

What's New in ESP

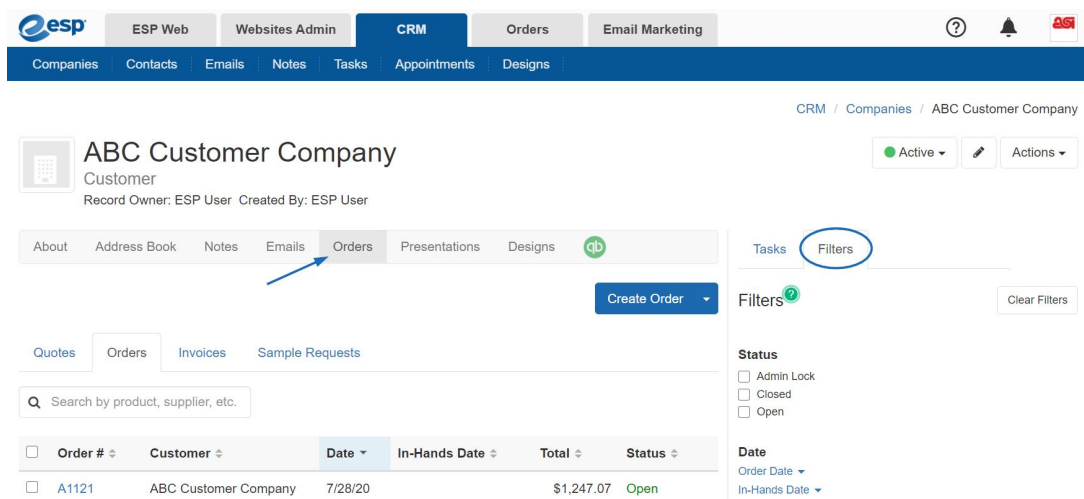
2020-09-30 - Jennifer M - What's New in ESP

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.



CRM / Companies / ABC Customer Company

Active Actions

ABC Customer Company
Customer
Record Owner: ESP User Created By: ESP User

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Create Order

Quotes Orders Invoices Sample Requests

Search by product, supplier, etc.

Order #	Customer	Date	In-Hands Date	Total	Status
A1121	ABC Customer Company	7/28/20		\$1,247.07	Open

Filters 2 Clear Filters

Status

- ☐ Admin Lock
- ☐ Closed
- ☐ Open

Date

- 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

☐



Send Invoice to Customer

ToDo

 ESP User

Due Date: Sep 29, 2020 Sep 30, 2020

Order #A1121


ESP User 4 minutes ago

Sent

- Hide Notes (1)


Today

☐



Get Tracking Information

ToDo

 ESP User

Due Date: Sep 30, 2020 Sep 30, 2020

Order #A1121

+ See Notes (2)

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