



Greytrix Business
Manager

Event
Manager

Budget
Planner

Sage CRM
Services

Project
Manager

**SAGE CRM
ADD ONS**

Mobile Service
Signature

Contract
Manager

Custom Mail
Merge

Resource
Planner

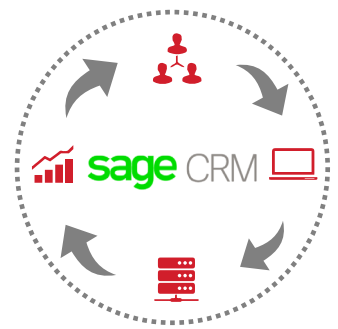
Sage CRM CTI
Framework



GREYTRIX

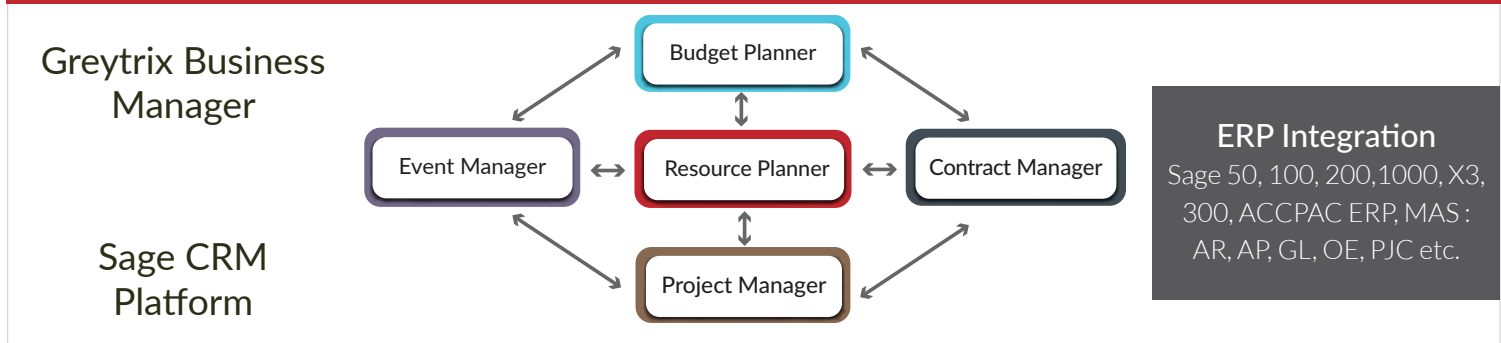
www.greytrix.com

Greytrix is a Sage CRM premier Gold Development Partner As leaders in the Sage world among resellers and partners for its data integration framework - GUMU™, Greytrix helps organizations realize maximum value from their Sage CRM with its enriched product suite comprising 10+ Sage CRM add-ons, integration and migration solutions. Greytrix Business Manager is a comprehensive Sage CRM suite comprising - Budget Planner | Event Manager | Project Manager | Contract Manager | Resource Planner



CRM Web Publisher

Website Maintenance, Automatic Publication of all business entities, SEO and Search Rankings Maintained, Web traffic monitoring, Hot Spot notification etc.



With Greytrix Business Manager (GBM), users can experience end-to-end insights of your business environment from projects, budgets, resources, contracts and events.

Sage CRM Project Manager

To gain accurate and detailed view of tasks from project initiation through delivery with graphical representation of billed days and tasks.

Filtering tasks

Date	Ref ID	Priority	Task Name	Status	Project	Assigned User	Allocated	Billed	Unbilled	Remaining
24.11.2016 21:20	10-1	Medium	Analysis	Complete	Onsite Implementation	System Administrator	1.00	1.00	0.00	0.00
24.11.2016 21:25	10-3	Medium	Documentation	Pending	Onsite Implementation	System Administrator	1.00	1.00	0.00	0.00
25.11.2016 21:25	10-2	Medium	Milestone 1	Pending	Onsite Implementation	System Administrator	0.00	0.00	0.00	0.00
25.11.2016 21:25	10-4	Medium	Development	Pending	Onsite Implementation	System Administrator	1.00	0.00	0.00	1.00
28.11.2016 21:25	10-6	Medium	Testing	Pending	Onsite Implementation	System Administrator	2.00	0.00	0.00	2.00
30.11.2016 21:25	10-5	Medium	Milestone 2	Pending	Onsite Implementation	System Administrator	0.00	0.00	0.00	0.00
30.11.2016 21:25	10-7	Medium	Deployment	Pending	Onsite Implementation	System Administrator	1.00	0.00	0.00	1.00

