Greytrix Business Manager

Event Manager

Budget Planner

Sage CRM Services

Project Manager

SAGE CRM ADDONS

Mobile Service Signature

Contract Manager

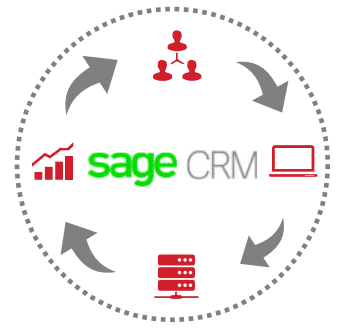Custom Mail Merge

Resource Planner

Sage CRM CTI Framework

GREYTRIX

Greytrix Business Manager

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

Website Community
Customer Services, Lead Generation, Order Entry, Registration, Renewals, Business Community Portal

Maintenance & Monitoring

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

Sage CRM Platform

- Budget Planner
- Event Manager
- Resource Planner
- Contract Manager
- Project Manager

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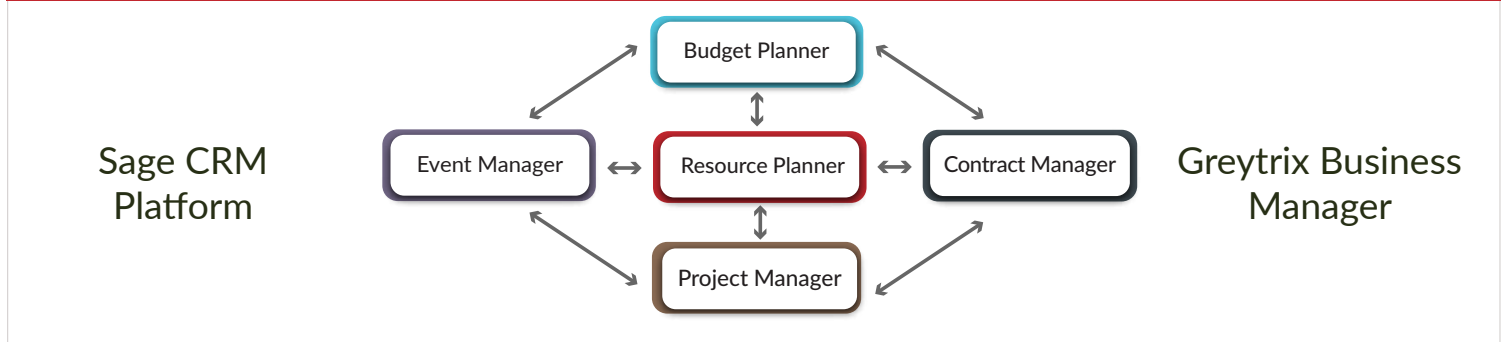
With Greytrix Business Manager (GBM), users can experience end-to-end insights of your business environment from projects, budgets, resources, contracts and events.

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

Timesheets to regulate schedule progress of Project tasks

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

Summary of Budget status

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

Planner Configuration

Features

- ☑ Drag & Drop Functionality
- ☑ Filtering options
- ☑ Planner configuration
- ☑ Customized Reporting
- ☑ Integration & Customization
- ☑ 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.

Graphical representation of income and expenditure
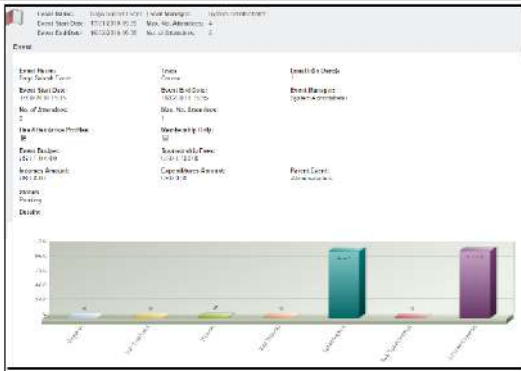
Registration through Web Portal

Features

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

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

Security & Permissions

Features

- ☑ Document Management Functionality
- ☑ Customized Reporting
- ☑ Dashboards
- ☑ Contract Template Library
- ☑ Integration & Customization
- ☑ 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	☑ Automatic lead creation
☑ Custom interfaces for each CTI event	☑ Interactive communication area
☑ Palette of actions per call in	☑ Open protocol enabled system
☑ Post actions on incoming and outgoing events	

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.
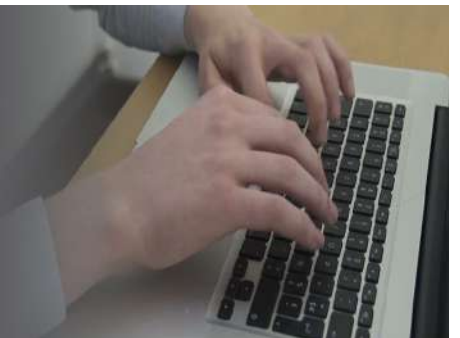
sage CRM Migrations

sage CRM — 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 CRM		GUMU™	sage CRM	
User	Company	Entity Mapping	Resource	Company
Contact	Address	Field Mapping	Person	Address
Email	Phone	Data Processing	Email	Phone
Activity	Lead	Data Writing	Communication	Lead
Opportunity	Attachment		Opportunity	Document

sage CRM Integrations

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	GUMU™ Integration	sage ERP
View / Promote Customers	GUMU™ Sage CRM .net DLL Application Extension	Customers
Promote Quote / Orders	GUMU Web Services API	Quotes / Orders / Invoices
Drill Down Orders / Invoices Open / Historical		Product
Security Matrix · Workflow · Multi Lingual / Multi Company · Sage CRM Web Services · Screen List · Sage CRM .net API	Real Time, Bi-Directional	Web Services · Multi Folder / Company / Site / Legislation · Pricing

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 Champion 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 ?

✉ **Email us at** : sage@greytrix.com / crmproducts@greytrix.com

🌐 **Website** : www.greytrix.com

📶 **Blog** : http://www.greytrix.com/blogs/sagecrm

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