|  |
| --- |
|  |

**TaiRox CRM and Collections**

**Implementation Guide**

© 2009-2024 TaiRox Software, Inc. All rights reserved.

**Important Notice**

TaiRox does not warrant or represent that your use of this software product will be uninterrupted or error-free or that the software product can be run with any version of Sage 300 other than 2018 to 2025, or that the information in this document is completely accurate. TaiRox warrants that any media by which you have received this software is free from defects. TaiRox will replace any such defective media. TaiRox expressly disclaims all other warranties, representations, conditions and guarantees of any kind including, but not limited to, warranties for merchantability or fitness for a particular use.

# Table of Contents

[1 Installation 3](#_Toc184818271)

[2 Activation 3](#_Toc184818272)

[3 CRM and Collections License Information 3](#_Toc184818273)

[4 Set Up Options, Opportunity Stages, Case Stages, and Communication Types for CRM 4](#_Toc184818274)

[4.1 CRM and Collections Options 4](#_Toc184818275)

[4.2 Add Opportunity Stages 6](#_Toc184818276)

[4.3 Add Case Stages 7](#_Toc184818277)

[4.4 Add Communication Types 8](#_Toc184818278)

[4.5 Add Optional Fields 9](#_Toc184818279)

[5 Set Up Contacts, Companies, and National Accounts 11](#_Toc184818280)

[5.1 Import Contacts from the Sage 300 M/T Contacts module using CRM’s Sync Contacts Program 11](#_Toc184818281)

[5.2 Import Customers from Sage 300 using CRM’s Sync Companies Program 11](#_Toc184818282)

[5.3 Import National Accounts from Sage 300 using CRM’s Sync National Accounts Program 12](#_Toc184818283)

[5.4 Import Existing Contacts from TaiRox Productivity Tools 12](#_Toc184818284)

[6 Set Up Territories, Users & Security 13](#_Toc184818285)

[6.1 Notes Regarding Companies, Territories, and Users 13](#_Toc184818286)

[6.2 Update Territory Codes 13](#_Toc184818287)

[6.3 Import Users from Sage 300 15](#_Toc184818288)

[6.4 Add New CRM Security Groups to Sage 300 16](#_Toc184818289)

[6.5 Add CRM Users to Security Groups in Sage 300 17](#_Toc184818290)

[7 Specify Email Settings and Content for Sending Statements, Letters, and Invoices to Customers 18](#_Toc184818291)

[8 Specify Settings for Overdue Payment Reminders, Payment Due Alerts, and Send Invoices 22](#_Toc184818292)

[8.1 Settings for Overdue Payment Reminders 22](#_Toc184818293)

[8.2 Settings for Payment Due Alerts 24](#_Toc184818294)

[8.3 Settings for Send Invoices 25](#_Toc184818295)

[9 Set Up Bulk Email Accounts 26](#_Toc184818296)

# Installation

Uninstall a prior version of TaiRox CRM and Collections before installing a new version of CRM and Collections

* **Control Panel > All Control Panel Items > Programs and Features**
* In Windows 10 or 11, go to **Settings > Apps and Features**

**Install the new version of TaiRox CRM and Collections**

* Run **Setup-2018-2025.msi** to install TaiRox CRM and Collections (for *Sage 2018 or later*)*.*
* You must install TaiRox CRM and Collections on each computer where Sage 300 is physically installed.
* You must run RegAcc.exe on each workstation that runs Sage 300 from a server (or run Workstation Setup with “repair”).

# Activation

**Activate the new version of CRM and Collections using Sage 300 Activation**

* Select **Administrative Services > Data Activation**
* No information is entered for activation

# CRM and Collections License Information

**Enter license information on the Sage 300 Desktop under TaiRox CRM**

* Select **TaiRox CRM and Collections > Setup > License Number**
* Enter the license number in the License field and choose Save

# Set Up Options, Opportunity Stages, Case Stages, and Communication Types for CRM

## CRM and Collections Options

**Provides:**

* Default number of lines in CRM grids.
* Default locations for CRM and Collections emails and documents.
* Switch to suspend automatic integration between A/R and CRM.
* Email server settings for sending emails directly from CRM and Collections.
* List of entities that will update users’ calendars.