Timesheets to regulate schedule progress of Project tasks

Entry Date	Ref ID	Task Name	Status	Billed	Unbilled	Project	Entry User	Customer	Timesheet	Notes
Mon, October 3 6:000-10	6000-10	Run test scripts for Unit components	Pending	1	0	PM for New Build	System Administrator	Schneider Ltd	View	
6:000-8	6000-8	Draw up reports	Pending	1	0	PM for New Build	System Administrator	Schneider Ltd	View	
Tue, October 4 6:000-1	6000-1	Phase II	Pending	1	0	PM for New Build	System Administrator	Schneider Ltd	View	
6:000-1	6000-1	Analysis	Testing	1.5	0	PM for New Build	System Administrator	Schneider Ltd	View	
6:000-10	6000-10	Run test scripts for Unit components	Pending	1	0	PM for New Build	System Administrator	Schneider Ltd	View	
Wed, October 5 6:000-1	6000-1	Phase III	Pending	0.5	0.5	PM for New Build	System Administrator	Schneider Ltd	View	
6:000-16	6000-16	Project Management	Pending	1	0	PM for New Build	System Administrator	Schneider Ltd	View	
Thu, October 6 6:000-13	6000-13	Post Live Support	Pending	0.5	0	PM for New Build	System Administrator	Schneider Ltd	View	
<p>WEEK TOTALS 7.5 0.5</p>										

Features

- Filtering tasks
- Graphical representation of tasks, project status
- Timesheets
- Project Manager Web Portal for field users to access timesheet



Sage CRM Budget Planner

To get a holistic view of your company's budget with income, expenditure and margin.

Monitor budgets

Budget
Budget Name: Consolidated budget for Project ATM-ESEG-1234
Company: Greytrix India Pvt Ltd

Budget Summary

Capital Expenditures	98,605.72	49,302.86	49,302.86
Personnel	98,605.72	49,302.86	49,302.86
Supplies and Materials	98,605.72	49,302.86	49,302.86
Training and Workshops	98,605.77	73,954.29	24,651.43
Travel	98,605.72	98,605.72	0.00

Budget Lines

Summary of Budget status

Budget Summary

Budget Name: Consolidated budget for Project ATM-ESEG-1234
Obligated Amount: USD 75,000.00
Award Start Date: 17.05.2017
Total Budget / Allocation: EUR 75,000.00 / USD 73,954.29 @ 1 : 0.986057
Unliquidated Advances: USD 0.00

Obligation Period:
Award End Date: 19.06.2017



Features

- View budget status
- Customized Reporting
- Monitor budgets



Sage CRM Resource Planner

To view the availability of resources and make timely allocation of tasks easily.

Drag and Drop Functionality

Friday 16 February, 2018

Time	System Administrator	Matthew Eldon	John Finch	Clifford Lobo
0:00	System Administrator	System Administrator	System Administrator	System Administrator
10:00	Paras Raina Paras Raina Paras Raina Company: Camence Sloings \, 44 1344 897 8791 Address: 3G Homes \, 44 1344 897 8791 Address: 3G BRACKNELL	Paras Raina Paras Raina Paras Raina Company: Camence Sloings \, 44 1344 897 8791 Address: 3G Homes \, 44 1344 897 8791 Address: 3G BRACKNELL	John Finch Company: Olive Street \, 44 1473 894 8181 Company: A Midland & Sons \, 44 1473 894 8181 Address: Bald House Demo Demo meeting Complete	Clifford Lobo Company: Olive Street \, 44 1473 894 8181 Company: A Midland & Sons \, 44 1473 894 8181 Address: Bald House READING Demo Demo meeting Complete

