

### SageCRM Enhancement: Tracking the Company Last Communication Date in SageCRM

One of the biggest challenges for sales organizations is making sure they touch base with their customers on a regular basis. The base SageCRM system that we provide you includes a system for tracking the Last Communication Date and it will flag accounts that haven't been contacted in 30, 60 or 90 days so you can take action on those accounts.

On the Company Record in CRM we maintain the following fields identified in the red box below:

Company ▶

<b>Company Name:</b> Maverick Papers	<b>Status:</b> Active	<b>Type:</b> Customer	<b>Account Manager:</b> Deb Taylor	<b>Territory:</b> Worldwide
<b>Lead Source:</b> Web	<b>Lead Details:</b>	<b>Market Segment:</b> Distribution	<b>Website:</b> <a href="http://www.maverickpapers.com">http://www.maverickpapers.com</a>	<b>Tradeshows Attended:</b> ABC Expo, BBB Show, XYZ Expo
<b>Business Description:</b>		<b>Competitor Info:</b>		
<b>Last Comm Date:</b> 10/11/2016	<b>No Comm 30 days:</b> False	<b>No Comm 60 days:</b> False	<b>No Comm 90 days:</b> False	
<b>Sage 100 ERP ARDivision No:</b> 01	<b>Sage 100 ERP Customer No:</b> 01-MAVRK	<b>Customer Type:</b>	<b>Price Level:</b>	<b>Default Payment Type:</b> CHECK
<b>Terms Code Description:</b> 2% Ten Days, Net 30 Days	<b>Tax Schedule Description:</b> Milwaukee	<b>Salesperson Number:</b> 01-0200	<b>Customer Status Description:</b> Active	
<b>Last Inv Date:</b> 03/01/2015	<b>Last Payment Date:</b>	<b>Avg Days to Pay:</b> 0	<b>Credit Limit:</b> USD 0.00	<b>Credit Hold:</b> N
<b>YTD Sales:</b> USD 0.00	<b>PYTD Sales:</b> USD 1,604.70	<b>YTD B(W):</b> USD -1,604.70	<b>PY Sales:</b> USD 1,123.57	<b>PY2 Sales:</b> USD 346.44

Effective Solutions implements custom scripts in your CRM system, so as you enter in new communications (Phone, Email, etc.) your SageCRM system will automatically update these fields, and each night it will automatically check to see if there are new Company Records that fall into the No Comm 30-60-90 Days criteria, and set those fields to TRUE where appropriate.

You can then use those fields in lookups, groups, reports and best of all, dashboard gadgets. See the example dashboard gadgets below that you can build in your system using the NoComm fields.

The screenshot shows a dashboard with two gadgets. The first gadget, titled "Companies not contacted in 60 Days", is highlighted with a red box. It displays a table with columns: Company Name, Sage 100 E..., City, State, Last Inv Date, and Account... The table lists various companies like ABC Bakery, ABC Buyer, ABC Filling Stations, etc. The second gadget, titled "Customers Behind in Sales YTD", displays a table with columns: Company..., Sage 100..., City, State, Last Com..., YTD B(W), and Accoun... It lists customers like Shepard M..., Maverick..., and Hillsboro S... Both gadgets include a filter box and a "Go!" button.

**The price to implement this Company Level Last Communication Tracking enhancement is \$700.**

**For an additional \$200 we can implement the same tracking fields at the Person level in SageCRM.**