

The Sage CRM logo consists of the word "sage" in a white, lowercase, sans-serif font above the word "CRM" in a white, uppercase, sans-serif font, both contained within a blue rectangular box. This box is positioned over a stylized orange world map.

sage  
CRM

The Sage Business Partner logo features the word "sage" in white lowercase letters on a green background, with "Business Partner" in white uppercase letters on a light green background below it.

sage  
Business  
Partner

# T-Collect for Sage CRM by Triad Software Services



A Member of the T-Suite group of products



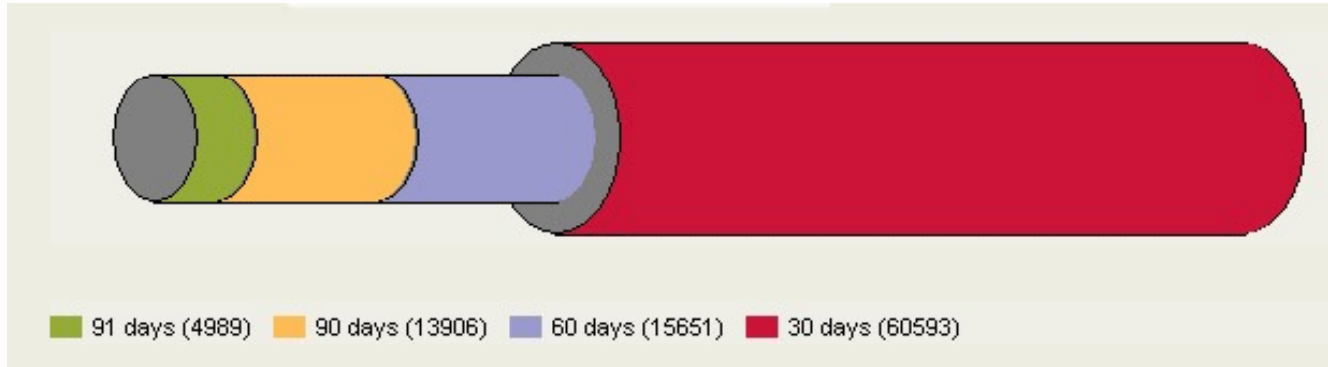


# What is T-Collections?

- Fully featured AR Collections add-on for Sage CRM
- Seamlessly integrates Sage Accpac ERP debt collection into Sage CRM
- Sophisticated tools help you view, prioritise and manage receivables in one place



- View aging figures by invoice, company or in a graphical pipeline



Overdue Invoice Details					
Accpac Company & Customer	Contact Name & Phone No.	Invoice No.	Outstanding Amt / Orig. Amt	Inv. Date / Due Date	Da Ag
Sam Inc. - 1520 <a href="#">Mr. Stephen Kershaw</a>	<a href="#">Mr. Kershaw</a> tel. 8045553372	<a href="#">IN00000000000019</a>	2862.48 / 3412.48	9 Sep 2009 / 15 Sep 2009	17
Sam Inc. - 1520 <a href="#">Mr. Stephen Kershaw</a>	<a href="#">Mr. Kershaw</a> tel. 8045553372	<a href="#">IN00000000000020</a>	537.41 / 537.41	9 Sep 2009 / 15 Sep 2009	17



# Features of T-Collections



- Manage collection communications such as e-mails and phone calls in a central repository
- Prioritise calls, schedule follow-up calls, and generate collection history

Collections Communications							
Date/Time	Action	Company	Person	Phone No.	Details	User Name	Status
09/03/2010 14:44:15	ARPhoneOut	ACME Plumbing	Mr. Carl Jenner	4084518981	Re. invoice IN00000000000016 - a cal's note	Susan Maye	<input type="checkbox"/>
09/03/2010 10:44:15	ARPhoneOut	ACME Plumbing	Mr. Carl Jenner	8165553341	Re. invoice IN00000000000016 - Spoke to Carl this morning, he said cheque went in the post yesterday evening. Will check its been recieved in 2 days	Susan Maye	<input type="checkbox"/>
11:00:00	ARPhoneOut	ACME Plumbing	Mr. Carl Jenner	4084518981	Follow up call re. invoice IN00000000000016	Peter Evans	<input checked="" type="checkbox"/>
00:00:00	ARPhoneOut	Bargain Mart - San Diego	Mr. Jose Grange	4084518981	Follow up call re. invoice IN000000000000000000324	Rhys Jones	<input checked="" type="checkbox"/>
05/03/2010 14:30:00	ARFollowUp	Mr. Ronald Black	Mr. Black	2135550274	Overdue Invoice Action Item Number of Invoices: 2 Orig Amount: 2657.83 Overdue Amount: 2657.83 Age as of: 03/03/2010	Peter Evans	<input checked="" type="checkbox"/>





# Features of T-Collections

- Handles multi-company and multi-currency environments
- Track balances by period utilising a pipeline
- Drill down directly into an individual invoice in Accpac ERP
- Filter and sort receivables by any combination of information



# Screenshot - Collections by Customer



Collections by Invoice | **Collections By Customer** | Collections Activity | ...



91 days (4989) 90 days (13906) 60 days (15651) 30 days (60593)

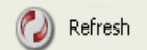
Aging Periods			
Period	Value	Period	Value
0 to 30	60592.94	31 to 60	15651.13
61 to 90	13906.03	over 91	4989.14
<b>Total Overdue</b>		<b>95139.24</b>	

Age as of  
09/03/2010

Order By  
Days Overdue  
Descending

Company  
Sam Inc.

