

## Sage CRM Event Manager

### Streamline Events and Budget Spending with Sage CRM

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

CRM Event Manager will enable you to optimize the efficiency and productivity of managing your activities, resources and schedules through a highly effective Event Management module. Extend the value of your business relationships by centralising, standardising and systemising the entire Event lifecycle, from creation through the actual production of the event and post event analysis.

The Event Management Facility provides the ability to create articulate, profiled information on your Event including all critical metrics for the Event. The communications and contacts around the Event itself including the Attendees themselves, any Suppliers, Partners, etc are regulated, structured and tracked by CRM Event Manager. During the Event Life Cycle, it enables you to evolve and track various facets of business around the Event, including Opportunities, Customer Service enquiries and even Leads for new business.

Screenshot of New Event Screen Details showing income and expenditure percentage in graph below.



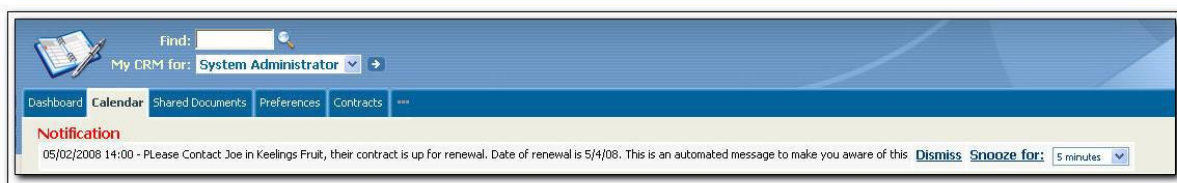
## Events Workflow

During the time of the Event Life Cycle, a Workflow can be run which determines the steps an Event must go through as part of its business logic. This workflow is configurable for the most complex Event life cycles or the standard process can be maintained.

## Notifications and Alerts

By establishing rules for workflow processes, you can be assured that the proper approvals, notifications and alerts go into effect for every Event stage at precisely the right time and involve precisely the right people. Any lapse in a given workflow process is immediately flagged for resolution.

Screenshot of an on-screen notification. You can also receive the notification by email or SMS. Notifications pop up from certain workflows entered into the system. For example: Flag all Membership Contracts that are up for annual renewal within 2 months.



## Pricing & Sponsorship

Greytrix Event Manager enables you to set up attendees on differing price scales depending on your market segmentation, and to control what numbers are attending at discounted/ differing pricing. It also enables you to keep track of any sponsorship amounts which may be attached to an event, without mandating attendance.

## Web Portal

Using Greytrix Event Manager Web Portal you can allow individuals to search for events and register online. This ensures all online registrations automatically update the overall attendee status within the Event Manager.


Screenshot of Event Registration Page.

**Event Registration**

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

<b>First Name:</b> Chris	<b>Last Name:</b> Jones
<b>Company:</b> Logical Group 1 212 625 4967	<b>Business E-mail:</b> Chris.Jones@LogicalGroup.com