Planner Configuration

RP Grid Time Slot: 60
RP Enable DragDrop:
RP Allow Additional Company/Persons:
RP Cell Colour By: Comm Status
RP Business Calendar: Standard Working Week
RP Resource Order By: LastName
RP Show Colours Legend:
RP Grid Axis: Resources on Top
RP Order Dir: ASC
RP Lighten Factor: 5
RP Additional Hyperlink Target: Self

Cancelled:
Complete:
In Progress:
Pending:
Reading:

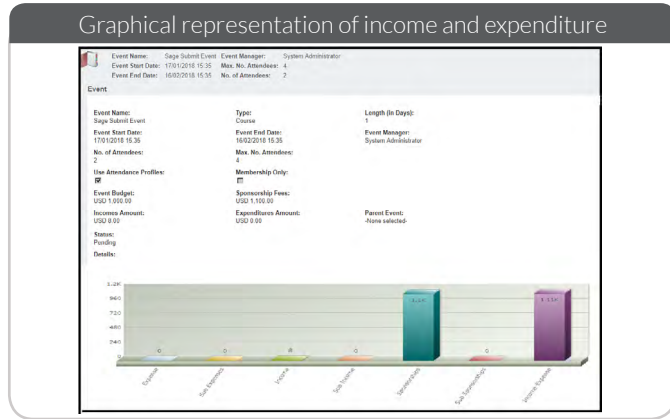
Features

- Drag & Drop Functionality
- Customized Reporting
- Filtering options
- Integration & Customization
- Planner configuration
- Resource view in Day, Week and Month mode



Sage CRM Event Manager

Extend the value of your business relationships by centralizing, standardizing and systemizing the event lifecycle from creation through actual production of the event to post event analysis.



Registration through Web Portal

Event Registration

Please confirm your registration of this Event by Saving the details below. You will receive an email as notification of your registration.

First Name: Aaron | Last Name: Hines | [Confirm Registration](#)

Company: Telecommunications Martech | Business E-mail: vishwas.singh@greytrixindia.com | [Back](#)

Phone: +91 999 267 3870

Attendance Event: Enabling Budget | Booking Date: 15/02/2018 4:35 PM

Attendance Status: Pending

Any details you may want to send on as part of your confirmation:

Features

- Event Workflow
- Monitor pricing and sponsorships
- Integration & Customization
- Notifications and Alerts
- Event Manager Web Portal for event registration
- Customized Reporting
- Restrict membership option to selected contacts



Sage CRM Contract Manager

Centralize, standardize and systemize the contract lifecycle from creation through expiration or renewal optimizing the lifetime value of your business relationships.

Add/ Modify clauses as per the workflow

My CRM for: System Administrator

24 Clause, Page 1 of 3

Name	Clause	Reference
Arbitration	All disputes, controversies, or claims arising out of or relating to this contract shall be submitted binding arbitration in accordance with the applicable rules of the American Arbitration Association then in effect.	A-7
Arbitration	All disputes, controversies, or claims arising out of or relating to this contract shall be submitted binding arbitration in accordance with the applicable rules of the American Arbitration Association then in effect.	A-7
Choice of Law and Forum	This agreement shall be interpreted under the laws of the State of California. Type : account_type# Any litigation under this agreement shall be resolved in the trial courts of Los Angeles County, State of California.	C-2
Choice of Law and Forum	This agreement shall be interpreted under the laws of the State of California. Type : account_type# Any litigation under this agreement shall be resolved in the trial courts of Los Angeles County, State of California.	C-2
Indemnification Language	The subcontractor agrees to indemnify and hold harmless the contractor against loss or threatened loss or expense by reason of the liability or potential liability of the contractor for or arising out of any claims for damages.	I-4
Indemnification Language	The subcontractor agrees to indemnify and hold harmless the contractor against loss or threatened loss or expense by reason of the liability or potential liability of the contractor for or arising out of any claims for damages.	I-4
Merge and Integration	This Agreement and the exhibits attached hereto contain the entire agreement of the parties with respect to the subject matter of this Agreement, and supersede all prior negotiations, agreements and understandings with respect thereto. This Agreement may.	M-1

