

SageCRM Enhancement: Display Aging and Open Balance Info on Invoices in CRM

Adding Aging Days and Open Balance amounts to your Invoice transactions in SageCRM gives your CRM users the information they need to help with collections when they are on the phone with a customer.

The data is typically updated on a nightly basis, but we can configure it to update more often if you are receiving payments throughout the business day.

Example of what the Invoices Tab looks like with Open Balance information displayed:

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Invoice Date	Invoice #	Sales Order #	Confirm To	ShipTo Name	Invoice Type	PO #	SP #	Ship Via	Freight	Non-Taxable \$	Taxable \$	Sales Tax Amt	invoiceamt	aging	Open Balance
06/20/2018	0100059	0000179	Annette O'Toole	Maverick Papers	IN		0300	SHIPPING FLAT	10.00	0.00	1,810.35	0.00	1,820.35	82	1,938.02
06/20/2018	0100058	0000177	Annette O'Toole	Maverick Papers	IN		0300	SHIPPING FLAT	10.00	0.00	407.40	0.00	417.40	82	443.88
06/20/2018	0100057	0000174	Annette O'Toole	Maverick Papers	IN		0300	SHIPPING FLAT	10.00	0.00	131.00	0.00	141.00	82	149.52

Reach out to Effective Solutions for pricing