 **Confirm Registration**

 **Back**

**Event to Attend:**  
Artist of the Year 2011

**Attendance Status:** Pending      **Booking Date:** 11/04/2011 3:25 PM

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

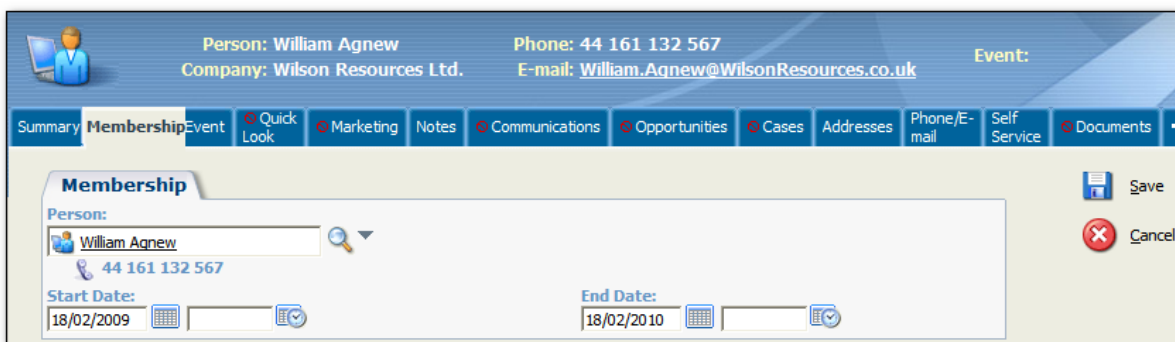
**Notes:**

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

**Members**

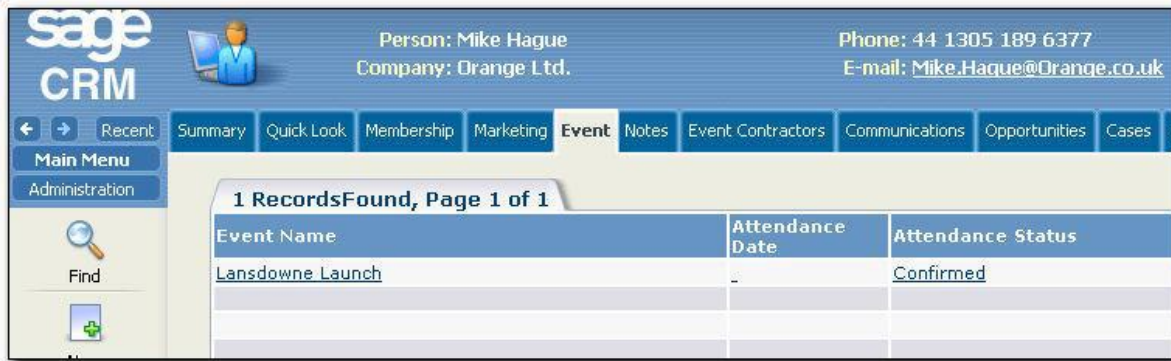
There is a Membership option that will allow you to restrict events to contacts from CRM who are listed as members. Once established as members, they are eligible to attend Events occurring within their renewal period. The Membership details can be extended as required to fully profile member activity. Event Manager can add also attendees from a global search or import lists of attendees from CRM Groups.

Person summary tabs highlighting Membership entity.



The screenshot shows a CRM interface with a top navigation bar containing tabs: Summary, **Membership**, Event, Quick Look, Marketing, Notes, Communications, Opportunities, Cases, Addresses, Phone/E-mail, Self Service, and Documents. The main content area is titled 'Membership' and displays details for 'Person: William Agnew' with phone number '44 161 132 567'. It includes 'Start Date' (18/02/2009) and 'End Date' (18/02/2010) fields. Action buttons for 'Save' and 'Cancel' are visible on the right.

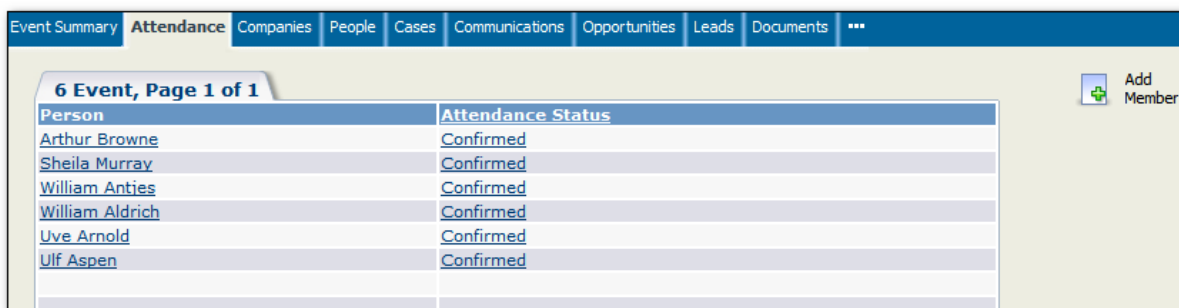
Person Summary Tabs lists Events attended or scheduled



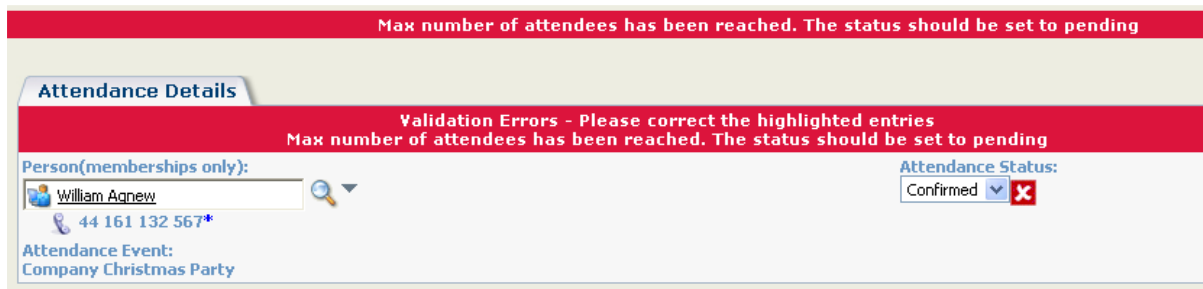
## Attendance to Events

Every Member can attend an Event, based on the criteria allowed for each Event. This can be based on logical rules set up within the Event workflow.

Attendance summary of confirmed status.



If you try to add more people to the event than the event attendance number supports then you will receive an error.



Only Persons that have 'Confirmed' are counted against this number. Therefore it is possible to have a number exceeding the 'No. Attendees' value once the number of Persons 'Confirmed' does not exceed this value.