Security & Permissions

Administration > Users > System Administrator

User rights

System Administrator

Profile: Unrestricted Profile

	Budget	BudgetLine	Cases	Clause	Communication	Company	Contract	DrawDown	Event	Lead	Opportunity
Assigned To	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del
Team	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del
Created By	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del
User's home territory	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del
Worldwide	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del
Marketing	No access	No access	View/Edt/Del	No access	View/Edt/Del	View/Edt/Del	No access	No access	No access	View/Edt/Del	View/Edt/Del

Features

- Document Management Functionality
- Contract Template Library
- Customized Reporting
- Integration & Customization
- Dashboards
- Contract Viewer

Sage CRM Mobile Service Signature

Remote Access, Update & Sign-Off of Job Sheets

Greytrix Sage CRM Mobile Service Signature enables field agents to get the approval and client sign off for the assigned job, while still on the client site. The clients can see the details of job listing on the agent's mobile devices and sign off the job sheet, on the touchscreen, immediately. Mobile Service Signature is seamlessly integrated with Sage CRM, where the job sheet along with the attached client signature is automatically saved to the client file in Sage CRM. This solution is compatible with Android tablets, phones, iPhones / iPads.



Sage CRM Custom Mail Merge

Merge across Custom Entities and Custom Behaviors

Greytrix Sage CRM Custom Mail Merge is a plug-in for Sage CRM giving your business the freedom to merge across custom entities and custom behaviors. The plug-in introduces a new API extension to the Sage CRM API allowing Mail Merge to function against document templates and any number of standard or bespoke data sources.



Sage CRM CTI Framework

Driving value from Call Management with ease of use and Customization features

Greytrix Sage CRM CTI Framework is a flexible open ended infrastructure applied on top of Sage CRM to allow a customizable and extended CTI integrated system for your business operations. With the Greytrix CTI Framework, we introduce a platform that can be used to have completely customizable CTI integration with Sage CRM. A standard feature set is delivered as part of the framework which is compatible with an appropriate CTI provider of choice. CTI events and actions are controlled through this frame which integrates with Sage CRM through remote frame based calls back to Sage CRM.



Features

- Customizable event handlers
- Custom interfaces for each CTI event
- Palette of actions per call in
- Post actions on incoming and outgoing events
- Automatic lead creation
- Interactive communication area
- Open protocol enabled system

More Sage CRM Add-ons



Sage CRM Field Service Management

Greytrix Sage CRM Field Service Management solution assists service departments in managing schedules and resources, meet SLAs, get client issues resolved quickly & efficiently. The solution ensures improved productivity, assisting timely renewal of contracts, efficient resource management, easy job sheet approval and sign-off for field agents on assigned tasks, incorporating customized reporting and document management.

Sage CRM Membership Management

Greytrix Sage CRM Membership Management is a powerful solution enabling organizations to manage all the communications and interactions with its members concerned with events. This include membership management, event registration, training management supported by a customizable web portal integrated into the organization's existing website.



Sage CRM Training Management

Greytrix Sage CRM Training Management allows program co-ordinators to manage the registration process. This involve creating courses and modules, communicate course information to interested members, providing booking confirmations, preventing overbooking of courses.

CRM Webservices Framework

Sage CRM Web services Framework is a flexible open ended infrastructure that is applied on top of Sage CRM to create a feature rich set of integrations. The framework is compatible with 7.2 version of Sage CRM, offering enhanced gateway, providing an improved framework control panel, creating a highly scalable CRM Web service that can be utilized by other systems.



Sage CRM Migrations



Salesforce | ACT! | SalesLogix | Goldmine | Sugar CRM | Maximizer

Greytrix GUMU™ migration framework allows efficient and seamless transfer of historical data from legacy CRM systems to the new Sage CRM. GUMU™ allows high quality, on-time, cost-effective and effortless migration of key customer data that includes the custom fields from source CRM fields into Sage CRM.

