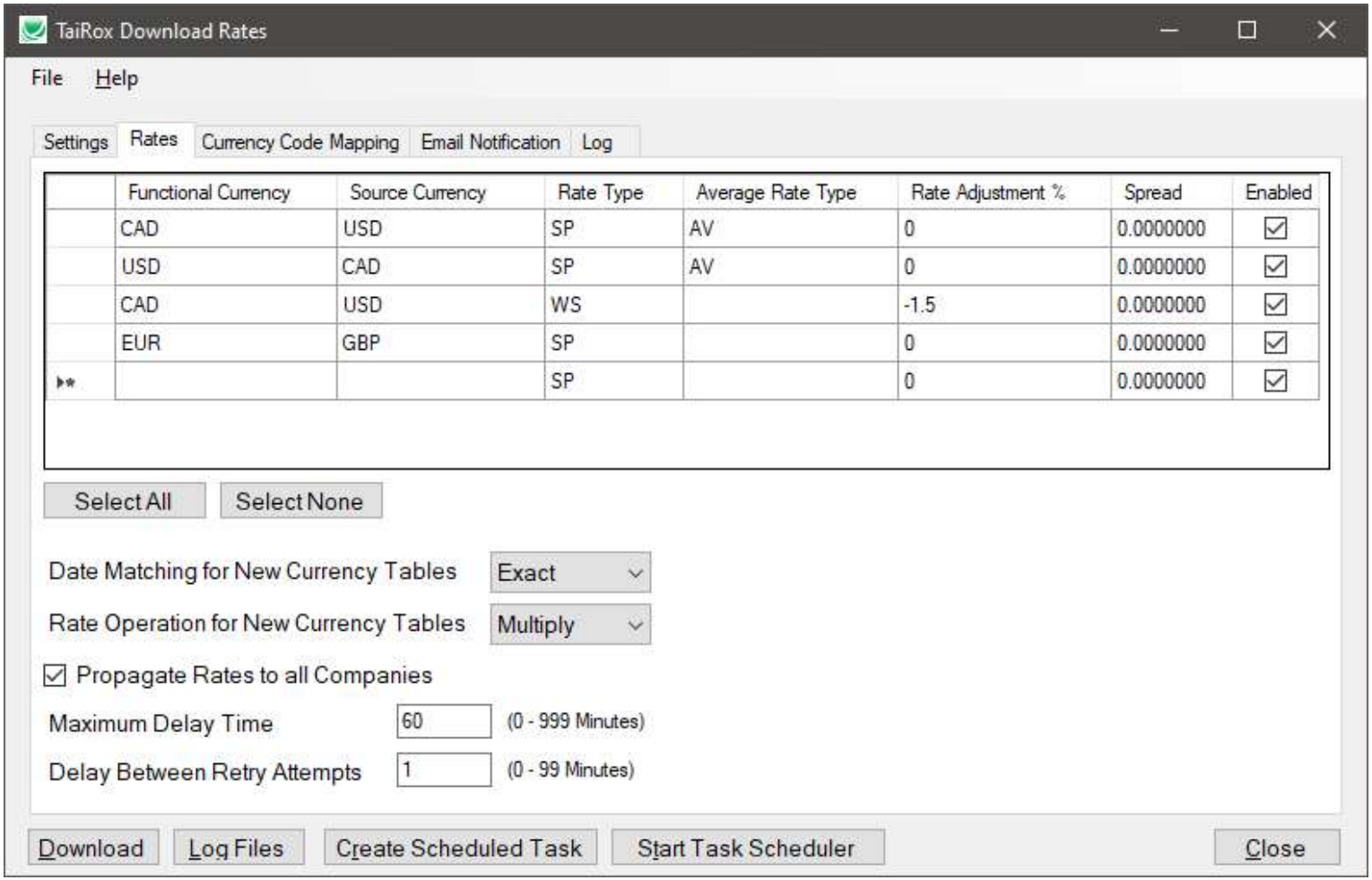
Settings | Consolidation | Email Notification | Log

