

Sage CRM Resource Planner

Gain full visual control of Resources within Sage CRM

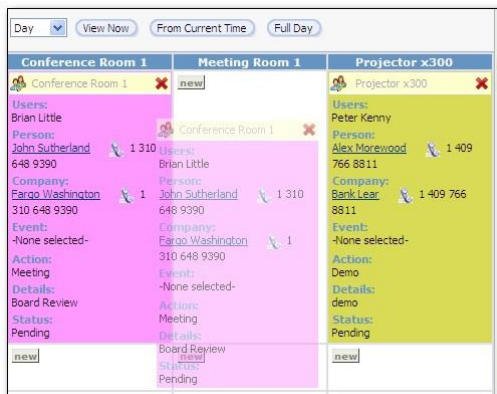
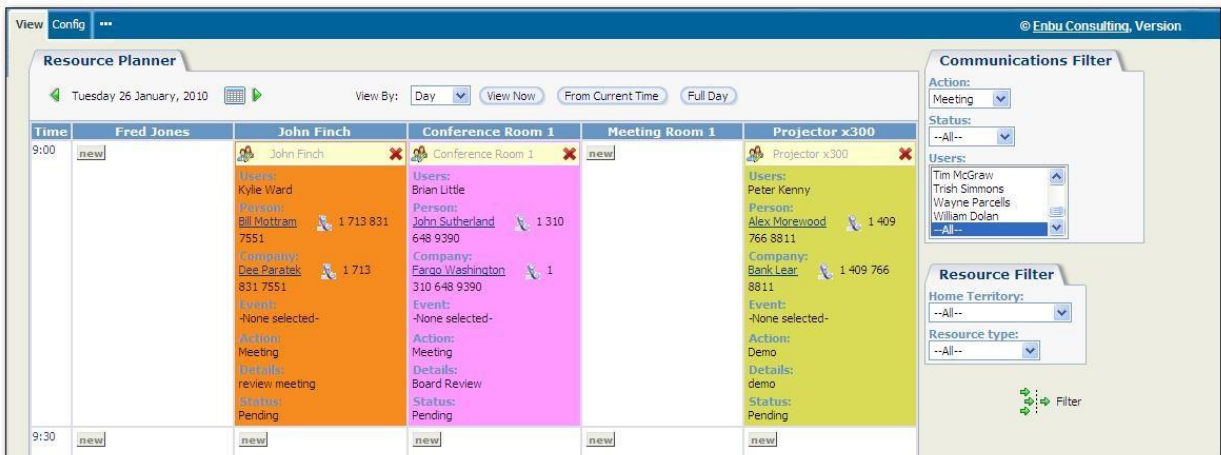
Greytrix has unrivalled, direct practical knowledge and experience with the Sage CRM system over many years.

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.

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

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.

The screenshot displays the Resource Planner interface in Week mode for Week 13, 2010, from Monday, March 22 to Sunday, March 28. The interface is color-coded by resource: Fred Jones (yellow), US Meeting Room (light green), John Finch (pink), Peter Johnson (light blue), and Matthew Ebden (orange). A context menu is open over the US Meeting Room cell on Wednesday, March 24, showing options: Edit Details, Change Status (selected), Delete, Canceled, Complete, In Progress, Pending, and Waiting. On the right side, there are two filter panels: 'Comm. Filter' with dropdowns for Action, Status, and Users; and 'Filter Out Resources' with dropdowns for Home Territory and Resource type. A 'Filter' button and an 'E-mail to Resources' button are also visible.

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.

Planner Configuration

So that you can easily identify resources on your resource planner, Enbu 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.

Screenshot of Planner Configuration.

Resource Planner

RP Grid Time Slot: 30 *

RP Enable DragDrop

RP Allow Additional Company/Persons

RP Cell Colour By: Comm Status

RP Show Colours Legend

Cancelled: Complete: In Progress: Pending:

RP Conditional Colour

RP Additional Company Hy: 200

RP Business Calendar: ResourcePlanner

RP Resource Order By: LastName *

RP Grid Axis: Resources on Top

RP Order Dir: ASC *

RP Lighten Factor: 5

RP Additional Hyperlink Target: Self

Contract Manager

For Future Use

output_type:

View Config ...