## Report Function

Using the Reports Function, any number of custom reports can be created such as: status reports, financial commitments, attendance reports, income generated etc. Export options include: Word, PDF, HTML, rich text, plain text, or Excel. Reports can also be generated for one event or a group

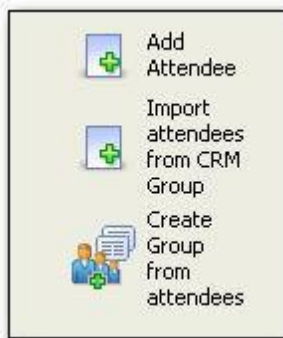
of events derived from the search feature or for all events – and always within the security rights defined for the user.

## Integration and Customisation

As with all of our products for Sage CRM, Event Manager is completely customisable and can be configured to suit the needs of the business.

## Other Features

Use the groups in CRM to create attendee and target lists



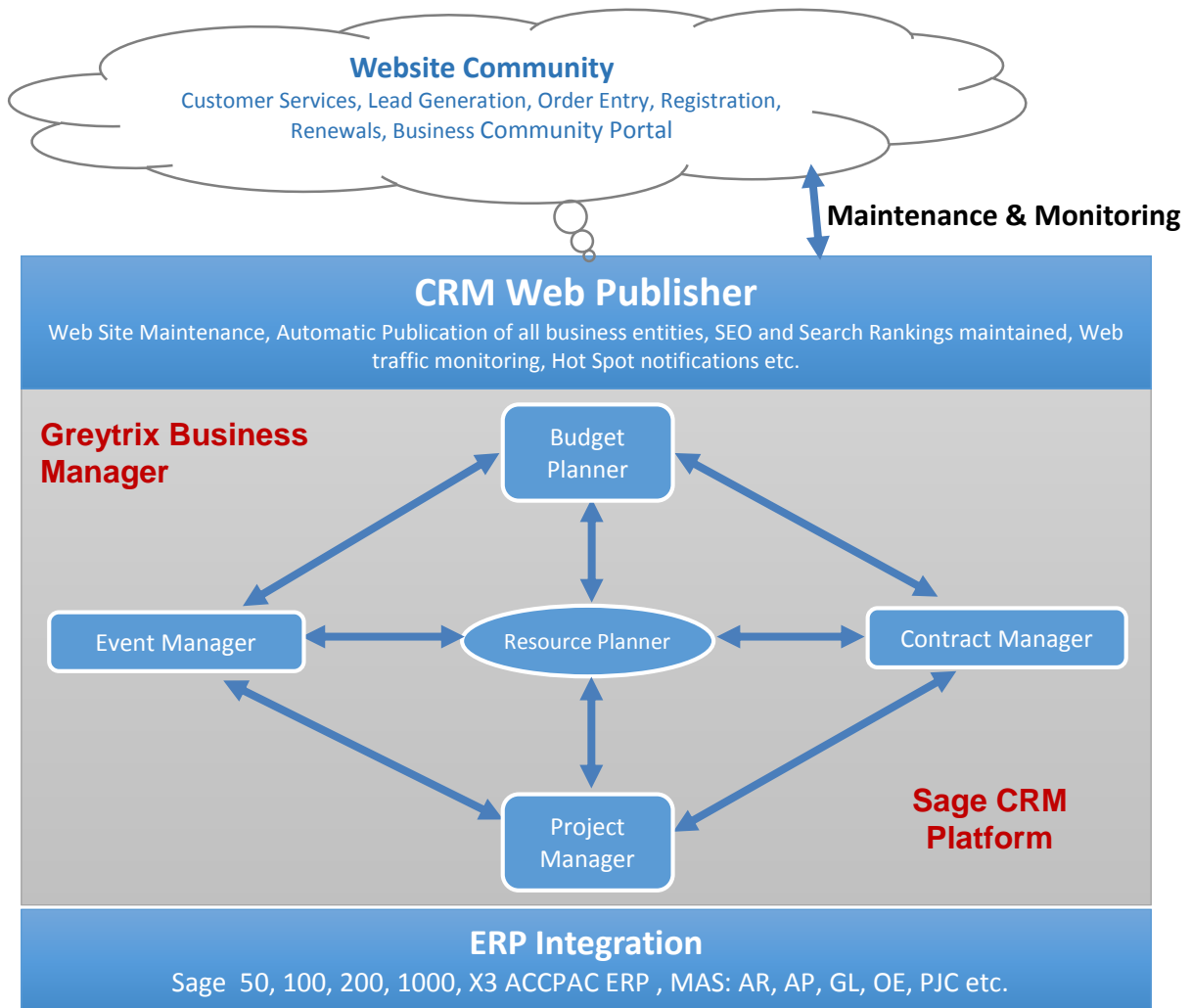
Copy Event function and workflow enabled to publish to live site



Attendee tab highlighting the group to import



## Greytrix Business Manager



CRM Event Manager is one of 5 products that make up the **Greytrix Business Manager (GBM)** Suite.

For more information on Greytrix Products and Services, write to us at [crmproducts@greytrix.com](mailto:crmproducts@greytrix.com)  
Website: [www.greytrix.com](http://www.greytrix.com) | Blog: <http://www.greytrix.com/blogs/sagecrm/>