	Source Company ID	Source Company Name	Export Process ID	Enabled
	SAMLTD	Sample Company Limited	1	☑
▶	SAMINC	Sample Company Inc.	2	☑
*				☑

Copy Company



Download Rates



Fast Clear History

- Clears More
  - AR/AP Tax Withholding
  - AR/AP Deleted Batches
  - Clears TaiRox Collections
- Options
  - OE Use Transaction Date
    - Instead of Completion Date

Module*	Core	Fast	Faster By
Bank	5 days	2 min	3600x
General Ledger	5 hrs	1.6 min	187x
Accounts Receivable	30 min	15 min	2x
Accounts Payable	35 min	10 min	3.5x
Inventory Control	2 days	120 min	24x
Order Entry	97 min	0.5 min	197x
Purchase Orders	7 hrs	12 min	35x
* Times vary widely with database sizes, settings and environment			
* Times for individual modules are not additive to a total for all modules			

"Fast ... cleared 49 million records in about 75 minutes ... before this ... not even an option! Thanks TaiRox!!" **Kelly Hummel, Net@Work.** Show complete quote.

"Database is 187 GB ... standard OE clear ... [2 or 3 days] ... TaiRox OE clear ... [less than 2 hours]" **Scott Davies, Equation Technologies.** Show complete quote.

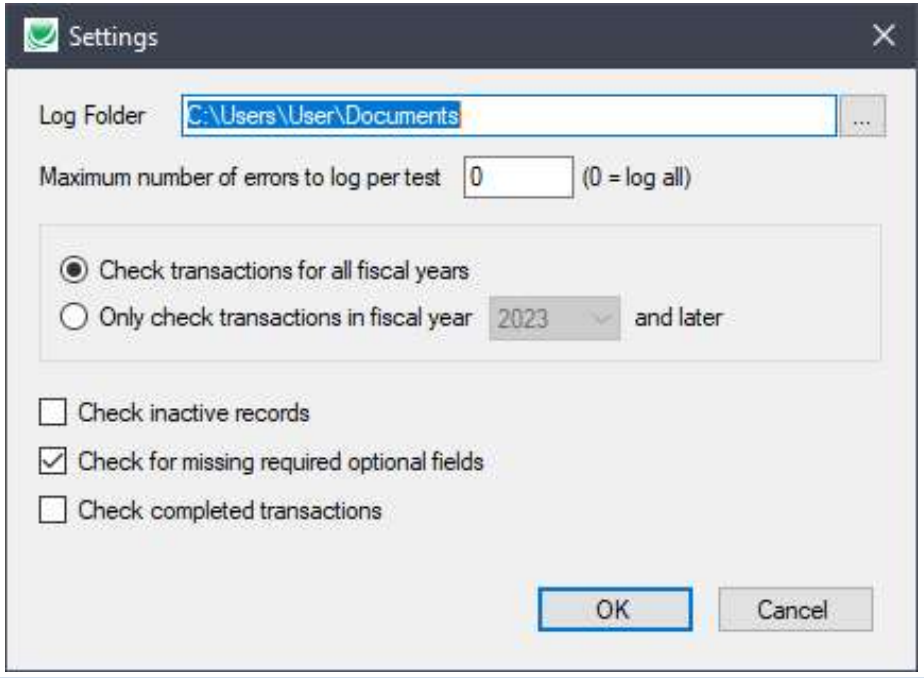
Fast Data Integrity

TaiRox

> "I would just like to say ... WOW! On the client's largest entity, over 200 gig, it typically takes a day to run a DI on just one of the modules (AR, AP or GL). It ran in 6 minutes on AR! I can also say it found and reported on the errors that I was expecting."
> **Kimberly Kyle, Sage 300 Certified Consultant.** Show complete quote.

