

SageCRM Enhancement: The MyCRM > Customer Sales 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.

The price to implement this enhancement is \$400.

Company	Customer Number	Industry	City	State	YTD Sales	PYTD Sales	YTD DIFF	PY Total	PY2 Total
Culver's Corporate	0000016	Retail	Milwaukee	WI	\$5,088.15	\$0.00	\$5,088.15	\$239.45	\$0.00
Maverick Papers	MAVRK	Distribution	Chicago	IL	\$2,848.60	\$2,378.75	\$469.85	\$3,587.75	\$0.00
Avnet Processing Corp	AVNET		Racine	WI	\$1,288.93	\$0.00	\$1,288.93	\$0.00	\$0.00
ABC Dealers	ABCDEAL			WI	\$270.00	\$0.00	\$270.00	\$0.00	\$0.00
American Business Futures	ABF	Distribution	Bogotá	WI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
A To Z Carpet Supply	ATOZ		Newport Beach	CA	\$0.00	\$0.00	\$0.00	\$514.00	\$23.50
Custom Craft Products	CUSTOM		Santa Ana	CA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Greater Alarm Company	GREALAR		Fountain Valley	CA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Jelico Packing	JELCO		Orange	CA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Breslin Parts Supply	BRESLIN		Molalla	WI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Orange Door & Window Co.	ORANGE		Irvine	CA	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shepard Motorworks	SHEPARD		Milwaukee	WI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Record Count	13				\$9,495.68	\$2,378.75	\$7,116.93	\$4,341.20	\$23.50