***Notes regarding email server settings:***

* These settings are used to send payment reminders for overdue invoices, to send documents from the Companies window, and to send statements, A/R invoices and O/E invoices to companies.
* You must also specify “from email” addresses in the Accounting Documents Setup function, and specify email text for A/R statements, letters and invoices.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CRM Options** | | | | |
| **Suspend A/R Integration** |  | | (select to suspend integration between CRM Companies and National Accounts and A/R Customers and National Accounts) | |
| **Suspend M/T Integration** |  | | (select to suspend integration between CRM Contacts and Sage 300 M/T Contacts) | |
| **Email Server Settings** | | | | |
| **Server Name** |  | | | |
| **Server Port** | Port # | | Use SSL | |
| **Username** |  | | | |
| **Password** |  | | | |
| **From Email** | (default can be changed for different accounting documents) | | | |
| **Email Archive Settings** | | | | |
| **Select one of the following options as the storage location for email files (\*.eml)** | | | | |
|  | | | | Location is specified on the Options > Document Folders Tab |
|  | | | | Location is specified on the Options > Document Folders Tab |
|  | | | | Use the Email Archive Folder in the Accounting Documents UI |
| **Calendar Settings** | | | | |
| **Select which entities will update user calendars** |  | | Cases | |
|  |  | | Opportunities (for CRM and Collections) | |
|  |  | | Tasks | |
| **Document Folders – Destination folders for emails and “drag and drop” operations** | | | | |
| **Generic Documents Folder** | | (stores documents related to multiple companies) | | |
| **Company Documents** | | (this folder …\{COMPID}\ is available by button from the Company UI) | | |
| **Document Folders – *continued*** | | | | |
| **Case Documents** | |  | | |
| **Tracked Invoice Documents** | |  | | |
| **Company Communications** | |  | | |
| **Opportunity Documents** | |  | | |
| **National Account Documents** | | (this folder …\{NATACCT#}\ is available from the National Acct UI) | | |
| **Nat. Acct. Communications** | |  | | |
| **Customer PDFs** | | | | |
| **A/R Invoice Options** | | (A/R Invoice report [.rpt] file) | | |
| **O/E Invoice Options** | | (O/E Invoice report [.rpt] file) | | |
|  | | Print Serial/Lot Numbers | | |
|  | | Include Backordered Items | | |
|  | | Use Custom Form | | |
|  | | Print Kit Component Items | | |
|  | | Print Bills of Material Component Items | | |
|  | | Retainage | | |
| **O/E Credit Note Options** | | (O/E Credit Note report [.rpt] file) | | |
|  | | Print Serial/Lot Numbers | | |
|  | | Use Custom Form | | |
|  | | Print Kit Component Items | | |
|  | | Print Bills of Material Component Items | | |
|  | | Retainage | | |

## Add Opportunity Stages

Opportunity stages are the key milestones of your sales process. CRM provides four default stages: “Qualified”, “Unqual”, “Meeting”, and “Proposal.” You can add as many stages as you require.

CRM Default Opportunity Stages:

|  |  |  |
| --- | --- | --- |
| **Stage Code** | **Description** | **Sort Order** |
| UNQUAL | Unqualified | 1 |
| QUALIFIED | Qualified | 2 |
| MEETING | Meeting | 3 |
| PROPOSAL | Proposal | 4 |

Codes you might add include: Prospecting, Needs Analysis, ID Decision Makers, Review.

Notes:

* The **Sort Order** for opportunity stage determines the order that the opportunity stages will appear in the Finder for the “Stage” field on the Opportunity screen. For example, UNQUAL has sort order “1” and will appear at the top of the list.

Opportunity Stages:

|  |  |  |
| --- | --- | --- |
| **Stage Code** | **Description** | **Sort Order** |
| **Notes** | |
| UNQUAL | Unqualified | 1 |
|  | |
| QUALIFIED | Qualified | 2 |
|  | |
| MEETING | Meeting | 3 |
|  | |
| PROPOSAL | Proposal | 4 |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |

## Add Case Stages

Case stages are user-defined stages in your collection or support process.

For example, you might add the following stages:

* Collection stages: Open, Reminder sent, Call, Warning, Legal.
* Support stages: Open, Research, Pending, Resolved, Closed

You can add as many stages as you require.

Notes:

* The **Sort Order** for case stages determines the order that the stages will appear in the Finder for the “Stage” field on the Case screen.

