

SageCRM Enhancement: The MyCRM > Sales by SalesRep Report

We add a custom tab to your MyCRM section called Sales by SalesRep. When you click on the tab it displays of customer item purchases for a particular salesrep. This is great for managers that want to quickly review customer sales happening for a particular salesrep. This tab can also be made available to the CRM user/salesrep so they can review their own sales details. You can use the search boxes to quick filter and search data in the customer list.

You also have the ability to adjust the date range and the salesperson number criteria for 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 and we can default it to the current user if the user is a salesrep, and give managers the ability to switch between salesrep's for reporting purposes.

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

Customer Name	Cust #	City	State	Industry	SP #	Prod Line	Item #	Item Desc	Inv_Date	Inv #	Qty	Unit Price	Ext Amt
<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"/>	<input type="text" value="Search"/>	<input type="text" value=">1"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
	0020707	Franklin	TN		0107	MB4	B4510-14-G	BUMPER 4 1/2" X 10" X 14" G	07-21-2016	1135251	2	\$33	\$66
	0020707	Franklin	TN		0107	BB1	M-DB13	BUMPER MOLDED DB 4" X 10" X	06-30-2016	1134300	2	\$18	\$36
	0020707	Franklin	TN		0107	MB1	B624-11	BUMPER 6" X 24" X 11"	07-08-2016	1134644	4	\$65	\$259
S	0020876	Nashville	TN		0107	MLM	442R24BKY	DIAMOND DEK SPONGE ROLL 9/16"	07-08-2016	1134669	3	\$405	\$1,215
	0000319	Marietta	GA		0107	BWC	WC88-8W10	WHEEL CHOCK 8" X 8" X 8" LA	07-26-2016	1135422	58	\$27	\$1,537
ucts	0012521	Miami	FL		0107	MDT	345S1212	DURA TILE 12" X 12"	07-14-2016	1134893	125	\$5	\$594
	0001382	Greensboro	NC		0107	MB2	B612-14-SF	BUMPER 6" X 12" X 14" STEEL	07-08-2016	1134563	22	\$91	\$2,004
	0001918	Tampa	FL		0107	MB1	B610-12	BUMPER 6" X 10" X 12"	06-28-2016	1134168	20	\$35	\$706
	0001918	Tampa	FL		0107	MB1	B810-14	BUMPER 8" X 10" X 14"	07-12-2016	1134766	2	\$84	\$169