








SageCRM Enhancement: View and Email PDF Invoices from within SageCRM

This enhancement gives your SageCRM users the ability to view Sage 100 PDF Invoices and email them directly from SageCRM. We have built scripts to give you that functionality from the Company > Invoices tab.

NOTE: This enhancement only works if you are using the Paperless Office feature in Sage 100 for your invoices

Example of what the updated Company > Invoices tab listing looks like with the new Action options:

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Invoice Date	Invoice #	Sales Order #	Confirm To	ShipTo Name	Invoice Type	PO #	Salesperson #	Ship Via	Freight	Non-Taxable \$	Taxable \$	Invoiceamt	Action
12/15/2022	0034929	0026484	Troy Oliver	ABC COMPANY	IN	W-012223	AF	UPS-G	62.93	146.10	0.00	209.03	 
12/06/2022	0034678	0026175	Troy Oliver	ABC COMPANY	IN	W-012133	AF		0.00	0.00	0.00	0.00	 
12/05/2022	0034621	0026175	Troy Oliver	ABC COMPANY	IN	W-012133	AF	UPS-G	0.00	901.44	0.00	901.44	 
12/05/2022	0034563	0026162	Troy Oliver	ABC COMPANY	IN	W-012117	AF	UPS-3D	109.28	160.20	0.00	269.48	 
11/17/2022	0033562	2-23362	Troy Oliver	ABC COMPANY	IN		AF		0.00	70.00	0.00	70.00	 
10/13/2022	0031202	0023548	Troy Oliver	ABC COMPANY	IN	candy cane	AF	UPS-3D	88.30	275.76	0.00	364.06	 
10/10/2022	0031042	0022489	Troy Oliver	ABC COMPANY	IN	8-1-22 REVISED	AF	UPS-G	0.00	1,065.80	0.00	1,065.80	 
09/27/2022	0030543	0023177	Troy Oliver	ABC COMPANY	IN	W-010839	AF	UPS-G				312.70	 
09/26/2022	0030513	0023141	Troy Oliver	ABC COMPANY	IN	W-010832	AF	UPS-G				1,749.40	 
09/21/2022	0030277	0022489	Troy Oliver	ABC COMPANY	IN	8-1-22 REVISED	AF	XPO				2,203.20	 
09/13/2022	0029995	0022489	Troy Oliver	ABC COMPANY	IN	8-1-22 REVISED	AF	XPO				26,599.60	 

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This ACTION column gets added to your Company > Invoices tab list.

When you click on the PAPER CLIP icon it will pop up a window with the PDF Invoice which is pulled from the paperless office folder of your Sage 100 system.

When you click on the EMAIL icon, a separate SageCRM email window will pop up with the PDF Invoice attached and your default invoice email will be displayed, just like the example below. When you send the email it will be attached to CRM.

Email

Send E-mail

Cancel

Help

Template: Invoice Template - AF

From: [User Name]

To: troy@abccompany.com

CC:

BCC:

Subject: Invoice 0034929 for ABC Company

Do not file this communication

Attachments: Invoice-0034929.pdf

Source | [Icons] | B | I | U | S | x² | I_x | [Icons]

Normal | Trebuch... | Size | [Icons]

Attached is a copy of your invoice. Let me know if you have any questions.

Regards,

Bob Smith
National Sales Manager - Southeast Division

Reach out to Effective Solutions for pricing.