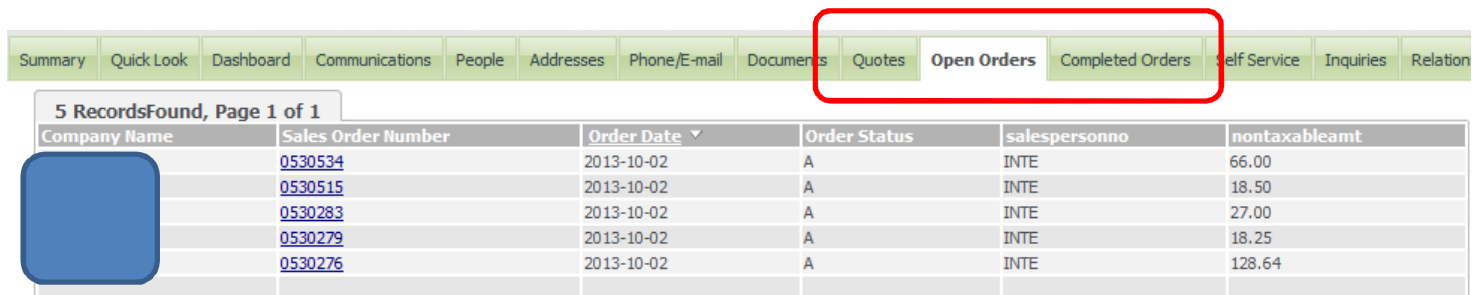


[Displaying Quote and Order information on the Company Screen in SageCRM](#)

Effective Solutions can setup scripts to bring in Quote and Sales Order information from MAS on a regular basis, and present that information on tabs on the Company Record in SageCRM.

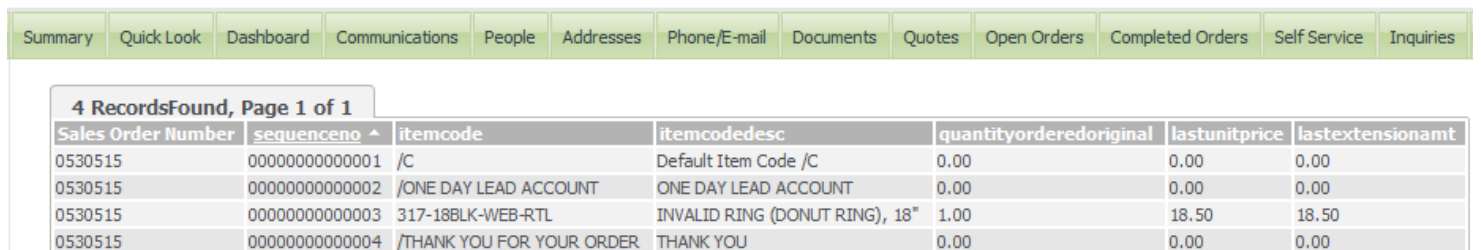
In the example below, we have created 3 extra tabs on the company record in CRM: Quotes, Open Orders, and Completed Orders.

Each tab displays the Order information based on the Status of the Sales Order. In the example below, I am viewing the OPEN orders.



Company Name	Sales Order Number	Order Date	Order Status	salespersonno	nontaxableamt
	0530534	2013-10-02	A	INTE	66.00
	0530515	2013-10-02	A	INTE	18.50
	0530283	2013-10-02	A	INTE	27.00
	0530279	2013-10-02	A	INTE	18.25
	0530276	2013-10-02	A	INTE	128.64

I can then **click on the Sales Order number** I would like to view, and it will display the line items for that order, just like the screen shot example below.



Sales Order Number	sequenceno	itemcode	itemcodedesc	quantityorderedoriginal	lastunitprice	lastextensionamt
0530515	0000000000000001	/C	Default Item Code /C	0.00	0.00	0.00
0530515	0000000000000002	/ONE DAY LEAD ACCOUNT	ONE DAY LEAD ACCOUNT	0.00	0.00	0.00
0530515	0000000000000003	317-18BLK-WEB-RTL	INVALID RING (DONUT RING), 18"	1.00	18.50	18.50
0530515	0000000000000004	/THANK YOU FOR YOUR ORDER	THANK YOU	0.00	0.00	0.00

This added functionality gives your CRM users the ability to quickly pull up a customer record in SageCRM and review their current Quotes, Open Orders and Completed/Shipped orders without having to go into Sage 100 / MAS or bother the inside sales or accounting teams.

Tasks Performed by Effective Solutions to implement this customization

- Build Sales Order Header and Detail Tables in SageCRM
- Implement SQL scripts to pull data from Sage100/MAS into SageCRM
- Build views in SageCRM to display and report on the order data
- Build the appropriate company tabs, list and screens to display the order data in CRM
- Create jobs in SQL to automate the import of the Sales Order data into SageCRM (typically nightly)
- Test and verify operation of data imports

Implementation Hours Range = 8 – 10 hours