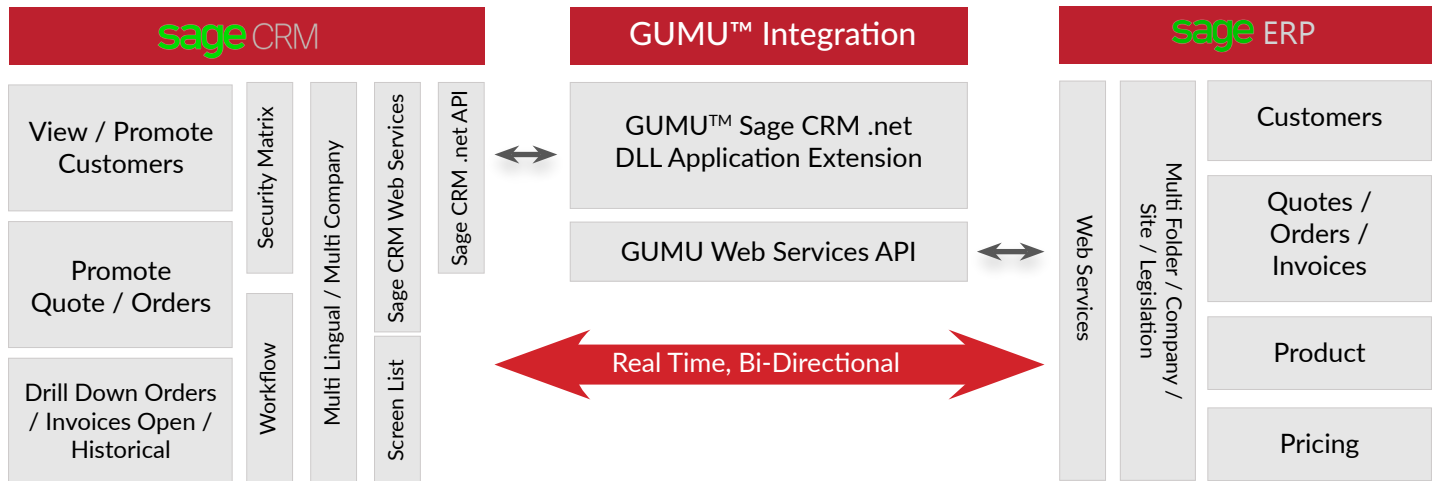
Source ERP		GUMU™	sage ERP	
GL	Bank	Entity	GL	Bank
Tax	IC	Field	Tax	IC
AR	AP	Data	AR	AP
Sales	Purchase	Import	Sales	Purchase

Sage CRM Integrations

sage CRM

Sage X3 | Sage 300 | Sage 100 | Sage 500 | QuickBooks | Sage PRO

Greytrix GUMU™ integrated Sage CRM and Sage ERP systems, enterprises can achieve a single, customer-centric view of critical business data across their organization. Thereby enabling accounting, operation, sales, marketing and customer service teams to share a single consistent view of customer's information and provide a better customer service.



Sage CRM Development Services

Greytrix has a highly experienced techno-functional team for development, integration and implementation of Sage CRM services, thereby making it feasible to offer best in class customizations for your enterprises.

- Requirement Analysis**
Business analysis to assist you in requirement gathering, design and testing of the Sage CRM services to your vertical specific requirements.
- Installation & Configuration**
Easy installation, configuration and online support for Sage CRM upgrades along with the latest Patches are an integral part of our offerings.
- Reporting**
Development of crystal reports, redesigning existing reports and enhanced customizations providing mobility to drive your business in the dynamic environment.
- Customization / Enhancements**
Tailoring the User Interface (UI), creating new screens and business rules using Sage CRM (SDK), customizing Workflow / Escalations and enhancing business processes.
- Integration with Third Party solutions**
Integration of Sage CRM with ERP systems and other third party applications using Web Services and Sage CRM .NET API.
- Customizing Sage CRM Self-Service**
We provide customized Sage CRM Self-Service to upload / download documents for support tickets. Greytrix Sage CRM Development Services offers significant improvement in the functionality and productivity of your enterprises.

ABOUT US

Greytrix - Sage Premier Gold Development Partner is a one stop provider for all your Sage ERP and Sage CRM needs. We provide complete end-to-end assistance for you pre-sales technical consultations, product customizations, data migration, system integrations, third party add-on development and implementation expertise.

Want to know more ?

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- 📺 **Youtube**: <https://www.youtube.com/user/greytrixsage>