Case Stages:

|  |  |  |
| --- | --- | --- |
| **Stage Code** | **Description** | **Sort Order** |
| **Notes** | |
| Enter code | Enter description. | (number). |
| Enter notes (e.g. for collections or support). | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |
|  |  |  |
|  | |

## Add Communication Types

Communication types appear on communications and show how you communicated with the company or company contact – such as by phone, email, mail, fax, text, or meeting. Each time you document a communication, you must also specify the communication type.

CRM Default Communication Types:

|  |  |
| --- | --- |
| **Communication Type** | **Description** |
| EMAIL | Email |
| FAX | Fax |
| MAIL | Mail |
| PHONE | Phone |
| TEXT | Text |

You might want to add Skype or meeting as communication types.

Communication Types:

|  |  |
| --- | --- |
| **Code** | **Description** |
| **Notes** |
| EMAIL | Email |
|  |
| FAX | Fax |
|  |
| MAIL | Mail |
|  |
| PHONE | Phone |
|  |
| TEXT | Text |
|  |
|  |  |
|  |
|  |  |
|  |
|  |  |
|  |
|  |  |
|  |
|  |  |
|  |
|  |  |
|  |

## Add Optional Fields

You can add Sage 300 optional fields to companies, contacts, opportunities, users, documents, communications, and cases.

Optional fields are displayed in grids (such as the companies, contacts, and users lists), as well as on Optional Field tabs.

* First, add optional fields to Sage 300 using **Common Services > Optional Fields**.

You can also add a set of values for a Finder list when you add fields.

* Second, add optional fields to TaiRox CRM using **TaiRox CRM > Setup > Optional Fields**.

You can set the default value of the optional field by choosing Yes in the Value Set field and selecting the value in the Default Value field from values that were added in Common Services. Or you can enter a default value if no list of values were added.

***Note about Company optional fields:*** A/R Customer optional field values will be imported from Sage 300 if the same optional fields have been added to CRM.

However, you ***do not*** need to set up the optional fields before you import customers. If you later add the matching optional fields to CRM, the program will ask if you want to update companies with the optional field data from A/R.

Optional Fields:

* Location is Companies, Contacts, Opportunities, Users, Documents, Communications, or Cases.

| **Location** | **Optional Field** | **Description** | | **Val Set** |
| --- | --- | --- | --- | --- |
| **Default Value** | **Value Description** | **Req** | **Auto Ins** |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |
| Choose record type | Type Op Fld name |  | |  |
|  |  |  |  |

# Set Up Contacts, Companies and National Accts

## Import Contacts from the Sage 300 M/T Contacts module using CRM’s Sync Contacts Program

* You must activate the Sage 300 M/T Contacts module before setting up CRM. If you do not have the Sage 300 M/T Contacts module, go on to the next step to synchronize A/R customers with TaiRox CRM and Collections.
* You must run Sync Contacts before running Sync Customers and Sync National Accounts if you use Sage 300 M/T Contacts.
* Note that National Accounts is an optional feature in Sage 300 and must be licensed to appear in TaiRox CRM and Collections.

**Import your current Sage 300 M/T Contacts to CRM**

* Select **TaiRox CRM > Setup > Sync Companies**
* Click Next – screen #2 lists contacts that are only in TaiRox CRM. This screen will not have any entries if this is a new CRM.
* Click Next – screen #3 lists all contacts that are in Sage Multiple Contacts only.
* Click the All button to copy all contacts to CRM.
* Click Next – screen #4 displays contacts that exist in CRM and Sage Multiple Contacts but have different data. This grid should be empty.
* Click Next to get to the last screen, and then click the Finish button.
* Optional fields associated with Contacts will also be copied if you selected matching optional fields in CRM.

Contact optional fields will also be imported from Sage 300 if the same optional fields have been added to CRM.

## Import Customers from Sage 300 using CRM’s Sync Companies Program

**Import your current Sage 300 A/R customers to CRM**

* Select **TaiRox CRM > Setup > Sync Companies**
* Click Next – screen #2 lists companies that are not in TaiRox CRM.
* Click the All button to copy all A/R customers to CRM.
* Click Next – screen #3 displays companies that are in CRM and Sage Multiple Contacts but have different data. This grid should be empty.
* Click Next to get to the last screen, and then click the Finish button.
* Optional fields associated with customers will also be attached to CRM companies if you selected matching optional fields in CRM.

