

## Sage CRM Planner

### Providing complete visibility across your organisation

The Sage CRM Planner is a reliable, add-on application for Sage CRM which provides complete visibility of all communications across an organisation, improving employee knowledge and enabling informed business decisions to be made quickly.

#### Summary

The Sage CRM Planner works within Sage CRM and provides businesses with a graphical view of all communications and meetings of either a specific person or all users within an organisation over a set period of time. This enables businesses to allocate resources effectively, schedule meetings sensibly and make more informed business decisions quickly.

#### The Importance of Communication

Regardless of the size or sector of an organisation, communication is key to success. Many organisations store communications against individuals. However, this still leaves significant gaps in knowledge.

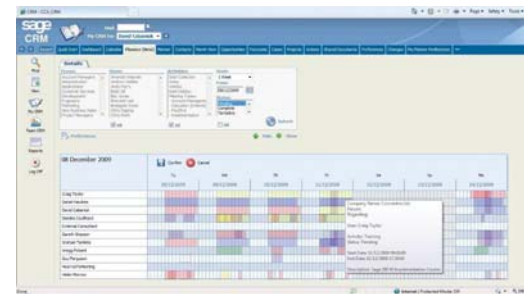
There are occasions within businesses when meetings are double booked or someone hasn't done something that they were supposed to do, often the reason for this is lack of knowledge. This is a common problem, even though often the information required to prevent it from happening is available from within the company's CRM system. The problem is that users don't view the information.

There is now an easy way to resolve this. Sage CRM Planner provides a graphical view of communications,

making them easier for the brain to interpret over a specific period of time.

#### Key Features of Sage CRM Planner

- » **An interactive User Interface** with drag and drop abilities on the communications displayed in the planner. The data is represented in a graphical format where communications can be dragged to different time slots and to different users. The user interface is intuitive and easy to use but still has the same look and feel as Sage CRM.
- » **Fast Direct Searching Facilities.** The planner interacts directly with Sage CRM data which produces extremely fast search results
- » **Filtering on key categories.** The planner allows for the searching facility to be filtered. This ensures that the data you want to view is returned in the quickest times.
- » **User Preferences.** The planner allows each user to set their own preferences, in terms of view colour and communication type. Users can also set their working hours, so that the planner will only show someone as available during their working hours.



#### Benefits of Sage CRM Planner

- » **Presents communications in a graphical context over a specific period of time**
- » **It provides a state-of-the-art user interface while maintaining the same look and feel of Sage CRM**
- » **Facilitates effective allocation of resources**
- » **Has quick search functionality**
- » **Can be customised to individual user preferences**
- » **Built on the reliable .net platform**

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- » **Editable Communications.** The planner doesn't just show communications, it also allows users to edit low level details of the communications
- » **Multiple Period Viewing.** The planner enables users to see communications for 1 day, 2 days, 1 week or 4 weeks, making allocation of resources and scheduling of meetings much easier.

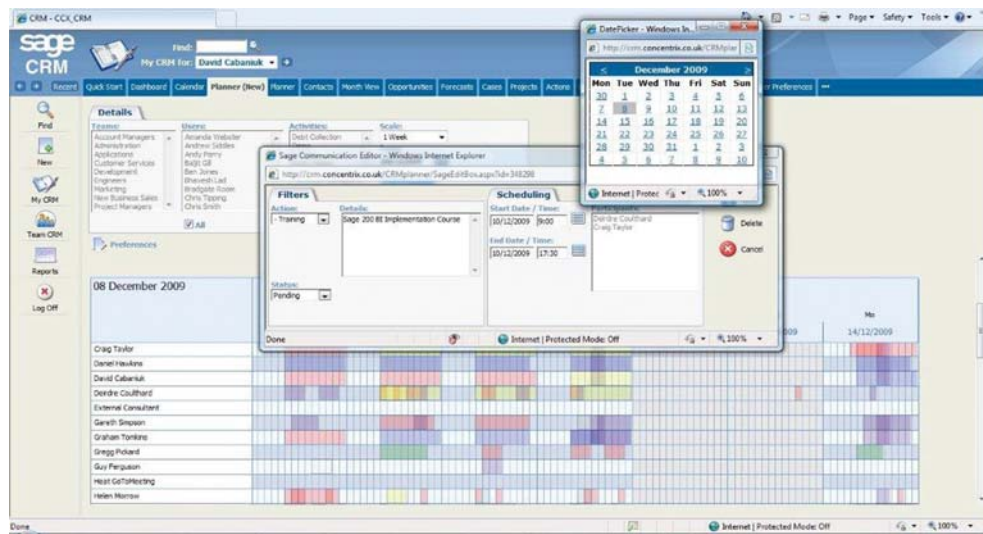
## A Robust, Customisable Solution

Sage CRM Planner is built on the .net platform; this ensures that it is a reliable and robust solution. The planner is also highly customisable - a user can decide on the view they have. For example, a user may choose to view 1 day, 2 days, 1 week or 4 weeks. Users can also change the colour of different tasks to their personal preferences, making it immediately obvious to them what someone else within the organisation is doing. In addition, a user can update the planner so that it reflects their working hours. This will prevent a user from being included in a meeting when they either haven't started work or have finished work for the day.

## Brings your Business Together

Because Sage CRM Planner sits within Sage CRM it automatically updates when CRM is updated. What's more if you edit a communication or task within the planner, this also updates Sage CRM.

The planner presents information in a graphical view, making it easier to understand. And because it is highly customisable, users will know what their colleagues are doing at a glance, as they will have colour coded each type of task.



## Sage CRM Planner and Your Business

Having all your information stored in one centralised location is critical for developing employee knowledge which ultimately enables you to deliver improved customer service. In other words, the Sage CRM Planner will help you run your business more efficiently.

## About Concentrix

Concentrix is an independent UK business management software and IT solutions provider.

Founded in 1999, Concentrix is a Fully Accredited Sage Business Partner, and helps companies increase competitiveness, profitability and customer satisfaction by improving business processes, system and IT. Concentrix has also been awarded Sage CRM Business Partner of the year 2009 and has also been awarded a place in the Sage Circle of Excellence.

Concentrix prides itself on providing quality solutions and high levels of service, supported by outstanding technical expertise, business knowledge and a professional approach. Concentrix values long-term relationships and works closely with customers to make sure that they implement solutions which are right for their business model and strategy.

**For more information about Sage CRM Planner, Sage CRM or Sage 200, please contact Concentrix on 01509 410500 or email [info@concentrix.co.uk](mailto:info@concentrix.co.uk).**

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