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What's New in ESP

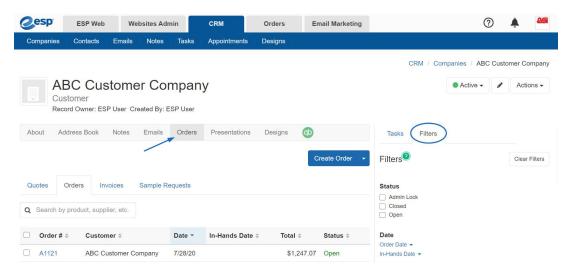
2020-09-30 - Jennifer S - What's New in ESP

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 available filters are:

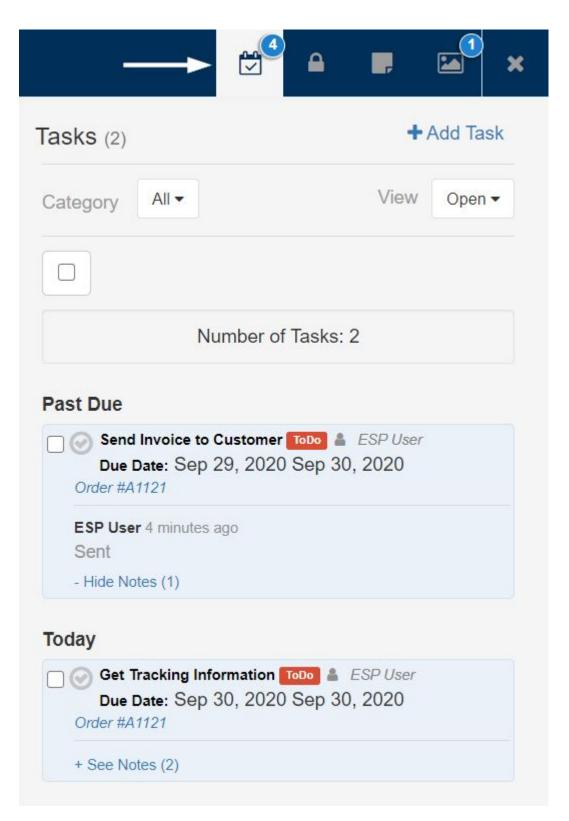
- Status
- Date (Order/In-Hands)
- Customer
- Contact (All/Billing/Shipping/Acknowledgement)
- Product Categories
- Vendors
- Sales Rep
- Tags

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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.



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