



## What's New in ESP

2020-09-30 - Jennifer S - 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.

The screenshot shows the CRM interface for 'ABC Customer Company'. The 'Orders' tab is selected, and the 'Filters' sub-tab is highlighted with a blue circle. A blue arrow points to the 'Orders' tab. The interface includes a navigation bar with tabs for 'Companies', 'Contacts', 'Emails', 'Notes', 'Tasks', 'Appointments', and 'Designs'. The main content area shows a table of orders with columns for Order #, Customer, Date, In-Hands Date, Total, and Status. A search bar is present above the table. The right sidebar contains a 'Filters' section with checkboxes for 'Admin Lock', 'Closed', and 'Open', and a 'Date' section with dropdowns for 'Order Date' and '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

[Return to Top](#)

---

### **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 \(2\)](#)

[Return to Top](#)

---