

SageCRM Enhancement: The MyCRM > My Open Orders and My Invoices tabs

We add 2 custom tabs to your MyCRM section called My Open Orders and My Invoices. These tabs let your CRM users get a quick list of Sage 100 Open Orders and Invoices by user or for a particular date range. See the detailed descriptions below. We can limit who gets to see these tabs. CRM users have the ability to use the search boxes to filter the data and you can export the data to Excel CSV if necessary.

My Open Orders tab: When you click on the My Open Orders tab and you are a salesperson, it displays all of the Open Sales Orders tied to you as the salesperson. If you are a non-salesperson or manager, you get to see all of the open Sage 100 sales orders. You can click on the Sales Order number to see the line items for the order.

Example of what the My Open Orders tab looks like:

Open Orders Report

Enter Start Date: Enter End Date:

Drag a column header and drop it here to group by that column

Company Name	SalesOrder#	Created via CRM	Order Date	Ship Date	Status	CustomerPO#	ShipTo Comp...	ShipTo City	ShipTo State	SP on Order	AcctMgr	SalesOrder\$
	0000489		2/6/2023	3/8/2023	N		Anderson Laboratories	Greendale	WI	ADM		\$209.90
ABC Dealers	0000483	CRMOrder	1/19/2023	12/6/2022	N		Burlington Office	Burlington	WI	0300	System Administrator	\$581.70
ABC Dealers	0000482	CRMOrder	1/18/2023	12/6/2022	N	test dg	Burlington Office	Burlington	WI	0300	System Administrator	\$295.85
Anchor Moving Systems	0000474	CRMOrder	12/12/2022	12/6/2022	N		Anchor Moving Systems	Milwaukee	WI	ADM	System Administrator	\$5,200.00
Addison Machine Engineering	0000473	CRMOrder	12/6/2022	12/6/2022	N		Addison Machine Engineering	Reedsburg	WI	ADM	System Administrator	\$357.85

My Invoices tab: When you click on the My Invoices tab and you are a salesperson, it displays all of the Invoices tied to you as the salesperson for the past 30 days by default. If you are a non-salesperson or manager, you get to see all of the invoices for the past 30 days. You have the ability to adjust the date range of invoices to view. You can click on the Invoice number to see the line items of the Invoice.

Example of what the My Invoices tab looks like:

Invoices Report

Enter Start Date: Enter End Date:

Drag a column header and drop it here to group by that column

Inv Date	Invoice#	Company Name	Type	Confirm To	ShipTo Name#	ShipTo City	ShipTo State	Comp SP#	Inv SP#	AcctMgr	PO #	Ship Via	Invoice\$
2/21/2022	0100084	ABC Dealers	IN	Jeff Bonell	Burlington Office			0300	0300	System Administrator		Blank	\$352.80
2/21/2022	0100085	ABC Dealers	IN	Bill Smith	Burlington Office			0300	0300	System Administrator		Blank	\$227.85
2/21/2022	0100082	Maverick Papers	IN	Jeanette O'Toole-Smith	Maverick Papers			0300	0300	System Administrator		SHIPPING FLAT	\$359.80
2/21/2022	0100083	Maverick Papers	IN	John Jones	Maverick Papers			0300	0300	System Administrator	11556	SHIPPING FLAT	\$499.76
3/4/2021	0100078	ABC Dealers	IN	Jeff Bonell	ABC Dealers			0300	0300	System Administrator		Blank	\$2,284.50
3/4/2021	0100080	Maverick Papers	IN	Annette O'Toole-Smith	Maverick Papers			0300	0300	System Administrator		SHIPPING FLAT	\$2,167.42
3/4/2021	0100081	Maverick Papers	IN	Bob Smith	Maverick Papers			0300	0300	System Administrator		SHIPPING FLAT	\$2,175.85

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