***About Company Optional Fields:*** A/R Customer optional fields will be imported from Sage 300 if the same optional fields have been added to CRM.

However, you ***do not*** need to set up the optional fields before you import customers. If you later add the matching optional fields to CRM, the program will ask if you want to update companies with the optional field data from A/R.

***Notes regarding territories:***

* Sync Companies adds territory codes to CRM for territories assigned to your current customers. You can add new territory codes in CRM and you can add a territory description to each one.
* You can assign users to as many territories as you want, as well as to “All Territories”.

## Import National Accounts from Sage 300 using CRM’s Sync National Accounts Program

**Import your current Sage 300 A/R National Accounts to CRM**

* Select **TaiRox CRM > Setup > Sync** **National Accounts**
* Click Next – screen #2 lists national accounts that are not in TaiRox CRM.
* Click the All button to copy all A/R national accounts to CRM.
* Click Next – screen #3 displays national accounts that are in CRM and Sage 300 Accounts Receivable but have different data. This grid should be empty.
* Click Next to get to the last screen, and then click the Finish button.
* Optional fields associated with customers will also be attached to CRM companies if you selected matching optional fields in CRM.

***About Company Optional Fields:*** A/R National Account optional fields will be imported from Sage 300 if the same optional fields have been added to CRM.

However, you ***do not*** need to set up the optional fields before you import national accounts. If you later add the matching optional fields to CRM, the program will ask if you want to update national accounts with the optional field data from A/R.

## Import Existing Contacts from TaiRox Productivity Tools

***If you maintain contacts with TaiRox Productivity Tools and do NOT use Sage Multiple Contacts,*** **import your current Productivity Tools contacts to CRM.**

Note that the “Import Prod. Tools Contacts” icon will ***not*** appear in the CRM Setup folder ***if you use the Multiple Contacts module with Sage 300.***

The “Import Productivity Tools Contacts” program does not import Sage M/T Contacts information from Accounts Receivable customer records.

The TaiRox Productivity Tools User Guide provides instructions for updating contacts when you activate the Sage 300 M/T Contacts module.

* Select **TaiRox CRM > Setup > Import Prod Tools Contacts**
* Operations include Insert Only, Update Only, and Insert and Update.
* CRM provides an option for including inactive contacts or contacts for inactive customers.
* Optional fields are not imported using this program.

See “Appendix C: Exporting and Importing Companies and Contacts” in the CRM User Guide for information on importing contacts from other contact management programs.

# Set Up Territories, Users & Security

## Notes Regarding Companies, Territories, and Users

**Companies belong to a territory. Territories are imported with customers from A/R when you run Sync Companies.**

* Opportunities, contacts and cases are linked to companies and, therefore, are associated with a territory.

**Users see companies based on the territories to which they belong and based on their security rights.**

* CRM users are imported from Sage 300 and assigned to territories and to CRM security groups.
* Users are also assigned to security groups that can provide access to CRM administrative rights and rights to CRM companies, opportunities, notes, and documents, cases, disputed invoices, overdue invoices, tracked invoices, promised payments, collections, and accounting documents.
* Security groups and user authorizations are granted through Sage 300 Administrative Services.

**Note:** To use Sage security for CRM, you must:

* Turn it on for the Sage 300 system database using Database Setup if the installation does not currently use security.
* Create Sage security groups for CRM access.
* Assign users to the CRM security groups.

## Update Territory Codes

**Add descriptions to Sage 300 territory codes, and add new territory codes for prospects.**

* Select **TaiRox CRM > Setup > Territories**

Territory Codes:

|  |  |
| --- | --- |
| **Code** | **Description** |
|  | **Notes** |
| Enter code | Enter description |
|  | Enter notes here. |
|  |  |
|  | . |
|  |  |
|  |  |
|  |  |
|  | . |
|  |  |
|  | . |
|  |  |
|  | . |
|  |  |
|  | . |
|  |  |
|  | . |
|  |  |
|  | . |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

***Notes regarding territories:***

* Sync Companies adds territory codes to CRM for territories assigned to your current customers. You can also add new territory codes in CRM.
* You can assign users to territories in the Territories Setup UI; however, it’s usually easier to add users to territories when setting up users. (See the next section.)

