

SageCRM Enhancement: The MyCRM > My Open Orders and My Invoices tabs

We add 2 custom tabs to your MyCRM section called My Open Orders and My Invoices. These tabs let your CRM users get a quick list of Sage 100 Open Orders and Invoices by user or for a particular date range. See the detailed descriptions below. We can limit who gets to see these tabs. CRM users have the ability to use the search boxes to filter the data and you can export the data to Excel CSV if necessary.

My Open Orders tab: When you click on the My Open Orders tab and you are a salesperson, it displays all of the Open Sales Orders tied to you as the salesperson. If you are a non-salesperson or manager, you get to see all of the open Sage 100 sales orders. You can click on the Sales Order number to see the line items for the order.

Example of what the My Open Orders tab looks like:

Dashboard | Calendar | My Open Orders | My Invoices | Activity Report | Leads | Cases | Shared Documents | Preferences | SS Maps Settings | Groups | MailChimp Campaigns | ...

Export to Excel

Company_Name	SalesOrder#	OrderDate	CustomerPO#	ShipTo_Company_Name	ShipTo City	ShipTo State	Territory	SalesOrder\$
Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...
	0331209	2016-04-27	8306760		Van Nuys	CA		\$1,346.00
	0331206	2016-04-27	2730137746		Olathe	KS		\$1,422.30
	0331218	2016-04-28	51003484		Indianapolis	IN		\$261.12
	0331099	2016-04-27	4090692		Gibsonton	FL		\$4,459.00
	0331096	2016-04-27	1421379-00		Atlanta	GA		\$1,470.26
	0331208	2016-04-27	4101411		Panama City Beach	FL		\$1,486.25
	0331164	2016-04-27	8306042		Jacksonville	FL		\$1,440.80
	0331190	2016-04-27	8913491-00		Riverside	CA		\$762.00
	0331211	2016-04-28	7330872-00		Orange	CA		\$99.00
	0331161	2016-04-27	48400		Blue Island	IL		\$86.00
	0331191	2016-04-27	6118354-00		Dallas	TX		\$1,655.20

My Invoices tab: When you click on the My Invoices tab and you are a salesperson, it displays all of the Invoices tied to you as the salesperson for the past 30 days by default. If you are a non-salesperson or manager, you get to see all of the invoices for the past 30 days. You have the ability to adjust the date range of invoices to view. You can click on the Invoice number to see the line items of the Invoice.

Example of what the My Invoices tab looks like:

Dashboard | Calendar | My Open Orders | My Invoices | Activity Report | Leads | Cases | Shared Documents | Preferences | SS Maps Settings | Groups | MailChimp Campaigns | ...

Enter Invoice Start Date (MM-DD-YYYY): 3-29-2016 Enter Invoice End Date (MM-DD-YYYY): 4-28-2016 Submit

Export to Excel

Inv_Date	Invoice#	Full__Company__Name	Confirm To	ShipTo_Company_Name	ShipTo City	ShipTo State	Territory	PO #	Ship Via	Invoice\$
Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...	Search...
04-27-2016	0276449		Todd Rheaume		Syracuse	NY		48582-00	ABF	\$1,429.60
04-27-2016	0276393		Kevin Streeter		Bellingham	WA		6478	FED EX	\$351.84
04-27-2016	0276437		Eric Duncan		Oklahoma City	OK		02-302481	AAA COOPER	\$718.81
04-27-2016	0276385		Curtis Leach		San Francisco	CA		8306409-00	SAIA	\$217.85
04-27-2016	0276435		Jorge Sanchez		Fort Worth	TX		1781061570	AAA COOPER	\$2,780.90
04-27-2016	0276433				Jonesboro	AR		A076810073278	AAA COOPER	\$2,539.40
04-27-2016	0276436		Ray		Miami	FL		415676	AAA COOPER	\$2,560.00
04-27-2016	0276424		Doug Domsten		Minot	ND		851331-00	YRC	\$1,617.42
04-27-2016	0276388				Sacramento	CA		64491	SAIA	\$396.00

The price to implement this enhancement is \$875.