

TaiRox™ Tech Note

CRM and Collections Missing Icons

Summary: CRM and Collections is sometimes installed and checks out just fine when the ADMIN user is logged in. For other users, the icons are missing from the Sage desktop. A setup step was missed: running the Users setup program. See details below. Why are CRM and Collections users needed? They may be restricted to certain A/R territories for some CRM and Collections operations.

Setup Details

Add Users (a CRM and Collections user is a Sage 300 user)

ID	User ID	User Name	All Territories	Notes	Created On	Created By	Modified On	Modified By	Inactive	Inactive On
1	ADMIN	Administrator	Yes	Administrator	1/2/2024	ADMIN	1/2/2024	ADMIN	No	
4	DON	User Deleted	Yes	Non Admin	1/2/2024	ADMIN	1/2/2024	ADMIN	No	
3	KEITH	User Deleted	No	Non Admin	1/2/2024	ADMIN	8/6/2026	ADMIN	No	
2	WADE	User Deleted	Yes	Non Admin	1/2/2024	ADMIN	1/2/2024	ADMIN	No	

Setup Details

Specify Territories for Users who are not allowed to view all territories

ID	Code	Name	Notes	Created On	Created By	Modified
2	AK	AK		1/2/2024	ADMIN	1/2/2024
3	CA	CA		1/2/2024	ADMIN	1/2/2024
5	MO	MO		1/2/2024	ADMIN	1/2/2024