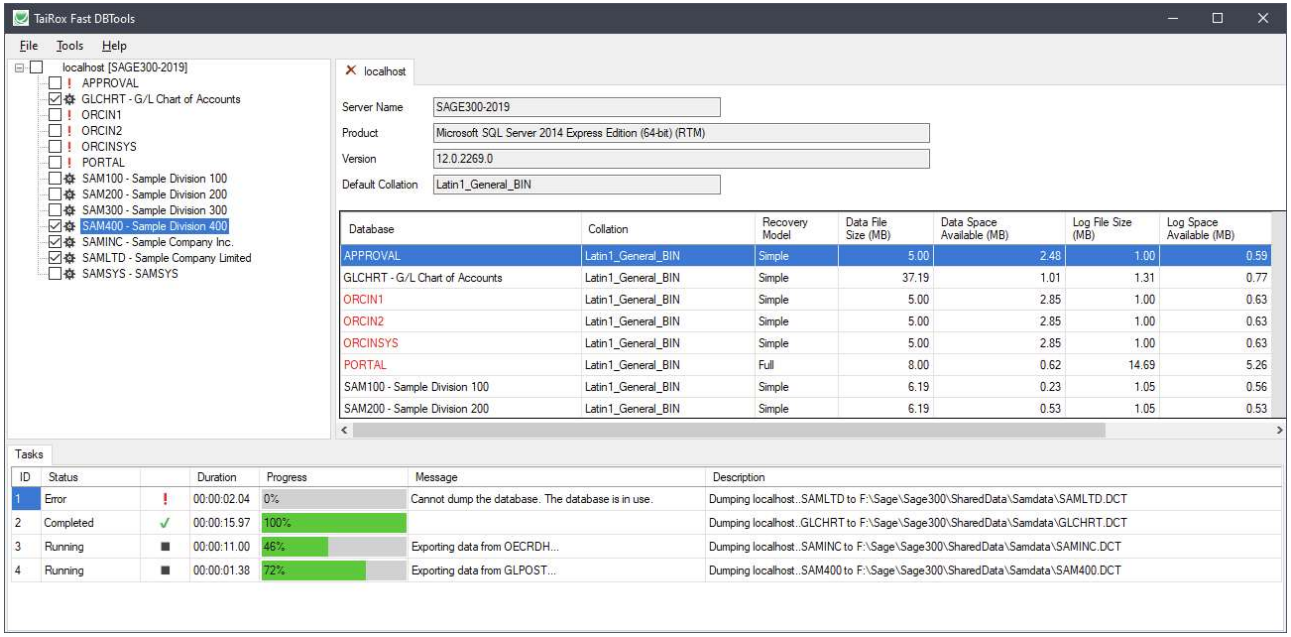
> "The native data integrity ... took over 3 days ... Fast Data Integrity ... less than 1.5 hours."
> **Bruce Warrell, NextLevel Information Solutions.** Show complete quote.

- Filtering Options
  - Only Recent Fiscal Years
  - Inactive Records
  - Completed Transactions
  - Required Optional Fields