## Import Users from Sage 300

**Import your current Sage 300 users who will use CRM**

* Select **TaiRox CRM > Setup > Users**
* Click the Add button on the Users screen.
* Enter or use the Finder to select the new CRM user. **Note:** the user ***must*** be added to Sage 300 first.
* Select the “All Territories” checkbox if you want the user will be able to see opportunities and cases in all territories – not just territories to which they are assigned.

CRM Users:

| **User ID** | **Name** | **All Ter?** | | **Restrict to these territories** |
| --- | --- | --- | --- | --- |
| **Notes** | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |
| User ID | User Name | |  | Or list territory codes |
|  | | | |

## Add New CRM Security Groups to Sage 300

Create security groups for different sets of CRM users to allow different access rights.

* Select **Administrative Services > Security Groups**
* Choose TaiRox CRM and Collections as the application

| **CRM Group ID** | Enter Group ID. |
| --- | --- |
| **Group Description** | Enter description. |
| **Select Security Access Rights** | |
| |  |  |  | | --- | --- | --- | | Setup Maintenance | Opportunity Maintenance | Note Maintenance | | Setup Inquiry | Opportunity Inquiry | Note Inquiry | | Import Processing | Contact Maintenance | Collections | | Export Processing | Contact Inquiry | Case Maintenance | | User Maintenance | Document Maintenance | Case Inquiry | | Company Maintenance | Document Inquiry | Send Documents | | Company Inquiry | Communication Maintenance | Accounting Doc Maintenance | | Promote/Unlink Companies | Communication Inquiry | Accounting Doc Inquiry | |  |  |  | | |

| **CRM Group ID** | Enter Group ID. |
| --- | --- |
| **Group Description** | Enter description. |
| **Select Security Access Rights** | |
| |  |  |  | | --- | --- | --- | | Setup Maintenance | Opportunity Maintenance | Note Maintenance | | Setup Inquiry | Opportunity Inquiry | Note Inquiry | | Import Processing | Contact Maintenance | Collections | | Export Processing | Contact Inquiry | Case Maintenance | | User Maintenance | Document Maintenance | Case Inquiry | | Company Maintenance | Document Inquiry | Send Documents | | Company Inquiry | Communication Maintenance | Accounting Doc Maintenance | | Promote/Unlink Companies | Communication Inquiry | Accounting Doc Inquiry | |  |  |  | | |

| **CRM Group ID** | Enter Group ID. |
| --- | --- |
| **Group Description** | Enter description. |
| **Select Security Access Rights** | |
| |  |  |  | | --- | --- | --- | | Setup Maintenance | Opportunity Maintenance | Note Maintenance | | Setup Inquiry | Opportunity Inquiry | Note Inquiry | | Import Processing | Contact Maintenance | Collections | | Export Processing | Contact Inquiry | Case Maintenance | | User Maintenance | Document Maintenance | Case Inquiry | | Company Maintenance | Document Inquiry | Send Documents | | Company Inquiry | Communication Maintenance | Accounting Doc Maintenance | | Promote/Unlink Companies | Communication Inquiry | Accounting Doc Inquiry | |  |  |  | | |

## Add CRM Users to Security Groups in Sage 300

After creating CRM and Collections security groups, add users in Sage 300 Administrative Services.

* Select **Administrative Services > User Authorizations**

| **User ID** | **(name)** | **Application** | **Group ID** | **(description)** |
| --- | --- | --- | --- | --- |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |
| User ID | User Name | TaiRox CRM and Collections | Enter Group ID | Group ID Description |

# Specify Email Settings and Content for Sending Statements, Letters, and Invoices to Customers

Specify email message details for sending documents to customers using the Accounting Documents setup screen.

* Select **TaiRox CRM and Collections > Setup > Accounting Documents**

Accounting Documents:

| **Field** | | | |
| --- | --- | --- | --- |
| **Document Type** | A/R Customer Statement | | Inactive |
| **Email Specification** | | | |
| **From Email** |  | | |
| **Reply To Email** |  | | |
| **CC** |  | | |
| **Bcc** |  | | |
| **Email Subject** | Click or tap here to enter text. | | |
| **Email Body** | Click or tap here to enter text. | | |
| **Attachment Limit** | . | (0 for no limit to the number of attachments per email) | |
| **Notes** |  | | |
| **Create a Communication When You Send an Email** | | | |
| **Archive Folder** |  | | |
| **Organize By** | Choose an item. | | |

