

SageCRM Enhancement: The MyCRM > Customer Sales by Month 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.

Enter 4-digit YEAR:

Customer Sales by Month 2022																		
Company	Acct Mgr	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2022 Sales	2022 YTD Sales	2021 YTD Sales	YTD Diff \$	YTD Diff %
<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="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"/>
Maverick Papers	System Administrator	\$0	\$859	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$859	\$859	\$4,343	-\$3,483	-80.21%
ABC Dealers	System Administrator	\$0	\$580	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$580	\$580	\$8,027	-\$7,446	-92.77%
American Business Futures	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
InSinkErator	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Shepard Motorworks	Deb Taylor	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
A To Z Carpet Supply	Ron Jackson	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
H&H Auto Parts	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Custom Craft Products	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Greater Alarm Company	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Jelico Packing	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Orange Door & Window Co.	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Culver's Corporate	System Administrator	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0.00	\$1,439.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,439.00	\$1,439.00	\$12,370.00	-\$10,929.00	

Reach out to Effective Solutions for pricing