

sage CRM Business Manager



Enabling Full Visibility on Everyday Operations with Sage CRM

After many years of services and development in the field of Enterprise solutions, Greytrix is delighted to bring to market a compelling Business solution which addresses a multitude of common business requirements in enterprise such as:

- Contact and Diary Management
- Customer Service Management
- Pipeline Management
- Project Management
- Event Management
- Contract Management
- Resource Planning
- Budget Planning and Allocation

All of these modules are seamlessly presented as a unified business solution pack: Greytrix Business Manager. In this unique way we can provide the User with a total end-to-end solution which gives a functional environment to process back end ERP transactions all the way through to front end Web publication and processing.

Screenshots

Project Management

Project Name: Roof Shingle Assembly Customer: 3G Homes Start Date: 09/01/2018 Allocated Days: 15
Billed Days: 3 Unbilled: 5 Estimated End Date: 09/01/2018 Unallocated Days: 0

New Task

Task Name: Sage CRM Upgrade to v2020 Project: Roof Shingle Assembly

Priority: Medium Allocated: 15 Due Date: 07/04/2020 15:50 Ref ID: 14-4

Status: Pending Assigned User: System Administrator

Remaining: 15 Billed: 0

Description: Upgrade Sage CRM to v2020

Buttons: Save, Save And New, Cancel

My CRM | Team CRM | Reports | Project CRM | Marketing | Resource Planner

My Timeheets | My Tasks | My Projects

Monthly View: June 2018 | View By: Week | New System Administrator

Entry Date	Ref ID	Task Name	Status	Billed	Unbilled	Project	Entry User	Customer	Timesheet	Notes
Fri, June 1	4-4	4-3	Pending	0.25 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
Sat, June 2	4-4	4-3	Pending	0.25 Hours	0.5 Hours	Date Navigation	System Administrator	Schneider Ltd	View	
	4-4	4-3	Pending	0.25 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
	4-4	4-3	Pending	0.5 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
Sun, June 3	4-4	4-3	Pending	1.25 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
	4-4	4-3	Pending	0.25 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
	4-5	4-5	Pending	0.25 Hours		Date Navigation	System Administrator	Schneider Ltd	View	
WEEK TOTALS				14.25 Hours	0.5 Hours					

Resource Planning

Resource Planner | Week 28: July 2019 | View By: Week | View Now | From Current Time | Full Day

Day	US Meeting Room	Fred Jones	Matthew Eldon	Peter Johnson	John Frisch
Mon 8	Users: Brian Little, Brian Little Action: Meeting, Status: Pending	Users: Fred Jones Action: Meeting, Status: Pending	Users: Tim McGraw, Tim McGraw Action: Meeting, Status: Pending	Users: Trish Simmons, Trish Simmons Action: Meeting, Status: Pending	Users: William Dolan, William Dolan Action: Meeting, Status: Pending
Tue 9	Users: Damien Walsh, Damien Walsh Action: Meeting		Users: Damien Walsh, Damien Walsh Action: Meeting	Users: John Frisch Action: Meeting	Users: John Frisch Action: Meeting

Buttons: Change Status, Edit Details, Add New, Cancelled, Complete, In Progress, Pending

Filter Out Resources: Home Territory: Worldwide, Resource Type: Filter, E-mail To Resources

Users

Users: Company: 3G Homes
Additional Company: Company: Person: Clemence Stockings

Users: A Post, Clive Stevens

Details

Action: Meeting, Status: Pending, Date: 13/05/2020 16:00, End Time: 13/05/2020 17:00

Project: Demo Project, Budget: Consolidated budget for Proj

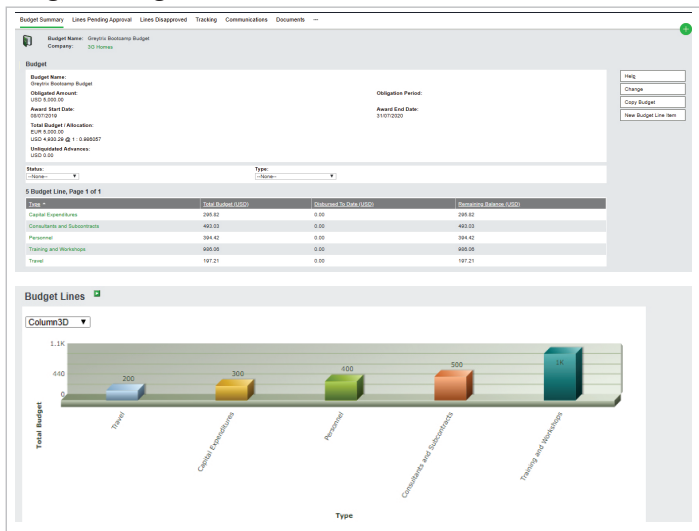
Event: DemoEvent#02

Details: Jaime Hart - Kitchen Furniture Delivery - 62 North Street

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Budget Management



Budget Line Details:

