

SageCRM Enhancement: The MyCRM > Company Product Lines Sold Report

We add a custom tab to your MyCRM section called Product Line Report. When you click on the tab it displays totals by Product Line for all items sold for the current year. This is great for managers that want to review what the most popular Product Lines are and what their YTD sales totals are compared to previous years. You can use the search boxes to quick filter and search data in the product lines sold.

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

We have the ability to limit what CRM users can see this tab.

The price to implement this enhancement is \$350.

Dashboard >> Calendar >> Contacts >> Leads >> Opportunities >> Forecasts >> Cases >> Shared Documents >> Item Report >> **Product Line Report** >> Customer Report >> Sales By S

Enter End Date (MM-DD-YYYY):

Product Line	YTD Count	YTD Sales	PYTD Count	PYTD Sales	YTD Diff	PY Count	PY Total	PY2 Total
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>
MLM	78,326	\$596,436.70	77,499	\$613,797.08	-\$17,825.38	118,278	\$1,000,834.49	\$0.00
BB1	88,369	\$574,477.94	80,170	\$625,333.73	-\$52,345.64	143,347	\$1,117,965.17	\$0.00
MB4	5,576	\$510,288.64	5,695	\$553,334.72	-\$43,046.08	10,701	\$1,066,529.75	\$0.00
BWC	36,294	\$502,772.21	39,591	\$496,319.11	\$5,113.10	63,381	\$834,668.72	\$0.00
BM4	87,991	\$446,871.08	70,791	\$349,900.04	\$84,688.11	124,808	\$622,641.90	\$1,582.50
BM3	52,149	\$388,017.72	52,431	\$342,868.49	\$39,858.13	82,452	\$609,848.14	\$0.00
MDT	82,432	\$355,560.85	94,124	\$385,617.66	-\$50,576.81	163,291	\$666,798.27	\$0.00
BM1	22,523	\$256,887.90	18,601	\$142,146.10	\$111,113.80	35,148	\$307,714.12	\$0.00
MTL	7,856	\$191,030.42	6,565	\$134,267.95	\$56,708.32	12,277	\$255,778.19	\$0.00
BM2	12,202	\$161,704.55	8,149	\$80,967.77	\$80,700.72	16,154	\$170,312.54	\$0.00