

sage CRM Resource Planner



1. Gain Full Visual Control of Resources

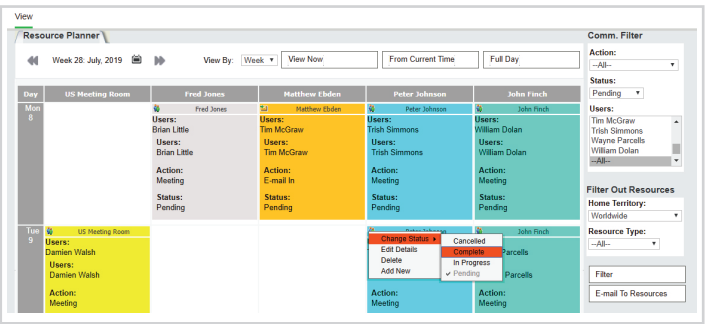
Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

The Resource Planner is a visual representation of all available resources. Each resource will have allotted time slots aligned vertically, displaying the time of day, creating a resource Time Box. These Time slots are configurable.

3. Viewing Modes

There are a number of ways that Resources can be viewed. Similar to most of our products, Resource Planner is highly customizable and sits fully within Sage CRM. We can add any entity from Sage CRM to a time scheduled booking. There are also options to change the views from the X & Y axis. You can view Resource Planner in Day, Week and Month mode and also from current time.

Screenshot of Scheduled resources in Week mode with Filter choice of Meeting enabled

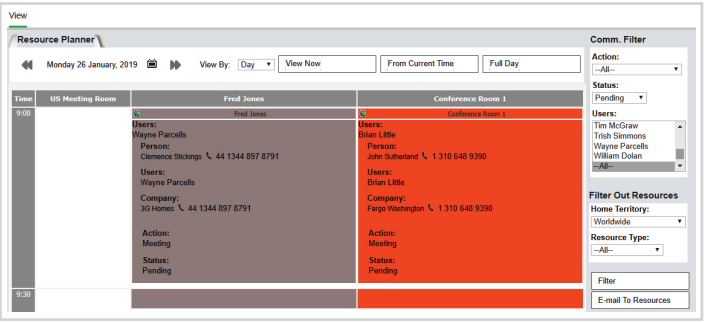


Refer Point-3

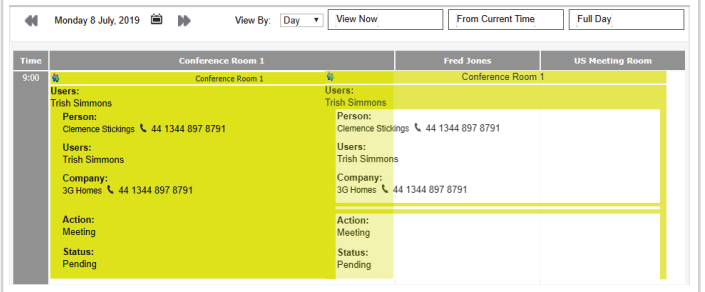
2. Drag & Drop Functionality

This provides the user with easy access to appointments or time schedules of any resource. Resources can be anything from a Pen to a Person. In the example below Resource Planner is in day mode and we can see conference Room 1 is booked for a meeting with Fargo Washington (company) and that Brian Little (user) has made the appointment. The following screen will show this appointment venue being changed and will check in CRM for diary conflict and that Brian Little and the Resource are still available.

Screenshot of Appointments for January 26th against the Resources.



Screenshot of Drag & Drop Resource Changes
In this example we can see that the Resource, Conference Room 1, is being changed to Meeting room 1

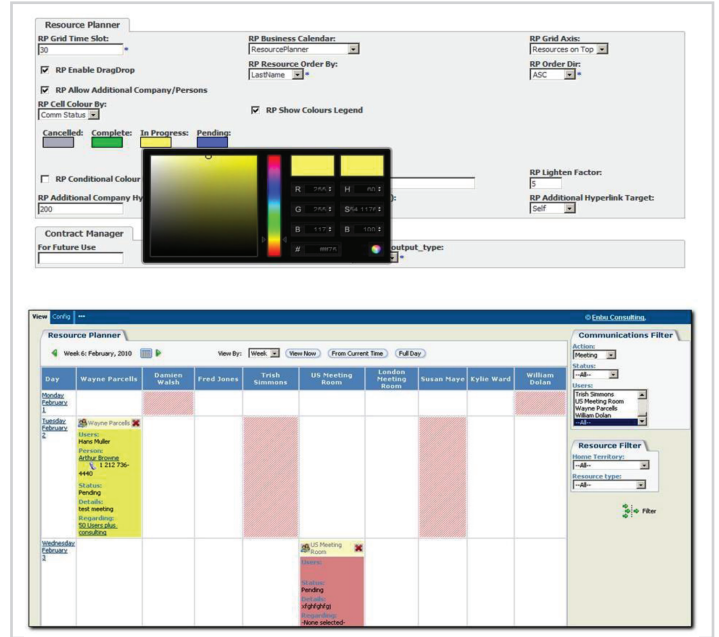


Refer Point-2



4. Planner Configuration

It easily identifies resources on your resource planner. Greytrix provides an easy way of color coding resource calendar cells based on the following attributes: resource, communication action or communication status. Once you select which attribute you are interested in you can assign colors to suit your needs. Additionally, there are a number of other configuration options.



Refer Point-4

5. Filtering Options

In the case of multiple resources, we have added extensive filtering options to our latest release. These include by Resource themselves, by Resource Type, Territory, User, Communication status and Communication action. These are the standard filters applied and can be easily modified depending on requirements.

6. Integration and Customization

Like all our products for Sage CRM, Resource Planner is completely customizable and can be configured to suit the needs of the business.

7. Report Function

Using the Reports Function, any number of custom reports can be created. Export options include: Word, PDF, HTML, rich text, plain text, or Excel.

Greytrix Business Manager

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