| **Field** | | | |
| --- | --- | --- | --- |
| **Document Type** | A/R Customer Letter | | Inactive |
| **Email Specification** | | | |
| **From Email** |  | | |
| **Reply To Email** |  | | |
| **CC** |  | | |
| **Bcc** |  | | |
| **Email Subject** | Click or tap here to enter text. | | |
| **Email Body** | Click or tap here to enter text. | | |
| **Attachment Limit** | . | (0 for no limit to the number of attachments per email) | |
| **Notes** |  | | |
| **Create a Communication When You Send an Email** | | | |
| **Archive Folder** |  | | |
| **Organize By** | Choose an item. | | |

| **Field** | | | |
| --- | --- | --- | --- |
| **Document Type** | A/R Customer Invoice**\*** | | Inactive |
| **Email Specification** | | | |
| **From Email** |  | | |
| **Reply To Email** |  | | |
| **CC** |  | | |
| **Bcc** |  | | |
| **Email Subject** | Click or tap here to enter text. | | |
| **Email Body** | Click or tap here to enter text. | | |
| **Attachment Limit** | . | (0 for no limit to the number of attachments per email) | |
| **Notes** |  | | |
| **Create a Communication When You Send an Email** | | | |
| **Archive Folder** |  | | |
| **Organize By** | Choose an item. | | |

**\*** Note that these settings are for the Send A/R Invoices program – not for the Send Invoices program.   
See the next section for Settings for Send Invoices.

| **Field** | | | |
| --- | --- | --- | --- |
| **Document Type** | O/E Order Invoice**\*** | | Inactive |
| **Email Specification** | | | |
| **From Email** |  | | |
| **Reply To Email** |  | | |
| **CC** |  | | |
| **Bcc** |  | | |
| **Email Subject** | Click or tap here to enter text. | | |
| **Email Body** | Click or tap here to enter text. | | |
| **Attachment Limit** | . | (0 for no limit to the number of attachments per email) | |
| **Notes** |  | | |
| **Create a Communication When You Send an Email** | | | |
| **Archive Folder** |  | | |
| **Organize By** | Choose an item. | | |

**\*** Note that these settings are for the Send O/E Invoices program – not for the Send Invoices program.  
See the next section for Settings for Send Invoices.

# Specify Settings for Overdue Payment Reminders, Payment Due Alerts, and Send Invoices

## Settings for Overdue Payment Reminders

Specify settings and email message details for sending overdue payment reminders to customers and national accounts using the Overdue Payment Reminders Setup screen.

* Select **TaiRox Collections > Setup >** **Overdue Payment Reminders Setup**

Overdue Payment Reminders Setup

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Overdue Payment Reminders – Settings Tab** | | | | | |
| **Overdue Payment Stages** | | **Label** | | **Action** | **Email Template** |
| [1] Day to [ 30] Days | | 1 - Late | | Send Email | 1Late.html |
| [ 31] Days to [ 60] Days | | 2 - Past Due | | Send Email | 2PastDue.html |
| [ 61] Days to [ 90] Days | | 3 - In Arrears | | Send Email | 3InArrears.html |
| Over [ 90] Days | | 4 - Delinquent | | Send Email | 4Delinquent.html |
| **Min days overdue** | | [0] | (specify the number of days that an invoice can be overdue before the program creates an Overdue Payment Reminder) | | |
| **Min days between payment reminders** | | [0] | (specify the minimum number of days before a company will be sent another payment reminder – such as 7 or 14 days) | | |
| **Format** (invoice table) | | Choose the format for listing invoices | | | |
| **Attachments** | | Click or tap here to enter text. | | | |
| **Email Server Settings** | | | | | |
| **Email Subject** | | <your company name> - Payment Overdue | | | |
| **From Email** | |  | | | |
| **Reply To Email** | |  | | | |
| **CC** | |  | | | |
| **Bcc** | |  | | | |
| **Create a Communication When You Send an Email** | | | | | |
| **Archive Folder** | (inactive unless you choose Custom for Options > Email Archive Settings) | | | | |
| **Organize By** | Choose an item. | | | | |
| **Overdue Payment Reminders – Scheduling Tab** | | | | | |
| **Send Email Options** | | | | | |
| **Attach copies of the invoices** | | | | | |
| **Substitution Variables** | | | | | |
| **Variable Name** | | **Value Description** | | | |
| **$USER\_NAME** | | Click or tap here to enter text. | | | |
| **$USER\_PHONE** | | Click or tap here to enter text. | | | |
| **Overdue Payment Reminders – Scheduling Tab** | | | | | |
| **Send Email Options --** continued | | | | | |
| **$USER\_EMAIL1** | | Click or tap here to enter text. | | | |
| **$USER\_EMAIL2** | | Click or tap here to enter text. | | | |
| **Create Task Options** | | | | | |
| **Assign To** | | Click or tap here to enter text. | | | |
| **Revisit On** | | 0 days after creation | | | |
| **Generate overdue payment reminders but do not send emails or create tasks for customers with** | | | | | |
| **Unapplied Credit** | | | | | |
| **Disputed Invoices** | | | | | |
| **Promised Payments** | | | | | |

