



1. Manages Tasks, Timesheets & Invoicing

Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years. The CRM Project Manager takes all the main concepts of Project and Time Management and delivers a pragmatic and highly effective management tool, which is installed on top of the Sage CRM platform. It is completely integrated into Sage CRM so it has all the benefits of CRM including user interface design, searching, reporting and document management. CRM Project Manager is compatible with the latest version of Sage CRM and is multi-browser compatible, so it not only works on the latest version of Internet Explorer but now also on Google Chrome, Mozilla Firefox and Safari.

Tasks

Refer Point-1

Projects

Due Date	Ref ID	Priority	Task Name	Status	Project	Assigned User	Allocated	Billed	Unbilled	Remaining
05/07/2015 14.24	6000-1	Medium	Analysis	Testing	PM for Software Build	William Dolan	2.50	1.50	0.00	1.00
07/07/2015 14.24	6000-1	Medium	Analyse Historical Data	Testing	PM for Software Build	John Finch	1.00	1.00	0.00	0.00
08/07/2015 14.24	6000-3	Medium	Workshops	Testing	PM for Software Build	System Administrator	6.00	0.00	0.00	6.00
14/07/2015 14.24	6000-2	Medium	Create Dev and Test Environment	Pending	PM for Software Build	John Finch	0.25	0.25	0.00	0.00
15/07/2015 14.24	6000-1	Medium	Phase I	Pending	PM for Software Build	Matthew Edden	0.00	0.00	0.00	0.00
22/07/2015 14.24	6000-5	Medium	First Draft Plans	Pending	PM for Software Build	John Finch	6.00	4.00	3.00	2.00
22/07/2015 14.24	6000-4	Medium	Extract Customer Data and Dedupe	Pending	PM for Software Build	John Finch	1.00	1.00	0.00	0.00
24/07/2015 14.24	6000-7	Medium	UAT	Pending	PM for Software Build	Matthew Edden	3.00	0.00	0.00	3.00
24/07/2015 14.24	6000-6	Medium	Create SQL Database Maintenance Plan	Pending	PM for Software Build	John Finch	0.50	0.50	0.00	0.00
25/07/2015 14.24	6000-9	Medium	Training	Complete	PM for Software Build	John Finch	0.25	2.00	0.00	-1.75

Project Status

Stage: Project Status: In Progress

Estim. Project Duration Days: 60.00

Tasks: 25

Completed Tasks: 1 **Completed Tasks (%):** 4

Resources: 3 **Average Availability:** 4.00

Allocated Days: 49.00

Billed Days: 32.25 **Remaining:** 16.75

Unallocated Days: 11.00

Unbilled: 5.50

Start Date: 04/07/2015 **Estimated End Date:** 23/08/2015

Calculated End Date: 23/07/2015 **Schedule**

Refer Point-1

2. Timesheet

Timesheets are the basis by which you draw down on the allocation of Days planned and set up by Project Tasks. Timesheets allow your Resources to log their work entries on a diary basis, cross referencing Projects and Tasks to help regulate the schedule and progress of the Project. Rather than maintaining the Project, purely by Task updates. Timesheets give you the realistic scenario of what is actually happening versus what should be happening.

Timesheet

Entry Date	Ref ID	Task Name	Status	Billed	Unbilled	Project	Entry User	Customer	Timesheet	Notes
Mon, July 13	6000-1	User Registration	Pending	0.5	0	PM for Software Build	System Administrator	Schneider Ltd	View	
	6000-13	Post Live Support	Pending	0.5	0	PM for Software Build	System Administrator	Schneider Ltd	View	
Tue, July 14										
Wed, July 15										
Thu, July 16										
Fri, July 17	6000-10	Run test scripts for Unit components	Pending	1	0	PM for Software Build	System Administrator	Schneider Ltd	View	
	6000-12	Go Live	Pending	2	0	PM for Software Build	System Administrator	Schneider Ltd	View	
Sat, July 18	6000-14	Verify Imported data	Pending	2	2	PM for Software Build	System Administrator	Schneider Ltd	View	
	6000-3	Workshops	Testing	0.25	0	PM for Software Build	System Administrator	Schneider Ltd	View	
Sun, July 19	6000-10	Run test scripts for Unit components	Pending	1	0	PM for Software Build	System Administrator	Schneider Ltd	View	
	6000-12	Go Live	Pending	1	0	PM for Software Build	System Administrator	Schneider Ltd	View	
	6000-9	Training	Complete	1.5	0	PM for Software Build	System Administrator	Schneider Ltd	View	
WEEK TOTALS				8.75	2					

Refer Point-2

3. Web Portal

Users (licensed users or resources) may access their Project Tasks and enter new Timesheets against a project using Greytrix Project Manager Web Portal. This allows users and resources (e.g. Field Agent's) to view and enter information into CRM without the need for them to have full access to the CRM system.

Notes: ** Sage CRM Self Service license is required to run the Web Portal feature.

