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What's New in ESP

2020-09-30 - Jennifer M - What's New in ESP

CRM & Orders Updates

- Filter Options for Customer Order Record
- Enhancement to Order Task Notes Display

Filter Options for Customer Order Record

In the CRM customer record, distributors now have the ability to use the Filter tab to narrow the visible orders.

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Companies	Contacts	Emails	Notes	Tasks	Appointments	Designs							
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A	BC Cus	tome	er Cor	npan	У					Active -		Actions	s •
	stomer ord Owner: ES	P User Cre	eated By: E	SP User									
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Q Search by	product, supp	ier, etc.							Closed Open				
Order #	Custon	ner ¢		Date -	In-Hands Date	≑ Total	l≑ Si	tatus ≑	Date				
A1121	ABC Cu	istomer Co	mpany	7/28/20		\$1,	,247.07 O	pen	Order Date 👻 In-Hands Date 👻				

The available filters are:

- Status
- Date (Order/In-Hands)
- Customer
- Contact (All/Billing/Shipping/Acknowledgement)
- Product Categories
- Vendors
- Sales Rep
- Tags

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Enhancement to Order Task Notes Display

When creating or editing an order in ESP Orders, users can click on the Tasks icon to open a side panel to display all relevant tasks for this order.

Previously, the notes for a task would be displayed in a separate pop-up window. Now, notes can be expanded within the side panel itself. This enhancement enables task notes to be visible alongside the order information.

Tasks (2)	+ Add Task
Category All -	View Open -
Number of	Tasks: 2
Past Due	ToDo 🛔 ESP User
Past Due Send Invoice to Customer Due Date: Sep 29, 2020 Order #A1121	terrer and the second
Due Date: Sep 29, 2020	terrer and the second
Corder #A1121 ESP User 4 minutes ago	terrer and the second
Corder #A1121 ESP User 4 minutes ago Sent	terrer and the second
Send Invoice to Customer Due Date: Sep 29, 2020 Order #A1121 ESP User 4 minutes ago Sent - Hide Notes (1)	Sep 30, 2020

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