- Type: Capital Expenditures
- Total Budget: EUR 300.00, USD 395.62 @ 1 : 0.98507
- Budget: Greytrix Bootcamp Budget
- Status: [None]
- Month: [May]

Records Found, Page 1 of 1:

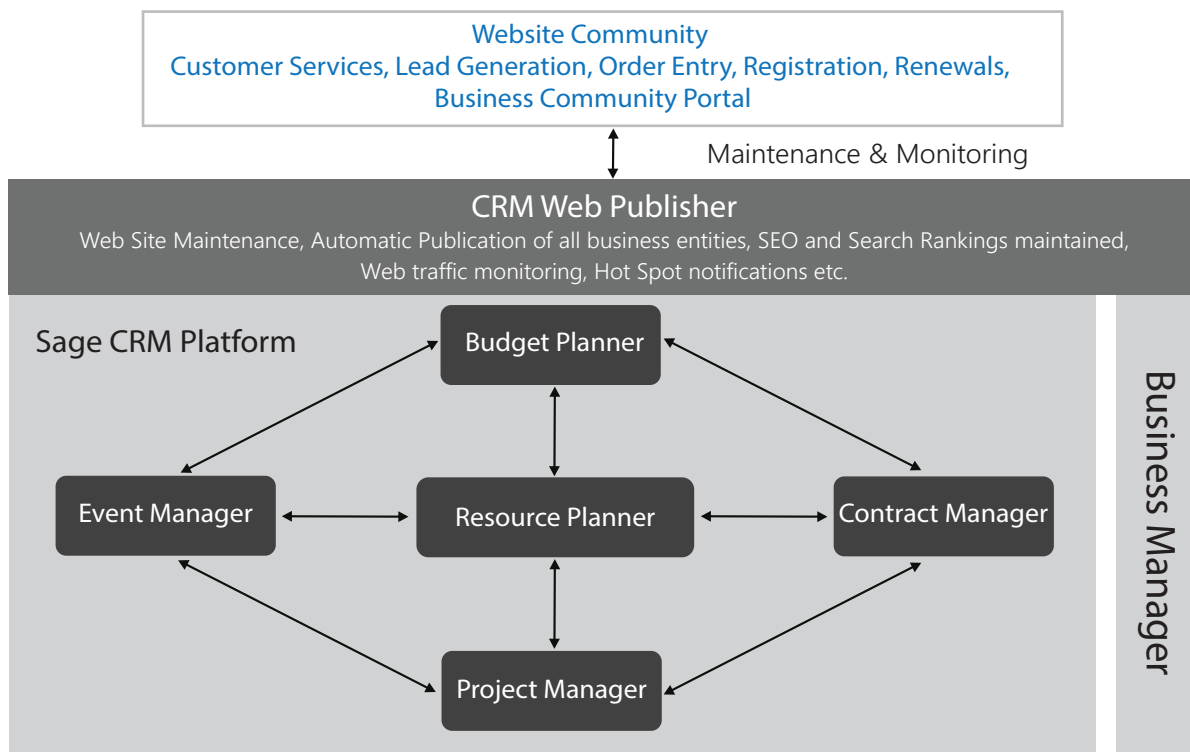
End	Month	Net Disbursed This Period	Created Date	Status
05-01	May	1,500.00	Today 20:55	Approved
05-01	June	500.00	Today 20:55	Logged

ALL of these solutions wrapped up in the **Greytrix Business Manager** for a Special price. Contact your Account Manager for details.



Greytrix Business Manager

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



GREYTRIX

For more information on Greytrix Products and Services, write to us at crmproducts@greytrix.com

<https://www.greytrix.com> | <https://www.greytrix.com/blogs/sagecrm/>