Refer Point-3



4. Milestone Check

The Milestone Check provides a Project Manager with a complete overview of the project deadline status. You can view preceding tasks and be immediately alerted to Tasks that have exceeded their deadline. The Milestone Check also allows for tasks to be allocated to differing timeframes and deleted from this interface. The screen below highlights tasks that cannot be completed based on the current resources allocated. There is also the option of using hourly based timelines.

There are 0 day available but tasks require 1.25 days in total:

Step	6000-1	Phase I	To Do: 1.25	Available: 0	Matthew Ebden
1.	6000-1	Analysis			William Dolan
2.	6000-3	Workshops			System Administrator
3.	6000-2	Create Dev and Test Environment			John Finch
4.	6000-1	Analyse Historical Data			John Finch
Step	6000-1	Phase II	To Do: 0	Available: 13.71	Matthew Ebden
6.	6000-4	Extract Customer Data and Dedupe			John Finch
7.	6000-5	First Draft Plans			John Finch
8.	6000-7	UAT			Matthew Ebden
9.	6000-6	Create SQL Database Maintenance Plan			John Finch

Refer Point-4

As part of the details of a Project, a dedicated Analysis tab is provided to give cross section analysis of the Timesheet data against the Project. This allows for a very thorough analysis of trends and patterns which can help to make proactive decisions on the running of the project. This also allows for typical metrics required for summary reporting.

Each analysis view allows for filtering over various aspects including:

- break down by Task
- break down by User
- filter by Task Status



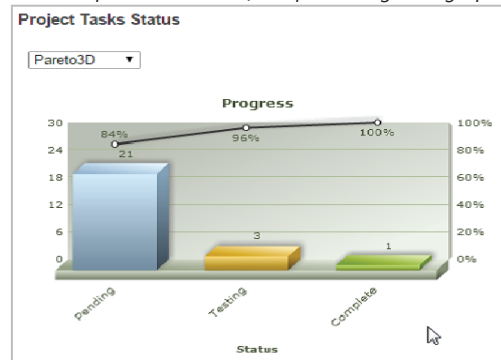
Refer Point-4

We believe in integration playing a vital role in Project Management Control. Out of the box, Project Manager can post timesheets to Accounts Receivable (AR) and Accounts Payable (AP) modules in Accpac.

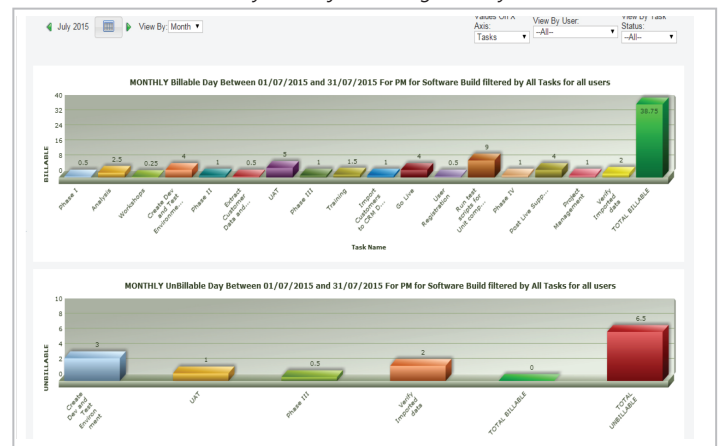
This screenshot shows the list of project tasks.

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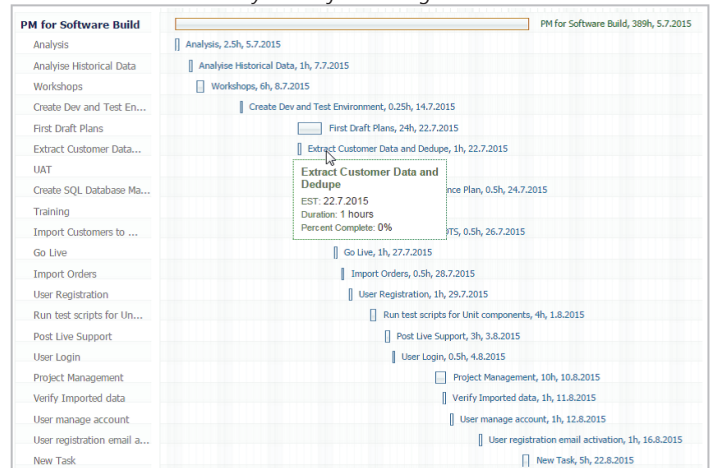
One of the various options available for representing data graphically.



This screenshot shows Greytrix Project Manager Analysis tab



This screenshot shows Greytrix Project Manager Gantt Chart within CRM.



Note : The latest version of Greytrix Project Manager now features Gantt Chart functionality.

sage CRM Project Manager



Greytrix Business Manager

CRM Contract Manager is one of 5 products that make up the Greytrix Business Manager Suite.