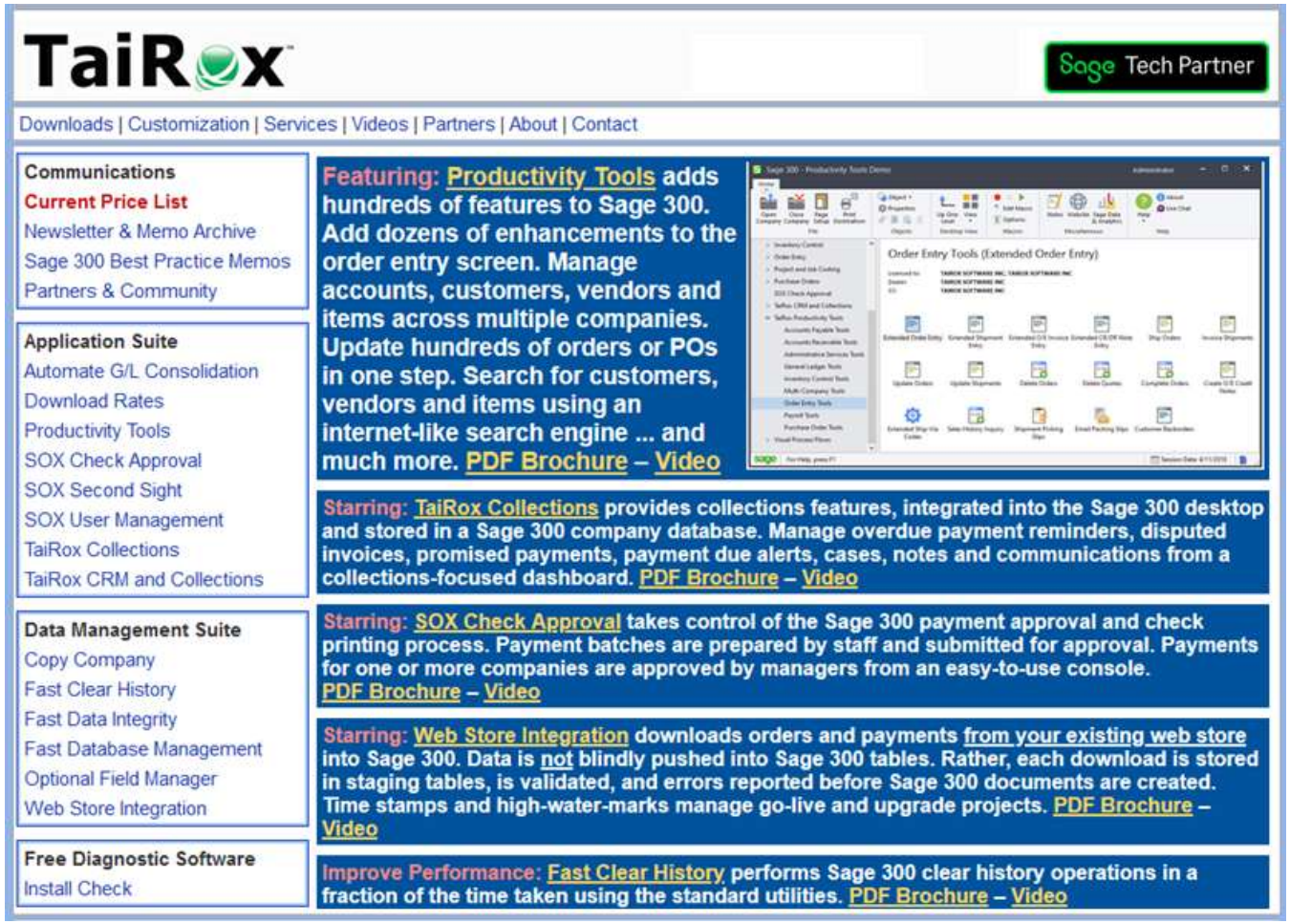
Fast Database Management – Fast DBTools

- DBLoad
  - 5x-6x faster
  - Load multiple at same time
- DBDump
  - Dump multiple in 1 step
  - REC or CSV
- Re-indexing



TaiRox Website

- Up-to-Date
  - Price List
  - PDF Brochures
  - Videos
  - Memos
  - Newsletters
  - Downloads
  - Release Notes
  - Install Check



Videos Page



TaiRox Software Inc

Introduction to TaiRox	2:00

SOX Check Approval

SOX Check Approval Overview	4:48
SOX Check Approval Web Screens	4:15

TaiRox Collections

TaiRox Collections Overview	8:09
Collections: Send Payment Due Alerts	2:57
Collections: Overdue Payment Reminders	5:18
Collections: Manage Disputed Invoices	3:21
Collections: Track & Add Notes to Invoices	5:17
Collections: Manage Promised Payments	3:17
Collections: Resend Invoices in < 1 Minute	1:52
Collections: Lightning Fast Customer Aging	0:56
Collections: Manage Tasks	4:09

