

SageCRM Enhancement: The MyCRM > Activity Report in SageCRM

We add a custom tab to your MyCRM section called Activity Report. When you click on the tab it displays all of the communications entered into SageCRM in the last week, with the most recent entries at the top. This is great for managers that want to take a quick look at the conversations that are happening in the field with their sales team and inside with their customer service team. You can use the search boxes to quick filter and search data in the communications entries.

We can also configure the report to display differently for salespeople. For example, when a salesperson clicks on the Activity Report tab they only see communications from their Accounts in the list.

You also have the ability to adjust the date range of the report and export the data to Excel CSV. This has become a valuable enhancement for many of our customers.

The price to implement this enhancement is \$875.

Enter Start Date (MM-DD-YYYY): Enter End Date (MM-DD-YYYY):

Activity Report									
Company	Person	Date	Time	Action	Subject	Details	CreatedBy	AssignedTo	Status
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search"/>	<input type="text" value="Se"/>	<input type="text" value="Sear"/>	<input type="text" value="Search"/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Sear"/>
Breslin Parts Supply	Winnie Spackman	10-20-2016	9:00AM	Meeting	Annual Review of Furniture Needs	Onsite meeting to discuss furniture needs and gather information required to put quote together so they can put furniture purchases in their budget for next year.	Deb Taylor	Deb Taylor	Complete
Acme Corporation	George Kramer	10-19-2016	10:05AM	PhoneOut	Initial Call to discuss furniture needs	They have about 3,000 sq ft of office space. Looking to replace some existing office furniture that is getting old. Not ready for a full office re-do yet, but may be ready to start budgeting for that next year. Going to work with them to get specifics so we can quote things. Setup a meeting for next week Wednesday.	Deb Taylor	Deb Taylor	Complete
ABC Baking	Don Smith	10-18-2016	9:45AM	PhoneOut	Follow up on quote	Talked to Don about quote details. He said that he still needs to run the pricing past the General Manager and asked for a call back at the end of the month.	Bob Smith	Bob Smith	Complete
Orange Door & Window Co.	Harold English, President	10-17-2016	3:25PM	PhoneOut	Check in Call CA Customers	Not ready to discuss now, call back next month.	Ron Jackson	Ron Jackson	Complete