Customer  
All Customers



## Overdue Invoice Details

Customer	Contact Name & Phone No.	30	60	90	91	Total Outstanding	Original Amount	Last Call Date & Note	Add Follow-up Task	Add Call Note
<a href="#">Bargain Mart - San Diego - 1100</a>	<a href="#">Mr. Jose Grange</a> tel. 4084518981	81.19	483.88	690.91	0	1255.98	1255.98	00:00:00 call note for Bargain Mart San Diego	<input type="text"/>	<input type="text"/>
<a href="#">Bargain Mart - Oakland - 1105</a>	<a href="#">Mr. Jose Grange</a> tel. 4084518981	0	1.02	499.03	0	500.05	500.05	No communications found	<input type="text"/>	<input type="text"/>
<a href="#">Mr. Ronald Black - 1200</a>	<a href="#">Mr. Black</a> tel. 2135550274	60511.75	1534.75	12017.45	0	74063.95	74063.95	00:00:00 this is a call note for Ronald Black	<input type="text"/>	<input type="text"/>





# Screenshot - Collections by Invoice



**Collections by Invoice** | Collections By Customer | Collections Activity | ...

■ 91 days (4989) 
 ■ 90 days (13906) 
 ■ 60 days (15651) 
 ■ 30 days (60593)

Aging Periods			
Period	Value	Period	Value
0 to 30	60592.94	31 to 60	15651.13
61 to 90	13906.03	over 91	4989.14
<b>Total Overdue</b>		<b>95139.24</b>	

**Age as of:** 09/03/2010  
**Order By:** Days Overdue (Descending)  
**Company:** Sam Inc.  
**Customer:** All Customers

Refresh

Overdue Invoice Details							
Accpac Company & Customer	Contact Name & Phone No.	Invoice No.	Outstanding Amt / Orig. Amt	Inv. Date / Due Date	Days Overdue / Aging Period	Add Follow-up Task	Add Call Note
Sam Inc. - 1210 <a href="#">ACME Plumbing</a>	<a href="#">Mr. Carl Jenner</a> tel. 8165553341	<a href="#">IN00000000000016</a>	1374.29 / 1374.29	4 Sep 2009 / 15 Sep 2009	175 / 91	<input type="text"/>	<input type="text"/>
Sam Inc. - 1520 <a href="#">Mr. Stephen Kershaw</a>	<a href="#">Mr. Kershaw</a> tel. 8045553372	<a href="#">IN00000000000019</a>	2862.48 / 3412.48	9 Sep 2009 / 15 Sep 2009	175 / 91	<input type="text"/>	<input type="text"/>
Sam Inc. - 1520	<a href="#">Mr. Kershaw</a>			9 Sep 2009 / 15		<input type="text"/>	<input type="text"/>









# Screenshot - Invoice Drill Down



## A/R Invoice

<b>Document Number</b> IN0000000000016	<b>Document Type</b> Invoice	<b>Document Date</b> Sep 4, 2009	<b>Due Date</b> Sep 15, 2009	<b>Discount Date</b>
<b>Document Description</b> Overnight shipment	<b>PO Number</b>	<b>Order Number</b> ORD0000000000018	<b>Last Statement Date</b>	<b>Terms</b> DUETBL
<b>Cust. Currency Discount Amount</b> \$ 0.00	<b>Cust. Currency Invoice Amount</b> \$ 1,269.55	<b>Cust. Currency Tax Amount</b> \$ 104.74	<b>Document Total Including Tax</b> \$ 1,374.29	<b>Applied Amount</b> -\$ 1,374.29
<b>Cust. Currency Amount Due</b> \$ 0.00	<b>Posting Date</b> Sep 4, 2009	<b>Optional Fields</b> <a href="#">Yes</a>		

-  [New](#)
-  [Edit](#)
-  [Posted Transactions](#)
-  [A/R Inquiry Menu](#)

## Invoice Details

Distribution Code	Description	Revenue Account	Extended Amount w/ TIP	Optional Fields
		4010-100-40	\$ 638.25	<a href="#">Yes</a>
		4010-100-10	\$ 127.80	<a href="#">Yes</a>
		4010-100-10	\$ 503.50	<a href="#">Yes</a>
<b>Total</b>			<b>\$ 1,269.55</b>	

## Applied Details

Document Type	Check/Receipt No.	Posting Date	Cust. Receipt Amount	Transaction Type	Remitting Customer No.	Reference Document No.
Receipt	000000013-00002	Wed Mar 10 2010	-\$ 1,374.29	Receipt - Posted		<a href="#">PY000000000000000000027</a>





# Screenshot - Collections Activity



Order By	Company	Customer	Action	Users	Status
Date	Sam Inc.	All Customers	AR Phone Out	All Users	Complete

Collections Communications							
Date/Time	Action	Company	Person	Phone No.	Details	User Name	Status
09/03/2010 14:44:15	ARPhoneOut	ACME Plumbing	Mr. Carl Jenner	4084518981	Re. invoice IN00000000000016 - a cal note	Susan Maye	<input type="checkbox"/>
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# Enquiries

Triad Software Services,  
P.O.Box 114531,  
Dubai, United Arab Emirates.  
Email: [shobha@triadme.com](mailto:shobha@triadme.com)  
Mobile +971 50 6570454