TaiRox CRM and Collections

TaiRox CRM & Collections Overview	9:19
Manage Opportunities with TaiRox CRM	8:50
View Assignments: Dashboard and Calendar	1:05
CRM and Collections Charts and Reports	2:02
Audit Trail of Changes	1:20
One-Click-Away Data Access	1:16
Send Calendar Event Emails	3:19
Integrated with Sage 300 Multiple Contacts	3:54
Email A/R and O/E Invoices	2:41

Productivity Tools

TaiRox Productivity Tools Overview	7:14
SmartFinders for Sage 300 Web Screens	1:44

Productivity Tools

General Ledger

Extended G/L Accounts	3:21
Accounting Status	1:34
Extended Fiscal Calendar	1:44

Accounts Receivable

Extended Customers	4:35
Apply Documents	2:46
Mass Billing	1:47
Mail Merge	2:27

Accounts Payable

Extended Vendors	5:00
Vendor Inquiry	3:06
Mail Merge	2:27

Inventory Control

Extended Inventory Items	3:17
Fix Item Valuation Errors	1:44
Mail Merge	2:27

Order Entry

Extended Order Entry	8:38
Extended Shipment Entry	5:36
Email Packing Slips	2:23
Extended Item Finder	1:52
Update Orders	5:19
Ship Orders	2:48
Invoice Shipments	2:00
Complete Orders	2:09
Delete Orders	1:12
Delete Quotes	1:36
Create O/E Credit Notes	3:33

Purchase Orders ■ ■ ■

Purchase Orders

Extended PO Entry	6:53
Stock Reorder	2:48
Complete Purchase Orders	2:28
Complete Zero Receipts	1:51
Delete Purchase Orders	2:23

Productivity Tools Enterprise

Productivity Tools Enterprise Features	7:08
Copy G/L Accounts	8:18
Look Up G/L Account	3:27
Create Price List	4:03
Application Security	2:11
User Management	5:44

Application Suite

Automate G/L Consolidation for Sage 300	3:02
Download Rates for Sage 300	3:25
SOX User Management for Sage 300	5:57

Data Management Suite

Copy Company for Sage 300	3:42
Fast Clear History for Sage 300	2:50
Fast Data Integrity for Sage 300	2:45
Fast DBTools for Sage 300	4:06
Optional Field Manager for Sage 300	6:26
SOX Backup Integrity Testing Service	2:05

Memos: Sage 300 Technical Details

TaiRox

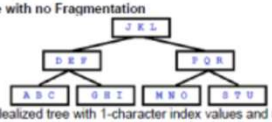
TaiRox Memo

Reindexing Sage 300 Tables

Summary
This memo describes, for a less technical audience, certain database terms related to Sage 300 performance: "unbalanced" and "fragmented" indexes. This memo also explains how Sage 300 and TaiRox tools are used to optimize index performance.

Indexes and Performance
Sage 300 indexes include account, customer, vendor and item numbers. Every Sage 300 table has between 1 and 7 indexes that are used to speed up access to the table. Each index will speed up particular operations. Indexes can become "unbalanced" or "fragmented" over time, which will degrade Sage 300 performance. Most SQL Server indexes are stored as trees.

A Balanced Index Tree with no Fragmentation



This picture shows an idealized tree with 1-character index values and up to 3 entries per page. To look up the entry "T", start at the top and navigate to the right (because T comes after L) to the next level. Then navigate to the right again (because T comes after R) to the next level. At that level you find a match and there will be a reference to the data for the T index value.

An Unbalanced Index Tree with No Fragmentation



This picture shows an extremely unbalanced tree. To look up the entry "T" now involves 7 levels of navigation instead of 3. This takes more time, especially if the pages are not currently cached in memory.

