

**SageCRM Enhancement: Add Tracking Numbers to Invoice Data in SageCRM**

Effective Solutions can implement some extra code in your SageCRM system to make Tracking Numbers available to CRM users when they are reviewing invoice transactions from the Invoices tab of a Company record.

On the invoices tab (screen shot below) we take the Ship Via info and make it a hyperlink, and when you click on the hyperlink it will display all of the tracking numbers associated with that invoice. We typically setup this information to update on a nightly basis from Sage 100.

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| Invoice Date | Invoice #               | Sales Order # | Terms Code | ccinfo            | Ship Via                        | Shipto Ad    |
|--------------|-------------------------|---------------|------------|-------------------|---------------------------------|--------------|
| 10/27/2015   | <a href="#">0032983</a> | 0032983       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 07/16/2015   | <a href="#">0031622</a> | 0031622       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 07/15/2015   | <a href="#">0031609</a> | 0031609       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 06/25/2015   | <a href="#">C21229</a>  |               | 13         |                   | <a href="#">UPS</a>             | 89 Morris St |
| 06/17/2015   | <a href="#">0031229</a> | 0031229       | 13         |                   | <a href="#">UPS NXT DAY SAV</a> | 89 Morris St |
| 06/10/2015   | <a href="#">C31106</a>  |               | 13         |                   | <a href="#">UPS</a>             | 89 Morris St |
| 06/08/2015   | <a href="#">0031107</a> | 0031107       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 06/08/2015   | <a href="#">0031106</a> | 0031106       | 13         |                   | <a href="#">UPS</a>             | 89 Morris St |
| 04/29/2015   | <a href="#">0030593</a> | 0030593       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 04/09/2015   | <a href="#">W5022</a>   | W5022         | 06         |                   | <a href="#">UPS</a>             | 89 Morris St |
| 04/09/2015   | <a href="#">0030324</a> | 0030324       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 03/31/2015   | <a href="#">W5020</a>   | W5020         | 08         |                   | <a href="#">UPS</a>             | 89 Morris St |
| 02/10/2015   | <a href="#">0029479</a> | 0029479       | 06         | VISA 2521 01/2017 | <a href="#">UPS</a>             | 89 Morris St |
| 02/09/2015   | <a href="#">0029436</a> | 0029436       | 06         | VISA 2521 01/2017 | <a href="#">UPS 2ND DAY AM</a>  | 89 Morris St |

When you click on the Ship Via data it will take you to another list that displays the tracking number info

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| Invoice Date | invoiceno | packageno ^ | Ship Via | trackingid         | Shipto Addr1  | Shipto City | Shipto State | Shipto Zip |
|--------------|-----------|-------------|----------|--------------------|---------------|-------------|--------------|------------|
| 10/27/2015   | 0032983   | 0002        | UPS      | 126503750347037415 | 89 Morris St. | Morristown  | NJ           | 07960      |

The CRM user can click on the back button to go back to the Invoices list.

**Reach out to Effective Solutions for pricing**