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Resource Planner

Week 6: February, 2010

View By: Week View Now From Current Time Full Day

Day	Wayne Parcels	Damien Walsh	Fred Jones	Trish Simmons	US Meeting Room	London Meeting Room	Susan Maye	Kylie Ward	William Dolan
Monday February 1									
Tuesday February 2	 Wayne Parcels Users: Hans Muller Person: Arthur Browne 1 212 736-4440 Status: Pending Details: test meeting Regarding: 50 Users plus consulting								
Wednesday February 3					 US Meeting Room Users: Status: Pending Details: xflightg Regarding: -None selected-				

Communications Filter

Action: Meeting

Status: --All--

Users:
Trish Simmons
US Meeting Room
Wayne Parcels
William Dolan
--All--

Resource Filter

Home Territory: --All--

Resource type: --All--

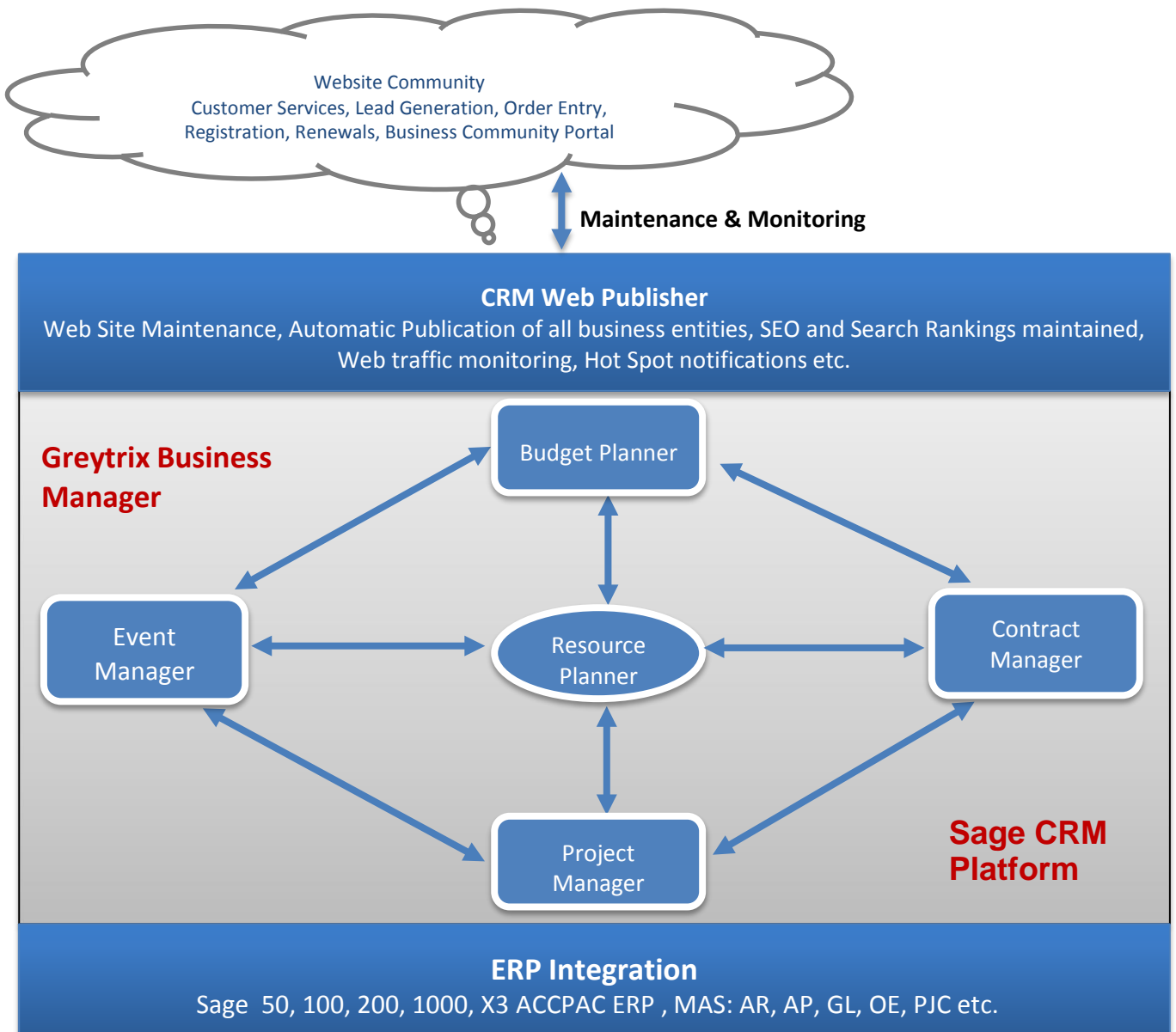
Filter

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.

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.



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

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Website: www.greytrix.com | **Blog:** <http://www.greytrix.com/blogs/sagecrm/>