## Settings for Payment Due Alerts

Specify settings and email message details for sending payment due alerts to customers using the Payment Due Alerts Setup screen.

* Select **TaiRox Collections > Setup > Payment Due Alerts Setup**

Payment Due Alerts Setup

| **Payment Due Alerts – Settings Tab** | | | | |
| --- | --- | --- | --- | --- |
| **Number of days before due date to send alert** | | | [0] | (specify the number of days before an invoice is due to send a Payment Due Alert) |
| **Min days between payment due alerts** | | | [0] | (specify the minimum number of days before a company will be sent another payment due alert – such as 7 or 14 days) |
| **Email Specification** | | | | |
| **Email Template** | DueSoon.html | | | |
| **Attachments** | Click or tap here to enter text. | | | |
| **Email Subject** | <your company name> - Payment Due Soon | | | |
| **From Email** |  | | | |
| **Reply To Email** |  | | | |
| **CC** |  | | | |
| **Bcc** |  | | | |
| **Create a Communication When You Send an Email** | | | | |
| **Archive Folder** | | (inactive unless you choose Custom for Options > Email Archive Settings) | | |
| **Organize By** | | Choose an item. | | |
| **Payment Due Alerts – Scheduling Tab** | | | | |
| **Send Email Options** | | | | |
| **Attach copies of the invoices** | | | | |
| **Substitution Variables** | | | | |
| **Variable Name** | | | **Value Description** | |
| **$USER\_NAME** | | | Click or tap here to enter text. | |
| **$USER\_PHONE** | | | Click or tap here to enter text. | |
| **$USER\_EMAIL1** | | | Click or tap here to enter text. | |
| **$USER\_EMAIL2** | | | Click or tap here to enter text. | |

## Settings for Send Invoices

Specify settings and email message details for sending invoices to customers using the Send Invoices Setup screen.

* Select **TaiRox Collections > Setup > Send Invoices Setup**

Send Invoices Setup

| **Send Invoices – Settings Tab** | | |
| --- | --- | --- |
| **Email Specification** | | |
| **Email Template** | SendInvoice.html | |
| **Attachments** | Click or tap here to enter text. | |
| **Email Subject** | <your company name> - Invoice | |
| **From Email** |  | |
| **Reply To Email** |  | |
| **CC** |  | |
| **Bcc** |  | |
| **Create a Communication When You Send an Email** | | |
| **Archive Folder** | | (inactive unless you choose Custom for Options > Email Archive Settings) |
| **Organize By** | Choose an item. | |
| **Send Invoices – Scheduling Tab** | | |
| **Send Email Options** | | |
| **Substitution Variables** | | |
| **Variable Name** | **Value Description** | |
| **$USER\_NAME** | Click or tap here to enter text. | |
| **$USER\_PHONE** | Click or tap here to enter text. | |
| **$USER\_EMAIL1** | Click or tap here to enter text. | |
| **$USER\_EMAIL2** | Click or tap here to enter text. | |

# Set Up Bulk Email Accounts

The Bulk Email Accounts Setup program stores the connection information for your bulk email provider’s website.

This information is required if you want to use the Send Bulk Email program with a bulk email service provider such as MailChimp or SendGrid to send general announcements or sales and marketing emails to customers.

* Select **TaiRox CRM and Collections > Marketing > Bulk Email Accounts**

| **Bulk Email Accounts** | | |
| --- | --- | --- |
| **Account** |  | Inactive |
| **Description** |  | |
| **Provider** |  | |
| **API Key** |  | |
| **API URL** |  | |
| **Notes** |  | |

***Note that Send Bulk Email and Bulk Email Accounts are not available in TaiRox Collections.***