

SageCRM Enhancement: Display Open Balance Amounts on Invoices in CRM

Adding Open Balance amounts to your Invoice transactions in SageCRM gives your CRM users the information they need to help with collections when they are on the phone with a customer.

The data is typically updated on a nightly basis, but we can configure it to update more often if you are receiving payments throughout the business day.

Example of what the Invoices Tab looks like with Open Balance information displayed:

7 Records Found, Page 1 of 1

Invoice Date	Invoice #	Sales Order #	Confirm To	ShipTo Name	Invoice Type	PO #	SP #	Ship Via	Freight	Non-Taxable \$	Taxable \$	Sales Tax Amt	Invoiceamt	Open Balance
10/25/2016	0100088	0000328	Annette O'Toole	Maverick Papers	IN		0200	SHIPPING FLAT	10.00	553.63	4,186.32	272.11	5,022.06	5,022.06
10/25/2016	0100080	0000330	Annette O'Toole	Maverick Papers	IN		0200	SHIPPING FLAT	10.00	0.00	135.00	8.78	153.78	153.78
10/11/2016	0100079	0000317	Annette O'Toole	Maverick Papers	IN		0200	SHIPPING FLAT	10.00	0.00	285.00	18.53	313.53	313.53

The price to implement this enhancement is \$350.