Adding the ability to search customers in SageCRM by what products they purchased

This is becoming a common request of our SageCRM users. Effective Solutions has come up with a solution to allow your CRM users to lookup customers by what item codes or product lines they have purchased. We build custom tables and views in SageCRM to allow you to search and display the ItemCode and ProductLine data. See the examples below.

Search Customers by ITEMCODE (price to implement = $700)

Users will be able to utilize the Advanced Find screen in SageCRM, we create an ItemCodeData entity and add it to the list of entities that can be searched.   and search by itemcode and other related fields. In the example below, the user is able to perform a search of all customers that purchased item code 1541 and they haven't been contacted in 30 days. Notice the data that is returned in the list, you get Current Year and Previous Year data as well as the YTD difference at the item level. So you can also include those fields in your search criteria.

Search Customers by PRODUCT LINE (price to implement = $700)

Depending on your item table structure, it might also make sense to add the ability to search by Product Line data. Perhaps you want to lookup customers based on the product lines they are purchasing. Here is an example of how it works.

Users will be able to utilize the Advanced Find screen in SageCRM, we create an ProductLineData entity and add it to the list of entities that can be searched.   Below is example of a search of customers that bought the LB3D product line and their YTD Difference is negative, meaning that bought less this YTD versus last YTD.