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TaiRox Memo

Sage 300 Clearing History

Background: Clearing history in Sage 300 is most commonly done to clean-up data, to reduce database size and to improve performance. For large databases, the built-in clear history operations might take several days to run, making the operation fragile and difficult to manage.

Cleaning Up Data: This is often the best reason to clear history. Sales History reports and order entry operations may be cluttered with inventory items that have been discontinued for many years. You want to delete the items but Sage 300 will not let you do this because the items are referenced by old sales and purchase orders. What can you do?

A technical person can delete the items by directly deleting items using SQL statements. The problem with this approach is that your database will no longer pass a database integrity check. It can be argued that the database integrity errors caused by this can be ignored as the orders are old and will not be changed. The problem with this argument is that if you do decide to check data integrity, it will be difficult to spot "current errors" as they will be buried in thousands of errors from the old orders.

You can run the Sage 300 clear history functions. But what if they take several days to run and your server decides to reboot in the middle of the operation? Our answer is Fast Clear History, that turns days into hours and hours into minutes.

Module*	Core	Fast	Faster By
Bank	5 days	2 min	3600x
General Ledger	5 hrs	1.6 min	187x
Accounts Receivable	30 min	15 min	2x
Accounts Payable	35 min	10 min	3.5x
Inventory Control	2 days	120 min	24x
Order Entry	97 min	0.5 min	197x
Purchase Orders	7 hrs	12 min	35x

* Times vary widely with database sizes, settings and environment
* Times for individual modules are not additive to a total for all modules

Reducing Database Size and Improving performance: Results here can be disappointing, relative to expectations. Clearing 5 years of history from a 10-year-old database sounds like a 50% reduction. But it is only a 50% reduction in a fraction of the tables. You might see a 5% reduction in overall database size. Performance involves many non-linear factors and there may be other means to get better performance (e.g. lower network latency). A half-second average improvement in a one-second average operation is noticeable. A half-second improvement in a three second operation, may be noticeable, but disappointing.

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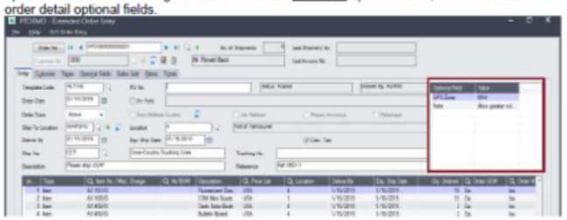
TaiRox Memo

A Comprehensive Guide to Sage 300 Optional Fields

Realizing the Full Potential of Optional Fields
Sage 300 optional fields can store all kinds of accounting-related data. The data can be stored in all types of transactions. The data flows from one transaction type to another. So far, so good. However, when put into practice, optional field usage often faces these challenges:

- **Visibility:** A user doesn't see the optional fields displayed when and where a user wants to see them. Navigation to a different screen, tab or pop-up is required.
- **Visibility:** For operations that support searching and sorting entries, searching or sorting by an optional field may not be supported.
- **Programming:** For a complete solution, a user wants some behavior to be controlled by optional fields. Additional programming, even if only a tiny amount of programming, is required.
- **Management:** Setting up an optional field for an entity like a customer, even if the optional field is required, doesn't put an optional field value into the thousands of customer records. Integrity checking reports these omissions as errors.
- **Management:** It is very common to set up optional fields, put them into practice, and then realize that they should have been set up a different way. It is difficult to remove optional fields correctly and they can hang around, affecting performance and database size.

Making Optional Fields More Visible - TaiRox Productivity Tools
TaiRox Productivity Tools is comprised of over 50 different programs that add hundreds of features to Sage 300. Some of these features make optional fields more visible. Suppose you want to see specific information about a customer when entering an order. You have to navigate to another window to see this information. Extended Order Entry will show selected customer optional fields when entering an order. These are customer optional fields, not order header or order detail optional fields.



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Questions?

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  - Productivity Tools (prefix XL)
  - TaiRox Collections (prefix XQ)

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