

SageCRM Enhancement: Add Tracking Numbers to Invoice Data in SageCRM

Effective Solutions can implement some extra code in your SageCRM system to make Tracking Numbers available to CRM users when they are reviewing invoice transactions from the Invoices tab of a Company record.

On the invoices tab (screen shot below) we take the Ship Via info and make it a hyperlink, and when you click on the hyperlink it will display all of the tracking numbers associated with that invoice. We typically setup this information to update on a nightly basis from Sage 100.

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Invoice Date	Invoice #	Sales Order #	Terms Code	ccinfo	Ship Via	Shipto Ad
10/27/2015	0032983	0032983	06	VISA 2521 01/2017	UPS	89 Morris St
07/16/2015	0031622	0031622	06	VISA 2521 01/2017	UPS	89 Morris St
07/15/2015	0031609	0031609	06	VISA 2521 01/2017	UPS	89 Morris St
06/25/2015	C21229		13		UPS	89 Morris St
06/17/2015	0031229	0031229	13		UPS NXT DAY SAV	89 Morris St
06/10/2015	C31106		13		UPS	89 Morris St
06/08/2015	0031107	0031107	06	VISA 2521 01/2017	UPS	89 Morris St
06/08/2015	0031106	0031106	13		UPS	89 Morris St
04/29/2015	0030593	0030593	06	VISA 2521 01/2017	UPS	89 Morris St
04/09/2015	W5022	W5022	06		UPS	89 Morris St
04/09/2015	0030324	0030324	06	VISA 2521 01/2017	UPS	89 Morris St
03/31/2015	W5020	W5020	08		UPS	89 Morris St
02/10/2015	0029479	0029479	06	VISA 2521 01/2017	UPS	89 Morris St
02/09/2015	0029436	0029436	06	VISA 2521 01/2017	UPS 2ND DAY AM	89 Morris St

When you click on the Ship Via data it will take you to another list that displays the tracking number info

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Invoice Date	invoiceno	packageno ^	Ship Via	trackingid	Shipto Addr1	Shipto City	Shipto State	Shipto Zip
10/27/2015	0032983	0002	UPS	126503750347037415	89 Morris St.	Morristown	NJ	07960

The CRM user can click on the back button to go back to the Invoices list.

The price to implement this enhancement is \$875.