

SageCRM Enhancement: The MyCRM > Customer Sales Report

We add a custom tab to your MyCRM section called Customer Report. When you click on the tab it displays your Customer list by YTD Sales in descending order, so your best customers are at the top of the list. This is great for managers that want to quickly review customer sales 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 customer list.

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 Salesrep | Preferences | Groups | ***

Enter End Date (MM-DD-YYYY):

Company	Customer Number	Industry	City	State	YTD Sales	PYTD Sales	YTD DIFF	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..."/>	<input type="text" value="Search..."/>
	0012888		N Syracuse	NY	\$7,983.05	\$3,118.50	\$4,864.55	\$23,916.40	\$9,961.64
	0003951		Columbia	PA	\$7,763.44	\$893.00	\$6,870.44	\$946.60	\$0.00
	0000811		Utica	NY	\$7,661.70	\$5,625.30	\$2,036.40	\$12,825.96	\$2,060.00
	0001979		Tampa	FL	\$7,502.45	\$9,621.70	-\$2,119.25	\$11,980.60	\$800.42
	0009262		Atlanta	GA	\$7,487.20	\$1,434.35	\$6,052.85	\$3,270.83	\$0.00
	0006231		Arden Hills	MN	\$7,481.83	\$9,960.73	-\$2,478.90	\$14,897.47	\$1,739.19
	0000432		Tampa	FL	\$7,454.52	\$1,841.22	\$5,613.30	\$2,031.42	\$0.00
	0011740		Milwaukee	WI	\$7,376.10	\$2,059.50	\$5,316.60	\$2,382.50	\$0.00
	0008608		Saint Louis	MO	\$7,343.70	\$3,267.40	\$4,076.30	\$9,214.20	\$183.18
	0009801		Florence	AL	\$7,161.40	\$10,506.60	-\$3,345.20	\$13,288.60	\$439.20