

SageCRM Enhancement: Tracking the Next Action Date in SageCRM

One of the biggest challenges for sales organizations is making sure they touch base with their customers on a regular basis. This enhancement will display the Next Action Date and Next Action Details if there is a Pending Communication scheduled for the company. The Next Action Details will include the Comm Action and Comm Subject from the pending task.

As part of the installation we will read through your existing pending communications to populate these fields for the existing pending tasks. As new pending tasks are created these fields will automatically be updated.

Next Action Date:
02/28/2020

Next Action Details:
PhoneOut - Follow up on Invoice

You can then use those fields in lookups, groups, reports and dashboard gadgets.

The price to implement this Company Level Next Action Date enhancement is \$400.