

What's New in ESP

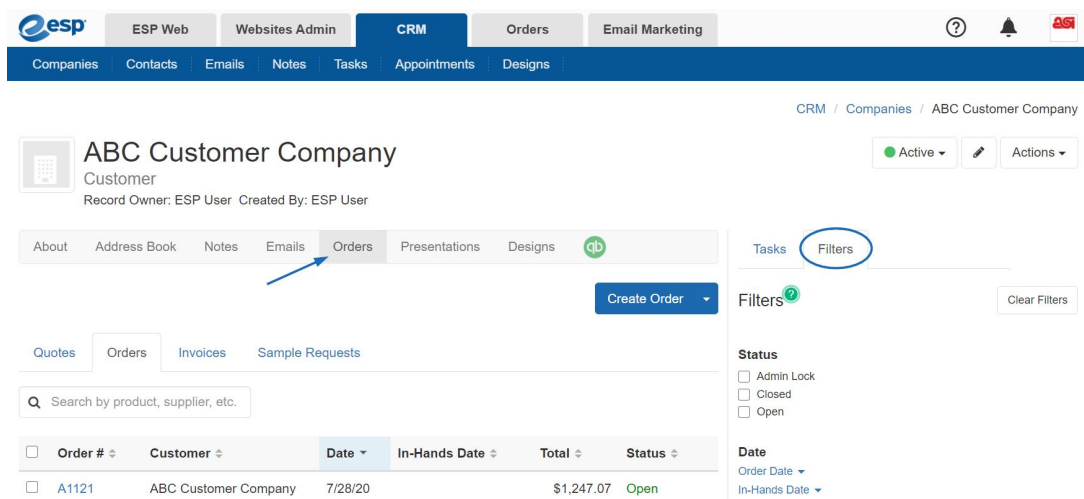
2020-09-30 - Jennifer M - What's New in ESP

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

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

Active Actions

Tasks Filters

Filters 2 Clear Filters

Status

- ☐ Admin Lock
- ☐ Closed
- ☐ Open

Date

Order Date

In-Hands Date

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

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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